A Business Analysts Guide to Delivering Solutions with IBM Case Manager

Powerful tools to kick start your case style solution creation

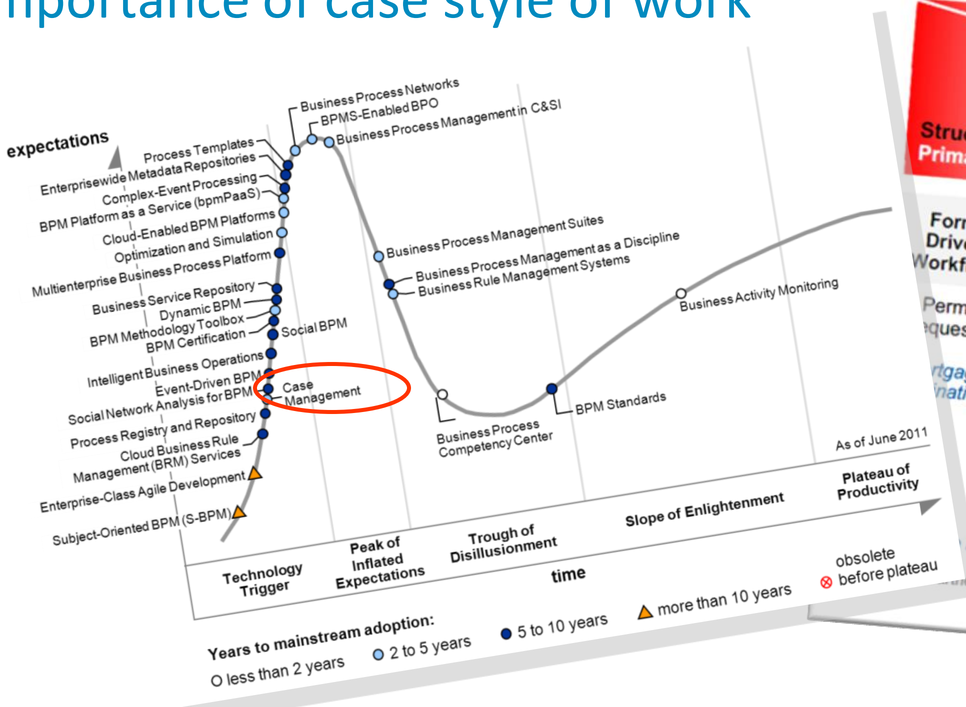
New market demands require new approaches

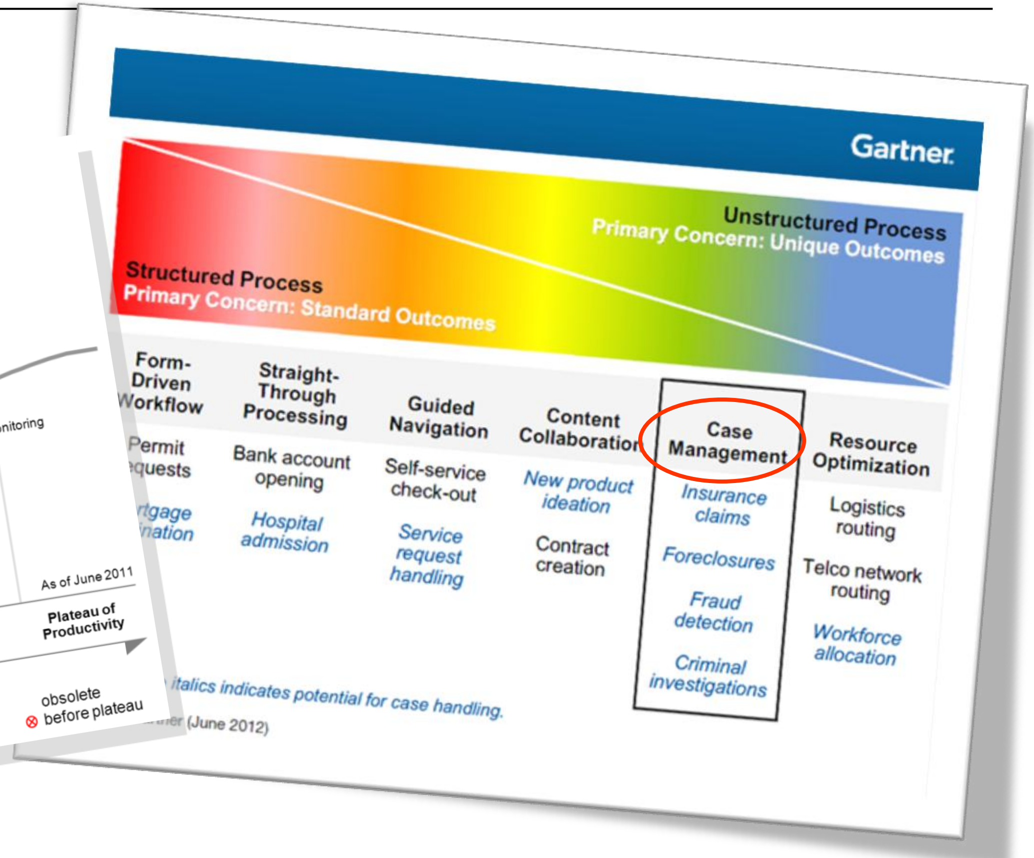
- Increased costs and risks from unpredictable processes
- Higher customer service level expectations
- Greater demands for productivity amid complex decisions
- Limited ability to respond to market dynamic
- Departing and diminished workforces

Challenges for IT

- Deliver on an ever growing Line of Business solution backlog
- Simplify internal architectures
- Reduce the number of tools and the unique skills required
- Adhere to corporate legal and risk policies

Case Management - Increasing importance of case style of work



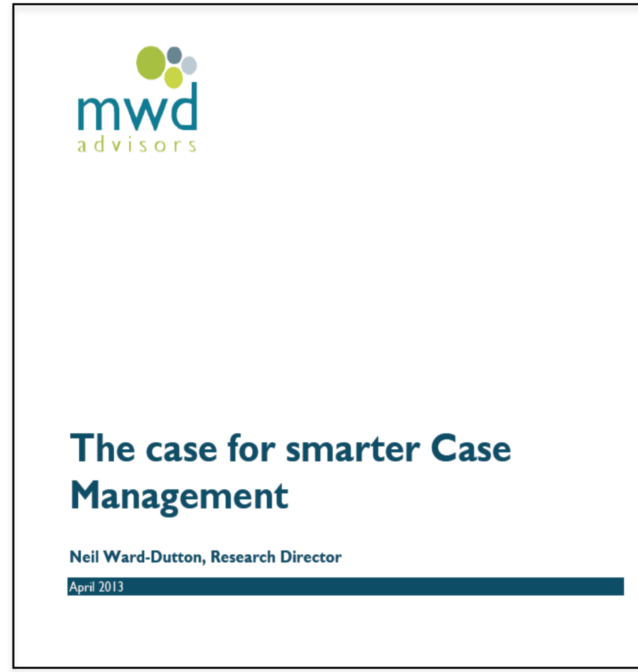


*"Casework is **complex and not routine**. Each case is a unique situation that involves complex interactions between **content, people,** business and regulatory **policies** to achieve an **optimal outcome**. Casework involves information, judgment, experience and policies, and strives to balance multiple and often contradictory perspectives about rights, entitlements, settlements, risks and money to reach an optimal (not perfect) outcome for all involved parties. Casework is often closely **audited** for adherence to corporate policies and government regulations, typically performed by **information workers** and experts, and is often **collaborative**…"*

Case-style work

A case management approach to supporting and managing work fits for situations where:

- Goals are understood, but the specific tasks, order and stakeholders are not completely defined
- Access to information is key
- Knowledge – some tacit, most documented - and business data - needs to be captured, analyzed, acted on, organized and stored


mwd advisors

The case for smarter Case Management

Neil Ward-Dutton, Research Director

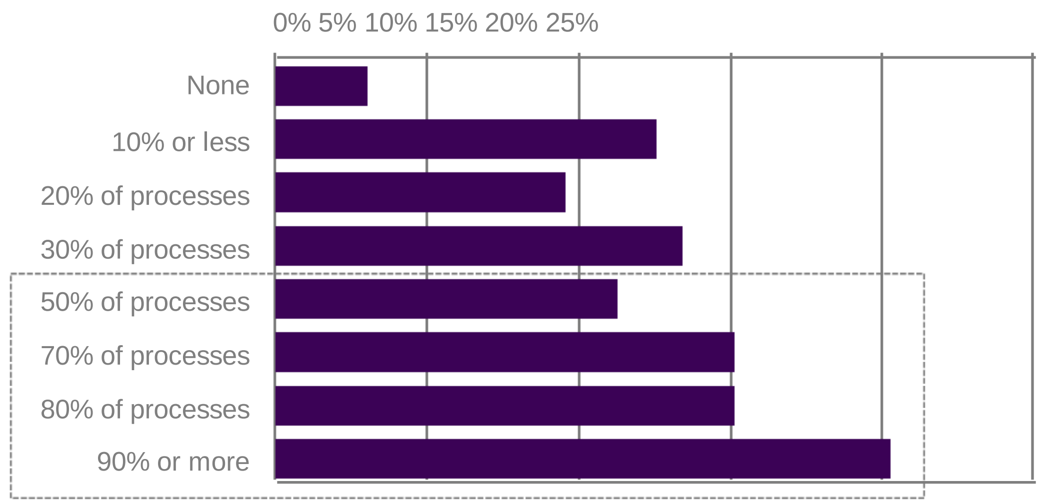
April 2013

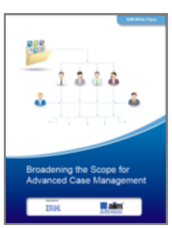
Marketplace view

More than 60%

of respondents indicate that 50 percent or more of their processes involve casework

What proportion of your main line-of-business (LOB) processes would you say involve a case file, claim file, proposal, bid, incident report, service ticket, etc.?





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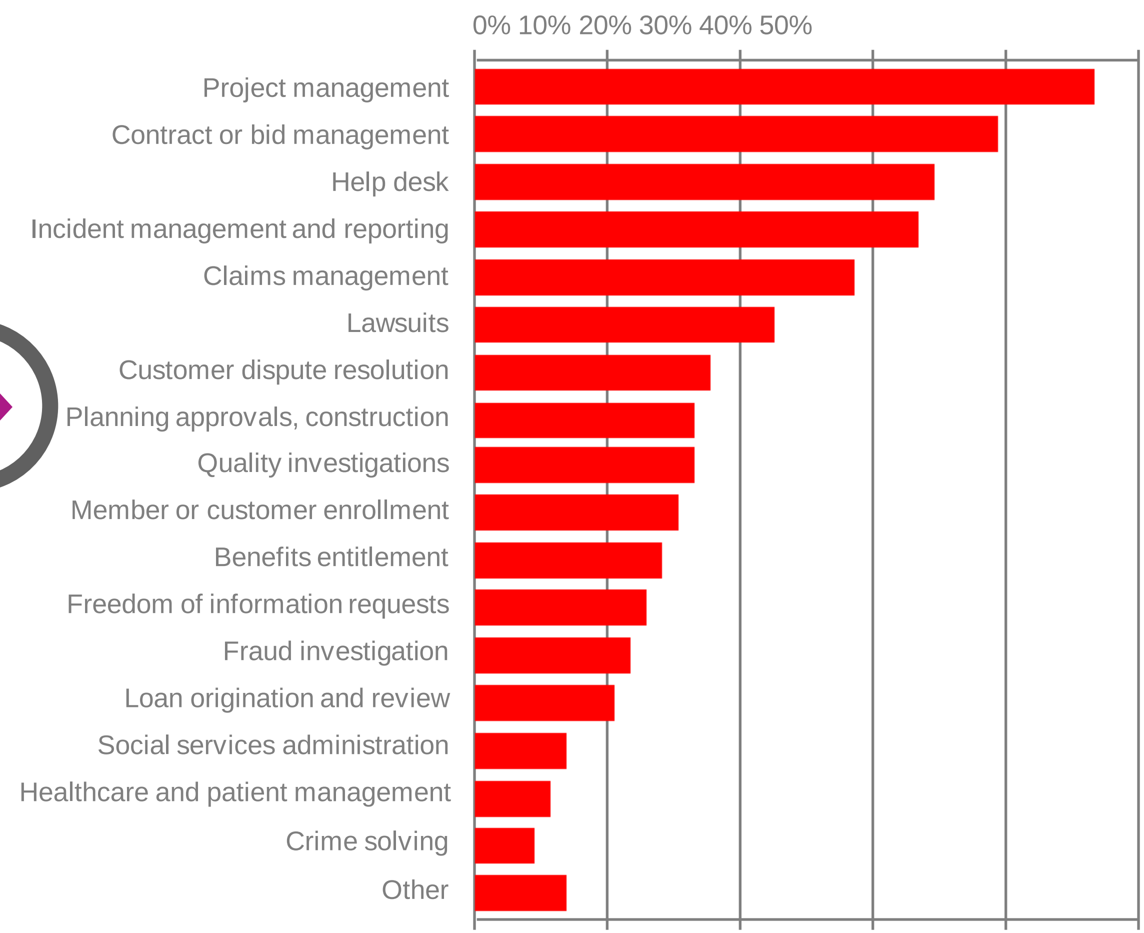
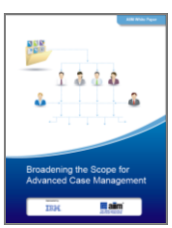
Marketplace view

But they do not necessarily call it
case management

How would you categorize your most prevalent or important case application(s)?





SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf. © AIIM 2013 www.aiim.org/© IBM 2013 www.ibm.com

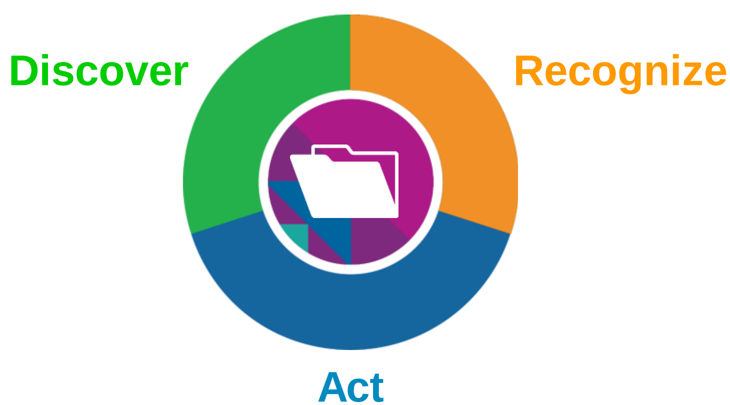
Capabilities required to address case style workloads

1 Provide information to help improve decisions

2 Support knowledge work

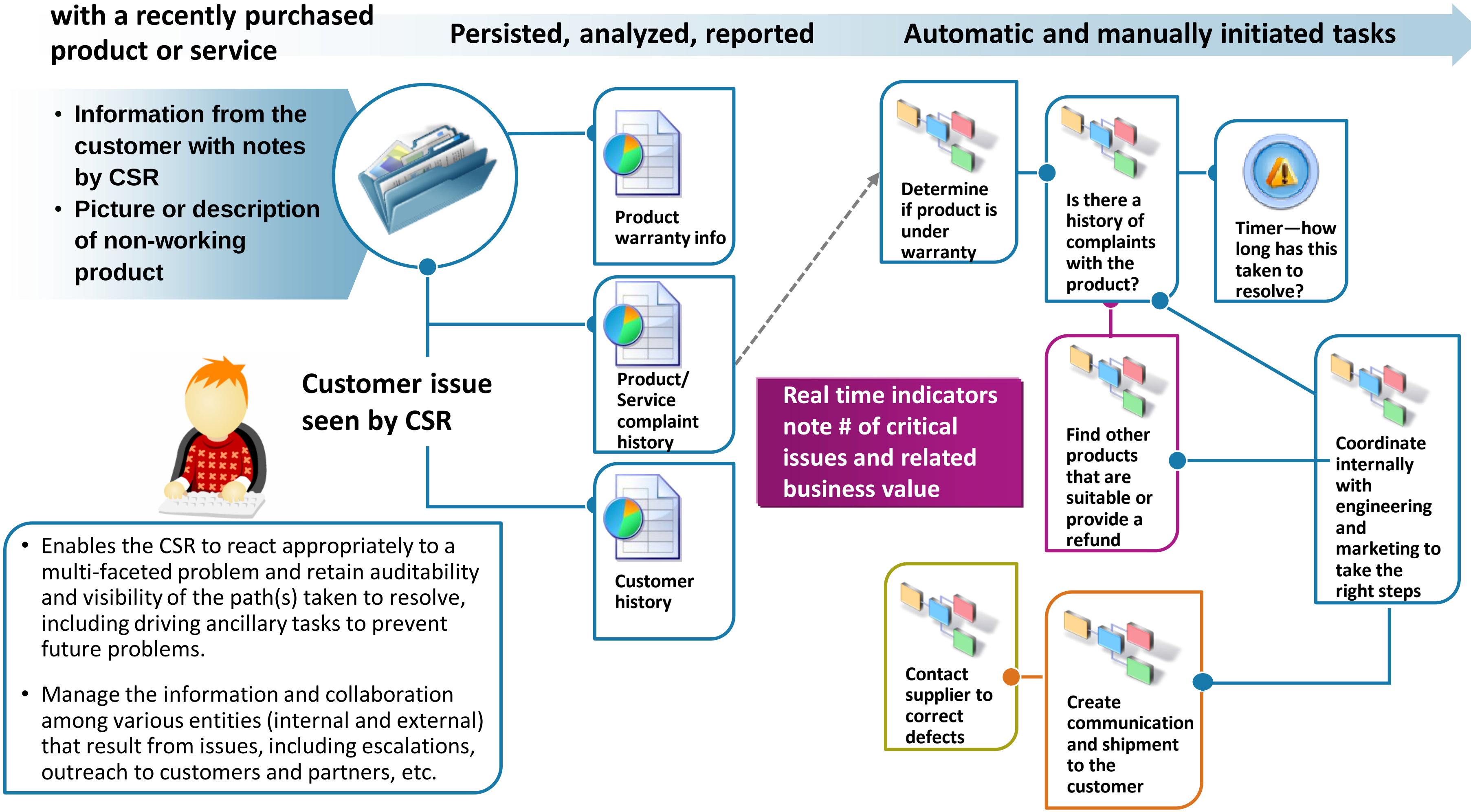
3 Optimize case outcomes

4 Business can take control



Case Style Example - Customer Service

A customer calls and complains about a problem with a recently purchased product or service



- Enables the CSR to react appropriately to a multi-faceted problem and retain auditability and visibility of the path(s) taken to resolve, including driving ancillary tasks to prevent future problems.
- Manage the information and collaboration among various entities (internal and external) that result from issues, including escalations, outreach to customers and partners, etc.

IBM Case Manager leverages existing investments to improve customer satisfaction

Texas Municipal Retirement System

The solution is targeted to support SLA objectives by enabling insight-to-action responsiveness in adjusting case flows to meet changing business needs

The need

- Support diverse customer needs through **flexible activities**
- Meet key internal service level agreements (SLAs) designed to compete successfully
- **Reduce costs** by replacing a highly customized and rigid application which required constant investment
- Gain the benefits of new solution capabilities with minimal disruption to the business

The solution

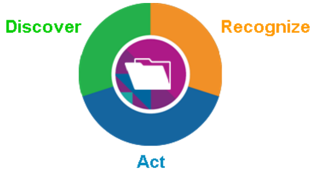
- Engaged IBM **Business Partner Adjacent Technologies** who recommended IBM Case Manager
- Leverages **existing IBM FileNet Content Manager investment**
- Planned for phased deployment beginning with member benefits and proceeding to address policies, contracts and taxes
- IBM Case Manager offers **90 percent of the required capabilities out of the box**
- Easily configurable case flows **enable business users to quickly adapt** and build case flows for specific needs and to create business rules for automatic, proactive response to potential SLA issues
- Provides dashboards and built-in analytic capacities to help managers identify SLA issues and trends

Projected benefits

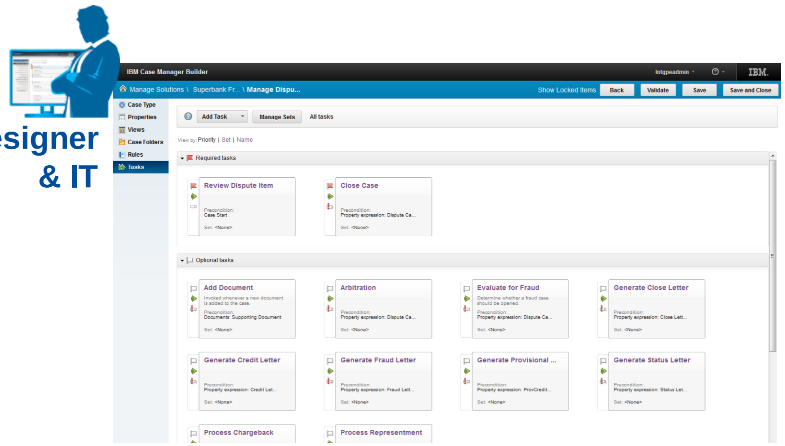
- **Replace a rigid solution** with a highly configurable IBM Case Manager solution that can change as business needs change
- Improve productivity with configurable case flows that **allow knowledge workers** to identify, launch and track tasks to personalize individual case needs
- Respond proactively to SLA issues with dashboard monitoring and analytics.
- Flexible business rules allow **rapid changes** in how work flows across the organization.

IBM Case Manager

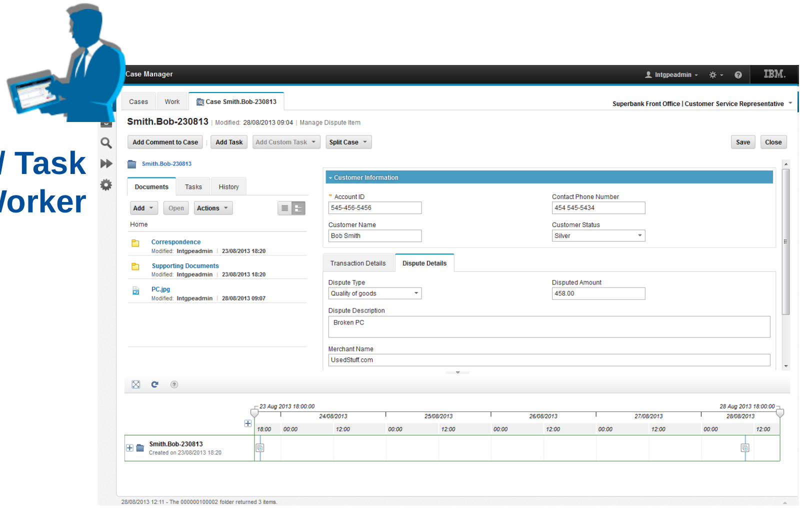
Bringing it all together in one powerful platform



