

IBM Smarter Business and Technology Series

Lotusphere and InformationOnDemand Come to You

Get Social. Do Business. Gain Insight. Optimize Results.



Enterprise Content Management Developments for Business and Industry.

Ulrich Leuthner

ECM Worldwide Marketing





Agenda

- Today's business challenges
- IBM Enterprise Content Management
- Case Studies
- Advanced Case Manager
- Advanced Case Manager Walkthrough

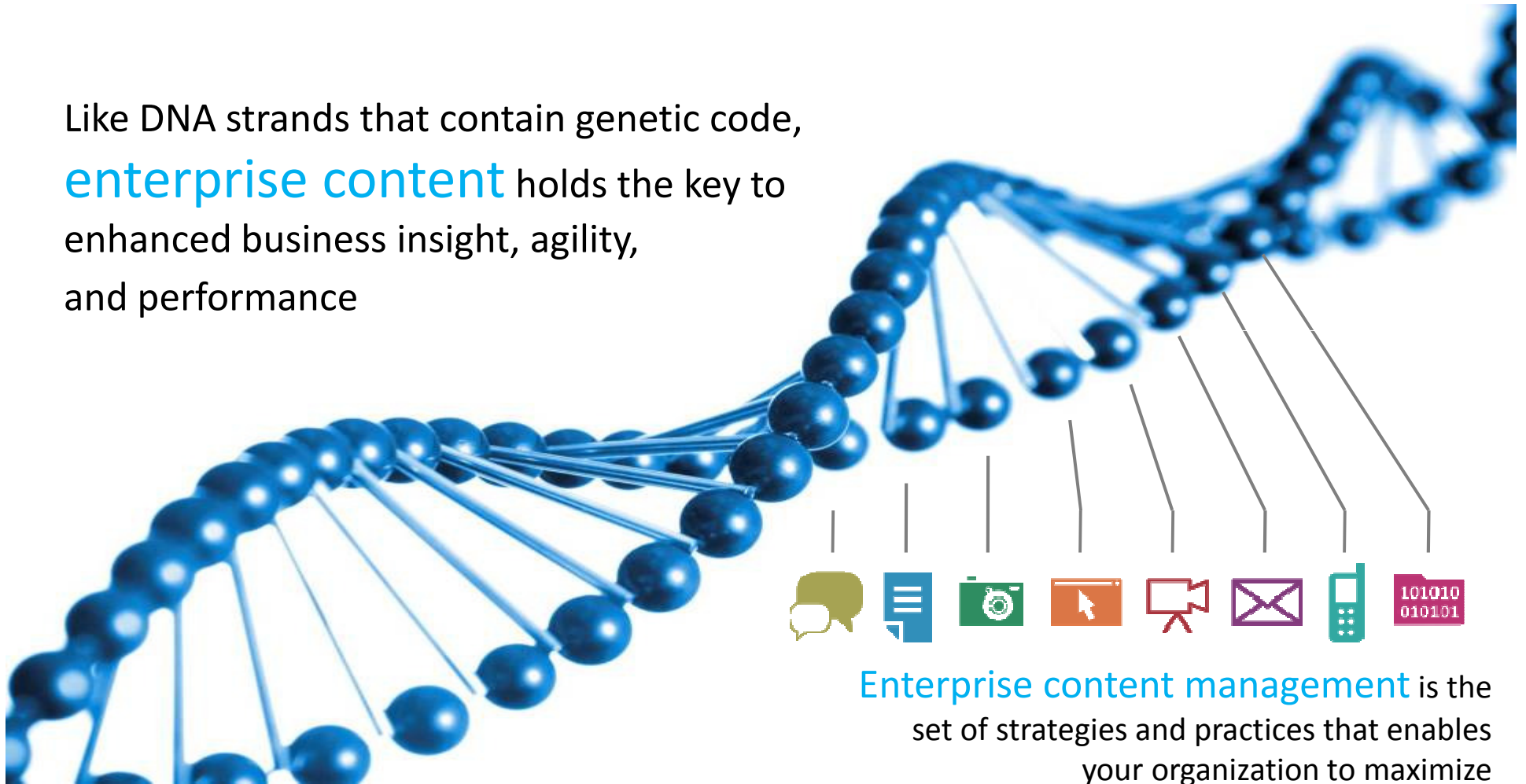
3:35pm Mini Track 3, Jason Ho



Enterprise content: your organization's DNA

How will you unlock its potential?

Like DNA strands that contain genetic code, **enterprise content** holds the key to enhanced business insight, agility, and performance

