

# Smarter Analytics 2012

## Case Management - Driving Business Value Through Integrated Analytics



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# We have experienced an information explosion


## Information Week Survey:

**70%** say Regulations drive up storage demands, businesses realizing they **must** classify, manage, delete data - not just keep adding storage



### Volume

Every day, **15 petabytes** of new information are being generated. By 2010, the codified information base of the world is expected to double every **11** hours.



### Variety

**80%** of new data growth is unstructured content, generated largely by email, with increasing contribution by documents, images, and video and audio.



### Velocity

An average company with 1,000 employees spends **\$5.3 million** a year to find information stored on its servers. **42%** of managers say they use the wrong information at least once per week.

Does this look familiar?



How do you turn this...



...into this?



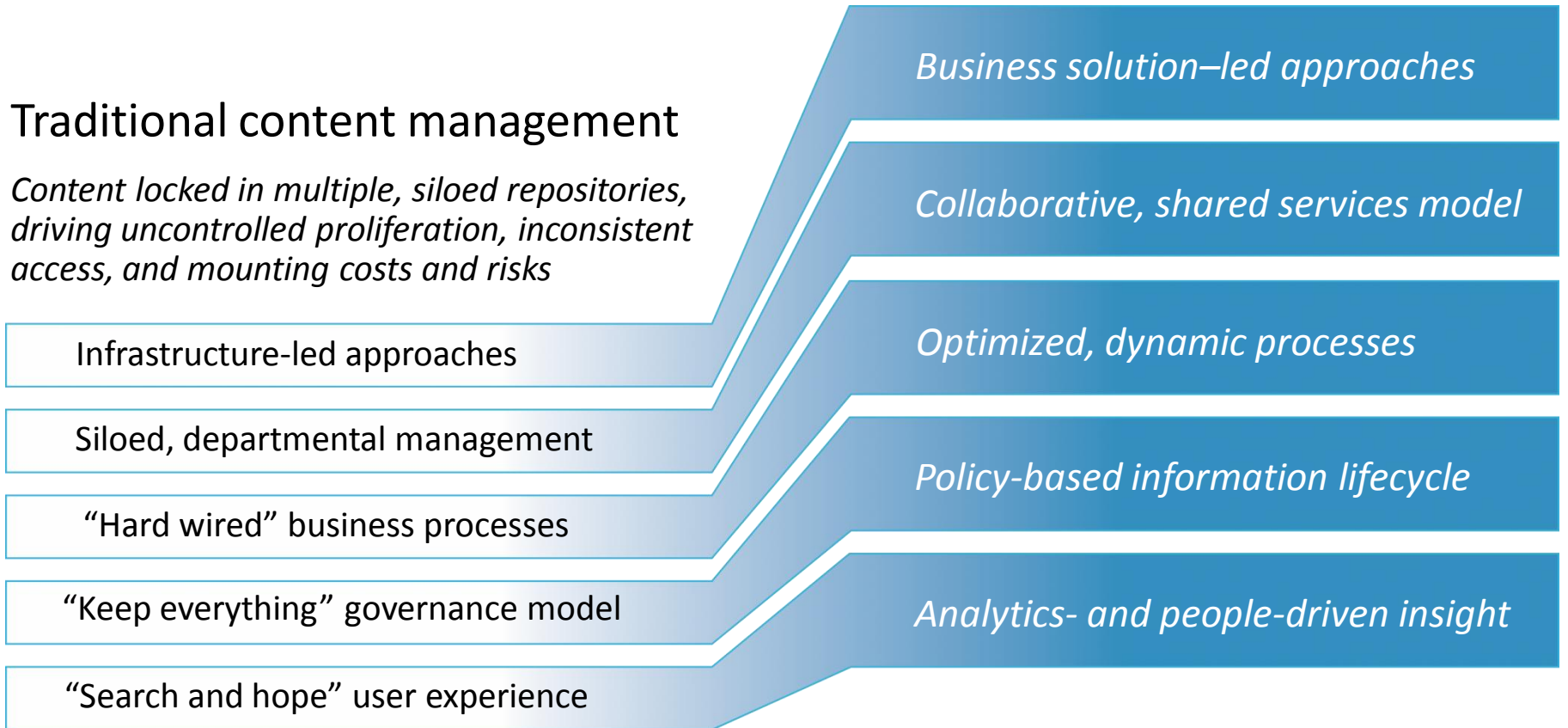
# Managing your information - smarter models are emerging.

## 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*



# Case Manager unlocks **valuable insights** & helps you make the right decision

*What our clients are doing with Case Manager*

Understand what customers want **before they ask.**



Detect fraudulent **claims** before they are paid.



**Dynamically deploy** resources to the areas of greatest threat.



Reduce **re-admission** rates of patients into hospital.

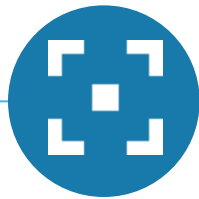


## Are you unlocking the value of your unstructured content?



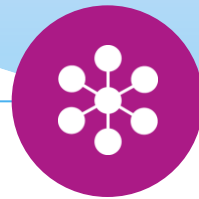
# What is Case Management?

Managing customer-related issues that require knowledge-based decisions or are outside the scope of normal business activities—  
or **in today's environment, is it more?**



