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Unleash the power of your content and processes  
to drive smarter business outcomes

Make active content work for you : ***IBM Case Manager***



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# Evolution of business needs...

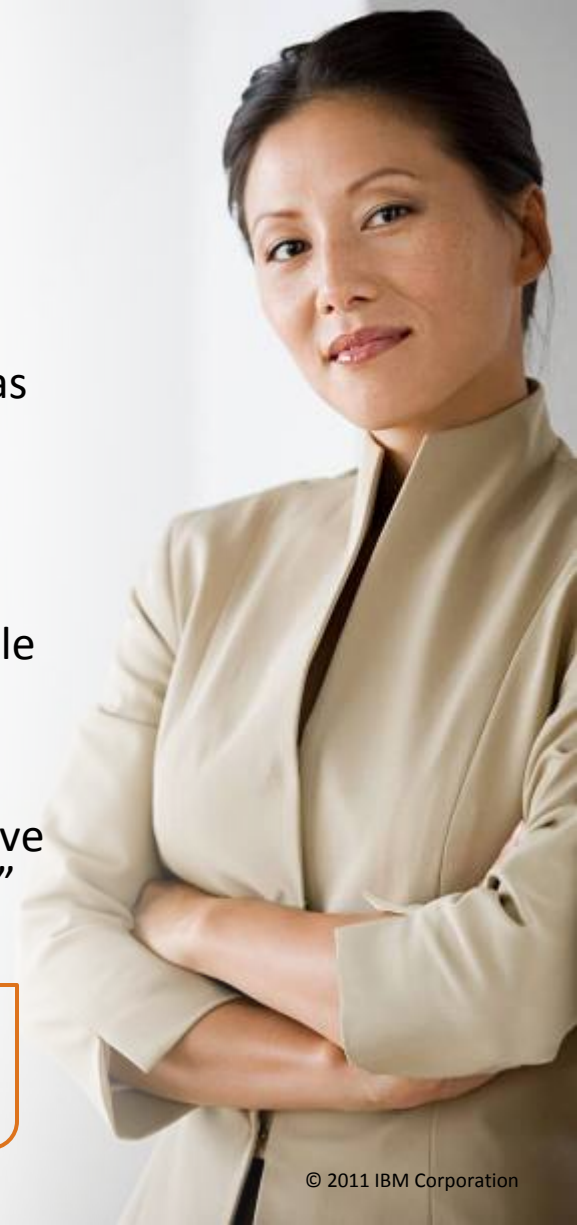
“As a result of ... continuous improvement initiatives, more heads-down, **mass-production-style ... activities ... are being eliminated** through automation, continuous improvement, or the rethinking of job assignments”

“**Predictable, highly repetitive work** will be handled as much as possible through straight-through processing that **the worker doesn't see or touch.**”

“**Older process automation approaches** based on old mass-production concepts are no longer adequate in an era of people driven processes.”

“Now these **ad hoc, human-driven** process flows **rival production and straight-through process types**, yet they receive far less attention and funding than more structured processes”