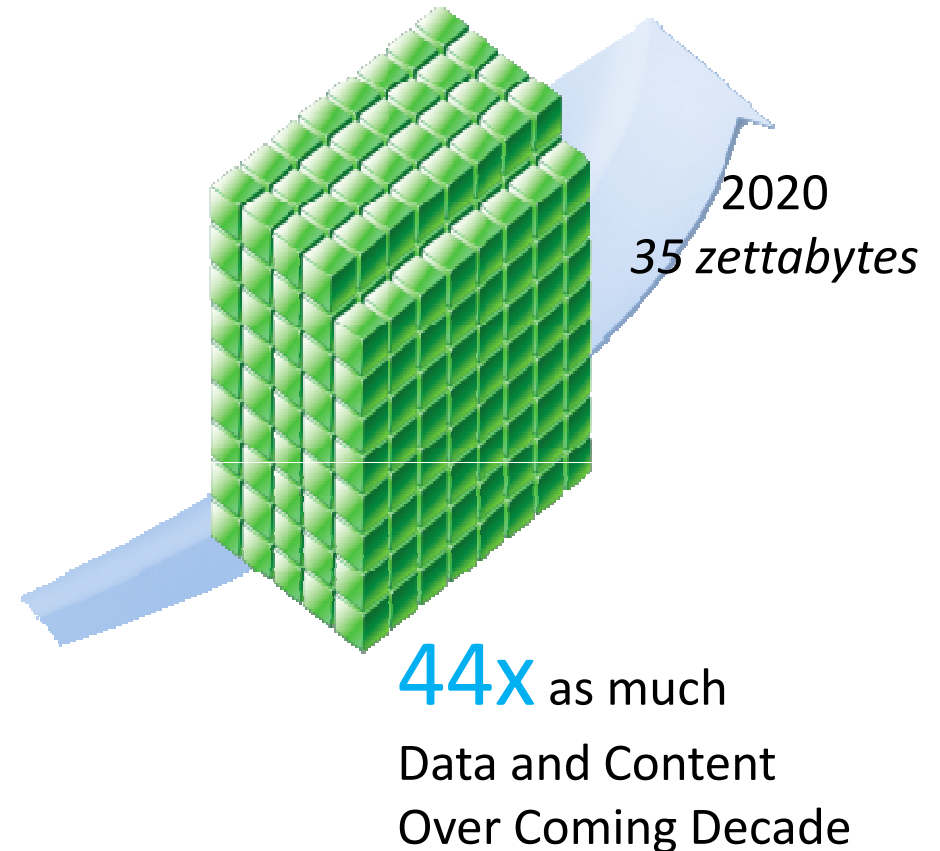
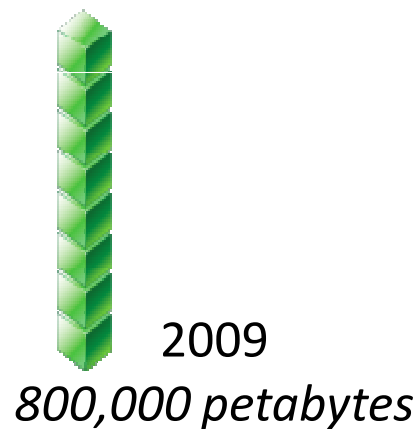


Enterprise content management is the set of strategies and practices that enables your organization to maximize value from content



The Continued Explosion of Information

80% of new information growth is unstructured content, with 90% of that unmanaged



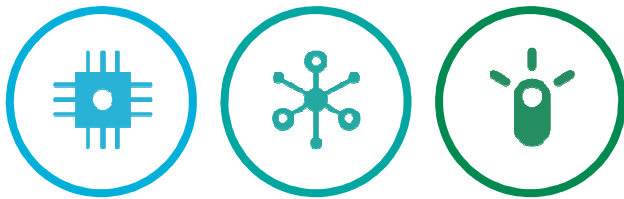
The volume, variety, and velocity of information is driving unprecedented complexity.



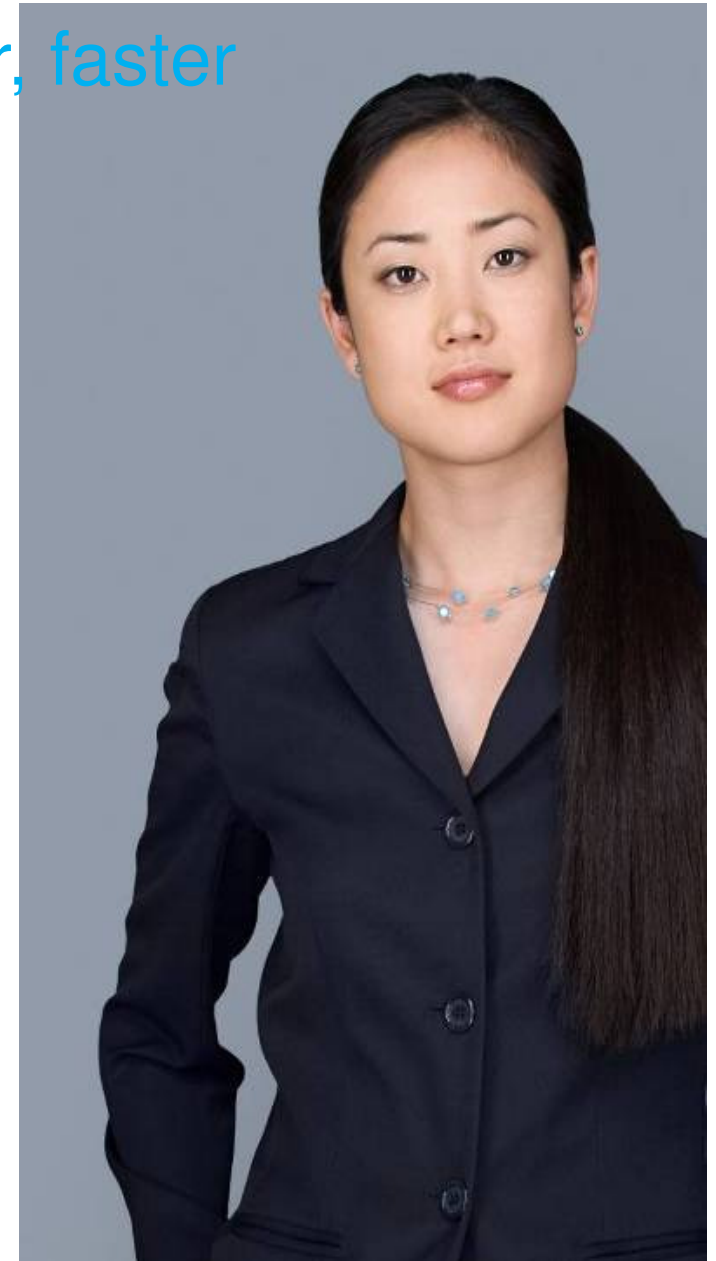
To achieve competitive edge

Organizations need to be smarter, faster

- **77% of CEOs** say they do not have real-time information to make key business decisions
- **1 in 3 business leaders** frequently make business decisions based on information they don't have, or don't trust
- **1 in 2 business leaders** say they don't have access to the information they need to do their jobs