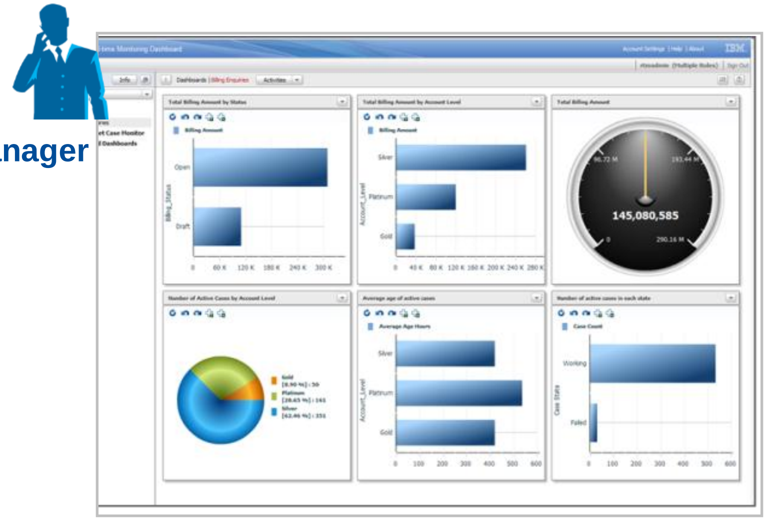
BA / Designer & IT



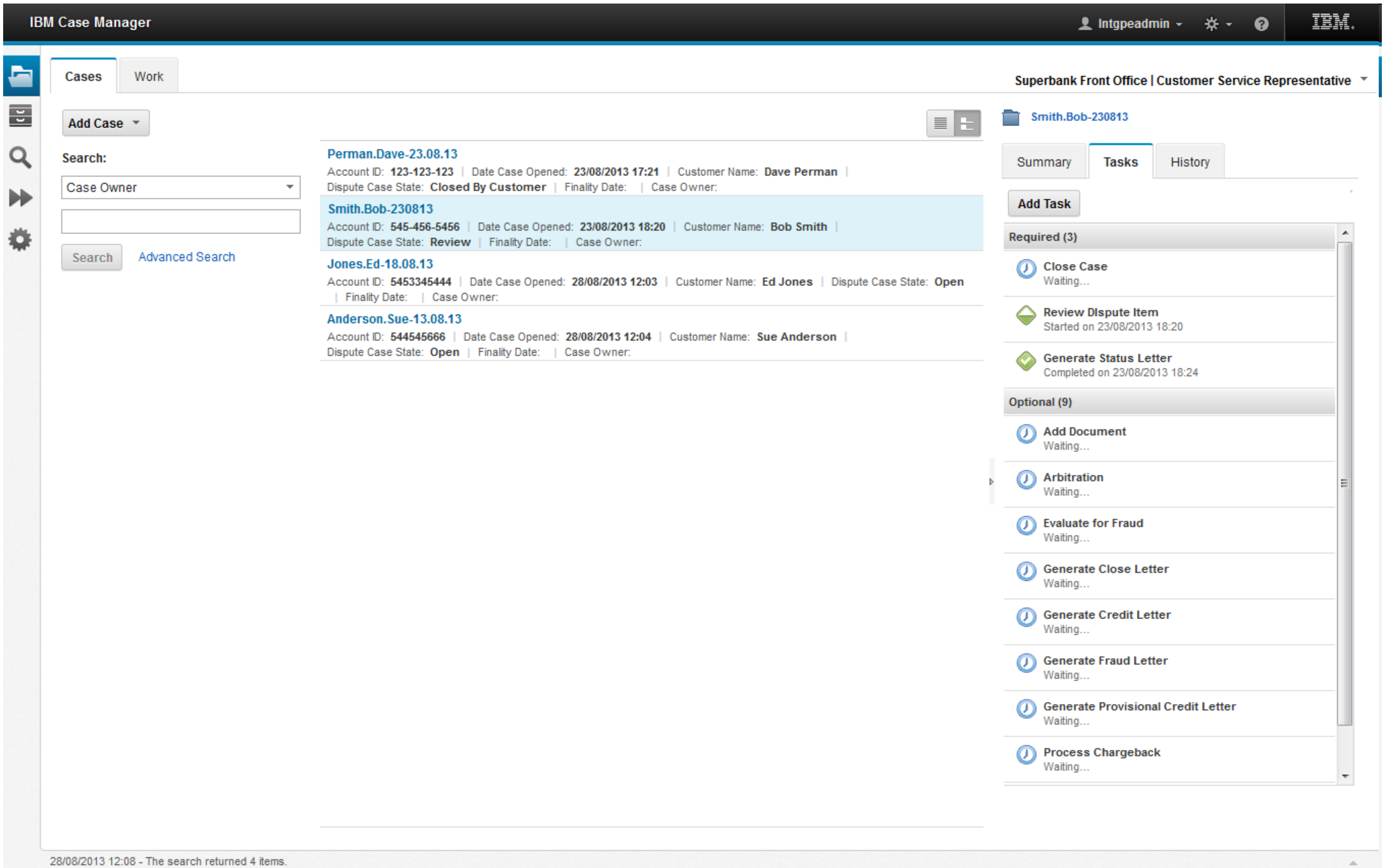
Case / Task Worker



Manager



Case Worker User Experience - Case Search Page



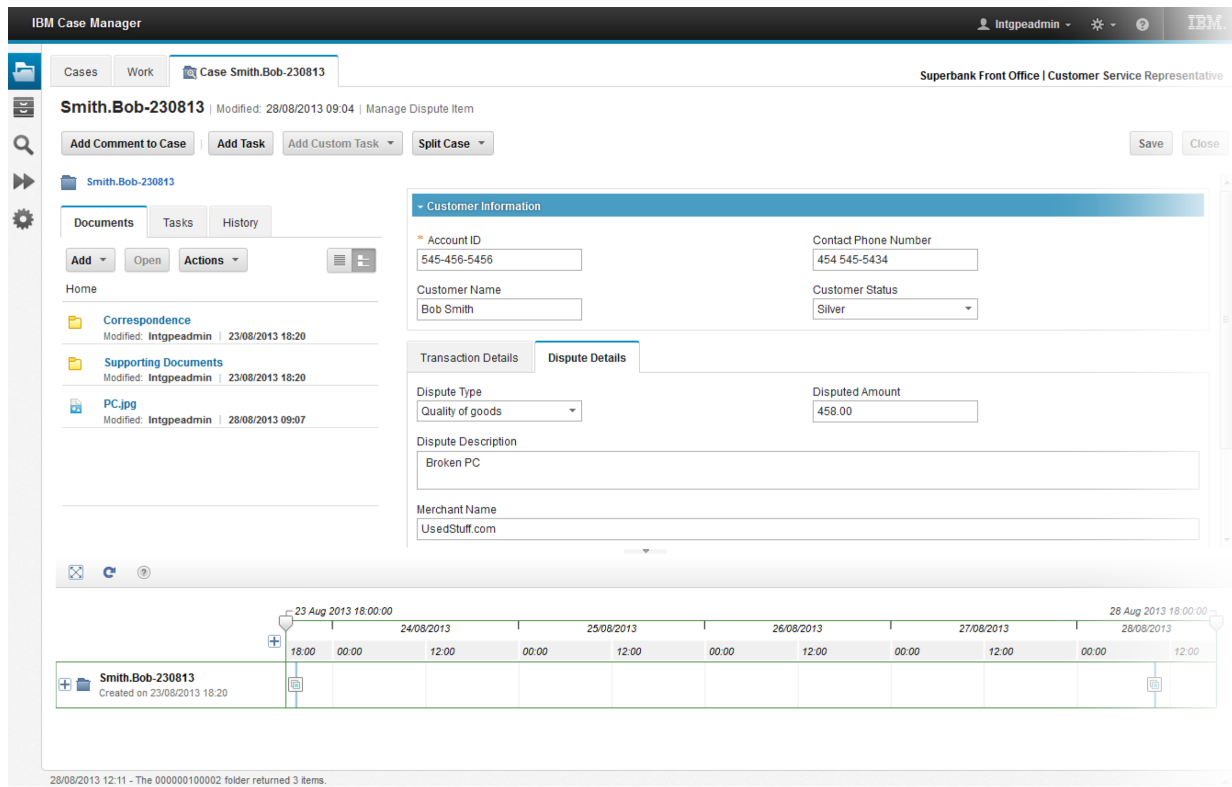
Case Worker User Experience – Opening a Case

- **Role-based and personalized**
  End user gets exactly the information they need to progress the case

- **Flexible and extensible**
  Can be configured to meet unique business requirements

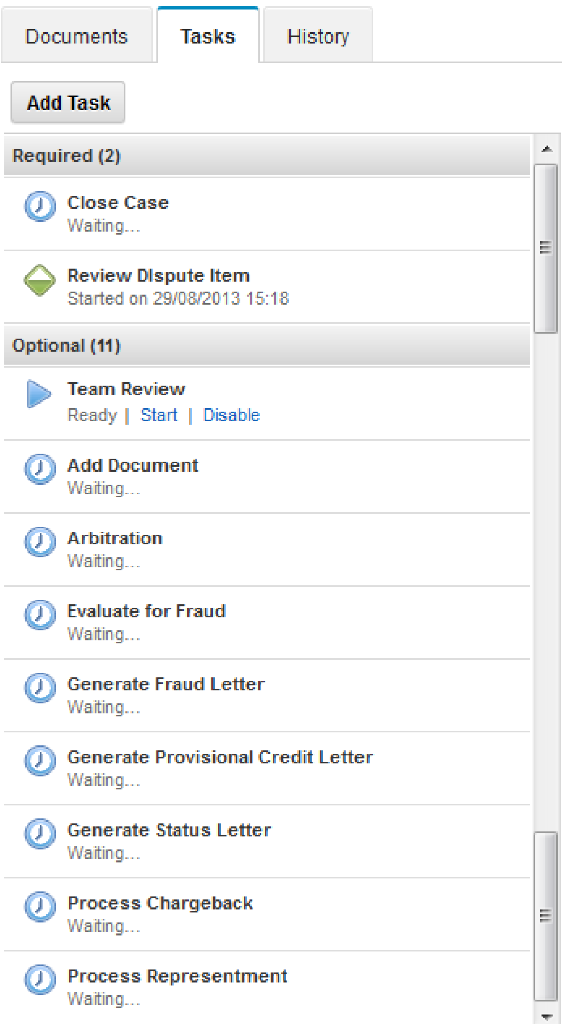
- **Provides deep context for case work**
  No more disjointed jumping between application

- ***Brings people, process and information together to drive case progression and better outcomes***

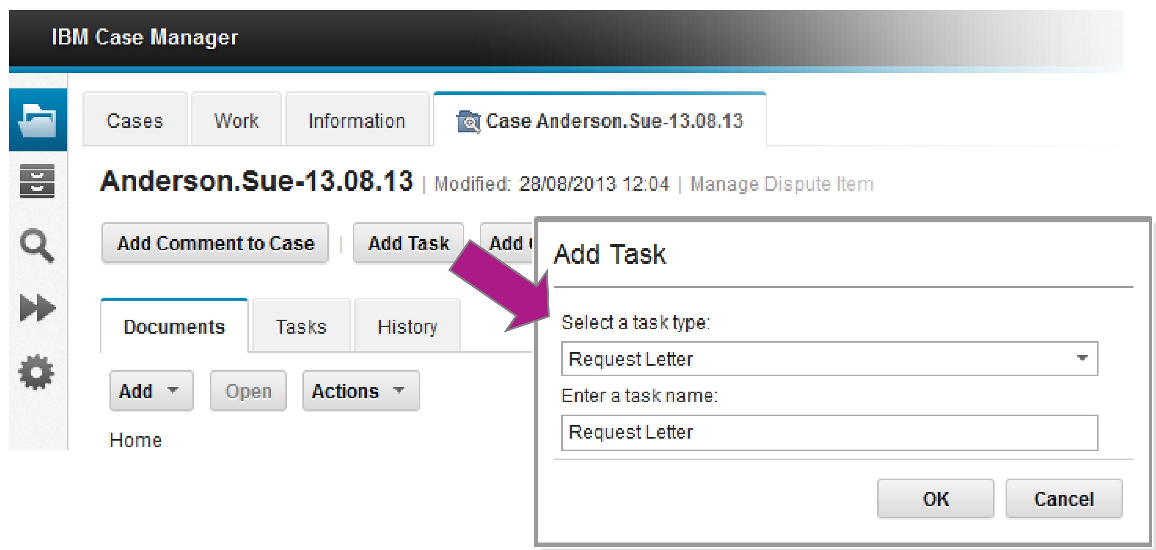


Case worker user experience showing tasks, documents, history, and case data

Cases are Dynamic



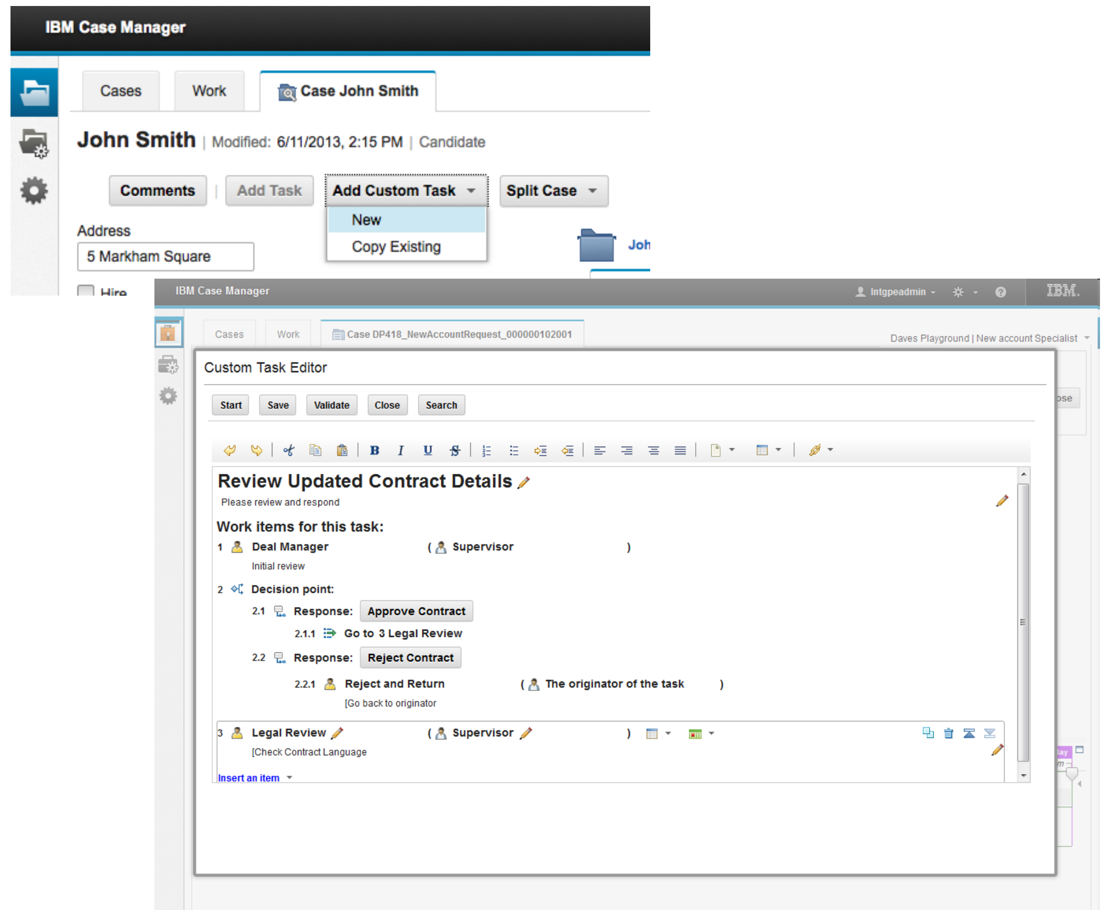
Case workers can view and start new Tasks for a case, changing how that case is handled on-the-fly



Case workers can even add new Tasks to a case

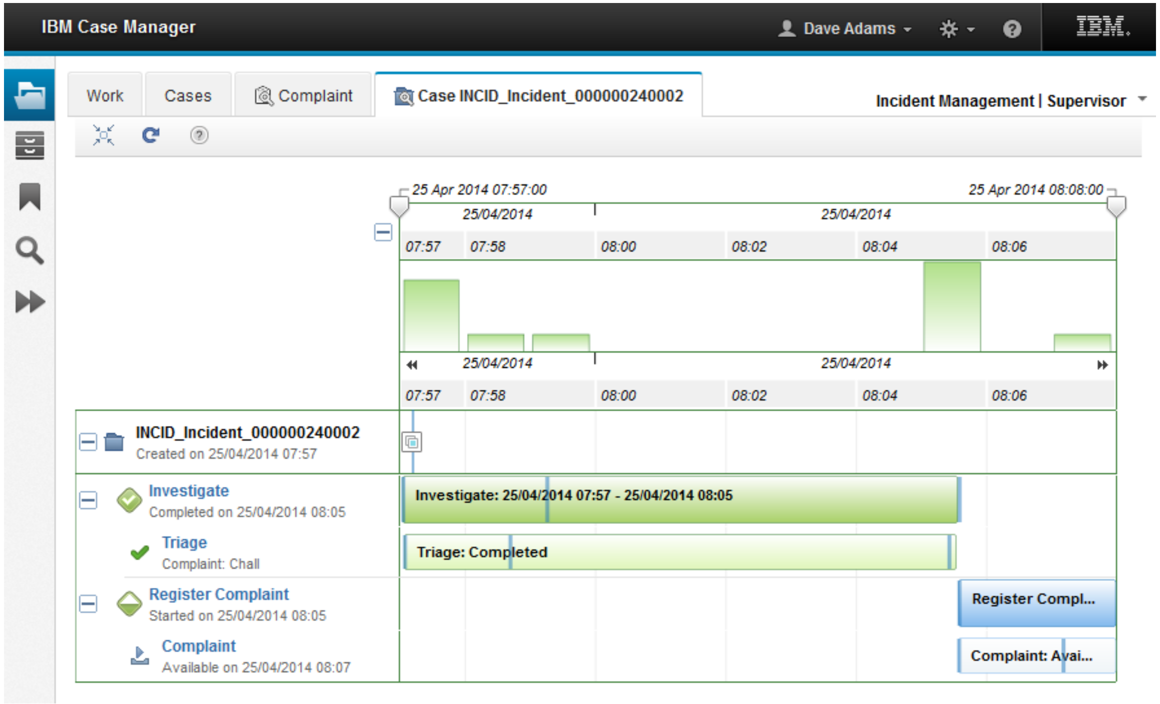
Case Worker Dynamic Custom Tasks

- Authorized case worker can define a sequence of actions that need to be performed on a case
- Supports use cases where the task flow is not well understood/known ahead of time
- Intuitive outline style text-based editor, enables defining work for humans
- The user is also able to copy and modify existing custom tasks when creating new ones



