



## BP Sales Play

Enterprise Content Management

Introducing **Smarter Content Solutions...**

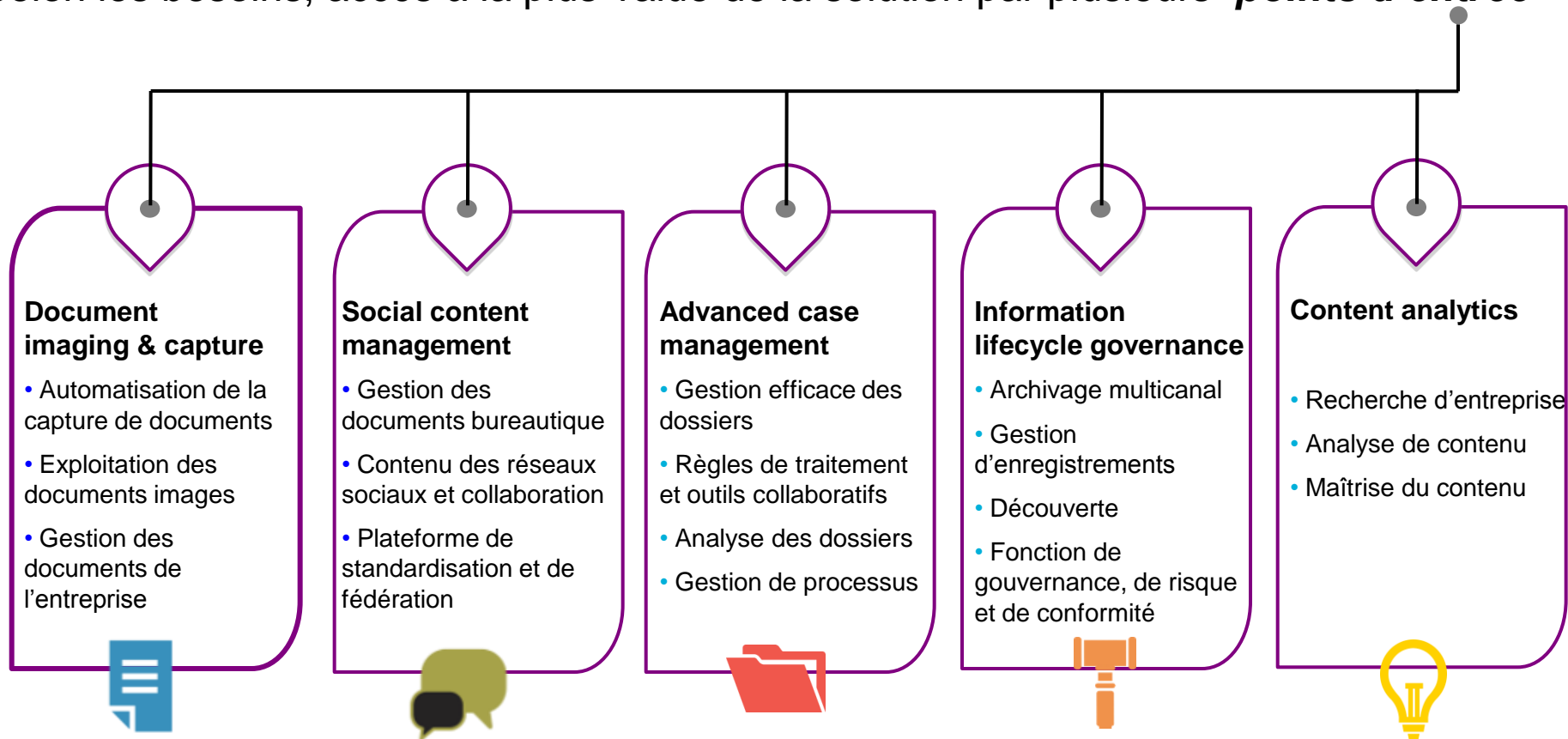




# IBM Enterprise Content Management



Selon les besoins, accès à la plus-value de la solution par plusieurs **points d'entrée**





# Magic Quadrant for ECM



**IBM extends undisputed leader position in the 2013 Gartner ECM Magic Quadrant!**

*"IBM has undertaken steps to reduce complexity and improve user friendliness for the business user"*

Gartner 2013 ECM analysis confirms the IDC ECM report.