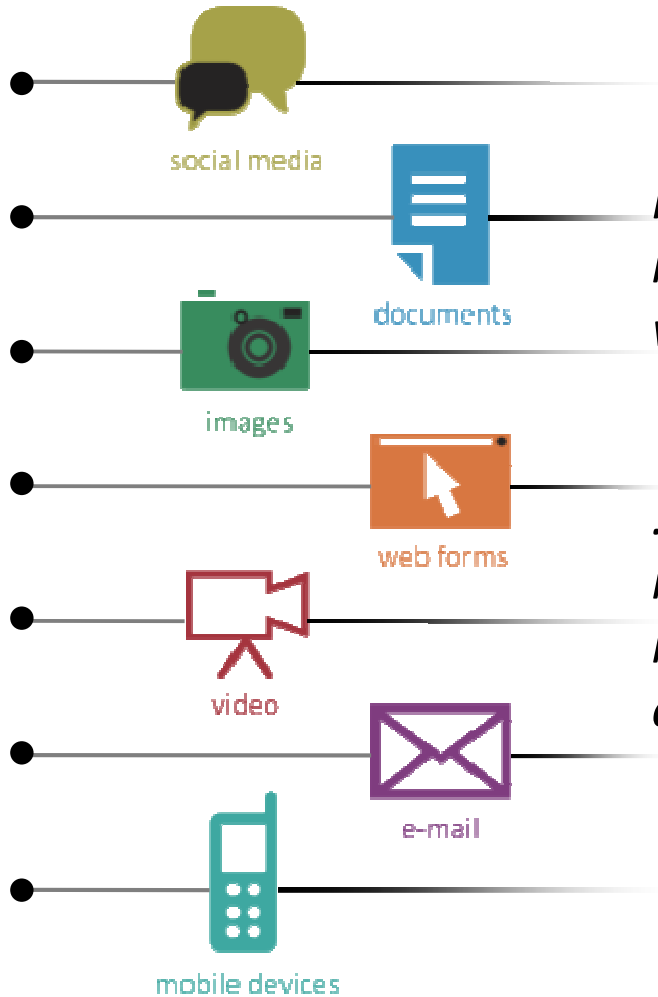


Companies that invest in business insight outperform their peers, showing 33% higher revenue growth, 12 times more profit growth, and 32% higher return on invested capital.





Customers are demanding **better services** ...



Knowledge workers in all industries must do more with less...

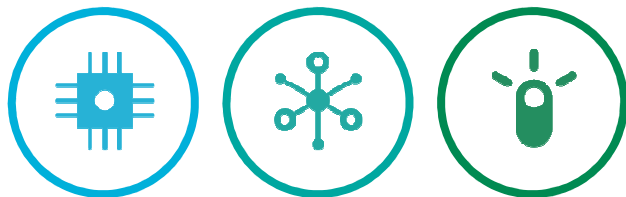
...yet businesses need to improve service and manage risk while controlling costs



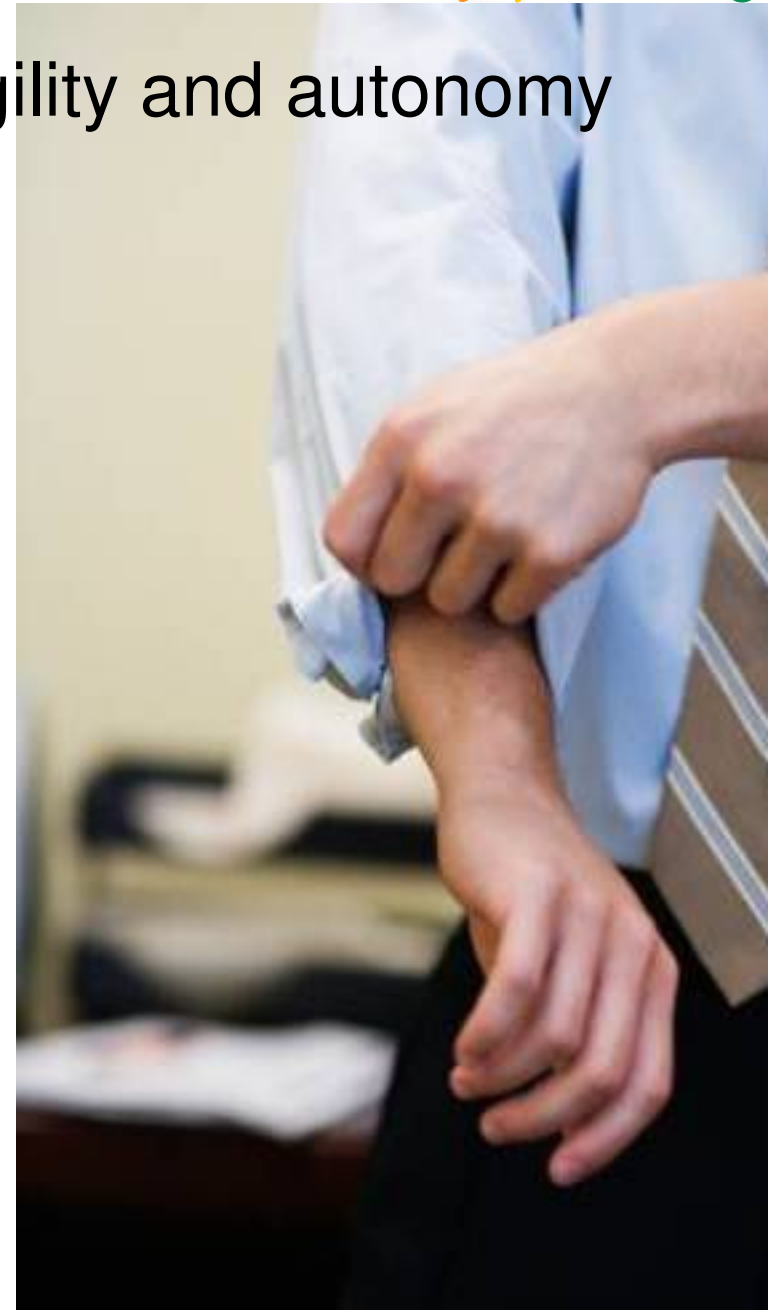


Knowledge workers demand agility and autonomy

- **Only 11% of knowledge workers** claim to have well-defined and mapped Case Management processes
- **40%** cite difficulty adding or changing processes as their biggest case-handling problem
- **Nearly half** have access to fewer than 40% of customer records required for case processing



Companies that invest in business agility outperform their peers, showing 10% higher revenue growth, 40% higher profit growth, and 60% higher return on invested capital.