## Capturing relevant Information

- Understanding
- Evaluating
- Analyzing



## Collaborating

- Internally
- Externally
- Communicating

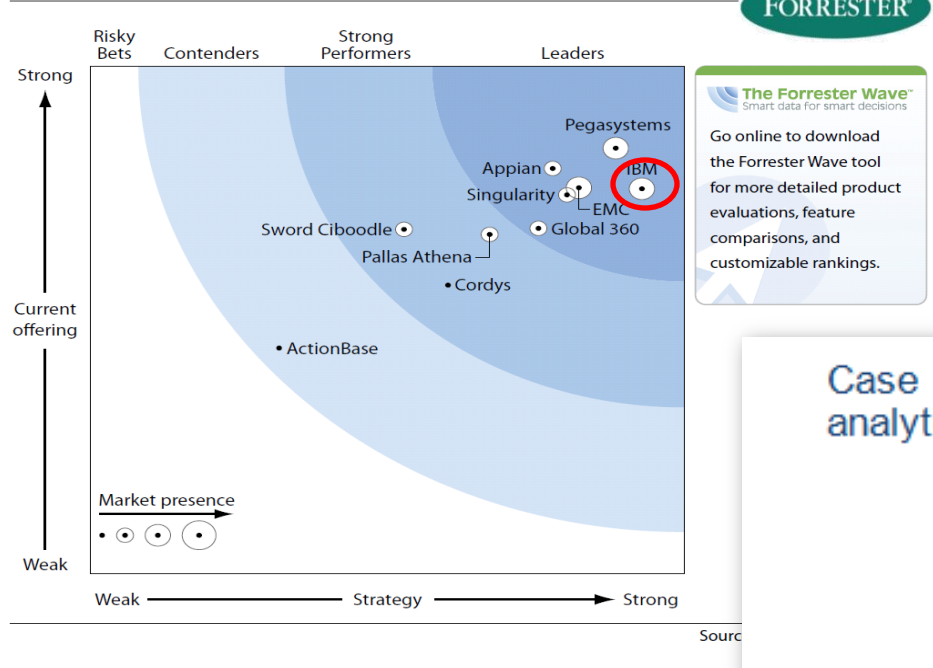


## Decision making

- Taking action
- Resolving
- Recording and reporting

# Why IBM Case Manager is Different ...

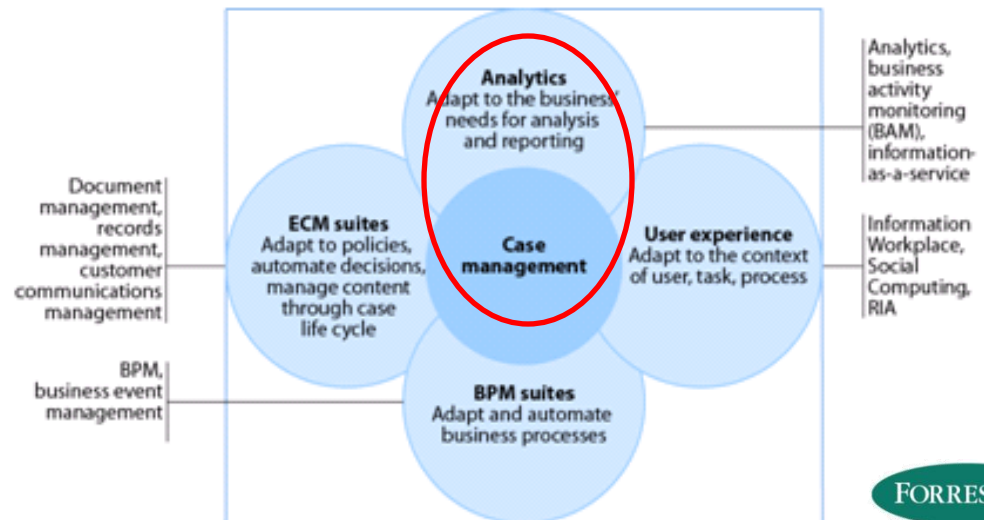
Figure 4 Forrester Wave™: Dynamic Case Management, Q1 '11



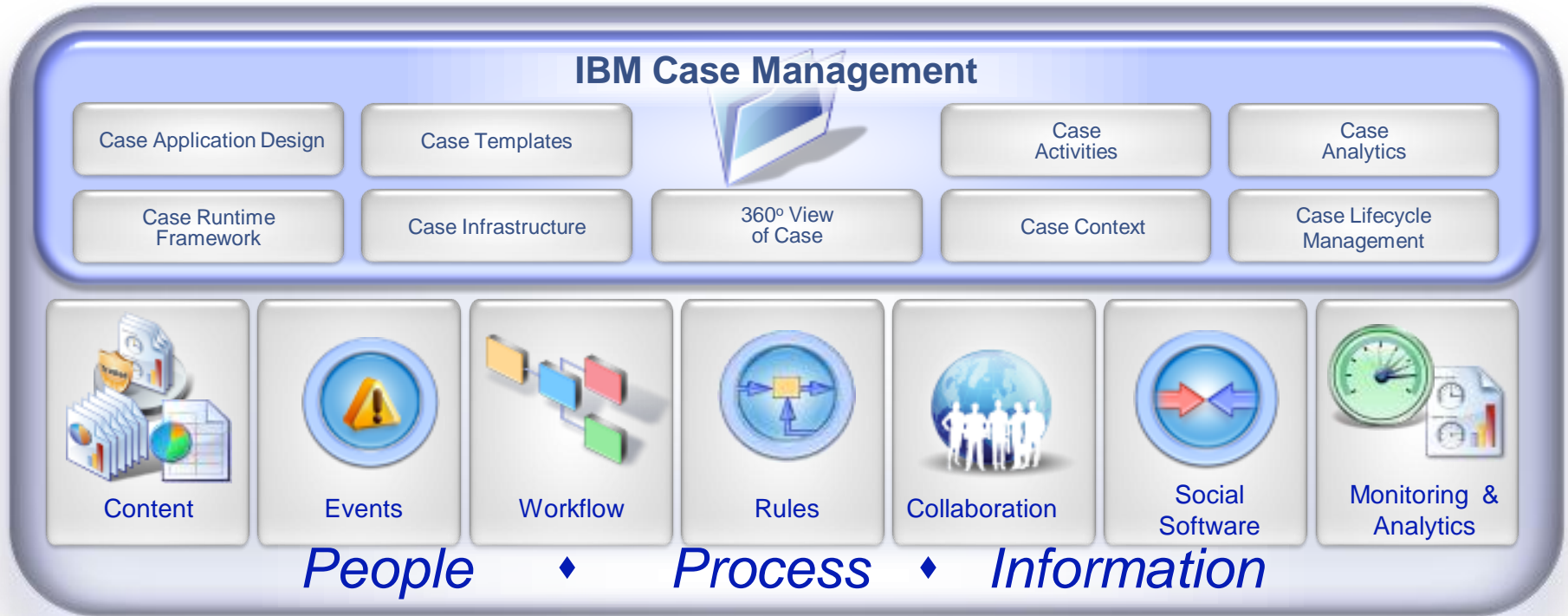
*“IBM can claim the **strongest scores** across the three DCM use case categories — investigative, service request, and incident management — reflecting the **strength and comprehensiveness** of its **overall portfolio**, which combines BPM, ECM, and analytics.”*

*“IBM will drive leadership in **analytics** in the dynamic case management market.”*