Case History Visualizer

- Provides a quick overview of life of a case
  Shows when things happened, what it was, and by whom
- Event Histogram shows when most activity occurred The taller the bar, the more things happened to the case
- Zoom in for more insight
  The lower timeline zooms to show details such as tasks and work item completion

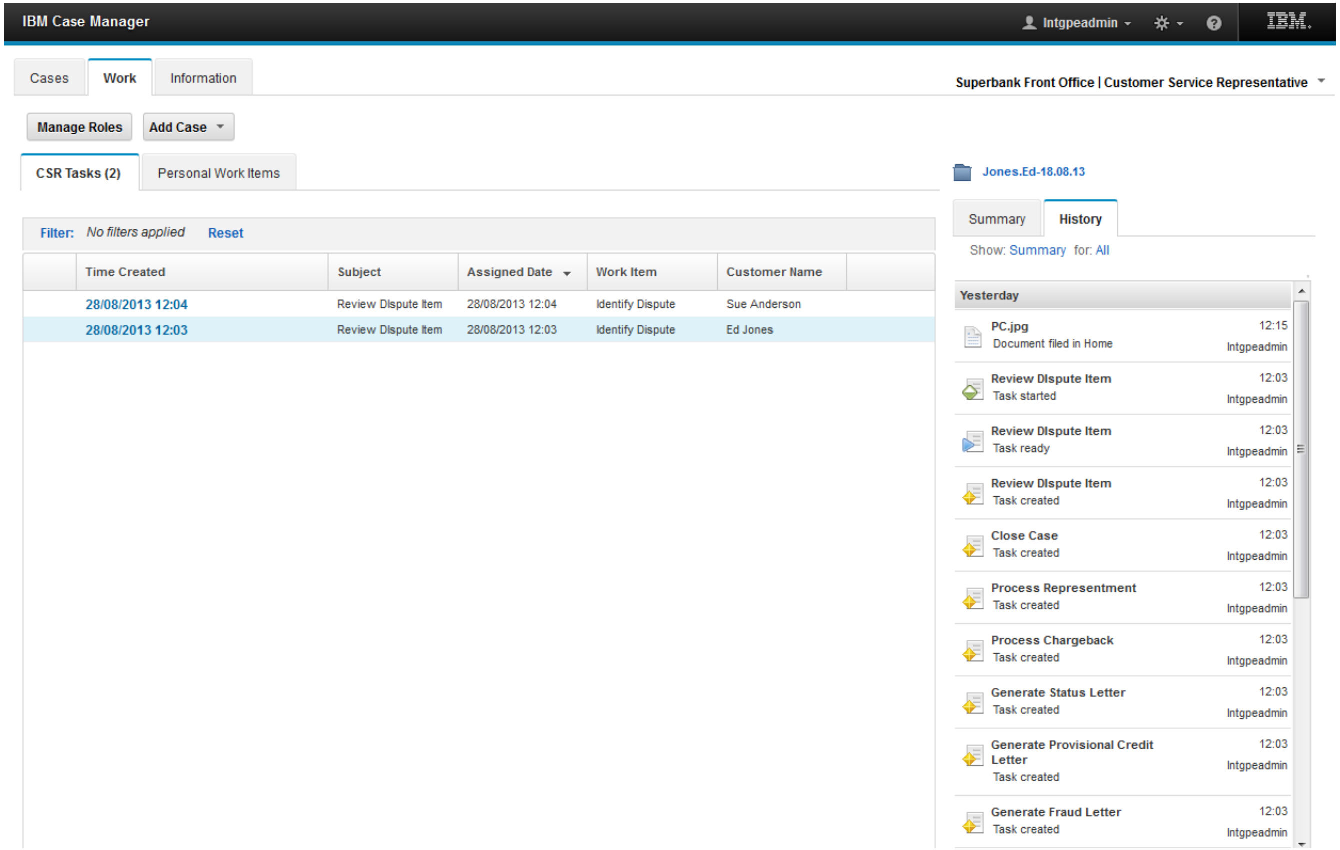


Task Worker User Experience – In-baskets of Assigned Work

- **Role-based and personalized**
  Customizable in-baskets of work for the user's role or assigned specifically to them

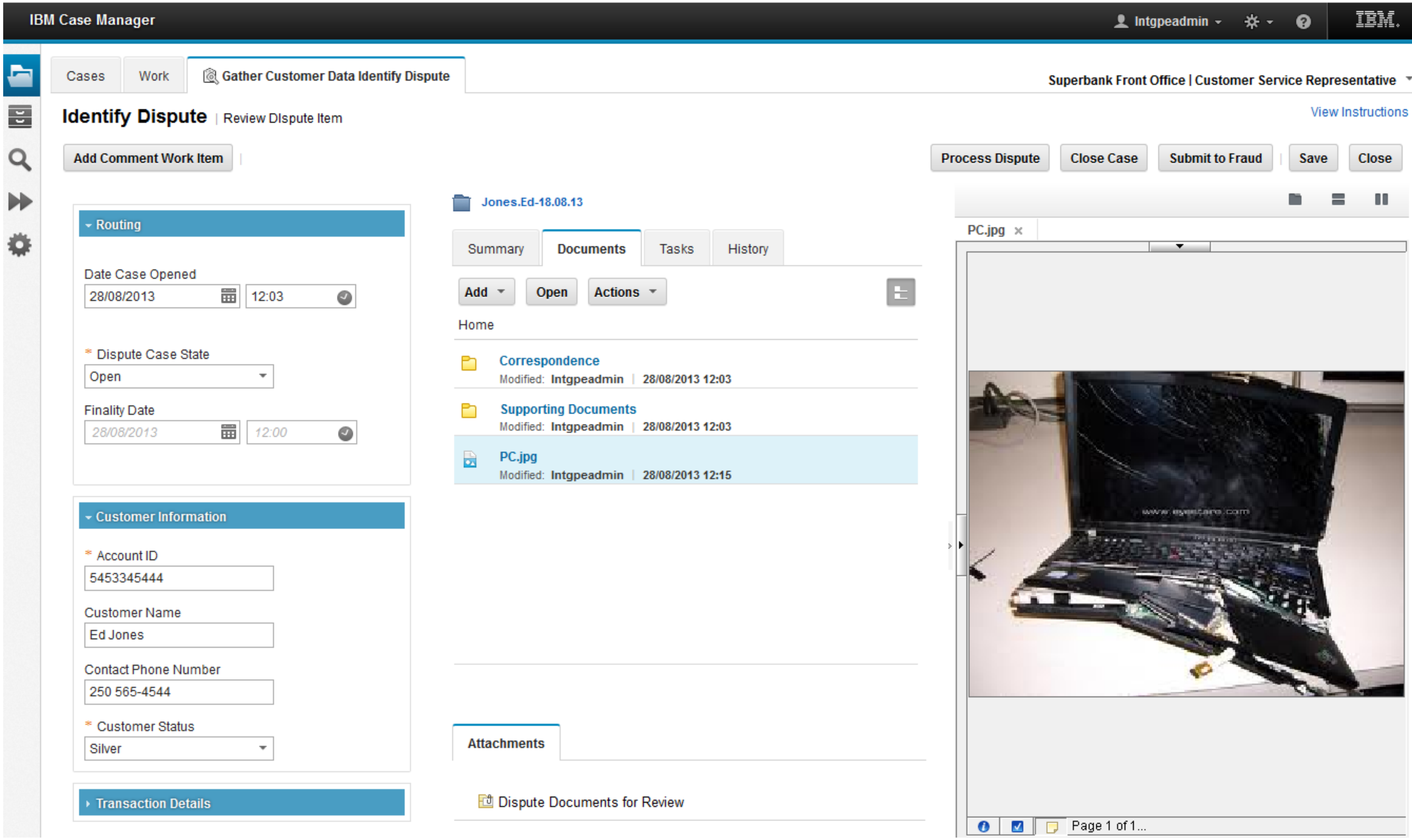
- **Flexible and extensible**
  Can be configured to meet unique business requirements

- **Provides deep context for case work**
  Direct access to the case data, documents and history



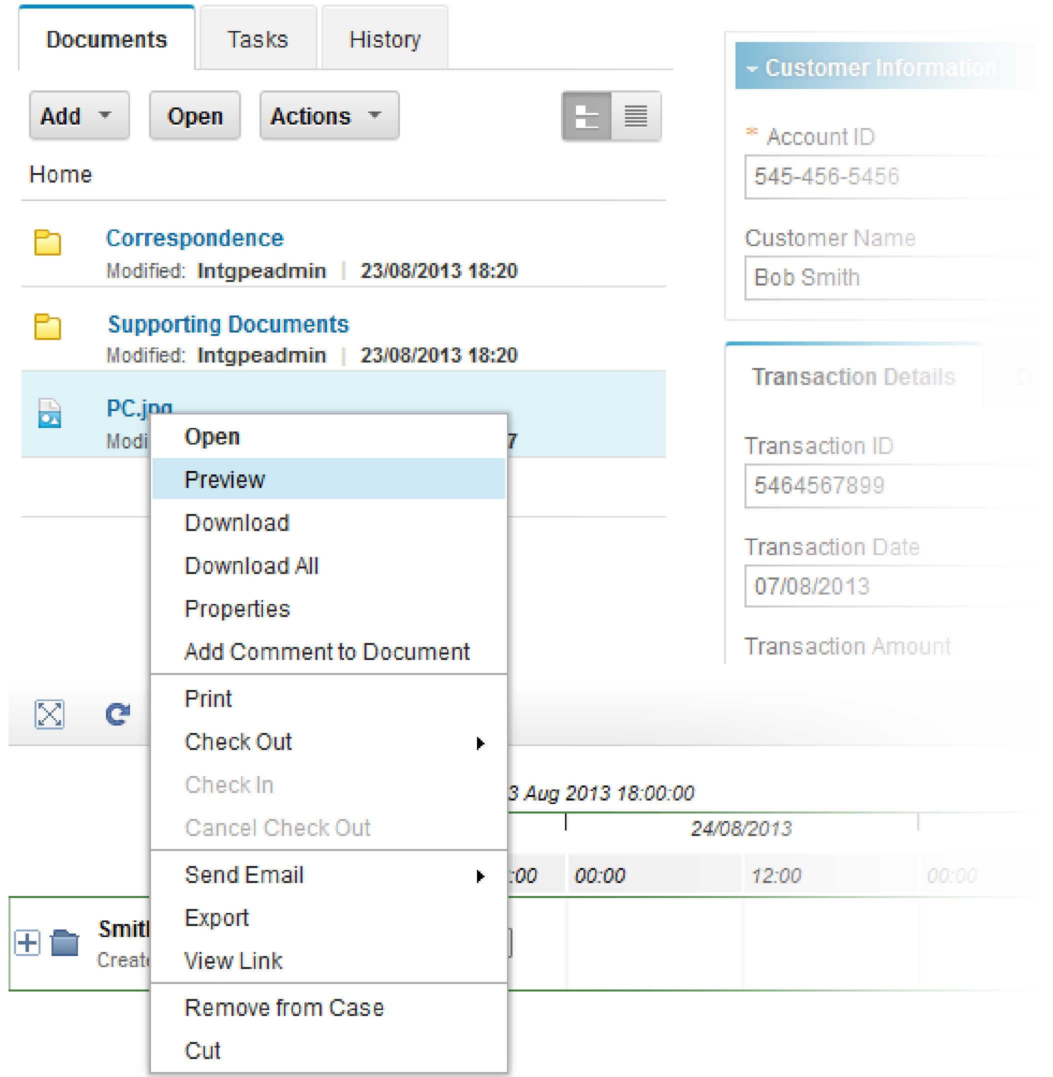
Task worker user experience showing configurable work lists and the case information associated with work item