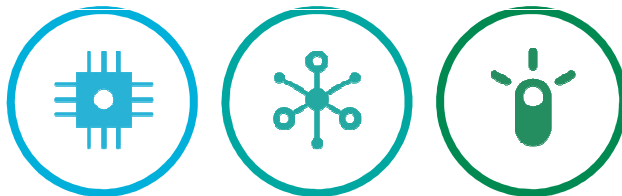




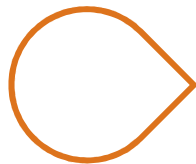
To enhance customer intimacy and employee collaboration

Business is becoming more social

- **69% of executives** report gaining measurable business benefits from social technologies
- **52% of organizations** plan to increase investment in social media and collaboration tools in 2011



“Social media has shifted control of the corporate message away from the organization and towards consumers and other stakeholders. Running away and hiding is no longer the safe option.”



Burson-Marsteller
“The Global Social Media Check-up,” February 2010





Your organizational advantage is **trapped** in your content

90%

Unstructured content that is currently *not being managed* by organizations

80%

New data growth from unstructured content, e.g. email, documents, images, video and audio

60%

Managers who miss key information when making business decisions

50%

Organizational content that carries risk without delivering business value



To optimize business outcomes

Smarter organizations manage content for value



SMART IS ... ELIMINATING PAPER

Standard Chartered Bank saved more than \$1.3 million annually by eliminating paper.



SMART IS ... GOVERNING AND DEFENSIBLY DISPOSING OF INFORMATION

JM Family Enterprises saved \$2.1 million annually by reducing call center labor costs.



SMART IS ... IMPROVING CONTENT-CENTRIC WORKFLOWS

J.B. Hunt added \$870K annually by more accurately charging customers.



SMART IS ... RAPIDLY DERIVING CONTENT INSIGHTS

A large U.S. bank achieved ROI on content analytics in 7 months.



SMART IS ... LOWERING LEGAL RISK AND COST

BASF implemented more cost-effective governance.



Do any of these **challenges** sound familiar?

For 72% of workers, it's harder to find information they own than information they don't own

More than 60% of organizations rely on manual processes to capture 75% of customer communications





Do any of these **opportunities** resonate?

Imagine if you could ...

... leverage claims patterns to optimize medical treatment approaches



... analyze “voice of the customer” insights to decrease churn



... adjust loan procedures dynamically to account for risk fluctuations



... decommission business records while improving regulatory and risk posture



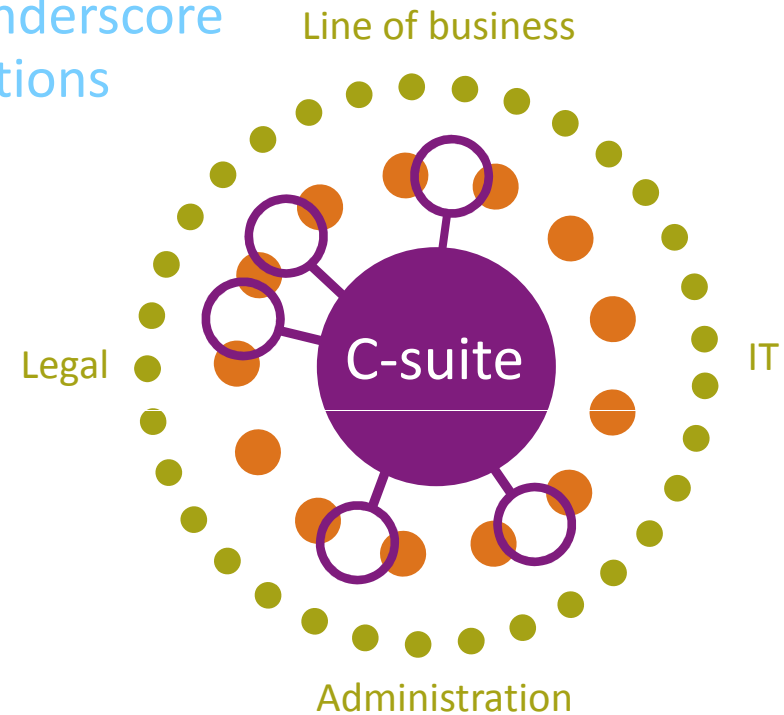


Content and the executive agenda

Emerging executive-level imperatives underscore the need for content management solutions across the wider organization

- **78%** of customer-focused CEOs will focus on insight and intelligence to realize strategy
- **74%** of CFOs believe that the need for faster decision-making will change their industry
- **78%** of CIOs want to improve the way they use and manage their content