**Source** : Forrester, “Next Generation of Knowledge Worker Processes Will Dominate Enterprises”, Oct. 2010

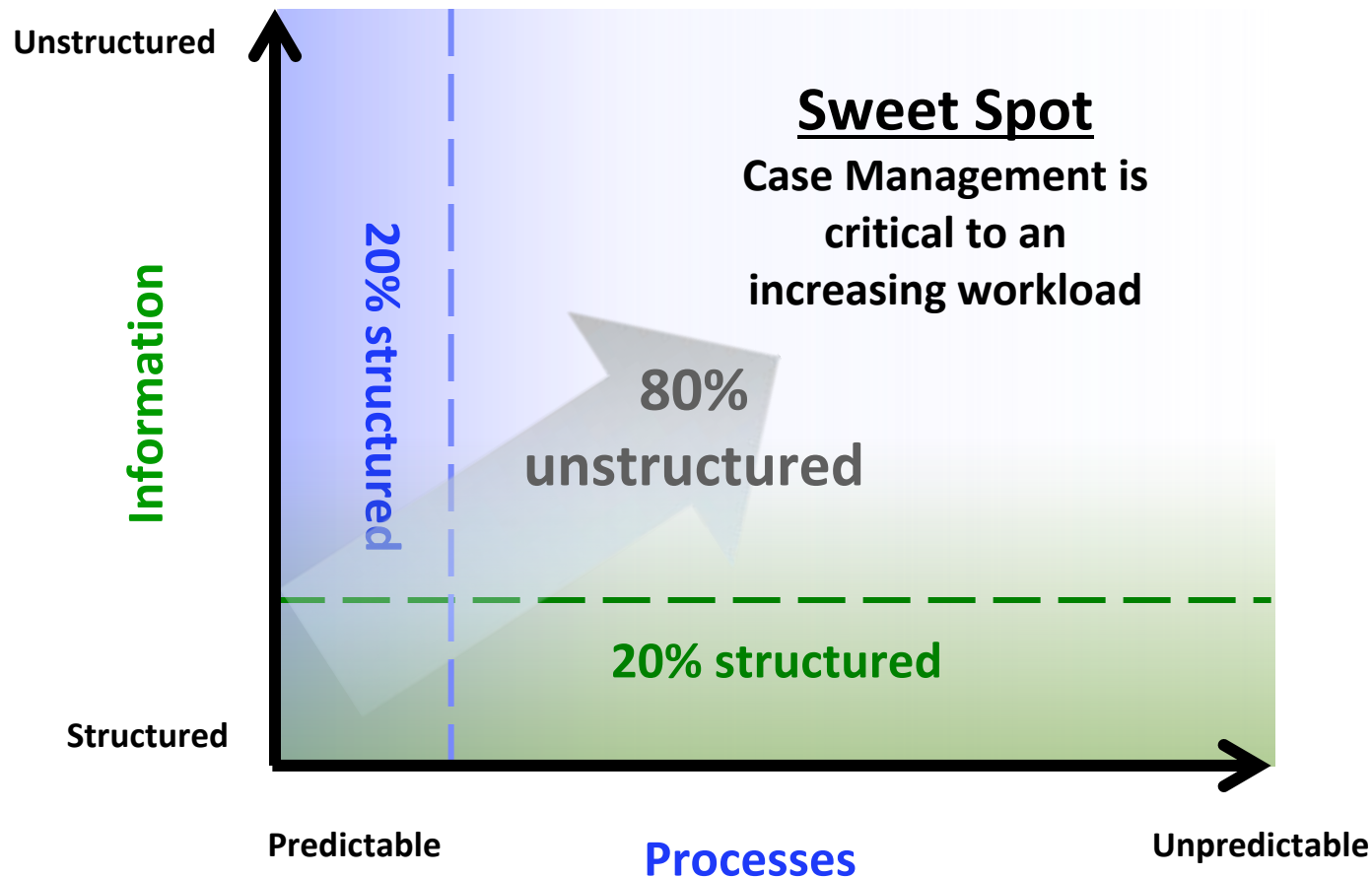


# A day in the life of a frustrated worker...



# Why are desired outcomes difficult to achieve?

*Critical business outcomes are driven by all types of processes and information*



# Organizations must improve and optimize business outcomes across a variety of use cases in every industry...

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

## Insurance



- Agent onboarding
- Underwriting process
- Claim adjudication
- Benefit disputes
- ...

## Banking



- Loan origination
- Wealth management
- Account changes
- Credit card fraud investigation
- Pension fund management
- ...

## Healthcare



- Patient cases
- Diagnosis and health management
- Commercial member enrollment
- Benefit Installation
- ...

## Government



- Grant management
- Court cases
- Incarceration and parole management
- Tax payer complaints
- Citizen services
- ...

## Energy & Utilities



- Rate case applications
- Permit approvals
- Complaint tracking
- Incident management
- ...