Task Worker User Experience – Work Details Page

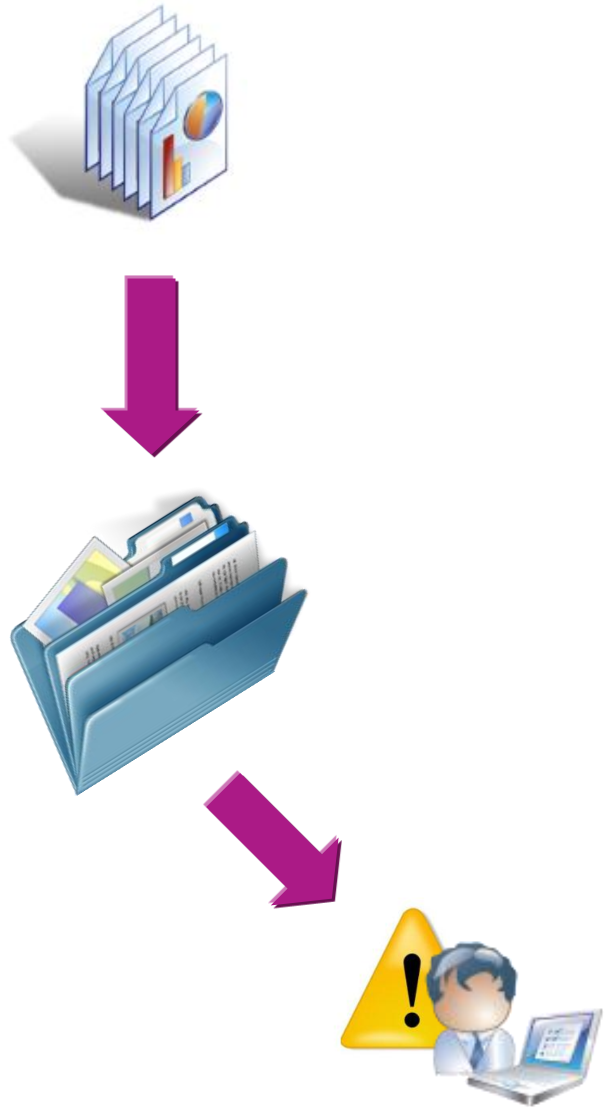


Fully Integrated Content Management

- **Every case has its own folder for storing its documents**
  End user have quick access to case material
- **Integrated document viewer with markup capabilities**
  View documents and case data at the same time
- **Full document management functionality**
  Document versioning and metadata properties
- **Centralized content repository for all case artifacts**
  Maintain control over cases and documents
- **Support for Content Navigator plug-ins**
  Extend the standard capabilities



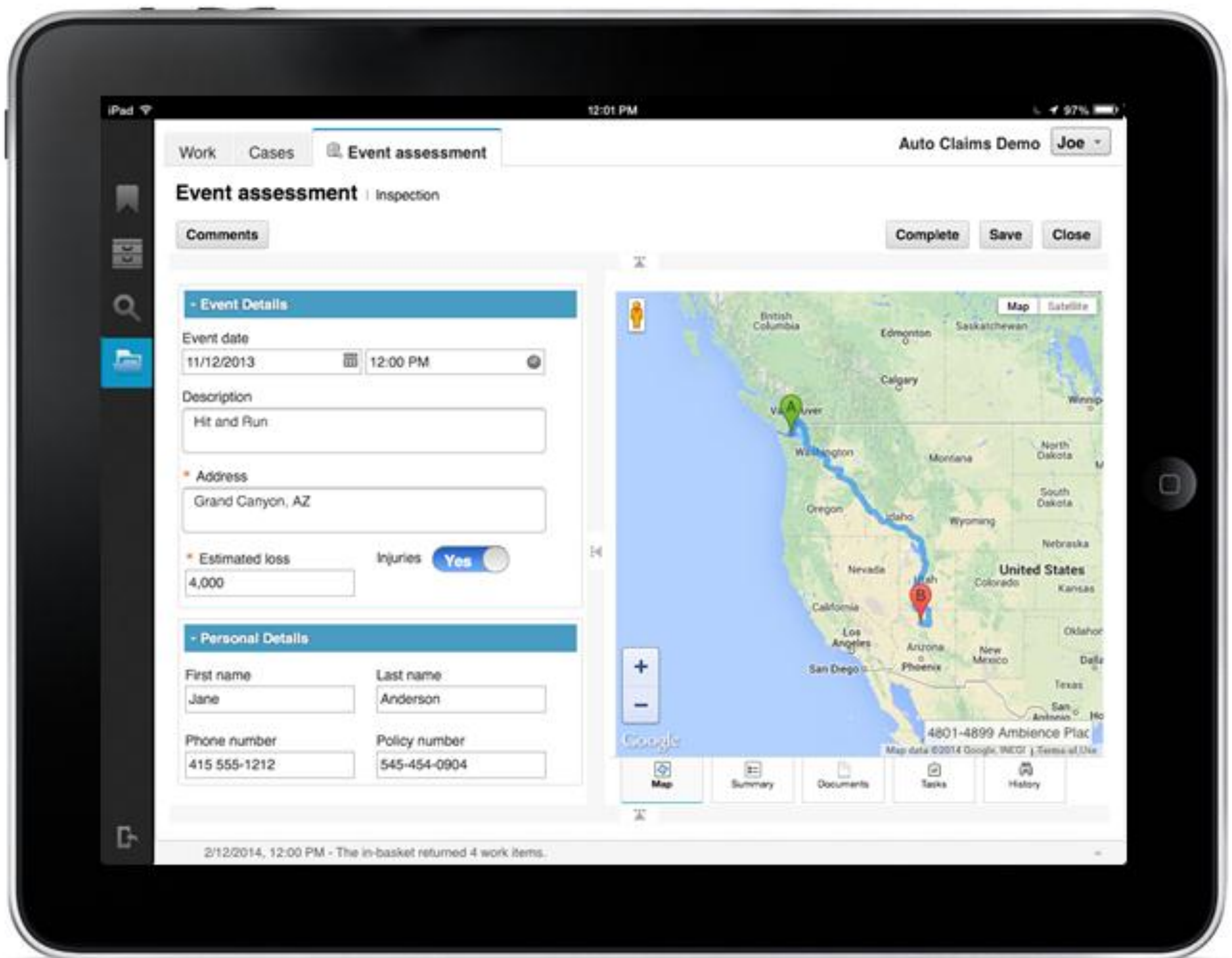
Active Content is Smarter Content



- Active content is a key capability where changes in content can cause an action within the system
- Active content allows customers to:
  - Accelerate time-to-value – significantly simplifying and shortening application delivery time
  - Achieve agility by allowing rapid changes through configuration
  - Mitigate risk by automating and logging important events for compliance or legal requirements
- Case Manager includes several built-in features that build on this capability
  - New case creation on document arrival
  - Case tasks that are started when documents are added to the case

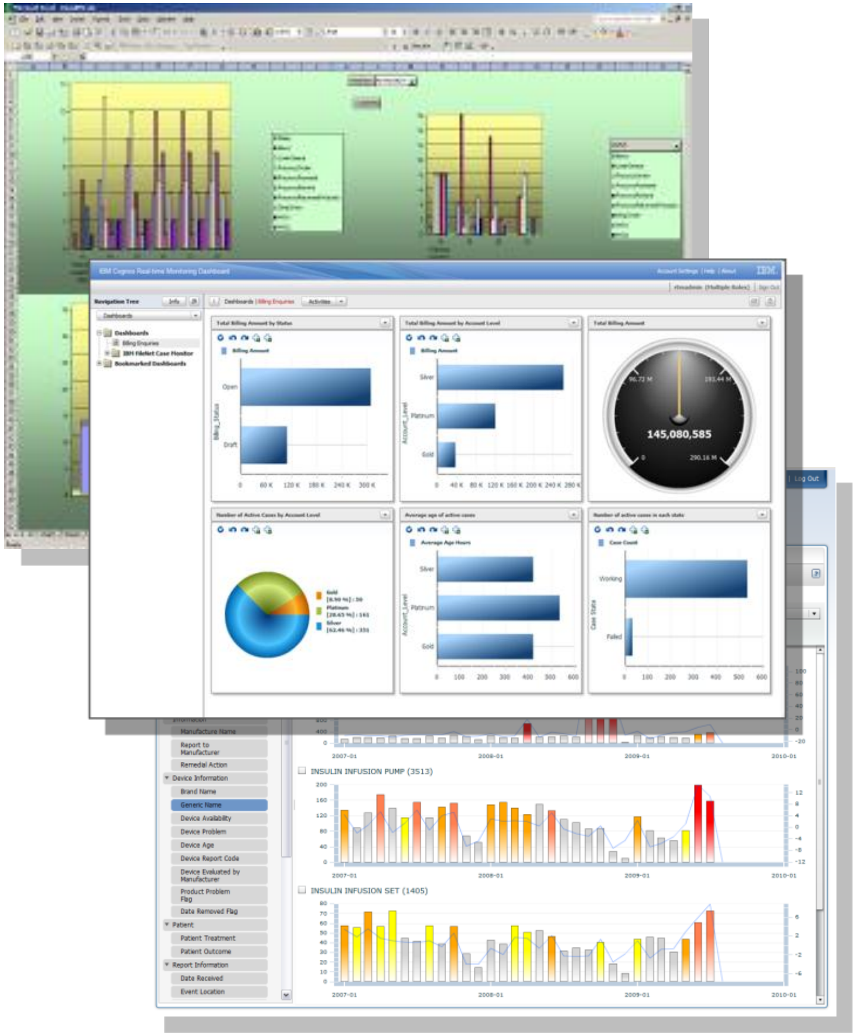
Case Mobile – Customized Work Details

- Part of the native Content Navigator iPad app
- Displays solution pages the way they were designed with mobile tweaks where appropriate
- No updates to app are required when case solutions are modified



IBM Case Manager – 3 Styles of Analytics

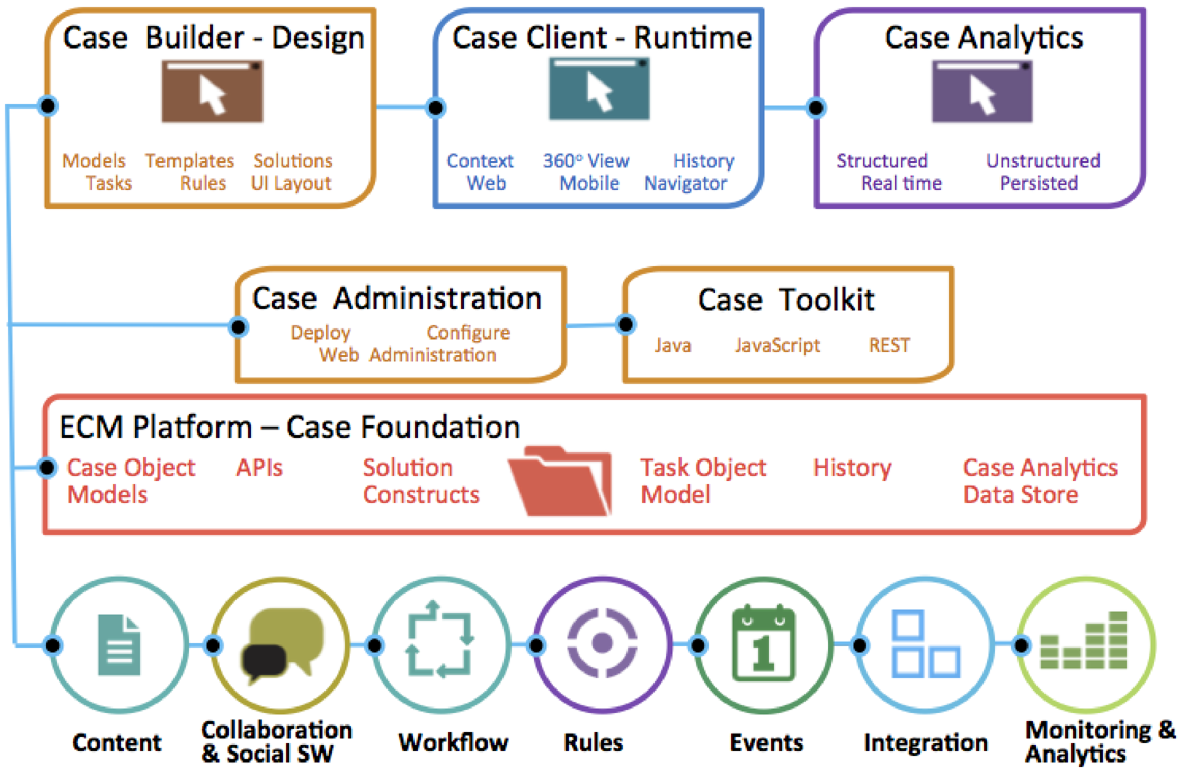
- Case Analyzer (Historical Reporting)
  - Excel and Cognos enable case and process analysis
  - Dynamic - Drill down, slice and dice, filter, etc
  - High performance, large volume analysis
- Case Monitor (Real Time Dashboards)
  - Cognos RTM provides real time cases monitoring
  - Threshold monitoring and alert generation
- Content Analytics
  - Crawl and index case contents and metadata
  - Discover patterns, trends and insights across cases. Example : Most common compliant in user comments in cases



How do you create a new case solution?