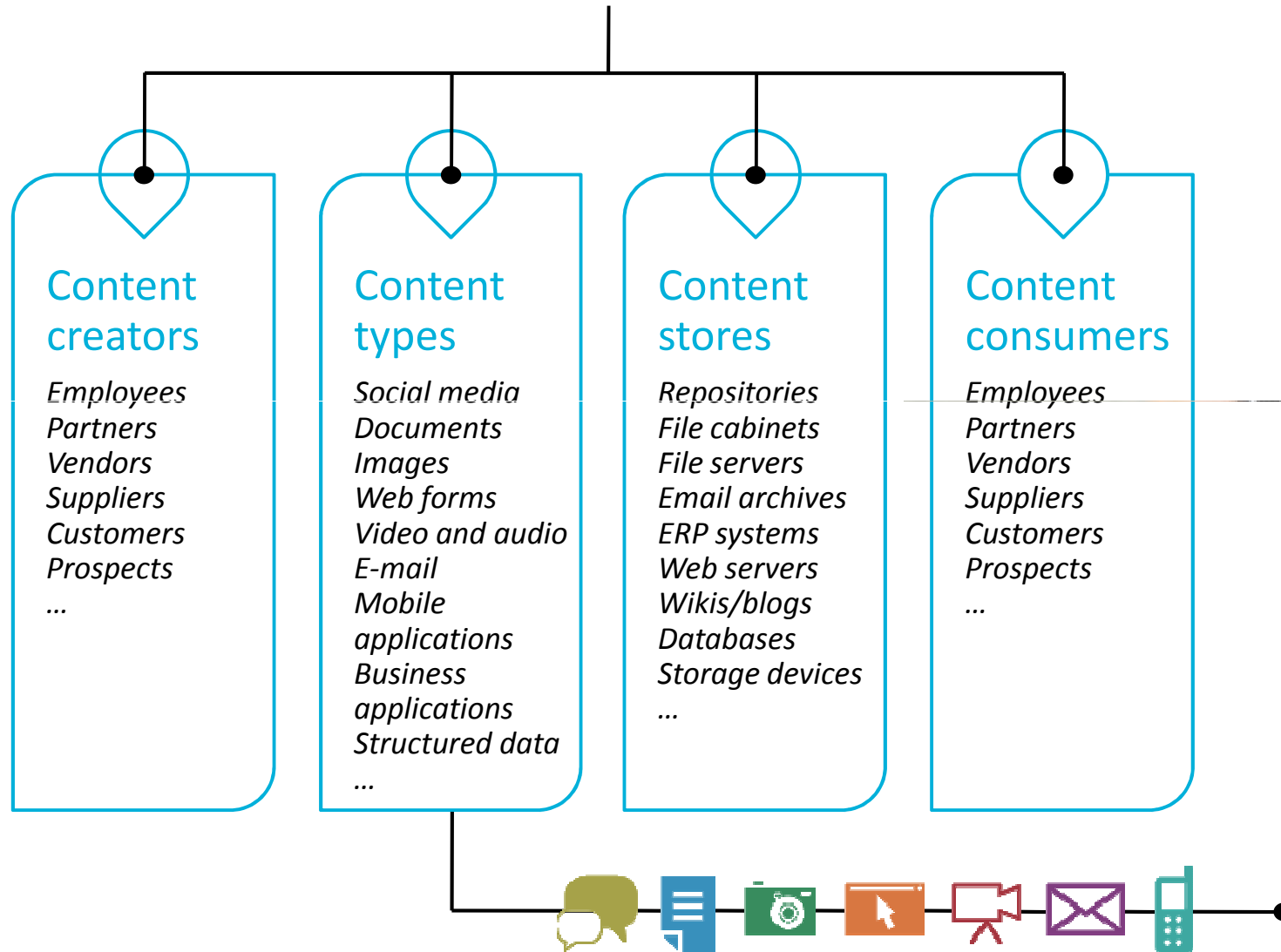
"Hertz gathers an amazing amount of customer insight daily.... We wanted to leverage this insight at both the strategic level and the local level to drive operational improvements. Working closely with the IBM-Mindshare team, we are able to better focus on improvements that our customers care about."



Joe Eckroth, CIO
Hertz Corporation



The staggering complexity of enterprise content





Why **new approaches** are needed ...

“The new generation of information **workers must collaborate** and juggle an ever-increasing set of tasks.”¹

“**Older process automation** approaches based on old mass-production concepts are no longer adequate.”¹

Business processes must increasingly tackle smart jobs — those encompassing more skilled workers who must accomplish **a greater variety of tasks** with relatively fewer resources.”²





Smarter models are emerging

Smarter Content Management

Content in a shared services model, delivered in context to specific business users and processes, driving faster insight and action

Traditional Content Management

Content locked in multiple, siloed repositories, driving uncontrolled proliferation, inconsistent access, and mounting costs and risks

Infrastructure-led approaches

Siloed, departmental management

Manual, inefficient processes

“Keep everything” governance model

“Search and hope” user experience

Business solution-led approaches

Collaborative, shared services model

Optimized, dynamic processes

Policy-based information lifecycle

Analytics- and people-driven insight





Smart is improving employee productivity

*A large
Asian Bank
headquartered
in Singapore.*

The need

➤ Fragmented document and content repositories, inconsistent content access, security policy and multiple disparate content management systems causing process deficiencies, extended turnaround times and ultimately effecting customer service.

The solution

➤ Advanced Case Management strategies from IBM now support the 20 applications and business processes in more than 40 countries. With a user base in excess of 22,000, the software has become a key enabler to deliver business benefits

The benefits

- The bank saves more than USD 1 million annually through decreased storage of physical paper and associated transport costs as well as an additional annual savings of USD250,000 in storage and courier fees.
- Automates manually intensive processes such as document retrieval, decreasing errors and rework
- Provides timely, accurate information to the right people to improve decision making
- Improves customer services turnaround time by eliminating duplicates and reducing storage needs through automation and electronic storage
- Manages retention and destruction of important documents aligned to regulatory and business needs



Smart is elevated customer service

A microfinance company in India with 130 branches in 11 states accelerates its loan applications process and elevates customer satisfaction



Business Challenge

- Branch offices had to physically send all documents pertaining to loan processing to regional offices for verification.
- This resulted in extended delays for customers who were waiting to learn about the final status of a loan.
- In many cases, loans would not be dispersed on time
- Needed a better way of managing key documents associated with every loan for long term retention purposes.

Smarter Business Outcomes

- Using advanced Case Management strategies from IBM, Ujjivan scans all enrollment forms, loan applications and other loan-related documents at each branch and sends the images to the central office for processing.
- End-to-end operational and process excellence, enhancing the company's existing offerings and thereby elevating customer satisfaction.
- Clear visibility to the status of loan applications.
- Accelerated loan application process sharpens competitive edge and generate more business.
- Eliminated manual, paper-based document management, helping to reduce operating costs.