Case management combines ECM, BPMS, and analytics with user experience advances



# IBM Case Manager



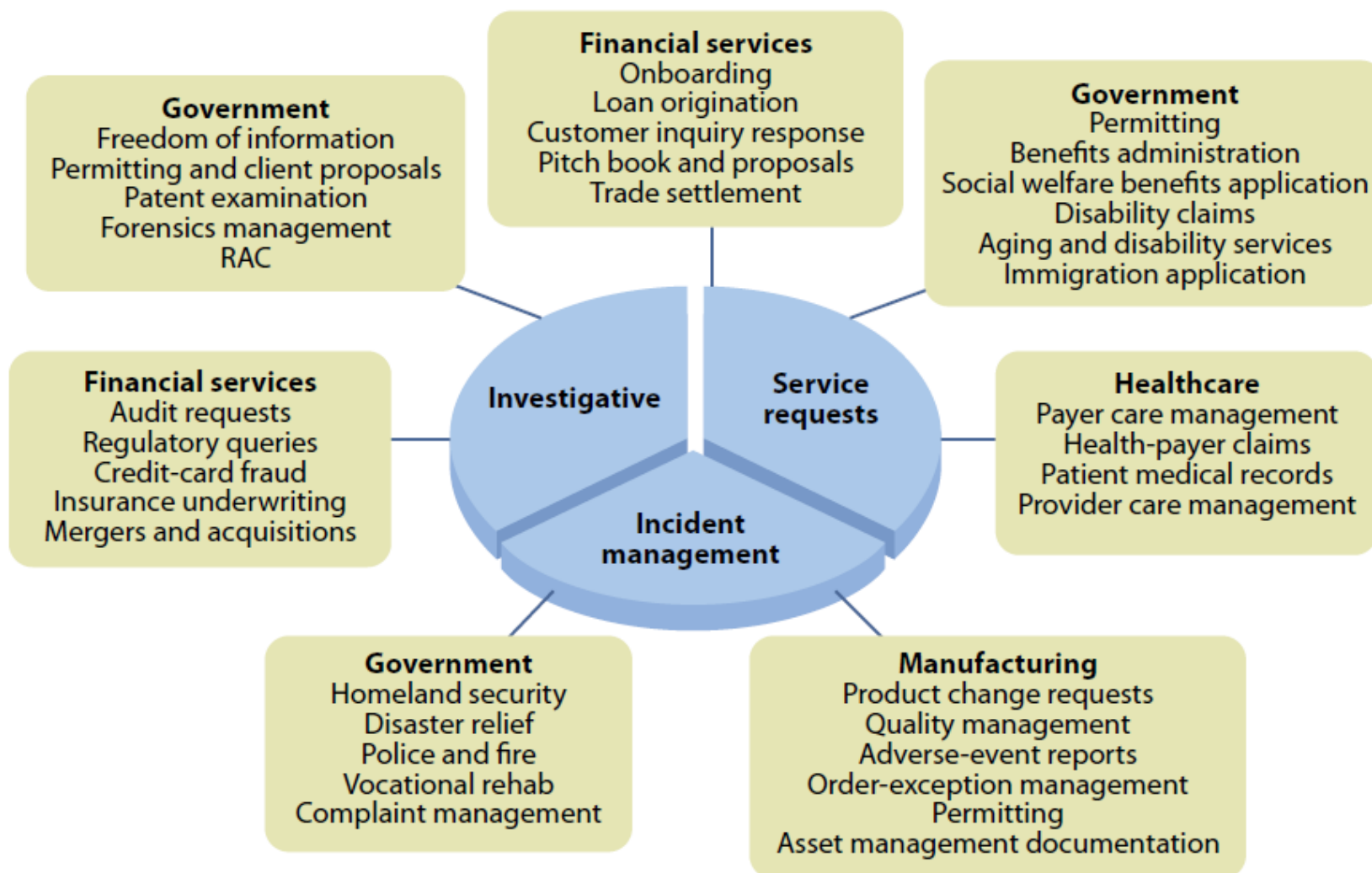
Unites information, process and people

Provides a 360 degree view of the customer

Delivers optimized case outcomes through Analytics, Rules, Collaboration & Social Computing



# How customers are using Case Manager today.



# Major bank in South Africa

## Automating business processes to build efficient systems & fuel business growth

### The need

- The bank was overburdened with manual & paper processes and incurred excessive overhead costs to manage them
- The bank had difficulties in having visibility of customer information in different departments such as secured lending, asset and vehicle lending.
- With limited visibility to customer information, the bank was facing limitations on their ability to cross sell / upsell.

### The solution

- The bank engaged IBM to automate & integrate systems for better customer view across departments
- IBM Case Manager eliminates duplicate tasks / redundancy **by enabling different departments with a 360<sup>o</sup> view** and easy access of customer data information.
- IBM Case Manager enables rapid development of case structures, helps to overcome exception challenges quicker and in turn provide a faster time to value.

### Business benefits

- Increase revenue per customer
- Improve customer loyalty
- Reduce errors
- Easy and quick access to customer information across departments
- Quicker service of banking transactions (cases)

# Case Manager Analytics

## Case Analyzer (Historical Reports)

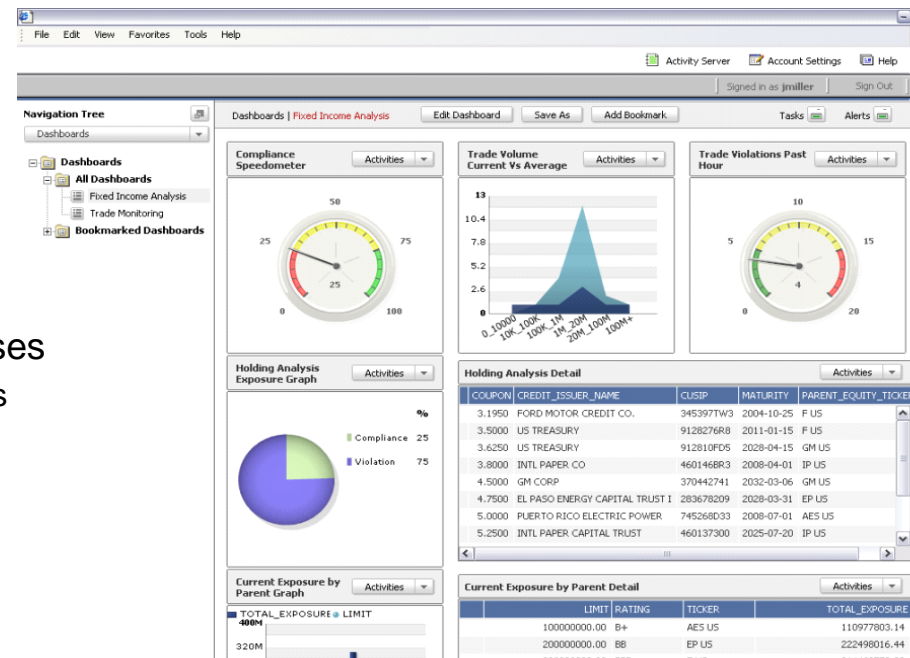
- Provides Excel and Cognos BI reports to enable case and process analysis
- Dynamic analysis (drill down, slice and dice, filter, etc)
- Historical trend analysis
- Based on Online Analytical Processing (OLAP) technology to support high performance dynamic queries on large data sets

## Case Monitor (Realtime Dashboards)

- Integrated Cognos RTM environment to provide real time monitoring of cases and processes
- Threshold monitoring and alert generation
- Real time dashboards for current data