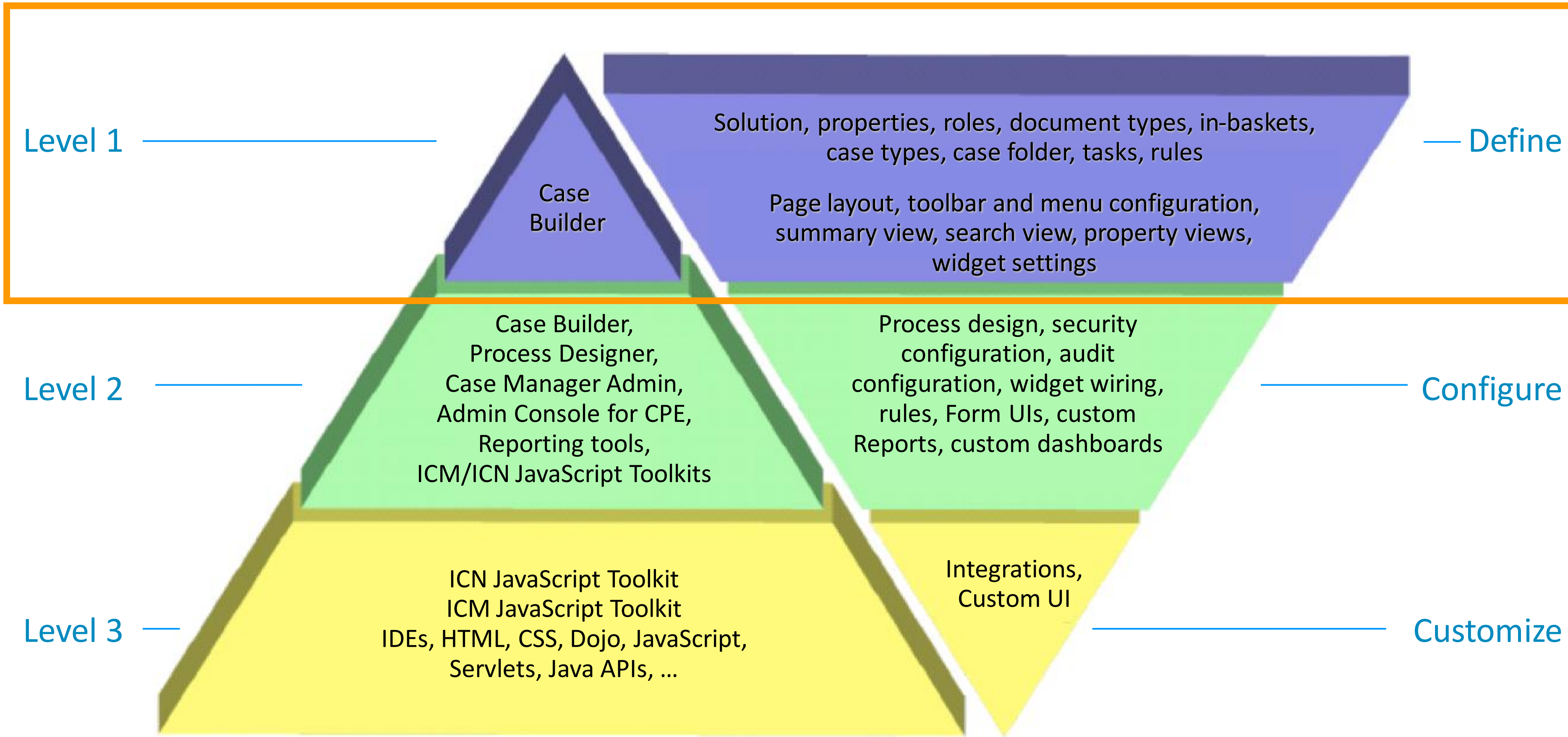
IBM Case Manager

Key Components Included

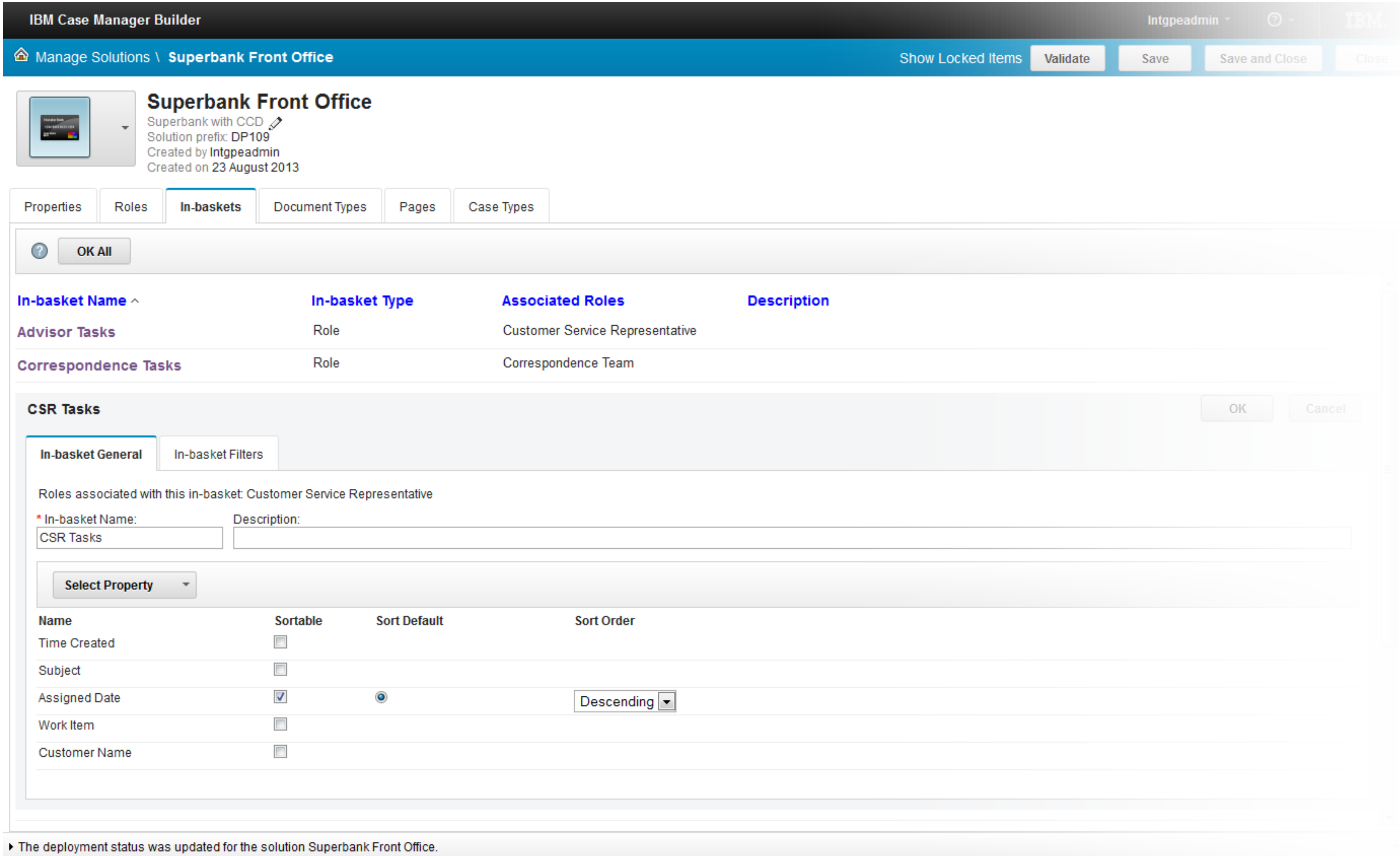


- **ECM Platform Foundation**
  - Built on top of an enterprise class active content platform
- **Case Manager Builder**
  - Case Solution builder tool oriented to needs of line of business analysts
- **Case Manager Client**
  - A run time environment for launching, processing, and interacting with cases
- **Case Manager Analytics**
  - Real time and historical case monitoring with threshold monitoring and alert generation
- **Case Manager Admin Client**
  - Web based tool for configuring the ICM environment and for moving solutions between development and production domains
- **Case Manager APIs**
  - Extend your case solutions using JavaScript, Java, and REST API toolkits

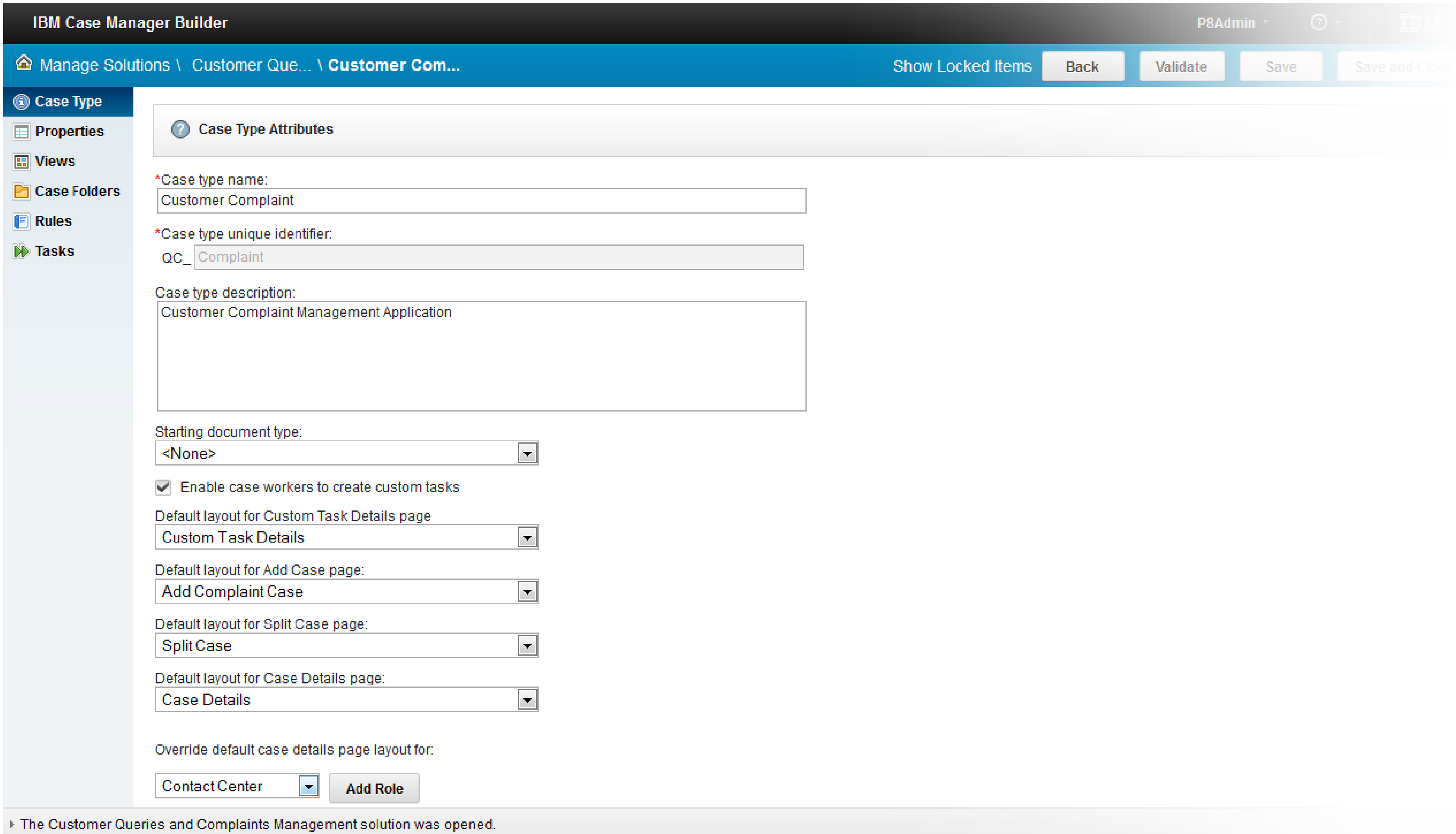
Levels of Design and Associated Effort and Skills



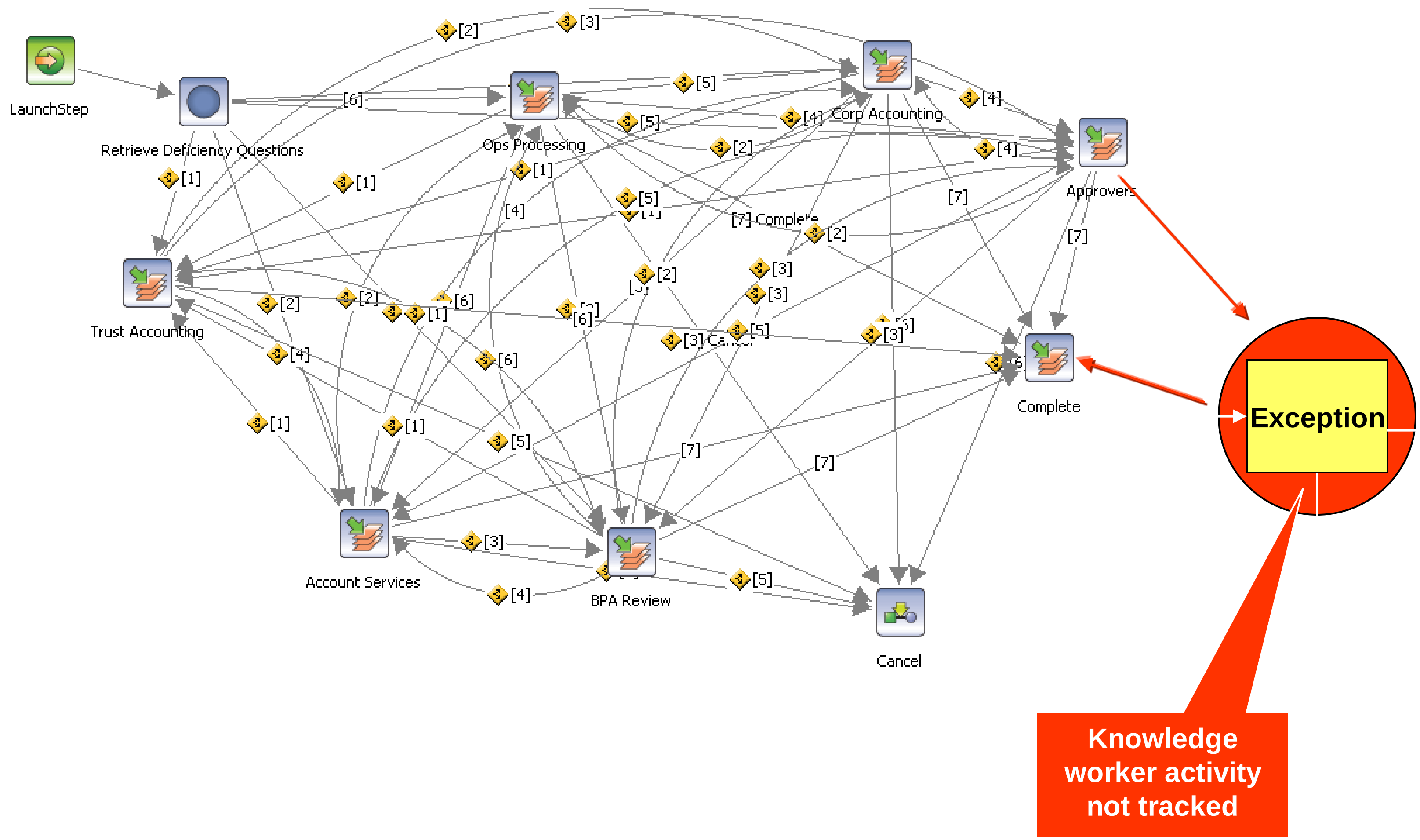
Case Builder: Rapid Solution Development