Smart is providing a one-stop shop for investors

*An Indonesian
Economic
Development
Institution*

The need:

The institution was experiencing customer satisfaction problems with its investor permit process. A lack of transparency and readily accessible, integrated information were a deterrent for potential customers. To win back its investors, the company sought a way to organize information in one place, streamline the application process and expand its customer base.

The solution:

The company established a Web-based portal to serve as a single access point for all integrated services. the solution. The solution provides all the necessary fiscal requirements & information pertaining to investing in Indonesia.

The benefits, what makes it smarter:

- Provides automation to monitor trends, gather wide ranges of data and support all investment-related activities
- Improves the back-office investment licensing approval process by more than 75%, from 128 days to less than 30 days, while allowing applicants to track their license application approval process
- Promotes swift response to demands of increasingly tech-savvy customers, greatly improving user experience and satisfaction levels



Smart is analysing customer information that enables Up-sell & Cross-selling



The Need:

In a competitive environment, the bank needed to better target its customers to optimize marketing efforts, whilst improving risk management and maintaining regulatory compliance.

The Solution

The Bank consolidated customer information scattered across several locations into a central database.

A robust analytics platform mines and analyzes the data, providing the bank with sharper insights about customer banking habits. This helped revolutionize marketing strategy, allowing bankers to assess customer needs before offering promotions.

The IBM ECM solution also satisfied all compliance obligations, and reduced risk for their customers.

The benefits, what makes it smarter:

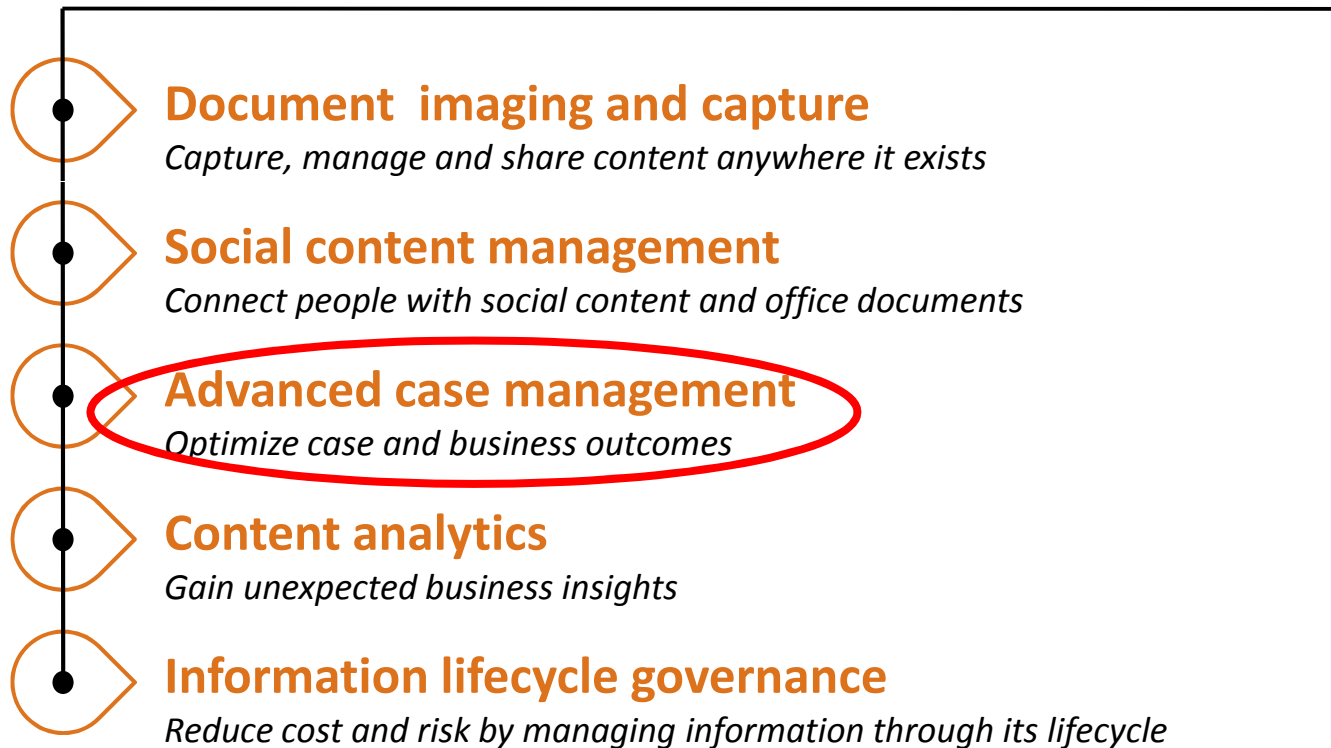
- By knowing a customer's risk level, staff can offer more attractive products or services.
- Ability to adapt offers quickly depending on the market dynamics
- The correct Cross-selling and up-selling opportunities for each and every customer



Select your value **entry point**

Where to *start*?