## IBM continues to lead in vision and execution:

- IBM is #1 vendor in ECM by Gartner for the 2nd year
- IBM is growing faster than the market
- IBM has improved user friendliness with a new universal UI, Content Navigator.
- For IT leaders and professionals, IBM has reduced deployment times through Content Foundation.
- IBM continues to show vision by focusing on solutions that traverse the existing SWG product portfolio: Case Management, Patient Care and Insights, and Defensible Disposal.

## Key points against our top competitors:

- EMC Documentum software and services continue to be challenging for some customers.
- Alfresco OpenSource very expensive for Enterprise
- Microsoft SharePoint: organizations are often challenged trying to get the level of adoption they expected (better usability and successful change management concerns).
- OpenText's acquisitions of Global 360, Metastorm and Cordys have created some confusion for ECM customers that have a strong process focus.



As of September 2013

# Market analysis and assessment (External)



Market size / growth (Markess International) – including Service

**ECM Market (WW) in 2014** : \$5,7 billion, with an annual growth of 10,1% (Gartner)

**ECM Market Growth (WW) in 2013** : 9,5% (Gartner)

**ECM Market Growth in France in 2013 (Only Software)** : 2,1%, from 238 million to 243 (IBM GMV Mathematical calculation)

**ECM Market Growth in Europe in 2013 (Only Software)** : 2,2%, from 1,730 billion to 1,769 (IBM GMV Mathematical calculation)

**Adoption of Cloud Computing on ECM (WW)** : 26 % growth between 2010 & 2013 (IBM Market insight)

Key industry opportunity and trends (Markess International)

Secteur d'activité	Efficacité des processus	Respect loi/ réglementation	Traçabilité	Accessibilité	Productivité	Satisfaction clients	Centralisation des contenus	Cycle de vie complet	Recherche	Sécurisation	Gestion de la conformité	Volumétrie	Conservation dans le temps	Collaboration
SP														
BFA														
D / OS														
IND														

- **Public Sector** : Lifecycle Management/conservation with growing volumes
  - **FSS** : Process management - traceability / Security / Customers satisfaction / Compliance
  - **Retail/ Distrib** : Process Management / Content Centralization / Accessibility / Conservation - Compliance
  - **Industry/ Manuf** : Conservation (technical documentation...)
- Search (every industry) / Importance of conservation

Customer Pain Points / Key Buyer Behavior points

- **Exponential growth of unstructured data**
- Lack of productivity and manageability
- Accessibility to the right information
- growing legal aspects / Archiving rules – conservation / destruction (Risk management)
- **Process reliability**
- **Improve decision process and quality**
- **Increase customers satisfaction**
- **Reduce costs**

Competitive Landscape – Top Competitors

- EMC Documentum
- Open Text
- Microsoft
- Alfresco





# 2013 Sales Acceleration Playbook



## Enterprise Content Management

CAPTURE 

SOCIALIZE 

ACTIVATE 

GOVERN 

ANALYZE 

### Advanced Case Management

Select this play for customers who want to unify information, processes and people to drive more successful, optimized case outcomes.

### Information Lifecycle Governance

Select this play for customers who need an integrated software platform for smart archiving, eDiscovery, records and retention management, and disposal and governance management.

### Content Analytics

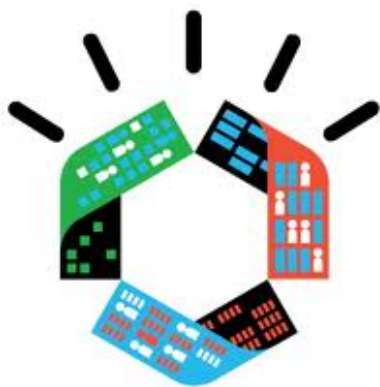
Select this play for customers wanting to harness the value of unstructured information, to gain insight into the business, and make better decisions.

### Essential ECM: Cut Costs and Improve Employee Productivity with IBM Imaging and Capture Solutions

Select this play for customers who need to improve storage, capture, management, integration and delivery all forms of content across the enterprise.