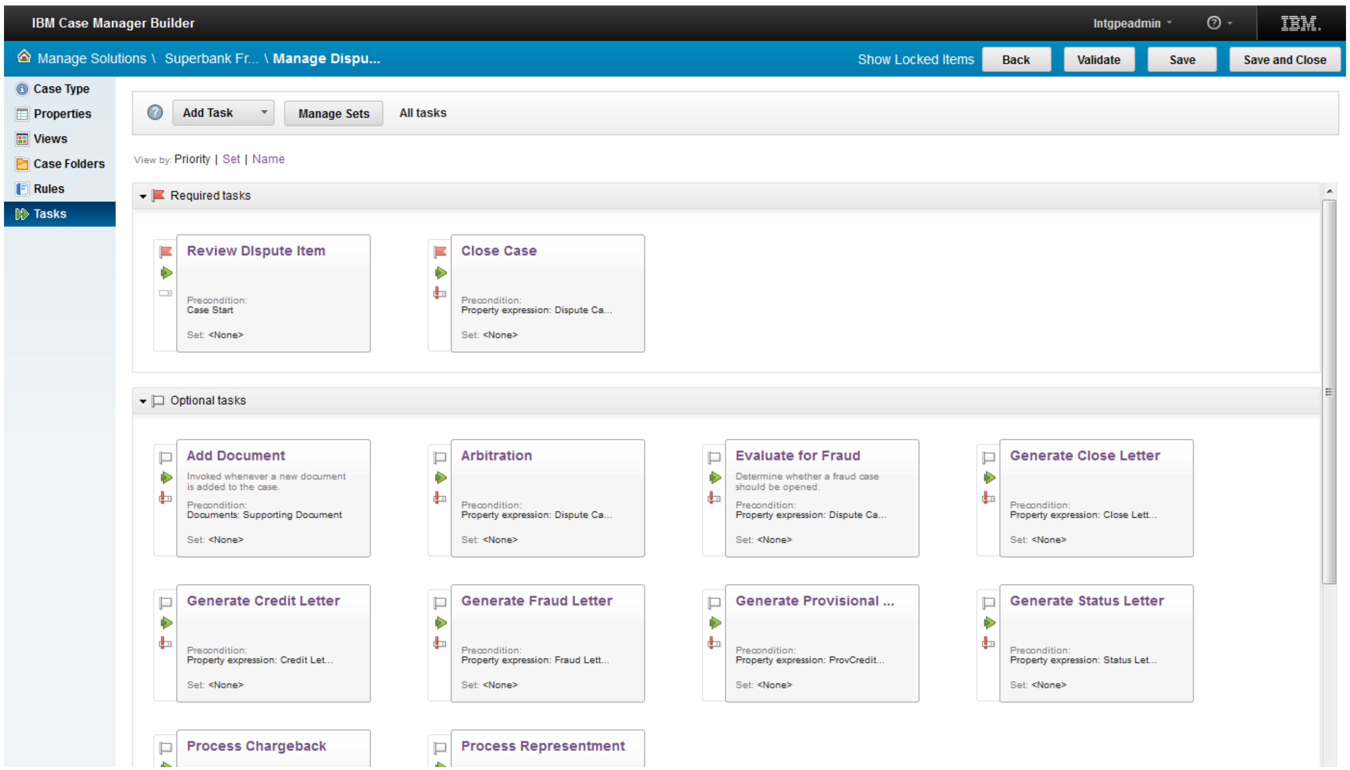
Case Builder: Case Types



Case Style Work Can Be Unpredictable

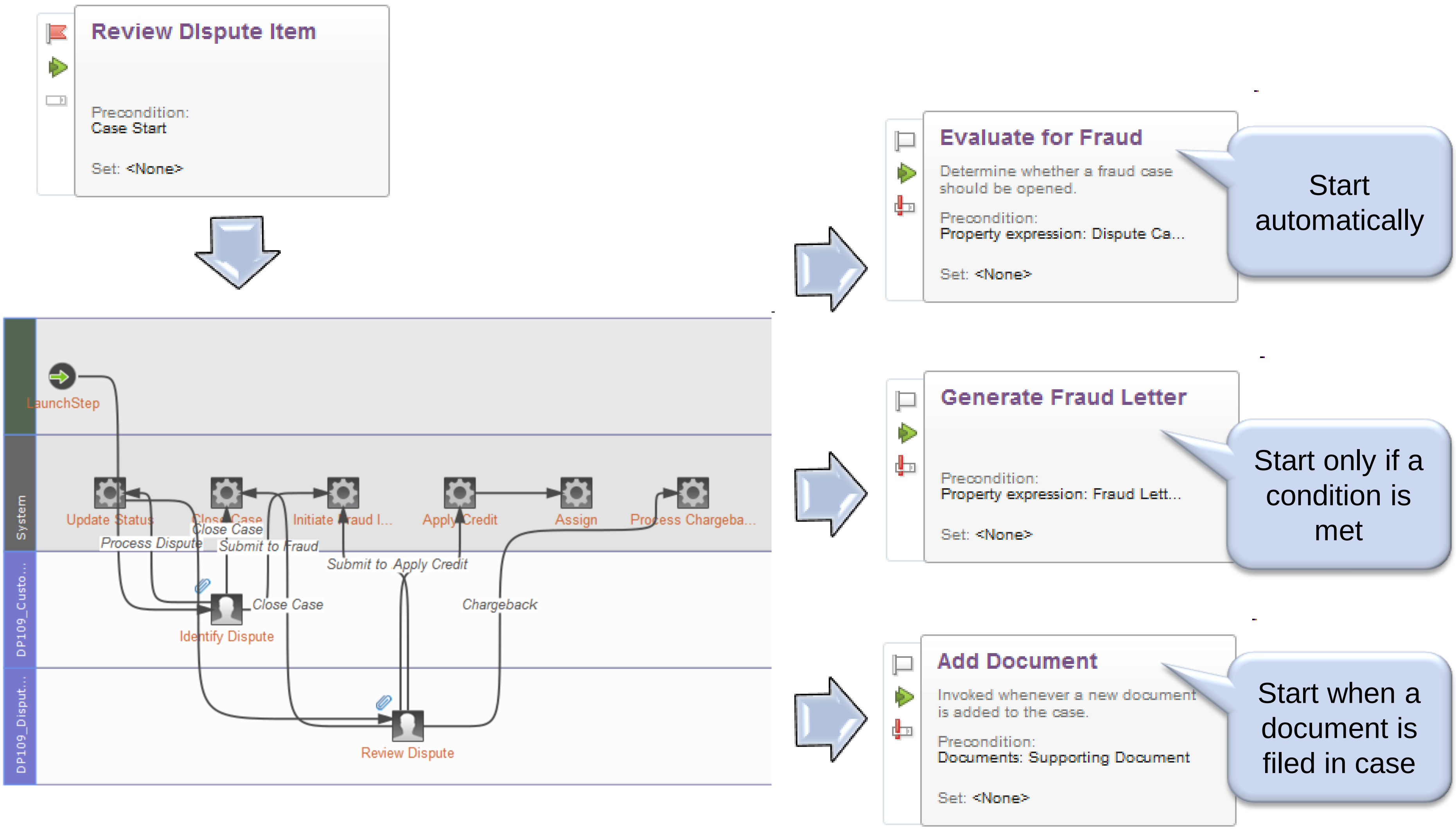


The Power of IBM Case Manager Tasks

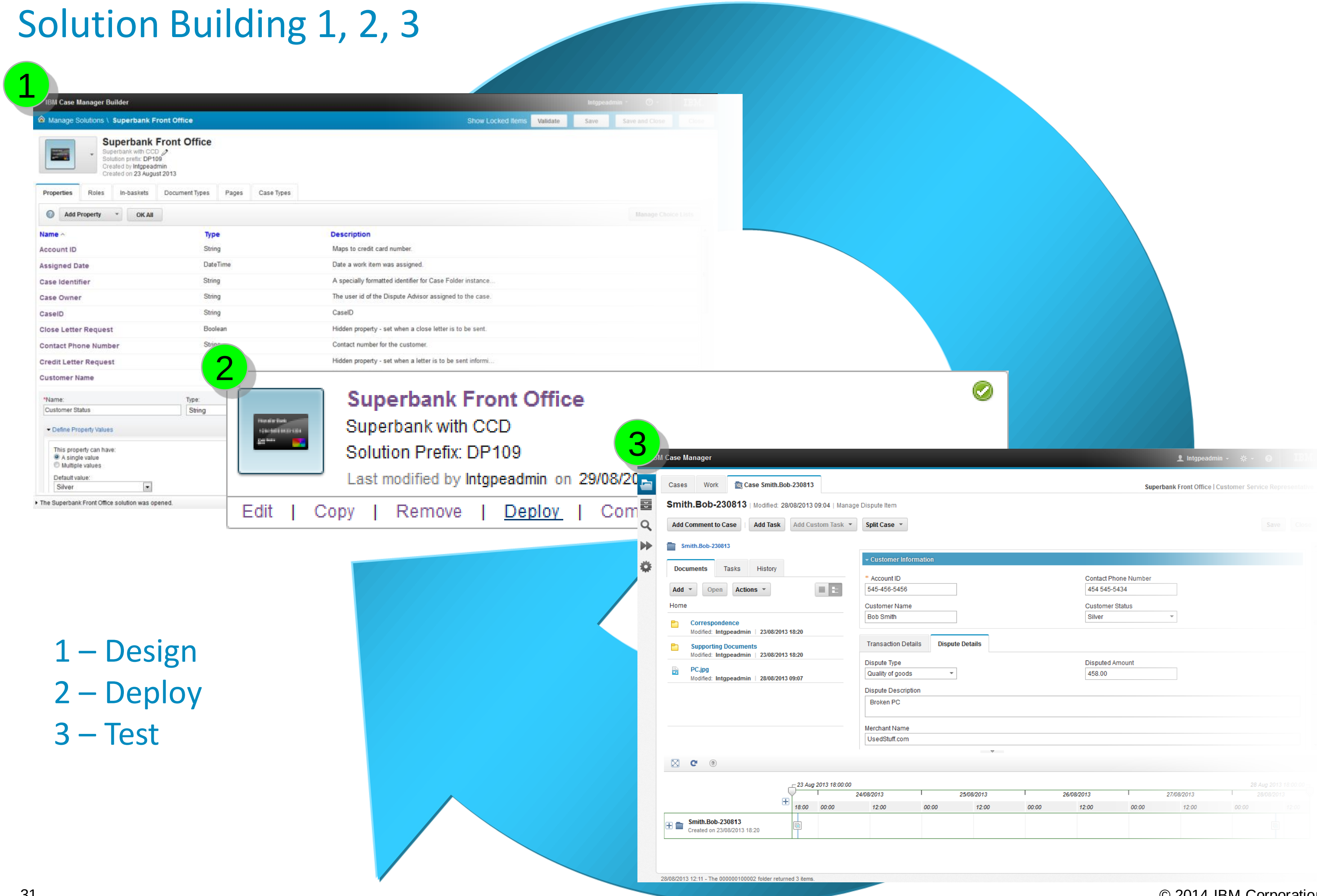


- Repeatability
  Tasks can be repeated at will
- Grouping
  Inclusive and Exclusive
- Optional
  User directed launching or skipping
- Ad hoc
  User dealing with unknown
- Triggered by
  Case worker actions
  New content arrival
  Updates to case data