# What is Case Management?

FORRESTER®

## “Dynamic” Case Management

“A **semi-structured** but also **collaborative, dynamic, human, and information-intensive** process that is driven by **outside events** and requires incremental and progressive **responses from the business** domain handling the case. “



# The Answer, IBM Case Manager

## Business Benefits

### Agility

Rapidly develop new solutions. Increase your ability to change and innovate

### Insight

Improve business operations by helping knowledge workers make better, more informed decisions

### Innovation

Break down barriers to give more control of an organization's processes to the line of business

### Leverage

Provide a shared services platform approach to foster best practices, reuse, consistency and governance

# Advanced Case Management requires an **integrated** approach that addresses repeatable **patterns**

## Patterns

- Unifying people process, and information in context to reach an outcome.
- Collaborative or ad-hoc processes can drive prescriptive actions
- Work is knowledge intensive, and content is essential for decision making
- Insight required to drive the best decision paths and outcomes
- Auditability and compliance are key for all related elements throughout the lifecycle of a case

Today, organizations develop bespoke applications or purchase multiple point solutions

## Integrated Solution

- Content management
- Workflow
- Dynamic tasks
- Collaboration
- Social capabilities
- Business rules
- Analytics
- Compliance
- Integration
- Solution templates

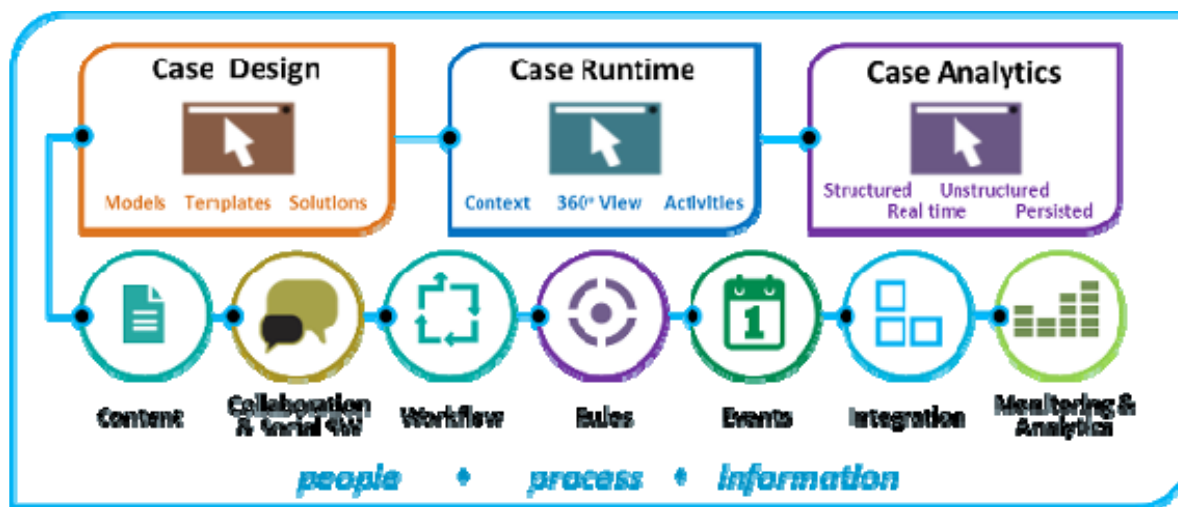
Tomorrow, organizations will implement business-friendly platforms that support multiple applications



# IBM Case Manager: An Agile, Flexible Platform

## Simplifying the delivery of solutions

- *Case Infrastructure built on IBM FileNet P8 Platform leveraging ECM services and content-centric process management*
- *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 to other systems*



# IBM Case Manager :

Active content infrastructure meets rapid solution design and delivery



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*Prescriptive processes can be designed and automated, creating efficiencies.*