### Social Content Management

Select this play for customers needing to replace "content chaos" with an easy-to-use solution that sets the standard for world-class, social and collaborative, content management.



# Objectifs closing



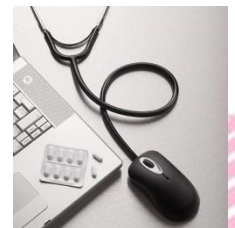
- Products

- DataCap
- PSS Atlas
- StoredIQ
- Daeja



- Solutions

- IBM Intelligent Investigation Manager
  - Use analytics and case management across industries to investigate, detect and prevent fraud
- IBM Patient Care and Insights
  - Advanced analytics and personalized care management to drive patient-centered care



- Winback : ?



**Backup Slide**



# Advanced Case Management

December 2012

## 1. Overview

- Advanced Case Management (ACM) enables organizations to optimize case outcomes for customer and citizen service interactions by managing a case through the unification of information, process and people
- ACM provides a 360-degree view of the case and ensures that the right information is available for case progression and resolution
- IBM delivers the industry's first advanced case management solution

## 2. What Customers Struggle With

- Macro trends:** Growing shift of labor force to information-intensive and service-oriented work, requiring knowledge workers to manage important information and associated processes
- Productivity:** Knowledge workers need better tools to support the way that they work and are required to accomplish a greater variety of tasks often with fewer resources
- Costs:** Case processes can be manual and paper-driven, and are inherently more costly to manage due to their ad-hoc and collaborative nature
- Customer service:** Need to manage service requests efficiently and effectively, requiring a 360-degree view of the case
- Regulatory risk:** Increasing need to manage important information and associated processes, decisions and other artifacts around a case for legal or compliance reasons
- Responsiveness:** Businesses require solutions and tools to rapidly respond to threats and opportunities

## 3. How We Can Help Them

- Maximize knowledge worker effectiveness → Deliver integrated collaboration, social software and communication capabilities
- Provide knowledge workers a contextual environment → Present a 360-degree view of a case and associated information, people, and tasks
- Optimize case outcomes → Meet goal-oriented key performance indicators and provide knowledge workers the right tools to support ad hoc processes
- Enhance customer experience → Reduce churn, improve loyalty

- Increase process efficiency → Enable organizations to capitalize on established business processes
- Ensure regulatory and legal compliance → Manage risk and improve compliance cost efficiency
- Improve business agility → Enhances time-to-value through business user focused design capabilities

## 4. Who Is Interested & Why

- LOB: LOB VP/Dir/Mgr, LOB Process Owner** -- need to optimize outcomes for case-oriented processes
- IT: Business Analyst, LOB Relationship Manager, Enterprise/Information/Solution Architect** – need a case management infrastructure that handles the highest levels of enterprise scalability, throughput, business continuity and security, extensible into the broadest set of software solutions

## 5. Value of the Solution

- IBM has over 2,000 customers leveraging content-centric BPM to solve case management problems, and over 200 partners delivering case-style solutions, IBM has deep experience and success in this area.
- State Shared Services - content-centric framework for process automation enables effective management and sharing of citizen information across critical business processes for 22 agencies and 2,000 state employees
  - Financial Services arm of an Automotive corporation – improved response times to customer inquires; saved \$202k annually; eliminated 168,000 pages of paper being printed annually; improved corporate records compliance
  - International engineering company – reduced project administration costs by 35-40%; improved customer satisfaction leading to new contracts; optimized staff productivity

## 6. Starting Questions

- How do you gather information to process service requests (e.g., customer on-boarding, claims)?
- How do you track actions and coordinate employees across multiple agencies or departments when responding to an incident (e.g., complaint, complex customer/ citizen inquiry)?
- How do you handle investigative cases (e.g., fraud, electronic discovery)?

## Enterprise Content Management

- Do your processes adequately handle the volume of cases flowing through your department?
- Do your customers or citizens have real-time visibility into processes and case status?

