



Highlights:

- Unify information, processes and people to provide a 360-degree view of contracts, work orders, permits, change orders and more
 - Optimize asset operations and availability by quickly accessing asset information and making decisions based on it
 - Respond to incidents more quickly, with pertinent information at hand, to make better handling decisions
 - Improve records management across enterprise systems to establish a verifiable audit trail, security-rich document retention, and archiving and change management capabilities
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Advanced case management for smarter energy and utilities

As our world becomes more interconnected, intelligent and instrumented, we have opportunities from every angle to build a smarter planet. Energy and utility companies are no exception: they too have the opportunity to optimize their performance based on the technology and strategies available to them.

To satisfy marketplace demands on today's utilities and remain competitive, these companies need a better way to manage tools and business processes—as well as all of the documents, drawings, emails and social networking content. However, utilities rely on multiple, isolated business processes composed of time-consuming manual procedures and disparate systems:

- Asset management
- Collaborative engineering
- Contract management
- Customer service
- Documentation creation and updates
- Maintenance
- Materials management
- Permit applications
- Regulations and auditing

To improve business efficiency, these processes and systems need to work together.

Utilities can work smarter through better integration, enhanced collaboration and greater insight, which can help employees make more-informed decisions that reduce costs, minimize waste and increase efficiency, while improving customer satisfaction.



Unify information, processes and people to work smarter

Utilities can leverage case management tools and approaches to optimize assets; manage incidents, such as customer complaints and disputes; and address regulatory compliance and rate case management. Cases include business issues such as contracts, work orders, permits, change orders and hundreds of other actions initiated—intentionally or accidentally—by people or businesses. All of these cases require structured, information-reliant processes in order to be managed in an efficient way that optimizes outcomes, lowers handling costs and boosts key metrics.

An advanced case management approach extends the concepts of case management by adding capabilities designed to help organizations close cases faster, with better results. It unifies information, processes and people to provide a 360-degree view of the case, using integrated analytics, business rules, collaboration and social computing to help drive optimized case outcomes. Advanced case management strategies can enable utilities to use their information infrastructure to operate more effectively, reduce costs and drive innovation.

Improve asset optimization and management

Companies must respond to pressures from global competition, increasing regulations, and rising expectations for clean energy—as well as to an instrumented and interconnected infrastructure. To address these challenges, companies can improve asset optimization and management and help ensure that information and changes related to those assets can be quickly accessed by decision makers and critical systems across the enterprise. Advanced case management strategies integrates people, processes and information to automate and enforce workflows—including asset change management and new asset acquisition—and to make asset data available to the right people, at the right time. It also leverages intelligence and analytics to provide insight into how utilities can manage and allocate resources—including personnel and assets—to make the best use of asset operations and availability.

Advanced case management capabilities can capture documentation related to an asset, including physical descriptions, a history of changes and process information. Business processes are connected to documents, data and strategic systems to maintain all documentation for safety, operations and compliance, including accurate “as-built” configurations. This tight integration helps optimize asset operations—ultimately lowering asset management costs, increasing revenues and adhering to regulations. Moreover, improved asset operations and management help decrease scheduled and unscheduled plant and grid downtime and help reduce asset maintenance time and costs.

Respond to incidents faster and help prevent future problems

Unlike the fixed, repetitive processes in many industries, utilities require greater operational flexibility in their case management. Utilities need to manage incidents—such as outages, customer complaints and third-party disputes—to maintain a high level of customer service and satisfaction. Independent of the incident type, the process involved in responding to the incident must track actions, coordinate people, leverage collaboration for decision making, use rules for escalation and document the entire process.

By integrating people, processes and information, an advanced case management approach helps utilities easily collaborate and quickly share incident files and content. As a result, utilities can respond to incidents faster, with pertinent information at hand, to make better handling decisions. Historically, incident management cases are somewhat structured, with limited paths for resolution. But, with advanced case management capabilities, incident managers can use flexible business rules to resolve unique situations and to optimize outcomes.

Advanced case management strategies include analytics that are critical to refining resolution processes, which in turn should reduce the number of similar incidents over time. These advanced analytics help businesses estimate the volume of incident cases per year, as well as to determine the root cause of the incident and the areas it affected. In turn, utilities can take corrective actions and help prevent recurrences to improve customer service and meet key performance indicators. Leveraging incident insights, expediting incident management and improving productivity can have a dramatic effect on the bottom line.

Better address regulatory compliance and optimize rate case management

Utilities that must address regulatory, risk and compliance management requirements need to do so in a streamlined and efficient way. Case contents, histories and forms should be recorded and managed for regulatory and legal requirements, which can be tedious, burdensome and difficult to trace. Moreover, utility companies in some geographies face significant risk to reputation and loss of necessary rate increases should they lose or mishandle content required for rate case management.

An advanced case management approach can help utilities address industry regulations and prepare for rate case depositions while mitigating risk. Best-practice case management templates connect people to compliance standards, while workflow processes manage records across enterprise systems and provide a verifiable audit trail, security-rich document retention, and archiving and change management capabilities. And because advanced case management capabilities are flexible, when regulations and business rules change, utilities can quickly and dynamically change too.

By streamlining and automating the compliance process, companies can decrease the cost of preparing regulatory submissions; reduce noncompliance fines, fees and penalties; and lower insurance costs.

Choose IBM for advanced case management and utilities expertise

IBM created its advanced case management strategy in response to industries in need of a smarter, more integrated way to handle their growing, increasingly complex caseloads and shrinking resources. Using leading solutions and proven best practices, IBM is equipped to assist utility companies around the world with its industry-specific advanced case management scenarios.

Because software is helping make the planet smarter, organizations have more challenges and opportunities to realize their potential. To do so, they need software that is fueled by expertise, built for change and ready for work. IBM can help.

For more information

For more information on how advanced case management capabilities can help your company close cases faster, with better results, please contact your IBM representative or IBM Business Partner, or visit:

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