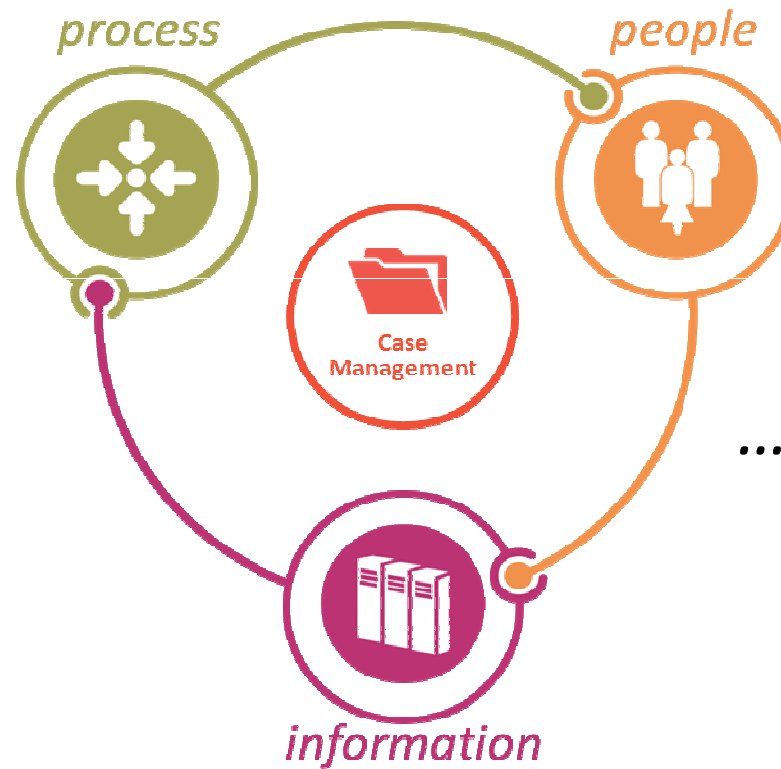
The path to value lies along one or more specific **solution entry points**.





IBM Advanced Case Manager

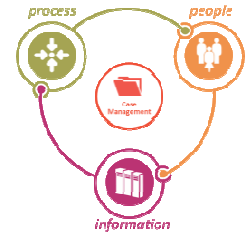
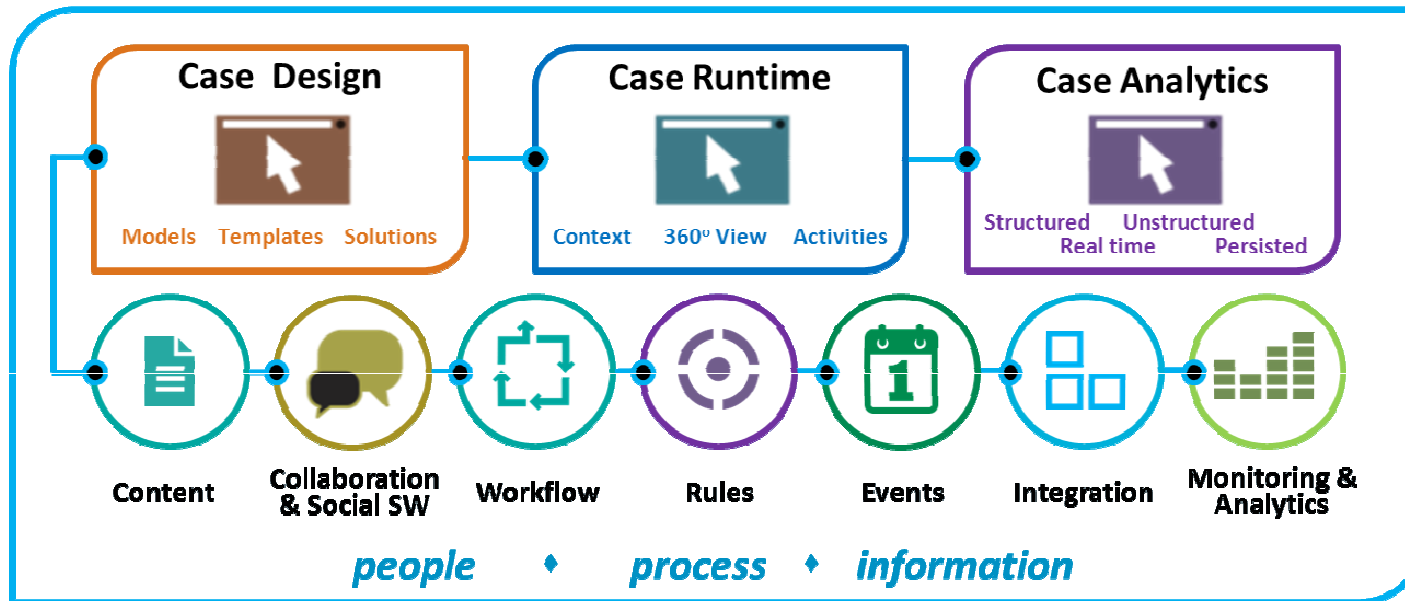
brings **people**,
process
and
information
together ...



... in the **context**
of a case

IBM Case Manager

Simplifying the delivery of case-based solutions



- *Built on IBM FileNet P8 Business Process Manager*
- *Includes Content Analytics, WebSphere ILOG jRules, Cognos RTM, Lotus Sametime and Mashups – for use within case solutions*
- *Extensible to the entire ECM portfolio*
- *Deep integration to WebSphere Process Server for connectivity*

What is Case Management?



- Case Management refers to the **coordination** of business services to **achieve** a specific business function that typically involves **people, process and content**
- *Examples include taxpayer records, grants, patient records or a contract.*
- This typically includes **creating a case folder** and following a **collaborative**, dynamic, human, and information-intensive **process** that is driven by outside **events** to resolve a case.
- The case folder includes all the documents, data, collaboration artifacts, policies, rules, analytics, and other information needed to process and manage the case.
- After a case is closed, case information is typically **retained for compliance** for long-term periods



Case Management is in most industries

Although a “case” may be expressed differently depending on your business ...



Invoice, Contract, Employee, Vendor, Customer, Project, Change Request, Complaint, Exception, Incident, Audit, Electronic Discovery, etc...

Insurance



- Policy
- Underwriting
- Claim
- Annuity
- ...

Banking



- Loan
- Mortgage
- Account
- Credit Card
- ...

Healthcare



- Patient case
- Claim
- Member
- Provider
- ...

Government



- Grant
- Court case
- Citizen
- Tax payer
- ...

Energy & Utilities



- Rate Case
- Permit
- Land
- Property
- ...