## 7. References

- [ACM Customer references](#)

## 8. Products & Platforms

- [Case Manager](#) - integrates content and process management with advanced analytics, business rules, collaboration and social software in the industry's first advanced case management product

### Add-on solutions:

- [Business Process Management](#) - delivers comprehensive content and business process management capabilities to address the creation, management, and optimization of content and related business processes
- [Collaboration and Social Software](#) capabilities – provides knowledge workers the tools to leverage enterprise knowledge and experience
- [ILOG business rules management](#) - allows organizations to define, deploy, monitor and maintain automated decisions
- [Mashup Center and Business Spaces](#) - creates dynamic case applications bringing together disparate user interface components and data sources optimized for the role or the individual user
- [Content Analytics](#) - helps organizations aggregate, analyze, and visually explore the unstructured content found within a case
- [IBM Master Content Bridge](#) - provides unified access to enhanced 360 degree views of customers, by linking data and content
- [Information Lifecycle Governance](#) - supports both formal regulatory compliance or legal discovery requirements
- [Analytics](#): from real-time activity monitoring to reporting, analysis and dashboards to predictive analytics – to help case workers analyze information and improve case outcomes.

## 9. Sales Acceleration Play

[Advanced Case Management](#)





# Information Lifecycle Governance

December 2012

## 1. Overview

- CIO: facing a 10 fold increase in information volume and diversity since 2006 with very little disposed of. 50% YOY data growth and 1% budget growth. "How do I deal with doubling data and shrinking budgets?"
- General Counsel: New 2006 legal rules expanded responsibilities to all information with net new risks and process. 10X rise in sanction cases. "How do I meet legal obligations more efficiently and reduce legal risk?"
- VP Records: Often does not have a seat at the table – making change difficult. Still challenged to meet legal and regulatory obligations for recordkeeping and retention for all information "How do I go from physical to digital records management?"

## 2. What customers struggle with

- The 4 enterprise organizations, Legal, Records, LOB and IT do not currently have eDiscovery, Retention and disposal alignment to meet their risk and cost reduction objectives
- IT has the data, but no visibility on legal duties or business value.
- Legal defines preservation requirements by employee, records schedules are documented by record class – neither informs IT of obligation to retain by system.
- IT then implements a 'keep everything policy'.
- This policy leads to excess legal and compliance risk and eDiscovery and Information Management cost.
- How can IT clean up legacy data, retire applications and optimize without creating new legal risk?
- How does IT efficiently determine which of 15,000 legal obligations apply to which departments, employees and information assets?

## 3. How We Can Help Them

The ILG Defensible Disposal Solution provides a comprehensive workflow and applications for legal, records and IT staff to work in concert to:

- Effectively retain and archive information of value - including both structured and unstructured data – risk reduction prerequisite to disposal
- Efficiently meet eDiscovery – evidence hold and collection - obligations – prerequisite to disposal
- Defensibly dispose of information for cost reduction – normalizes the growth curve
- Only IBM provides information lifecycle governance policy creation, management and execution.
- Only IBM Defensible Disposal solution systematically links legal, regulatory and business decisions to data management.
- Only IBM's Defensible Disposal Solution delivers the legal and information management cost and risk reduction required by the CIO, GC and SVP Records.

## 4. Who is interested & why

- CIO's with a major cost reduction mandate.
- CIO's with a complex legal, regulatory and information environment.
- CIO's with a repository consolidation project that is stalled because IT can't identify information with obligation or value to the business.
- General Counsel unable to perform rigorous nor efficient preservation and collection processes
- General Counsel with a project to reduce spend on outside counsel review
- SVP Records with a mandate to implement electronic records management

## 5. Value of the solution

- IT Cost Reduction – Defensibly disposing of data enables IT to reduce storage, application and mainframe costs. These savings, at one client, are projected to be \$100m in 4 years. This, in turn, is the funding mechanism for the Data Governance, eDiscovery and electronic records projects.
- Legal Cost Reduction – case and cost assessment tools empower in house teams to improve decision making and lower cost
- Measurably lowest enterprise cost of compliance and Risk Reduction - Discovery process management with legal holds, custodian interviews

and collection coordination, global, local and system-specific retention policy management and execution

- IBM Smart Archiving: Rated #1 by IDC Sept 2011
- IBM eDiscovery Management and Records and Retention management recognized leadership by Gartner 2011
- IBM Governance "top of the line" Forrester – Computerworld Defensible Disposal issue.