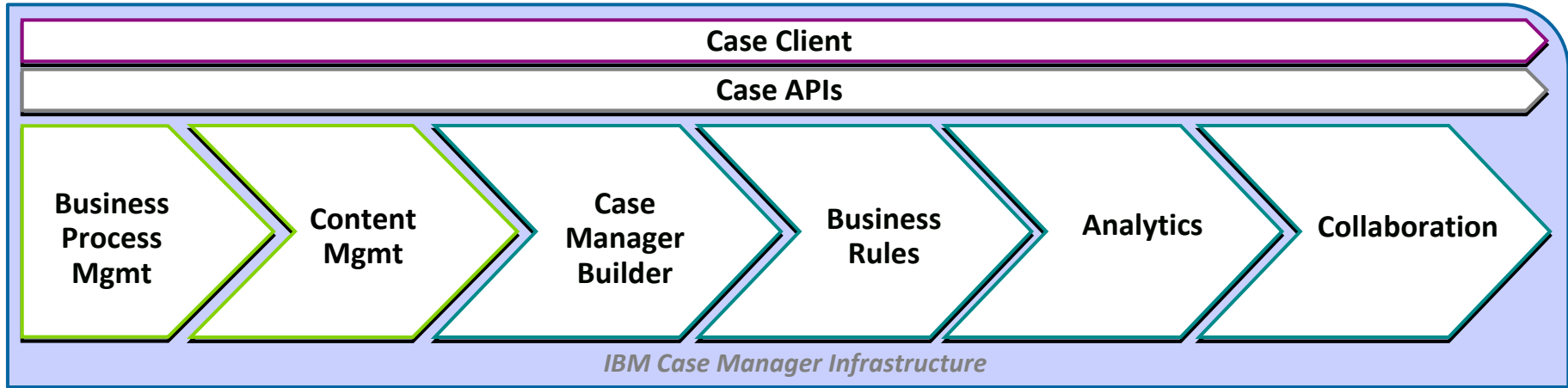
*Virtual file or case folders manage content and deliver it effectively to workers.*



**Active content  
Unifies these Capabilities**

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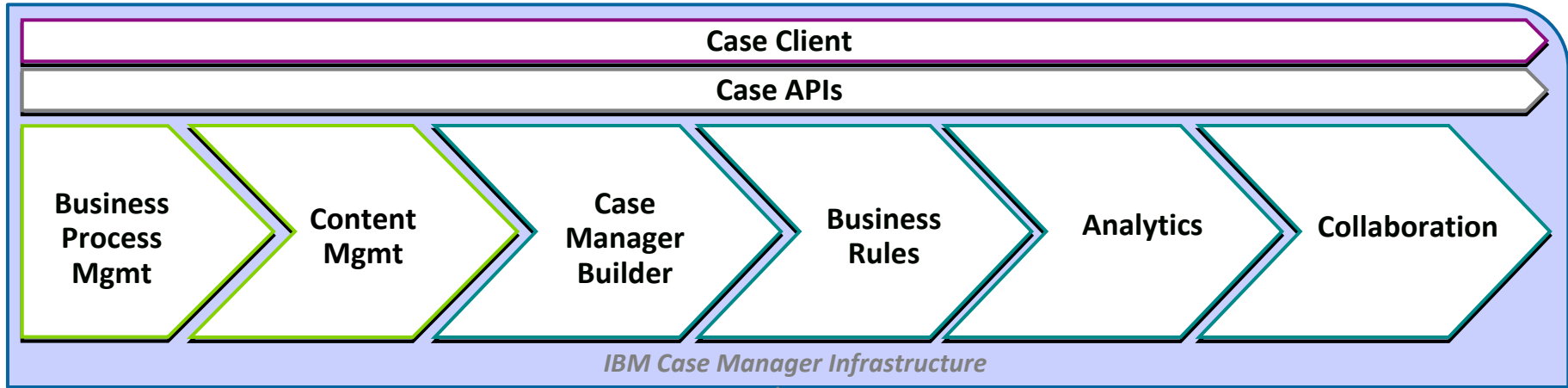
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**Active content  
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Active content infrastructure meets rapid solution design and delivery



**BPM & Workflow**  
Leverage processes

*Content Mgmt*  
*Leverage CM content*

*Business analysts design solutions **20-30% faster+***  
*Template reuse reduces solution design by **25%+***