## Content-based Analysis

- Crawling and indexing of case contents & metadata
- Discovers trends and anomalies across cases
- How frequently do textual patterns occur across cases  
e.g. most common compliant in user comments in cases



# Energy producer for large USA City

## Employee lifecycle management streamlines manual compliance



### The need

- Replace manual, resource intensive steps required to comply with NERC (North American Electric Reliability Corporation) for employee/ contractor access to physical and electronic systems as well as IP
- Periodic NERC audits required significant manual effort to report employee and contractors' access to assets
- Enable a single **360° view of case information** across structured and unstructured information including instant messages and information from mainframe and ERP systems across the City with a simple, intuitive single interface which requires minimal user training and includes all information, tasks and activities and also report on case activity throughout the case lifecycle

### The solution

- IBM Case Manager provides an end to end employee lifecycle management solution – a manager enters open positions that launches a case, continues through interview, hiring tasks, employee onboarding tasks and tracks access to facilities, systems and IP.
- Compliance knowledge workers have a single user interface one-stop-shop for all records, documents, tasks, and decisions related to access to physical/ electronic systems &

### Business benefits

- Dramatically reduces effort to track and employee or contractor access and changes to physical/ electronic systems & IP with quick and easy response to NERC audit reporting requests.
- A single environment providing a 360° view across information, tasks and systems and dramatically reduced solution development cycles - IBM business partner, Adjacent, rapidly prototyped solution options in front of the customer for review/ adjustment in real time. Knowledge workers drove interest and business need for the solution
- Provides a solution development platform for rapidly developing new solutions.



# IBM Case Manager: Powerful analytics for better case outcomes



## Case Analytics



Real time    Persisted  
Structured    Unstructured

- **Comprehensive reporting and analysis**  
Gives case managers visibility across all information types to assess and act quickly
- **Real-time dashboards**  
Understand issues before they become a problem
- Unique content analytics for discovering **deeper case insight** to understand business impact
- **Discover patterns, trends** and insights across cases

### Bottom line:

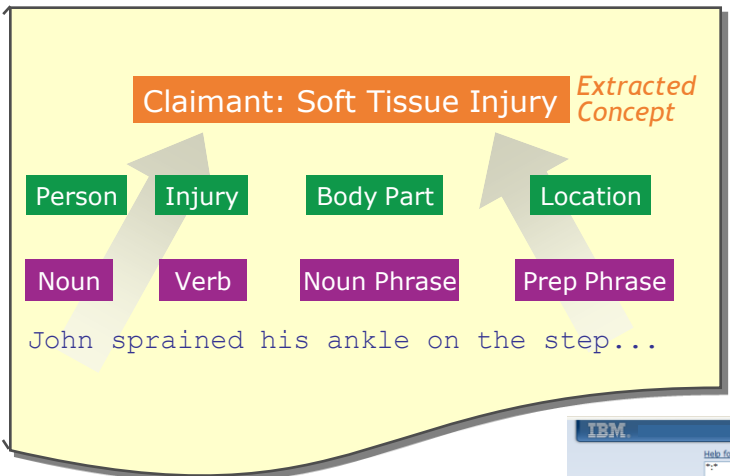
Case managers need insight in order to impact results, and integrated analytics help organizations understand the impact of case loads.

# Content Analytics enables analysis that was previously impractical

## Aggregates conclusions & scales out understanding to large data sets



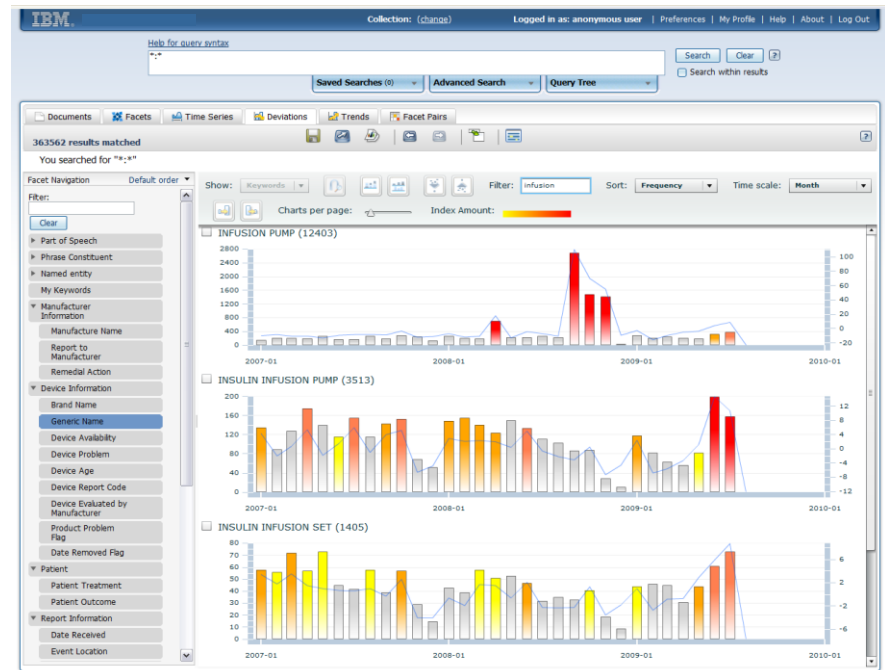
Source Info  
(ECM, File, Web, DBMS, ...)



Analyzed Documents  
with identified concepts

- Content analytics scales out document by document content investigation
- Aggregate the conclusions
- Assess volumes of information not otherwise humanly possible (or cost effective)

Automatic Visualization  
Concepts and tagged source information are visualized in UI



# Large US Health Insurance company

## Driving enterprise efficiencies and cost reduction

*Targeted savings of US\$2.6M annually in replacing custom frameworks and system consolidation along with US\$4M in risk mitigation*



### The need

- Long-term FileNet BPM customer with over 11,000 knowledge workers enterprise-wide using the solution
- Customized solution framework developed on FileNet Business Process Manager was difficult to manage and change
- Seeking a single environment with broad out of the box capabilities and highly configurable design environment
- Seeking to consolidate series of similar systems with an additional 20,000 users into a single manageable platform