## 6. Starting Questions

- How much storage do you currently have (volume)?
- What is the storage volume growth rate?
- What is the cost of storage? Cost growth rate?
- What is the budget growth rate?
- How many active matters and legal holds? How many collections per year?
- How do legal preservation plan get communicated and executed?
- How is the global records schedule executed by IT?
- How much information is past retention but is still retained?
- Does IT perform routine disposal of information? (both records and 'non-records')
- How is legacy data disposed of?
- How are legacy applications retired? What happens to the data?

## 7. References

[ECM Client Reference Wiki](#)

## 8. Products

See Defensible Disposal Bill of Materials on [ILG Central](#)

## 9. Sales Acceleration play

- [ILG Central](#)
- [ILG Sales Play](#)



# Content Analytics

December 2012



## 1. Overview

IBM Content Analytics is an advanced search and analytics platform that enables better decision making from your enterprise content regardless of the source or format. Content analytics solutions can understand the meaning and context of human language and rapidly process information to improve knowledge-driven search and surface new insights from your enterprise content.

Content Analytics uses the same Natural Language Processing technologies as IBM Watson DeepQA, the world's most advanced question-answering machine.

About 80% of the information created and used by an enterprise is unstructured content and it is growing at twice the rate as structured data.

Harnessing that unstructured and semi-structured information can help an organization work smarter, serve customers better, control costs, and plan for the future.

## 2. What Customer Struggle With:

- Finding relevant content quickly and securely across the sources required to perform their jobs effectively
- Leveraging and exploiting their content to deliver timely, analytical insights on their customers, processes and operations in order to optimize their business overall
- Knowing and organizing their content to understand what is valuable, what poses risk to the organization, where that content resides and which content is unnecessary and safe to decommission.

## 3. How We Can Help Them

Deliver new insight from content assets by:

- Finding content with knowledge driven search by extracting business understanding from content and unifying users with the knowledge they seek.
- Leveraging and exploiting content to spot issues and important trends that may fall outside of the normal business reporting channels and deliver new insights to business users across the organization.

- Knowing and organizing content by dynamically analyzing it to make rapid decisions about it and to cut costs and optimize storage

## 4. Who Is Interested & Why

### LOB Executives:

- Improve customer satisfaction through call center analytics and customer insight from correspondence, external web content and social media
- Identify fraud in process based on historical patterns
- Understand why lines of business are under/over performing hidden within relevant operational content

### CIOs:

- Invest in a flexible and extensible platform for analyzing and mining insights from content to solve a broad range of business problems
- Reduce duplicate storage of content
- Decommission content and content sources to reduce runaway infrastructure and energy costs

### Customer Service Executives:

- Make informed decisions when responding to inquiries and solving customer problems
- Provide customers better information about their accounts in self-service scenarios

### Compliance and Legal Officers:

- Gain control of content 'in the wild'
- Dynamically collect content for eDiscovery

## 5. Value of the Solution

- Improve customer satisfaction by up to **90%**
- Advanced search and analytics over an integrated single view of plans, patients and providers enables better negotiations and improves service for health care providers
- Analytics over insurance claim files helps detect fraud faster, reducing costs and optimizing the claims-handling process
- Reduce unnecessary eDiscovery costs: Up to \$1 million+ per case for typical F500 company
- Reduce time to find relevant information by up to **80%**

## 6. Starting Questions

### LOB Executives

- How much correspondence and feedback are you getting from your customers? Do you systematically extract intelligence from it?
- Are you able to spot unusual, costly behavior more rapidly as part of your business processes
- Do you want to identify growth opportunities through a better understanding of customer behavior, interactions and patterns?
- Do you want to add enterprise content to your trusted single version of the truth for each customer/citizen?

### CIO

- Do you want to gain insight from your enterprise's content like you gain business intelligence from your enterprise's data?
- How would it help your business if you could reduce storage infrastructure costs by 80%?

### Customer Service Executives

- Do you want to use content to provide better customer service and self-service?
- How do customers locate information about the products / services you provide?