*Business rules provide **increase efficiency 5-10%\****

*Integrated analytics provide a **5-10% efficiency increase\****

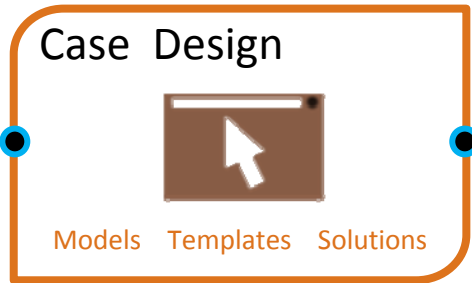
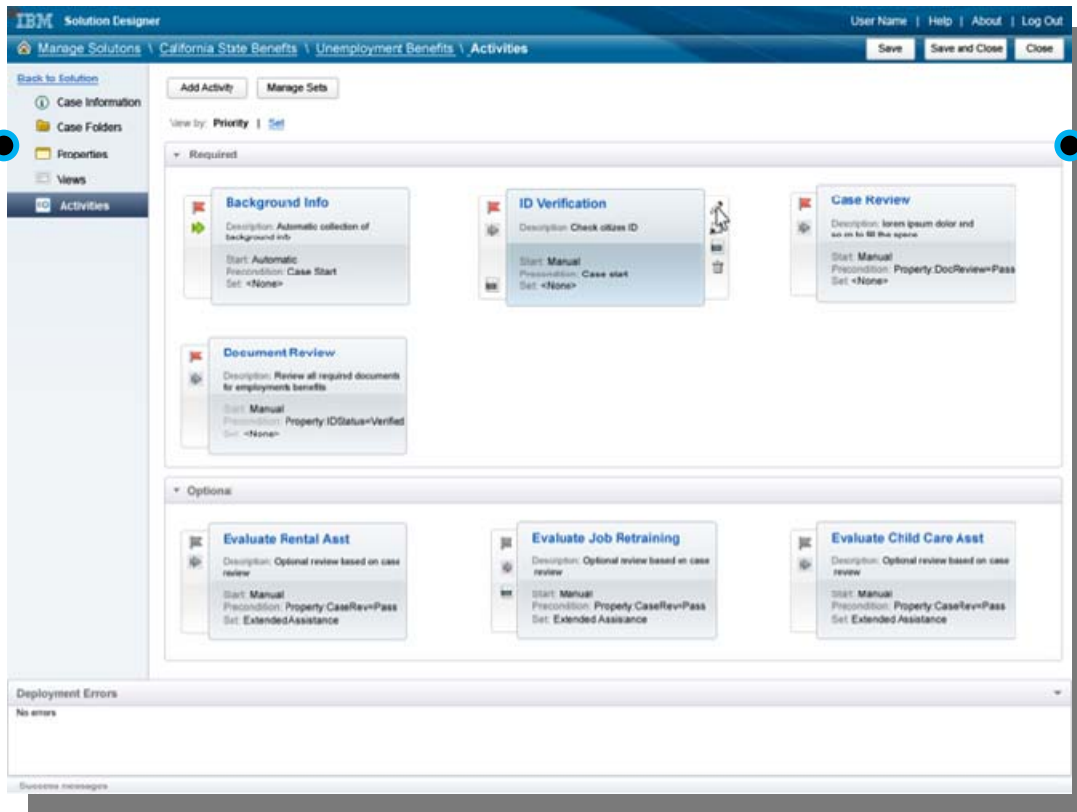
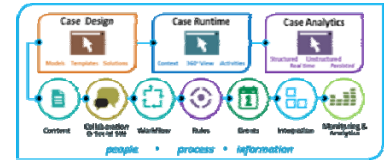
*Collaboration provides a **2% efficiency increase** and a **40% cost reduction\*\****

Integrates with WPS processes

*Cases hold external content*

\*IBM experience  
\*\*Gartner estimate  
+ After 2 initial processes

# IBM Case Manager: Rapid Application Case Design for the Business



- Leverage *templates* for a fast start  
*Represent organizational best practices*

Significantly shortens time-to-value for case-style applications

- Easy to use, “Interview Mode” (wizard-driven)  
*Case designer allows a business user to very quickly build a solution*

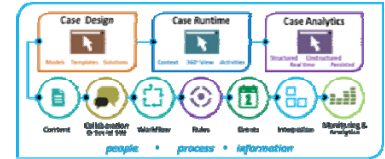
- Comprehensive across case assets  
*Solutions provide 360° role-based view of case*