### The solution

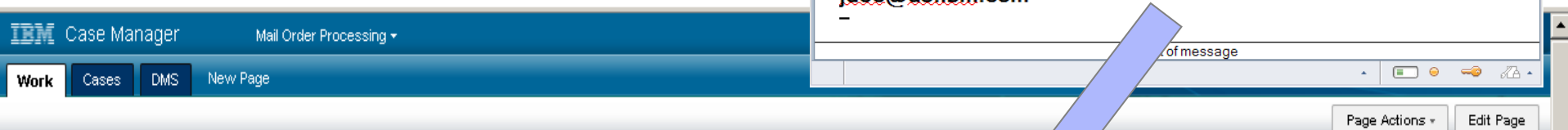
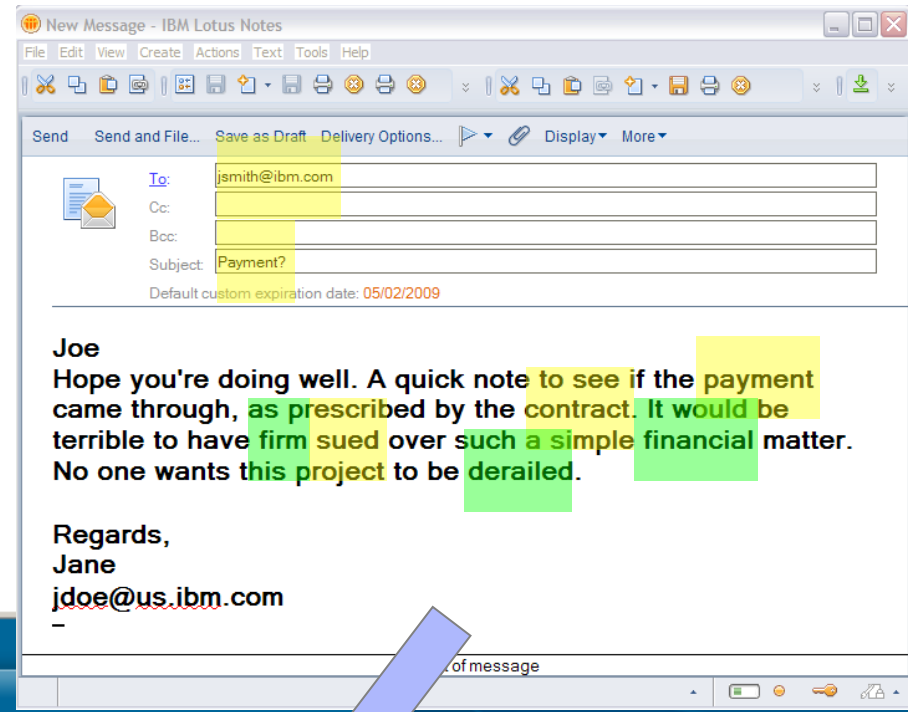
- IBM Case Manager replaces their custom framework with an extended set of pre-integrated capabilities out of the box
- Highly configurable design environment translates into 80 percent configuration and only 20 percent customization to meet business requirements
- Target system consolidating and custom framework replacement in a key claims areas to prove out the enterprise cost justification

### Business benefits

- Single enterprise environment with broad out of the box capabilities and a highly configurable design environment
- IBM Case Manager provides faster application development and deployment cycles
- Reduced costs by eliminating enhancements and maintenance for custom frameworks

## Content Analytics analyses text from emails and starts a "Case."

Orders or queries from customers are recognized based on rules or keywords and routed to correct staff for processing.



**In-baskets**

**AEMC NCOEM Tasks (1)** | Unrecognized Job | My Tasks

Filter: No filter is defined

Items 1 - 1

Customer Name	Purchase Order Number	Sales Team
CTL Datacom	Invalid Order	AEMC-NCOEM



Real-time updates

BPM Analytic Data with thresholds

# Case Manager provides insight for all Business Departments

- Corporate reputation
- Voice of the customer
- CSR training & monitoring
- Loyalty alerts
- Monitor faqs
- Market sentiment

Customer Service



Product Management



Service Management



Sales



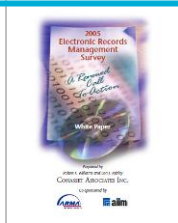
Partners



Marketing



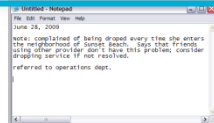
External and Internal Content (and Data) Sources including Social Media and More



22 Industry reports



Market research Transcripts



Call logs



Internal docs and reports



Web



Blogs



Email

# A large Insurance provider

## Speeding mortgage operations to fuel business growth

*The solution is targeted to save more than \$100,000 per month by closing the time gap between loan closing and loan performance.*



### The need

- Provide efficiencies to **grow the business five times** by 2013
- **Reduce cost** - shorten time between loan closing and sale.
- **Improve staff efficiency** in 'post-close' loan operations.
- Retain **high customer satisfaction** while responding quickly to changing regulations.

### The solution

- IBM and business partner, Pyramid, provide a transparent, collaborative 'post-close' mortgage operations environment.
- Eliminates duplicate activities by providing 360° view of loan status - case tasks, decisions, structured and unstructured information.
- Automates the detection and gathering of information. Simple, transparent collaboration between branch offices and the bank.
- Enables creation and editing of critical rules by business analysts.

### Projected benefits

- Automates manual detection steps while **eliminating duplicate tasks and loan collaboration bottlenecks**
- Delivers a **single, holistic view of a loan**
- Provides a **competitive edge and high customer satisfaction** through quick response to changing market needs.

# Case Manager provides 360 Degree View of the Customer

Information from 5 different systems displayed on a Single Screen.

**Background documents available for review Due on 5/21/2010**

- merchant\_background
- customer\_history.pdf
- last\_statement.pdf
- receipt.pdf
- cust\_corr\_advert.pdf
- dispute.pdf

Case ID: MCS-09908

Summary | History | Team

**May 2010**

- 05/19/2010 09:08 | Activity "Evaluate dispute" created John Dunne
- 05/19/2010 09:21 | Activity "Background documents available for review" created John Dunne
- 05/19/2010 15:32 | IBM SPSS Predictive Score auto-generated - High likelihood of fraud in this claim.
- 05/19/2010 13:08 | Case MCS-09908 created John Dunne

Dispute submitted

**Number of disputes**

Quarter	Merchant	Average
1Q	11	8
2Q	14	8
3Q	12	7
4Q	24	8

**Customer Sentiment**

Quarter	Sentiment
1Q	High
2Q	Medium
3Q	Medium
4Q	Low

**Transaction Volume**

Quarter	Merchant	Average
1Q	82000	60000
2Q	85000	62000
3Q	82000	70000
4Q	115000	115000

**Recent Customer Transactions**

- 05/19/2010 - \$67.33 - Gas Station XY
- 05/19/2010 - \$118.23 - Jean World
- 05/18/2010 - \$132.18 - Grocery Mart
- 05/15/2010 - \$6.76 - Coffee Palace
- 05/15/2010 - \$135.00 - Transit Auth
- 05/13/2010 - \$6.76 - Coffee Palace
- 05/13/2010 - \$45.90 - XO Restaurant
- 05/13/2010 - \$47.18 - Gas Station XY
- 05/12/2010 - \$6.76 - Coffee Palace
- 05/12/2010 - \$89.14 - Grocery Mart
- 05/11/2010 - \$6.76 - Coffee Palace
- 05/11/2010 - \$42.90 - PDS Books
- 05/10/2010 - \$6.76 - Coffee Palace
- 05/10/2010 - \$24.99 - Magazine Best
- 05/10/2010 - \$70.00 - Silver Gym
- 05/09/2010 - \$6.76 - Coffee Palace
- 05/09/2010 - \$32.18 - Lunch and Run
- 05/08/2010 - \$6.76 - Coffee Palace
- 05/08/2010 - \$33.90 - Clean Shirts, Inc.