### Compliance and Legal Officers

- Do you want to eliminate parts of your content infrastructure but are afraid of what you might unknowingly throw out?
- Do you know what risk is related to your content? What content is really a corporate record but isn't being managed properly?

## 7. References

- [IBM Content Analytics powers Watson](#) to win on Jeopardy
- [North Carolina State University](#)

## 8. Products & Platforms

- [Content Analytics Bundle](#)

## 9. Sales Acceleration Play

- [Content Analytics](#)



# Essential ECM: Cut Costs & Improve Employee Productivity with IBM Imaging & Capture Solutions

December 2012

## 1. Overview

Despite significant advances in IT solutions and industry visions for paperless offices, many companies still struggle under mountains of paper. Yet the faster they can reduce labor-intensive, error-prone processes and paper related costs, the faster they can reap the financial rewards and enable the business flexibility and speed. Achieving the benefits of streamlining and automating processes requires a collection of technologies - including an imaging solution, business process management (BPM) capabilities and a content management repository.

## 2. What Customers Struggle With

There is a cost to every organization to operate and maintain paper based filing systems. The costs associated with physical space, filing supplies, personnel, photocopying, organizing, sorting, filing and re-filing add up very quickly. Implementing an IBM Production Imaging Edition system removes many paper handling inefficiencies and saves time and money.

## 3. How We Can Help Them

- Makes it easier for organizations of any size to extract insight for analytics faster, expediting caseloads, filing patient claims or other processes. For example, state and county courts could use document capture software to quickly collect information so paralegals, attorneys and judges can review information for a pending case more efficiently -- eliminating any delay in processing a case.
- Helps organizations quickly and easily capture and extract key information from documents and convert it to images that are stored electronically
- Leverages IBM FileNet Content Manager repository to improve manageability and flexibility
- Incorporates IBM FileNet BPM components to increase process performance and productivity
- Improves document usability with enterprise-wide document image viewing, annotation and redaction

## 4. Who Is Interested & Why

All industries including Telcos, Utilities, Financial Services, Insurance, Healthcare, and Government.

- VP/Director LOB
- CIO
- IT Director

## 5. Value of the Solution

- Reduce response & processing time for customer & supplier correspondence and enabling customer self-service for statements and correspondence.
- Provides a powerful and extensible, open standards based framework that enables ECM services to be pervasive throughout the enterprise.
- Helps companies manage content, optimize business processes, and enable compliance with an integrated infrastructure.
- Delivers trusted content to single version of the truth applications to provide greater depth and more complete single views of customers.
- Provides the ability to align IT with content-centric business application needs for all types of content and associated processes - from casually created, contributed and consumed content to compliance and risk-related information and processes.
- Information is freed from the physical limitations of paper and converted into an electronic document format. It becomes a more valuable strategic resource.

## 6. Starting Questions

- Are there organizational initiatives that are driving you to become more efficient, improve quality, decrease customer churn, or increase profits?
- Are there any external drivers that dictate records management guidelines? Such as: Government or agency regulations? Industry standards?
- Are there general business drivers for imaging and Capture? Such as: Decrease records management costs? Increase productivity? Increase capacity for growth? Shorten customer or vendor billing cycles?
- Are the right people involved in the decision-making process in your organization to foster performance and responsiveness?
- Do you have high data entry costs associated with manual and/or paper based processes?

- Is it important to find an ECM platform that lowers your total cost of ownership and allows content management for multiple existing content sources, including the ability to manage content in third-party repositories as records?
- Do you need an efficient way to access and manage an increasing variety and volume of content across silos in your organization, including content created with collaborative tools such as SharePoint and Quickr?
- Are you able to control your information and provide a streamlined view of content across all departments that meet industry, regulatory or environmental compliance/reporting requirements?