Tasks and Dependencies



Solution Building 1, 2, 3

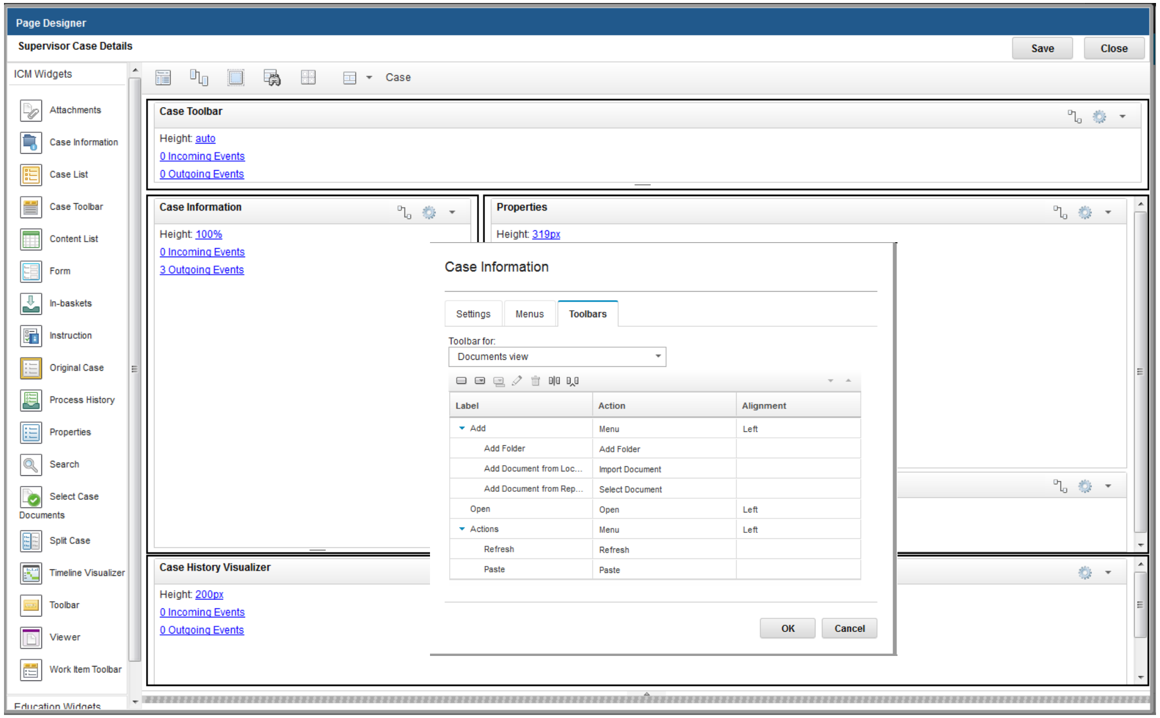


1 – Design
2 – Deploy
3 – Test

Customizing Your Solution Even More

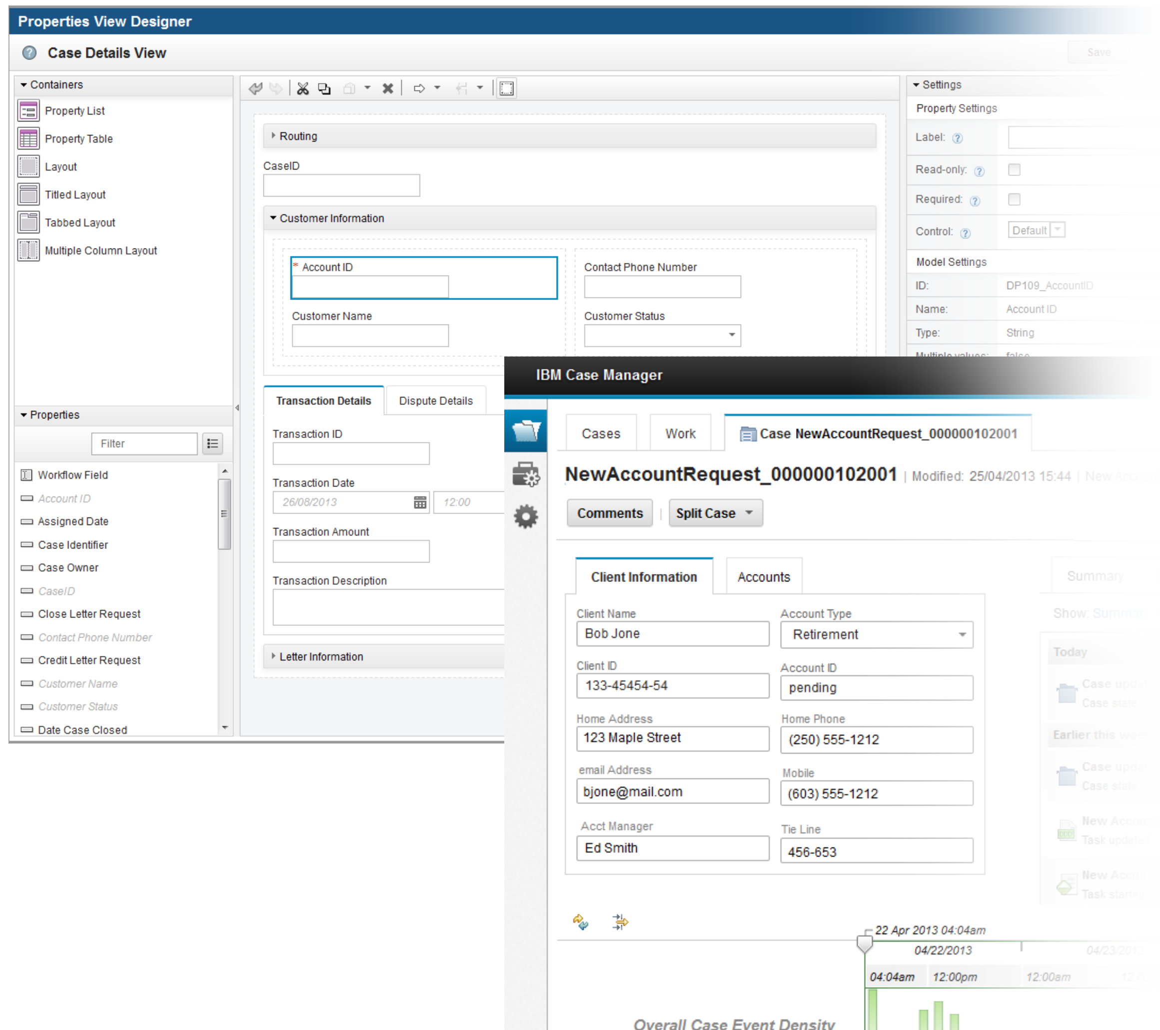
Integrated Page Designer

- Solution page design is now completely integrated into Case Builder
- Provides a palette of both ICM provided page widgets and any custom page widgets added to system
- Includes point and click settings for easy widget customization
- Widget event wiring with powerful javascript integration options allows for even more advanced customizations
- All pages are now part of the solution package and are deployed automatically

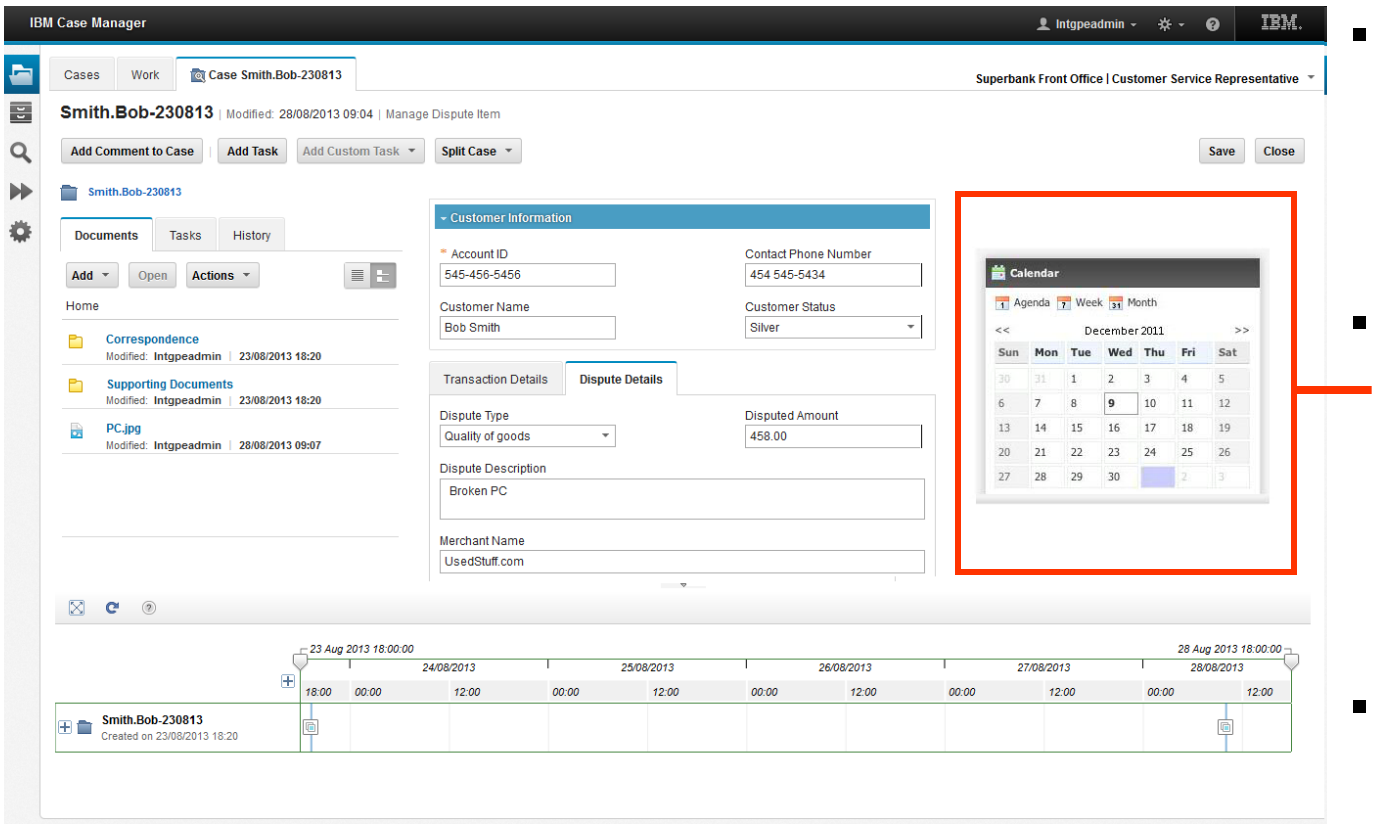


Integrated Data Layout Designer

- An integrated case data layout designer allows more efficient presentation of case data without having to use more flexible, but loosely coupled, external tools
- Multiple layouts can be created to provide different data views for case add, case details and work details
- Display and editing of multi value, repeating data such as dependant information or vehicle year, make and model
- Additional data entry and formatting options for each field type
- Continued support for use of advanced form templates



Client Customization and UI Widgets



- **Customizable component based UI**
  Standard page layouts can modified using drag and drop
- **Custom page widgets can be added to solution pages**
  Display other data or create custom actions to meet unique business requirements
- **Custom page widgets can reused in other ICM solutions**
  Once developed, they can be easily added to any page

IBM ACM Partner Solutions
Make an organizational impact and minimize your risk by partnering with experts who understand your specific business challenges

These line-of-business application solutions are built on the IBM Case Manager platform by partners with the industry subject matter expertise. These innovative, targeted solutions delivered by the ECM partners meet stringent requirements and generate tangible value. They span a wide variety of real world needs, such as:

- Patient care management - Healthcare
- Asset Protection (loss prevention) – Retail stores
- Asset/facility lifecycle management - Retail store location planning, opening/closing
- Vendor/supplier management
- Contracts Management - Cross industry
- Fraud investigation - Financial Services or Healthcare
- Injury Claims
- Loss prevention
- Child support disbursements payments
- Inmate tracking in prisons
- Pension administration
- Non profit administration
- Environmental compliance
- And many more!

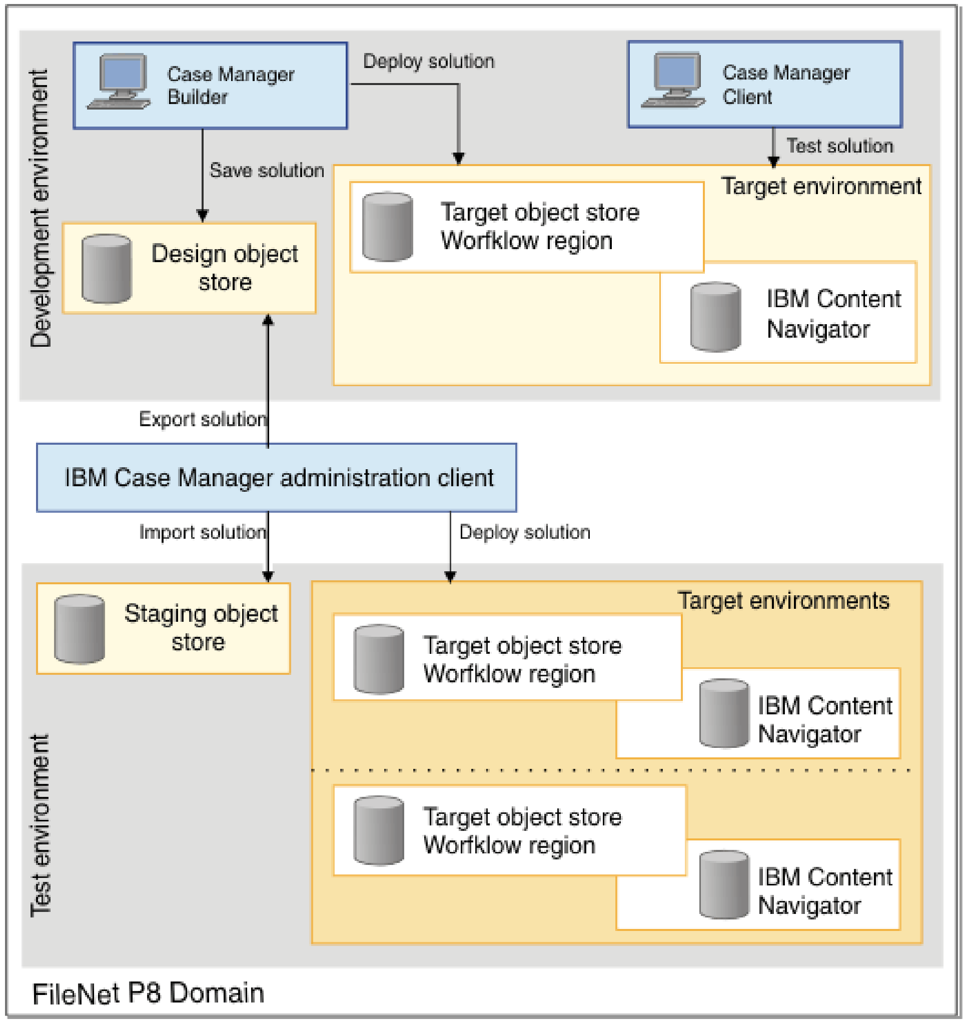
Accelerate2Value Partner Solutions Catalog

Powered by IBM Case Manager

Thank You!

Backup

Deployment Architecture / Model



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41