## Bottom line:


Deliver end users the solution in a fraction of time of other approaches

# IBM Case Manager

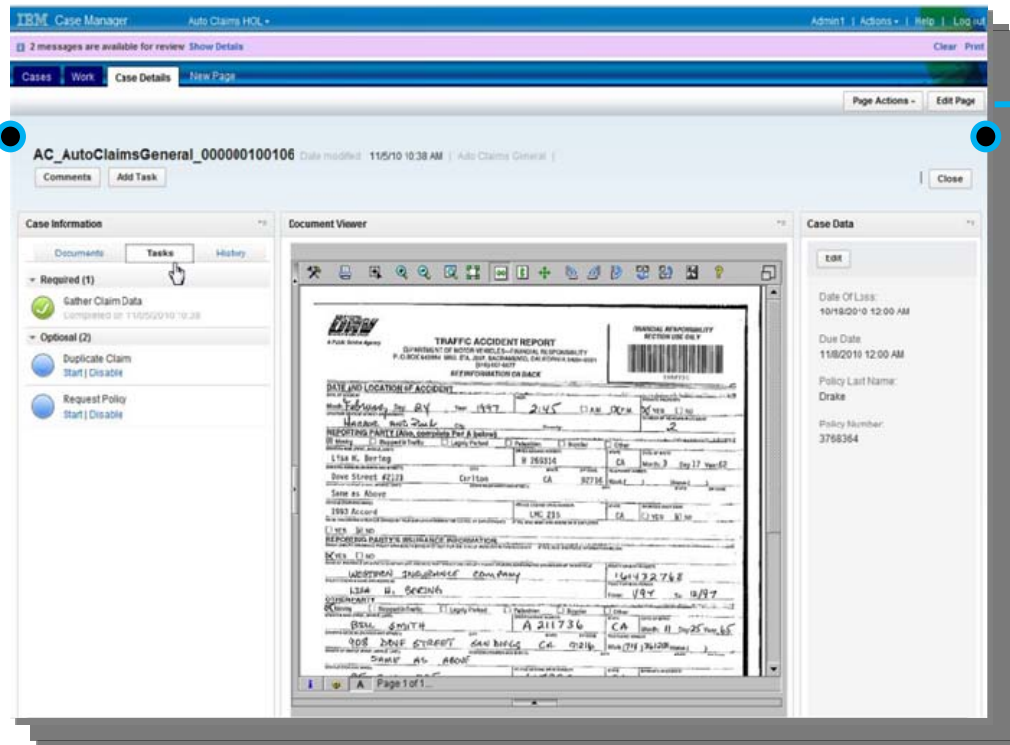
## Case Worker User Experience



### Case Runtime



Context   360° View   Activities

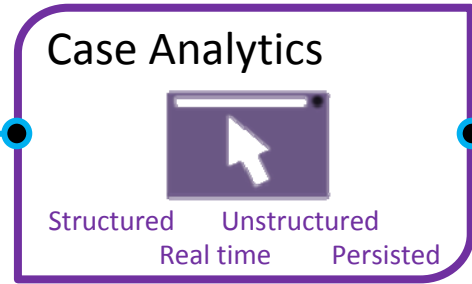
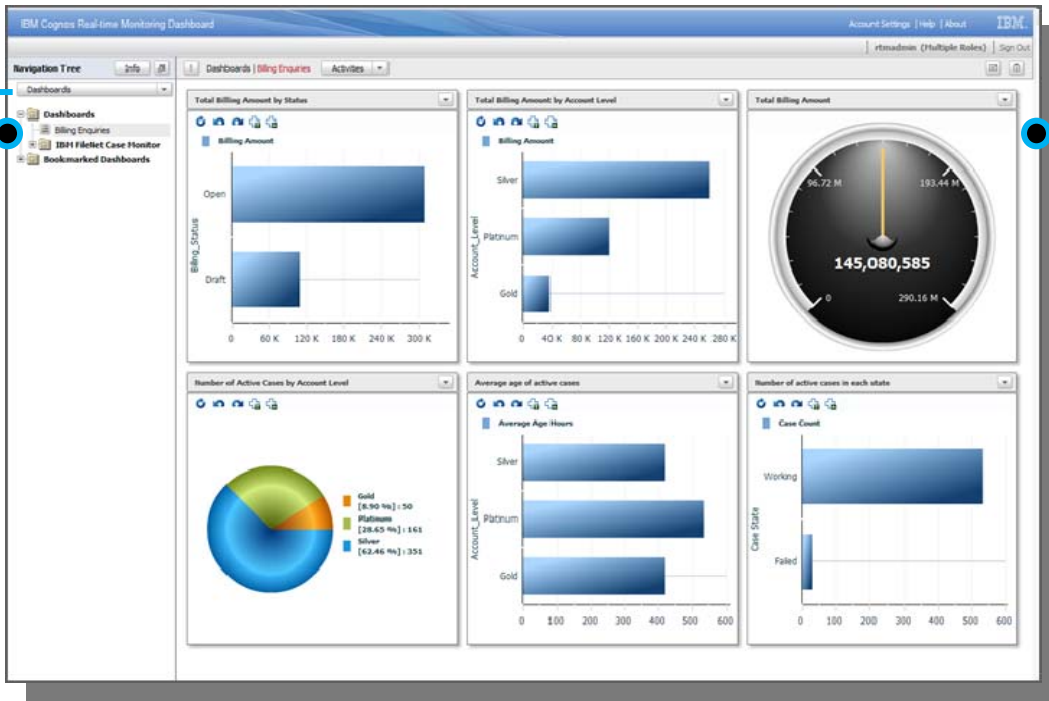
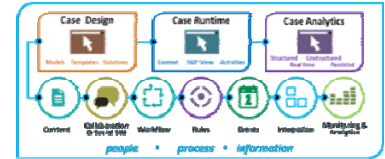


- **Role-based and personalized**  
*End user gets exactly the information they need to progress the case*
- **Flexible and extensible**  
*Can be configured to meet unique business requirements*
- **Provides deep context for case work**  
*No more disjointed jumping among applications*