# Large Chinese financial services provider

## IPO arm speeds operations to provide efficiency and accuracy

*Business users can flexibly edit rules allowing hundreds of separate operational processes to be consolidated into individual tasks which can run in parallel*

### The need

- Initial Public Offering (IPO) branch required an efficient means to manage complex, formal documentation for IPO business operational milestones
- Customer's senior leadership had a vision of leveraging a platform from single vendor to meet sophisticated content, process, rules and analytics requirements across their business
- Simplify complex business operations - Over 200 documented business processes. No clear view into operational bottlenecks. IPO engagements could span multiple years.
- Very strict rules and controls in China legislation for IPO.

### The solution

- IBM Case Manager's business rules simplified steps and rapid development and editing of business rules by analysts streamlined activities
- Multiple individual tasks could be launched in parallel and progress tracked for a 360 degree view of individual IPO status
- Complete content management capabilities met sophisticated

### Business benefits

- IBM Case Manager's robust and integrated content management, process management, rules management and business analytics met senior leaderships complete vision and provide an out of the box solution implemented within weeks
- Analytics provide 360 degree view of individual IPO status and a clear view on task status and bottlenecks
- Phased rollout to additional business areas to provide efficiencies and reduce total costs

# Case Manager -configurable role based User Interface

Frank Adams - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

http://snjgsa.ibm.com/~rbtleee/public/ACM/live/Run Time/trunk/

Frank Adams

Home New Reply Reply to all Forward Views

Share something Send e-mail Start discussion topic New task

What are you working on right now?

**Top Updates**

Following List

Flagged

Discover

Collections

- Project Sofia
- State News
- Legal Watch
- My Team

People & Groups

- Samantha Daryn
- Dan Misawa
- Frank Adams
- Gail Chao
- Heather Reeds
- Dennis Michaels
- Ron Espinosa
- Review Team

Vivian Birch assigned a case to me **Wrongful termination review** Due Fri 1:08 PM

Tracy's background shows that she could be eligible for job retraining and RA.

Moments ago from Case: Programs State Benefits Manager - [share](#) - [comment](#) - [mark complete](#) - [more](#)

**Cognos Alert: Pierre Dumon's case load is above thresholds set for your department.**

Moments ago from Cognos Sales Dashboard

Alert: **Traffic congestion is possible.**

Moments ago from Traffic Dashboard

Ron Espinosa sent mail **Items for upcoming agenda** to me

I'm collecting agenda items for the upcoming review meeting...

5 minutes ago from Notes Mail

Expense notification: **Heather Reeds has submitted an expense report for your approval.**

8 minutes ago from Renovations Sales Expense System

**Vivian Birch** has just assigned a new case to you.

Samantha Daryn assigned to-do item to me **Contact HR about app contractors** Due Fri 1:08 PM

2 Meeting Invitations

- Pecha Kucha - Contracts Coordinator**  
Jan 30 - 1:00 - 2:00 PM
- Quarterly Case Review**  
Feb 1 - 10:00 - 11:00 AM

3 Invitations to Connect

- Herb Medway**  
Career Counselor
- Leo Fedynsky**  
Director of Policies & Programs
- Rebecca Gestner**  
Case Supervisor

Do You Know?

- Mali Vo**  
Associate Legal Assistant

Connect

ALERTS 1 of 2

10 min until next meeting

# Case Manager Viewing Engineering Drawings (CAD / CAM)

Role-based and personalized

User gets exactly the information they need based on their Role

The screenshot displays the Fusion P8 web interface in a Microsoft Internet Explorer browser. The interface is divided into several sections:

- Left Panel (Navigation):** Shows a tree view of folders under 'Work In Progress'. A red circle '1' highlights the 'DW Drawing' folder. Below this is a search panel with a search field containing '\*BUS\*' and a 'Go' button. A red circle '2' highlights the search results area.
- Search Results Table:** A table with columns: Document Number, Rev, Document Title, Current State, Approval Status, Version, and Creation Date. A context menu is open over the table, with a red circle '3' highlighting the 'Launch' option.
- Autodesk Inventor Professional 2008:** A window showing a 3D model of a mechanical part. A red circle '4' highlights the model. On the left, a 'Model' tree shows a list of components, with a red circle '5' highlighting the component '1030840301P017:1'.

At the bottom of the browser window, the Windows taskbar is visible, showing the Start button and several open applications including 'Content Engine...', 'Active Directory...', 'C:\inetpub\www...', 'EditPlus - [C:\In...', 'engineer.jpg - ...', 'Fusion P8 - Mi...', and 'Autodesk Inven...'.

# Case Manager for Legal & Compliance

The screenshot displays a web browser window titled "Legal Document Manager - Windows Internet Explorer". The address bar shows the URL "http://2ndadm.demoworld.altien.com/adm/". The browser's Favorites bar includes "Legal Document Manager". The application interface features a menu bar with "Document", "Folder", "Edit", "Mode", "Tools", and "Help". A toolbar contains icons for "Quick Search", "Matters", and "Review Request". A sidebar on the left lists navigation options such as "Searches", "Process", "LawFirm", "Advanced Search", "Recent Documents", "Recent Matters", "Checked Out Documents", "Mason, Perry", "Personal Documents", "Active Matters", "All document by Della", "General Trading PLC - Dark Pool JV development (03995\_002)", "Giant Electric Company - New IP Assignment (04566\_005)", "Goldmine Inc - Drillcore design assignment (02322\_002)", "Street, Della", "Searches", "Active Matters", "Archive Matters", "Knowledge", "Antitrust & Competition", "Banking & Finance", "Business Restructuring", "Corporate Criminal Investigations", "Energy", "Environmental", "Government Regulation", "Health Care", "Intellectual Property", "Labor & Employment", and "Litigation".

The main content area displays a table of search results with columns: Document Title, Author, Document Date, Document Type, Document Sub..., Document Sta..., Document Nu..., and Date C. The table is filtered by "Document Type : Agreement (9)".