## 7. References

- [Invacare accelerates accounts payable processes](#)
- [Dow Jones & Company automates data entry and accelerates subscription processing](#)
- [Virginia Department of Taxation accelerates tax return processing and improves customer service](#)

## 8. Products & Platforms

- [IBM Production Imaging Edition](#)
- [DataCap Taskmaster Capture](#)
- [FileNet Capture](#)
- [IBM Case Manager](#)
- [FileNet Content Manager](#)

## 9. Sales Acceleration Play

[Essential ECM: Cut Costs and Improve Employee Productivity with IBM Imaging and Capture Solutions](#)

# Social Content Management

December 2012

## 1. Overview

IBM Social Content Management connects people and expertise with content and processes for significant business value. IBM's social content solutions bring content to life so people can actively engage with it, adding context, insight, and relevance. At the same time, proactively managing social content makes it easy to discover, improve, secure, and preserve the intelligence that content represents while reducing potential organizational risk. Social Content Management is a both a software bundle and a Sales Strategy.

- **Software bundle includes** FileNet Content Manager, IBM Connections and IBM Desktop Connectors
- **Sales Strategy** is designed for IBM Sales teams to compete against and/or co-exist with Microsoft SharePoint in established IBM ECM and/or Collaboration Solution Accounts. Also designed for IBM Partners to compete against Microsoft in the SMB and Mid Markets

## 2. What Customer Struggle With:

*The world has gone social. Everywhere you turn, customers, employees, businesses are posting, blogging, tagging, rating, ranking, and letting their voice be heard.*

- Social collaboration tools are changing the way people work. Employees are sharing ideas and working together across professional social networks. They also want content delivered to a device convenient for them at the time whether it's a laptop, phone or tablet.
- With the injection of social content (including blogs, wikis, text chats, activities, communities, pictures, and videos) into the workforce and business, customers are increasingly interested in making sure this information is available, managed, protected, and incorporated into their business systems and discoverable
- Customers want better business outcomes so they are implementing social business applications such as customer care and insight, product and service optimization, or workforce optimization solutions.

## 3. How We Can Help Them

*The social content management software bundle and sales strategy helps customers:*

- Connect Social Content to the right people for significant **business value**
- Access and share content in the context of **communities**
- Improve the **effectiveness of knowledge workers** and improve business outcomes
- Manage high value content properly and maintain **compliance**

## 4. Who Is Interested & Why

*The Social Collaboration offering is targeted to customers who already have a strong relationship with IBM. Either they have IBM ECM or Lotus Software and want to combine the two products to support the new social mediums with Content Management.*

- **CIO's:** who have established that IBM ECM and/or Lotus is the corporate standard .
- **IT Directors:** Who have to support existing versions of Office applications like Office 2003 or 2007 or Lotus Notes and Symphony
- **Department heads** Who need a shared area for people to post and update content but do not have time or budget to train users on new apps.
- **End users** who want to save content directly from their desktop applications and are interested in using Wiki's and Blogs as a new means of communication

## 5. Value of the Solution

Leverages the customers existing investments in IBM ECM, Microsoft and Lotus applications,

- Better customer care and insight through managed social content
- Increased productivity through better business processes and workforce effectiveness
- Streamlined product and services innovation
- Improves the quality of information, making it relevant and secure
- Speeds up decision making through collaborative content

## 6. Starting Questions

*How is content created and collaborated on within your organization?*

- Do you still use shared drives to store content?
- Do you send and receive lots of file attachments via email?
- Do you have a hard time locating current and up to date content?
- When you find the content would it be helpful to have direct feedback from others who used this content?
- Would it be helpful if you could easily locate and connect with the content producers or approvers?
- Would you like to leverage the existing infrastructure you have today --- desktop/email and/or ECM ?
- Would you like to leverage features in consumer web applications such as blogging, tagging, rating, ranking and discussion forums for content stored in the ECM solution.?

## 7. References

Client references and other sales related material can be found at the following [wiki](#)

## 8. Products & Platforms

*IBM Social Content Management software includes the following products*

- IBM Connections Enterprise Content Edition
- IBM Connections Content Edition
- IBM ECM
  - IBM Content Manager 8.4
  - FileNet Content Manager 4.51
  - FileNet Content Manager 5.0
- FileNet Content Manager Collab Edition
- Lotus Quickr V 8.5 (Domino & Portal/Java)
- Lotus Quickr Connectors V 8.5

## 9. Sales Acceleration Play

[Social Content Management](#)



- Merci