- **Brings people, process and information together to drive case progression and better outcomes**

**Bottom line:**  
A case worker has all the information needed to improve case outcomes and optimize decisions.

# IBM Case Manager

## Powerful Analytics for Better Case Outcomes



- **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.



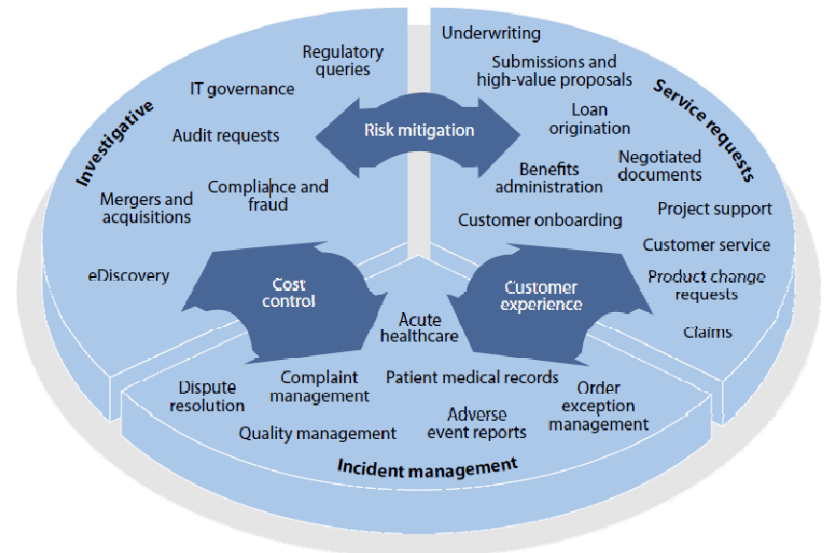
# Results from the Forrester Case Management Wave

## IBM Case Manager Declared Unique in the Market



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

“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.”