Document Title	Author	Document Date	Document Type	Document Sub...	Document Sta...	Document Nu...	Date C
General Trading PLC - Darkpool - Joint Venture A...	Fish, Richard	13/10/2008	Agreement	Joint Venture Agr...	Released	0000000182	09/08/20
General Trading PLC - Darkpool - Mutual NDA - E	Mason, Perry	29/08/2008	Agreement	Mutual Nondisclos...	Released	0000000181	09/08/20
General Trading PLC - Darkpool - Mutual NDA	Fish, Richard	04/08/2008	Agreement	Mutual Nondisclos...	Released	0000000171	09/08/20
General Trading PLC - Darkpool - Joint Venture A...	Fish, Richard						09/08/20
Exhibit 2 - General Trading PLC - Darkpool - IP A...	Mason, Perry						09/08/20
Exhibit 1 - General Trading PLC - Darkpool - IP A...	Fish, Richard						09/08/20
General Trading PLC - Darkpool Term Sheet	Fish, Richard						09/08/20
General Trading PLC - Darkpool - IP Assignment	Fish, Richard						18/08/20
General Trading PLC - Darkpool - IP Assignment - ...	Fish, Richard						09/08/20

Below the table, there is a section for "Document Type : Correspondence (24)" with a list of documents including "Background to ACME Insurance", "Re: Mutual NDA", "Re: Re: Possible meeting dates?", "Mutual NDA", "Draft NDA for your review", "Re: Possible meeting dates?", "Hi. I may need your help...", "Letter from General Trading PLC to Darkpool 08/...", "PW: Re: Re: Possible meeting dates?", "Re: Possible meeting dates?", "Glad it went well", "Re: Draft NDA for your review", "Re: Draft NDA for your review", "Re: Background to ACME Insurance", "Re: Draft NDA for your review", "Re: Hi. I may need your help...", "Possible meeting dates?", "Letter from Valery Dear re Darkpool", and "Thanks!".

A "Properties" dialog box is open over the selected document. The dialog title is "Properties for General Trading PLC - Darkpool - Mutual NDA - EXECUTED COPY". It has tabs for "General", "Properties", "System", "Security", "Folder", and "History". The "Document Class" is "Client Related Document". The "Properties" section includes:
 

- Document Title: General Trading PLC - Darkpool - Mutual NDA - EXECUTED COPY
- Document Type: Agreement
- Document Sub Type: Mutual Nondisclosure Agreement
- Author: Mason, Perry
- Document Date: 29/08/2008 00:00:00
- Description: Signed by John Smith
- Document Number: 0000000181
- Document Status: Released
- Practice Area: Intellectual Property

 The dialog has "Save" and "Cancel" buttons at the bottom.

# Case Manager Integrated with Maximo Library

Work - Mozilla Firefox
- [ ] X

File Edit View History Bookmarks Tools Help

https://cm-newportvm18.usca.ibm.com:9443/mum/enabler#pid%3DM09276BD491707D44F9B6957227CACD
Google

Work

Case Manager
user | Actions | Help | Log out

Cases Work New Page

Documents Filter Download 1 - 15 of 49

Document Name	Description	Doc Folder	Type	Path	Print
9321-F-30123	Title Updated	MISC CIVIL	DMS	7884C90D-BA2C-48D2-88E2-44CA021FEDFB	<input type="checkbox"/>
IBMLOGO.GIF	IBMLogo.gif	MISC CIVIL	DMS	8A369DF9-568E-438B-BED0-06428D157906	<input checked="" type="checkbox"/>
9321-C-10033	Site Map	Maps	DMS	C96502E5-2C7C-415E-8831-2743BBEAD750	<input type="checkbox"/>
23456789	Updated Test 2/DESCRIPTION>	Maps	DMS	8F0CFB86-E19A-4699-A257-49B20CB3FFAA	<input type="checkbox"/>
IBMBANNERBACKGROUND.GIF	IBMBannerBackground.gif	MISC CIVIL	DMS	C4B226D9-7463-4312-BB19-A9DCF9940960	<input checked="" type="checkbox"/>
9321-F-10033	Aqua Site Location	Maps	DMS	33186561-BC62-4672-9E89-C2565F334C4B	<input type="checkbox"/>
9321-C-20313	1basic-dyes-500x500.jpg	MISC CIVIL	DMS	95A94506-42DC-4D02-B62F-96F03BF500EF	<input checked="" type="checkbox"/>
9321-F-31033	Electrical 120	ONE LINES	DMS	078D45D4-41E7-4114-837D-26D32905BC78	<input checked="" type="checkbox"/>
AP-1.1	Revision One	ONE LINES	DMS	37CAA7EE-1682-4E59-950B-9303050D23D9	<input checked="" type="checkbox"/>
NTIMAGE.GIF	ntimage.gif	MISC CIVIL	DMS	236BFFBF-93D7-4617-91F3-963B8FF763D8	<input checked="" type="checkbox"/>
FORKLIFT	Forklift Drawing (AutoCad)	CAD	FILE	\\DOCLINKS\FORKLIFT.DWF	<input checked="" type="checkbox"/>
ROOM	Conference Room Drawing	Maps	FILE	\\DOCLINKS\ROOM.DWF	<input checked="" type="checkbox"/>
SRV-ARCH	Servers Architecture	Network	FILE	c:\DOCLINKS\default\HW-Components1097012	<input checked="" type="checkbox"/>
VPN-ERR	VPN - ERROR001	ErrorMsgs	FILE	c:\DOCLINKS\default\VPN-Error.jpg	<input checked="" type="checkbox"/>
ROLLS	Rollers- Chain Wash Assembly	CAD	FILE	\\DOCLINKS\ROLLS.DWF	<input checked="" type="checkbox"/>

**Details**

Document: 9321-F-30123	Title Updated	Created By: MXINTADM
Document Folder: MISC CIVIL	Miscellaneous Civil Drawings	URL Type: <b>DMS</b>
URL / File Name: 7884C90D-BA2C-48D2-88E2-44CA021FEDFB		Created Date: 1/20/11 9:01 AM
Print with Work Pack? <input type="checkbox"/>		Changed By: MXINTADM
		Changed Date: 1/20/11 12:03 PM

0 items

Mozilla Firefox: IBM Edition
X

http://snjgsa.ibm.com/~rbllee/public/ACM/live/R

John Dunn
Case Work Supervisor

**Vivian Birch** Hey John, got a quick sec? 12:56:52 PM

**John Dunn** Sure, what's on your mind? 12:56:55 PM

**Vivian Birch** I am starting to think there might be some discrimination in the Tracy McShay case re her vision impairment 12:56:57 PM