... a common pattern of challenges exists across all industries



IBM's approach to Case Management

Use Cases

- Complex exception handling
- Complaint or dispute management
- New customer or new account opening
- Lending applications
- Credit approval
- Contract management
- Claims processing
- Benefits enrollment
- Rate Case Management
- Investigations or audits

KEY: Both *horizontal* and *vertical* in nature

Patterns

- Work activities are event-driven
- Collaborative, ad-hoc processes
- Processes are often not predetermined
- Work is knowledge intensive
- Content is essential for decision making
- Outcomes are goal-oriented
- Relies on people

KEY: A *case* is the primary focus of the system

Integrated Solution

- Content management
- Business process management
- Collaboration tools
- Social software
- Business rules
- Analytics
- Solution development and deployment
- Templates

KEY: Solution is optimized for the *context* of a case



Why IBM Case Manager is different ...

With this new Case Management offering, IBM moves the vision forward by making a reality that you'll be able to buy and implement.” — **Rob Koplowitz, Forrester**

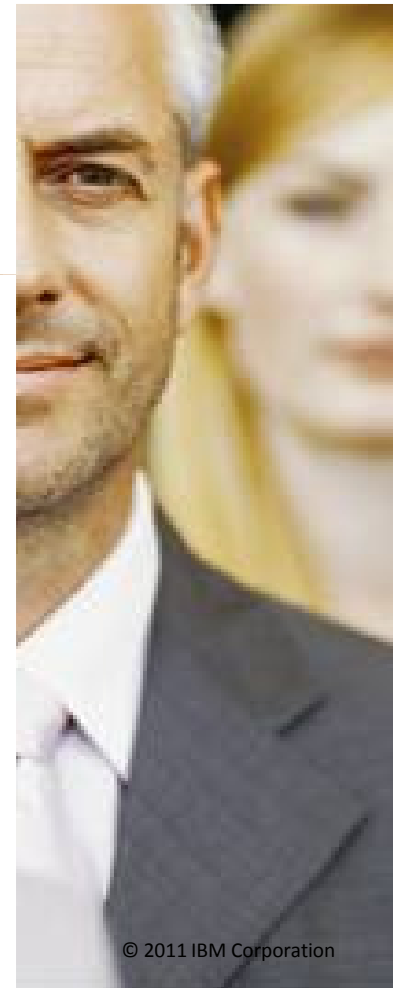
Next-generation Case Management requires a different mindset... this new Case Management will be a huge departure from the workflow/imaging solutions of old and will be based on predictive analytics, business rules, and social collaboration, in addition to core BPM and ECM functionality. — **Forrester**

IBM ... has pushed the envelope with its Case Management solution, IBM Case Manager. Combining document management with robust social, collaboration, and communication capabilities, IBM has integrated a broad array of functionality from its software portfolio to provide a unique business solution. the end, the whole suite offers far more value than the component parts.” — **Rob Koplowitz, Forrester**



Why IBM? Recognized industry leader

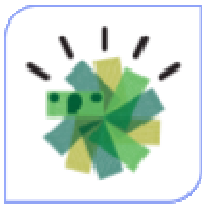
- **Leader** – Gartner Magic Quadrant, Enter Management
- **Leader** – Forrester Wave, Dynamic Case Management
- **Leader** – Forrester Wave, ECM Suites
- IBM's enterprise content management solutions are deployed in:
 - ✓ 7 of the top 8 banks worldwide,
8 top banks in Asia
 - ✓ 24 of the top 25 insurers worldwide
 - ✓ 15 of the top 16 telcos worldwide
 - ✓ All 8 top retailers worldwide
 - ✓ Major government agencies in US and
around the world





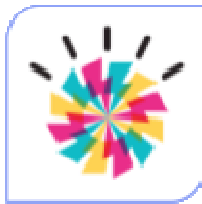
Case Management solutions for your specific needs

Banking



- Commercial / consumer lending
- New account origination
- Online brokerage account administration
- Investor servicing
- Mortgage processing
- Asset record certification and deficiency resolution

Energy & utilities



- Engineering project management
- Rate case submission management
- Pre-construction project mgmt
- Emergency permit requests & processing
- Critical safety compliance management

Government



- Administrative and trial court management
- Budgeting and planning
- Licensing
- Child support payment collections
- Citation management
- Fraud investigation
- Grant management
- Retirement administration

Healthcare



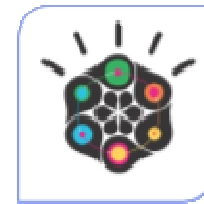
- Credentialing
- Electronic health records
- EHR integration
- Patient financial services
- Release of information
- Health info management
- Patient records billing
- Medical records mgmt
- Patient records mgmt

Insurance



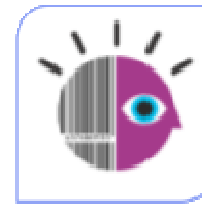
- Claims processing
- Customer care
- New product development
- Policy management
- Complaints and appeals
- Healthcare enrollment
- New business
- Underwriting
- Wholesale insurance management

Chemicals & petroleum



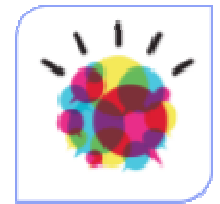
- Asset management
- Plant lifecycle management
- Engineering project management
- Document lifecycle control
- Critical safety compliance management
- CAD drawing management
- Workplace safety management

Retail



- Automated invoice processing
- Single view of customer
- Issues management
- Contracts management
- Customer service

Telecommunications



- Contracts management
- Customer service
- HR on-boarding
- SLA monitoring
- New product introduction

More than 250 Business Partner solutions spanning 18 industries at ibm.com/imaccelerator



Why IBM? Your strategic vendor for ECM

- ✓ Industry **thought leader** anticipating and shaping the future in enterprise content management
- ✓ Uniquely capable of **solving clients' most complex challenges** related to content management
- ✓ Delivering **value-added solutions** through our unparalleled business partner ecosystem
- ✓ The most **complete portfolio** to address clients' content management imperatives
- ✓ **Scale-up, scale-down platform** capable of managing the most content-intensive organizations