“Strategically, its strong **partnership ecosystem** will help drive the horizontal platform deep into industry solutions across all DCM use case segments.”

# Customer Case Study : Business Benefits

## Large FileNet Content Manager & BPM customer

### Need : Dynamic flexible Insurance claim processing

#### *Change a simple claim to complex claim*

Customer reports an accident that involves car damage

A simple claim is filed. Insurance company creates a reserve to pay damage

While claim is processing, customer reports bodily injury

Claim now changed from simple claim to complex claim that contains car damage and bodily injury



**Current solution:** Entirely new claim created. Productivity loss across hundreds of cases.

**IBM Case Manager Solution :** Simply trigger a new task on the same claim. Dramatic productivity & tracking gains

### Case management solution capabilities

- **Dynamic work handling**  
Change how work is progressed as events dictate
- **New tasks launched and managed**  
Retain the context and auditability of the entire case
- **Leverage current FN BPM processes**  
Full participants and are called upon, as required for case progression
- **No need to duplicate information**  
Easily address new/ dynamic tasks as part of a case
- **Apply resources more efficiently**  
Facilitate complex case elements

# Case Studies

## Customer experiences with IBM Case Manager

### Large US Pension System

- Provides retirement, disability and death benefit services.
- Seeking to modernize entire business operations
- Reviewed multiple options to meet their business requirements
- A top option reviewed was to purchase individual capabilities from various vendors and integrate

#### Solution

- Selected IBM Case Manager
- Attributed significant value to IBM's complete, integrated capabilities
- Highlighted the value of Case Designer to rapidly develop/ edits applications – including providing solution development power to business users

### Leading US Mortgage Lender

- Seeking adaptable solution for mortgage processing, underwriting, closing, post-closing and investor delivery.
- Business Partner rapidly provided prototyped solution in just weeks after gathering requirements

#### Solution

- Selected IBM Case Manager
- Supported customer's vision – A Flexible business process which adheres to a rules based compliance structure
- Mortgage consultants as active participants translated to reduced time to close loans, increased profitability and market share
- Analytics enable rapid adoption to market changes and increased business at lower cost

# Partner Case Study



## Pyramid's success with IBM Case Manager

*Pyramid solutions quickly adopted IBM Case Manager to develop solutions.*

### Goals

- Build and demonstrate customer specific prototypes within days/ week
- Provide solution templates that reduce risk, cost and time to delivering a application
- Provide real-life, dynamic Operational Dashboards
- Targeted business operations
  - Wealth Management and Trust
  - Account Opening
  - Pension Management
  - Mortgage Lending
  - Employee Lifecycle Management
  - Consumer Lending

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Aggressive goals targeted to meet key **client requirements**

### Key Benefits

- Rapidly developed customer prototypes
- Rapid development of industry specific templates/ solutions demonstrate the flexibility for IBM Case Manager
- Integrated business rules capabilities offer significant benefit and are easy to create
- Real time dashboards and integrated analytics offer new business insights

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Key benefit : **TIME TO VALUE**

# Roadmap / pathways to wider BPM value

*Get more from your investment in IBM FileNet*

**v.next**

1

## **Upgrade to FileNet P8 5.0**

- Lower TCO
- Java PE
- Performance improvements

2

## **Add IBM Case Manager**

- Improved tooling
- Case infrastructure
- Market leading strategy

3

## **Extend to all ECM starting points**

- Production Imaging
- Information Lifecycle Gov.
- Social Content
- Content Analytics

4

## **Leverage extended BPM capabilities**

- WPS for integration
- Enterprise rules
- Process analytics

## **Leverage IBM Software for BPM**

- Process design center
- Unified process execution infrastructure
- Unified runtime UX

- ✓ Establish currency with the latest FileNet **P8 release (5.0)**
- ✓ Add **IBM Case Manager** to empower business users and significantly shorten time-to-value
- ✓ Extend to other **ECM capabilities** driven by your platform investment and strong BVA
- ✓ Leverage extended **IBM Software for Business Process Management** capabilities today
- ✓ Share our long term vision of a unified Software Business Process Management platform

*thank you!*



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