**John Dunn** Interesting - go ahead and check it with legal 12:56:59 PM

b i u ↕ ↗ ↘ T

Done

# Case Manager Interface designed for a Call Centre.

CSR UI Demo
Client Services Desktop

**Brett Jones**  
Avg. Handle Time: 05:16  
[+1:16]

Workstation Home

Log Out

**My Work**

Refresh

Priority	Task name	Group name	Account number	Client name	Task status	Last updated
<span style="color: red;">■</span>	Investigate case	My Employer, Inc.	JPMC-1234	Bill Smith	Unclaimed	Mon Oct 11 12:45:21 2010
<span style="color: orange;">!</span>	Investigate case	XYZ Corporation	23894	Anna Smith	Unclaimed	Tue Oct 12 23:52:27 2010
<span style="color: orange;">!</span>	Investigate case	ACME Test, Inc.	97436	Robert Strasser	Unclaimed	Tue Oct 12 23:51:27 2010

**Search**

Account Number

[Advanced Search](#)

**Current Cases**

Show: Summary ▾ Refresh

Items 1 - 3 Previous | Next

**YWS20112**  
Date modified: *Mon Oct 11 12:45:21 2010* Modified by: *System*  
Enquiry type: **Billing** Group name: **My Employer, Inc.**  
Account number: **JPMC-1234** Client name: **Bill Smith** Case status: **New**

**DWS23412**  
Date modified: *Sat Oct 9 08:47:19 2010* Modified by: *System*  
Enquiry type: **Billing** Group name: **My Employer, Inc.**  
Account number: **23894** Client name: **Anna Smith** Case status: **New**

**YQS25012**  
Date modified: *Sat Sep 18 12:47:19 2010* Modified by: *System*  
Enquiry type: **Billing** Group name: **My Employer, Inc.**  
Account number: **97436** Client name: **Robert Strasser** Case status: **Draft**

Items 1 - 3 Previous | Next

**Notifications**

Items 1 - 4 Previous | Next

- New Policy: Transactions over \$5000 require supervisor approval**
- Note: September statements include new formatting of transaction expense section. [More details](#)**
- CSR annual training validation must be completed by Oct 31**
- [Learn more](#) about the Client Workstation's new search capability**

Items 1 - 4 Previous | Next

**Tools**

Service Delivery Reporting

Call Reports

Change Requests

Client History Reporting

Policies & Procedures

All Tools...

# Case Manager Call Centre Supervisor Interface.

Supervisor UI Demo
Client Services Desktop

**Amanda Stinson**  
 Avg. Team Handle Time: 07:42  
[+2:42]

[Workstation Home](#) | [Approve Case](#)

 Log Out

**Instructions**

To complete this task, you will need to review the attached customer e-mail and relevant billing statements.

Once you have reviewed the necessary documents, verify the information on the *Case Details* screen are correct and click **Next**.

**Summary View**

Case ID: **YWS20112** [Open Case Properties](#)

Documents | Tasks | History

Add | View | More Actions

**Home**

Items 1 - 3 Previous | Next

Name	Modified	Modified by
<b>Account History</b>	2010-01-01 15:55:45	System
<b>Correspondence</b>	2010-01-01 15:55:45	System
<b>Supporting Materials</b>	2010-01-01 15:55:45	System

Items 1 - 3 Previous | Next

**Toolbar**

Add Comment Complete Save Close

**My Task**

< Previous Client Details Enquiry Details Approve Enquiry Next >

**Case Details**

**Case ID:** YWS20112

**Enquiry type:** Billing

**Group name:** My Employer, Inc.

**Account number:** JPMC-1234

**Client name:** Bill Smith

**Case analytics** Close document

**Processing Time (hours)**

■ Avg. Processing Time  
■ Processing Time for this Case

Avg. Processing Time	17
Processing Time for this Case	29

**Enquiry Dollar Amount**

■ Max  
■ Average  
■ Min  
■ Current Case

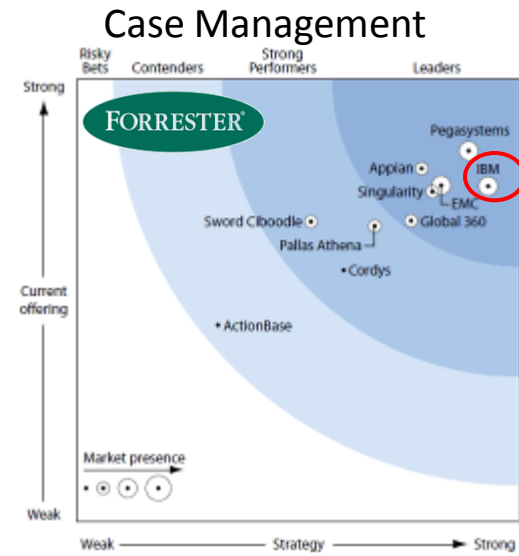
Max	\$14,180
Average	\$1,523
Min	\$121
Current Case	\$5,000

31

poration

# Why IBM? A recognized industry leader

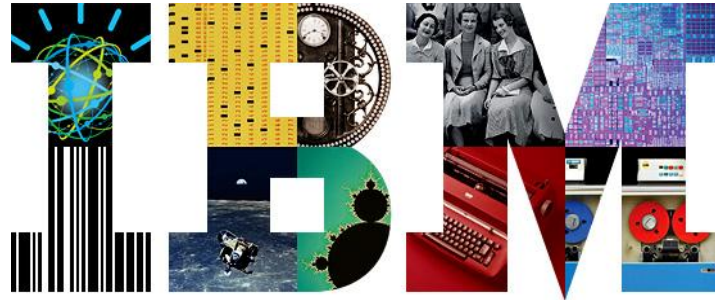
Report Title	Position	Publication Date
Gartner MQ for Enterprise Content Management	Leader	Oct 2011
Gartner MQ for Enterprise Information Archiving	Leader	coming soon
Gartner MarketScope for Enterprise Records Management	Strong, Positive	Aug 2010
Forrester Wave for Enterprise Content Management	Leader	Nov 2011
Forrester Wave for Message Archiving	Leader	Mar 2011
Forrester Wave for Dynamic Case Management	Leader	Jan 2011
IDC Archive Report	Leader	Oct 2011



Legend: Significant change in position  
 Improved position

“IBM will drive leadership in analytics in the dynamic case management market.”



A hand holding a black marker writing the words "Thank you" in a cursive script. The marker is positioned at the end of the word "you".

**Lloyd Parata**  
ECM Solution Specialist  
Singapore

Back up

# Question?

IBM Case Manager unifies information, process and people to provide a \_\_\_\_\_ view of the customer?

A) 90<sup>0</sup>

B) 180<sup>0</sup>

C) 360<sup>0</sup>

To achieve a competitive edge,  
Organizations today need to be **smarter, faster.**

- **77 percent 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 percent higher revenue growth, 12 times more profit growth and a 32 percent higher return on invested capital.*

