

A Partner Solution for Cross Industry

Efficiently Manage Millions of Customer-Centric Documents and
Provide Access Anytime, Anywhere

IBM **Information Management** software



Scalaris AG Document Management Systems – Customer Relationship Management

Partner Solution

■ **Target Industry**

Cross Industry

■ **Business Application**

*Content Management to Support
Customer Relationship
Management*

■ **Product**

IBM FileNet Content Manager

Business Challenge

The challenge of managing large quantities of customer information is exacerbated by regulatory and compliance demands along with the need to manage information from multiple touch points across a diverse customer and business base.

Information and documents concerning clients are often filed in various locations and systems, engendering time consuming searches for important documents. The lack of an online, centralized system – coupled with paper-intensive processes – hinder concurrent processing and teamwork. From a sales and customer service perspective, this presents challenges due to the lack of a consolidated view of customer information and interactions.

Linking customer relationship management (CRM) systems to an enterprise content management (EMC) system can increase timely access to updated, compliant information and give organizations a productivity boost and a more comprehensive view of customer information and interactions. This results in the ability to better serve customers, thereby increasing sales opportunities.

Solution

Scalaris's Document Management Systems portfolio of products provides audit-proof long-term archiving of structured and unstructured information in a robust high-performance repository; lifecycle management of digitized documents via a centralized ECM platform; along with optimization and automation of laborious manual work routines.

The Scalaris Document Management Systems- Customer Relationship Management (CRM) module provides Web-based access on demand to a central repository for all documents (e.g., email, fax, letters, Microsoft® Word™ and Excel™ documents, pictures, etc.) associated with a particular business process to be organized by client. Relevant, pre-filtered content can then be retrieved from the content management system, based on data entered into the CRM system.

The solution features roles and permissions based access and supports efficient indexing and full text search within a folder, group of folders or according to document type. The integration with Microsoft Outlook™ streamlines the process of archiving documents, (e.g., an incoming e-mail



can be added to a folder via drag and drop functionality). Individual documents or folders can be deleted according to an exact schedule and the deletion can be triggered by an event or after a certain time frame has elapsed. The solution also offers comprehensive document versioning to meet legal auditing requirements.



Value Proposition

The solution supports business goals by providing contextual access – instant access to content that is directly relevant to the situation at hand – in the right format, compliant and tailored to the customer. In addition to providing readily available information, it provides full connectivity of content and processes to streamline processing of business transactions at significantly reduced costs.

Providing unfettered access to information via a standard Web-browser, the solution establishes a standardized and clearly structured online central filing system. This enables organizations to minimize commercial risk due to reliable access to complete and up-to-date information. Additionally, it offers significant time and cost-savings in data mining and administration. Efficient knowledge sharing is promoted throughout customer relations departments, increasing the effectiveness of customer facing staff.

The solution also offers benefits from an information security and compliance perspective and meets various security and compliance standards. Compliance needs are addressed as all relevant documents for a client relationship can be collected in a folder, ready for audit.

Company Description

Scalaris AG is an intersectoral provider of Intelligent Document Processing (IDP) systems. Our solutions portfolio focuses on company-wide management of information, knowledge and business processes.

For more information, please contact:

Patrick Märki
+41 44 560 35 36
patrick.maerki@scalaris.com

© Copyright IBM Corporation 2008

IBM
3565 Harbor Boulevard
Costa Mesa, CA 92626-1420
USA

Printed in the USA

08-08

All Rights Reserved.

FileNet, IBM and the IBM logo are trademarks of IBM Corporation in the United States, other countries or both. All other company or product names are registered trademarks or trademarks of their respective companies.

For more information, visit
ibm.com/software/ecm