IBM Case Manager in a Box
Velocity Play for Business Partners

Digital Conversation Guide

Content In the Context Of Business

More organizations need to make real-time, complex decisions with changing information, often working interactively internally or with others externally to obtain the most effective outcome. Advanced case management is a new, more efficient way of handling cases, whether your cases are contracts, disputes, investigations, incidents, fraud, escalations, customer service events, lawsuits, claims, social cases or applications. Advanced Case Management can:

- Give knowledge workers the control and insight they need to resolve cases more effectively
- Provide real-time access to the documentation, structured data and analytics required to make complex decisions
- Offer agile design capabilities to help reduce time to market and enable rapid application updates
- Leverage IBM Content Navigator to enable casework from any location through mobile connectivity and cloud solutions
- Support a full Enterprise Content Management (ECM) suite, including records management, complex search and content analytics

Use this five-step guide to learn all about the recently announced IBM Case Manager Workgroup Pricing play

1	2	3	4	5
Understand	Ask	Help	Demonstrate	Progress and Close

Enterprise Content Management

IBM offers a robust ECM platform, complete with every capability imaginable - from document generation and capture to data analytics and decision management - all of which is tightly integrated with IBM Case Manager to create a fortified productivity suite for knowledge workers in every industry.

- Understand IBM's POV on Enterprise Content Management - http://youtu.be/us-wSaCct0o

IBM Case Manager

Many organizations struggle with the changing nature of casework, often having to do more with less—less time, less budget and less staff. IBM Case Manager delivers a broad spectrum of ready-to-use capabilities that put information, analytics, collaborative tools and process controls into a single user interface. The result: organizations can work cases more efficiently and with better business results.

IBM Case Manager helps companies work smarter by enabling them to extract more value out of their information—whether it's contained within a customer request, loan application, or complex industry or regulatory procedure. The software provides a flexible framework, a cohesive approach and integrated tools for managing cases, allowing organizations to work smarter while addressing audit requests and regulatory requirements. It empowers caseworkers and knowledge workers to extract more value and insight from critical information, enabling them to make better and faster decisions on cases.

Understand *the Workgroup Pricing Play for Case Manager*

Workgroup Pricing for IBM Case Manager:

This new play enables Business Partners to sell IBM Case Manager to departments / businesses with up to 50 (x2, max) AUVUs per workgroup, at a new price point 50% off the Case Manager entitled price – A great way to introduce case management benefits to organizations across industries.

THE STARTER KIT

- Case Manager on IBM.com - IBM.com page for ICM
- Case Manager Overview - ACM Solution Bundle Overview
- Case Manager Client Conversation Guide: ACM Client Conversation Guide
- Basics: Partnerworld page for Advanced Case Management (ACM)

Target Industry: Cross industry (look for departments that are least efficient (complex workflows, heavy documentation) with highest potential for improvement)

Target Audience: IT, Line of business, or C suite

New Drug or Medical Device Submissions

Life Sciences

Fraud, Law Enforcement, Intelligence, Counterfeiting

Disaster & Incident Management

Banking, Insurance, Healthcare, Government

Customer Service Complaints, Appeals and Grievances

Caseworker Collaboration

Government, Healthcare

New Customer Onboarding

Cross Industry

Complex Claims Underwriting

Life, Disability, P&C, Health Insurance

Understand

Understand

Ask

Help

Demonstrate

Progress and Close

Ask *the Right Questions*

- Is the organization looking to improve business processes related to working with content? i.e. better claims processing, new customer onboarding, customer service, etc.

- In a recent AIIM Survey, executives were asked what their biggest need in terms of case management was. Over 50% responded 'access to information'. Is this a key requirement for your enterprise as well?

- Are your operations and systems connected or do they work in silos?

- Is the organization struggling with increased pressures of service resolution and customer engagement, while their core systems leave gaps in work processing and documentation, resulting in increased manual intervention

- Is the organization looking for ways to better manage incident management and reporting?

- Is the organization looking to reduce losses due to fraud?

- What tools do you use today to detect financial crime? How effective are they? Are there too many false positives? How is the Investigation team coping?

- What enterprise-wide mechanisms and processes are in place to prevent, detect investigate and resolve financial crime? How effective are they?

- Is the organization looking to uncover "unknown" fraud?

- Could the organizations' response to fraud be considered as a brand differentiator?

Ask · Understand · Ask · Help · Demonstrate · Progress and Close

Help *the Client See Value*

3

Showcase IBM solutions and capabilities to LOB and IT Audience with client-facing materials
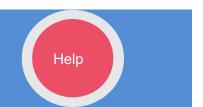
Client Presentations
- ACM – Client Presentation
- Molina Healthcare Video
- Evangelical Lutheran Good Samaritan Society
- State of Illinois

Use Cases Demos
- 5 Minute Demo (Partnerworld)
- ECM Video Demos (Partnerworld)

Entry Points:
- ACM – The Anatomy of an ACM Deal presentation

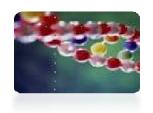Help   Understand   Ask   Help   Demonstrate   Progress and Close

Help *the Client See Value*

Three Clients succeeding today with Case Solutions

Improved customer engagement through operational efficiency

- Case lends itself to automating the branch; eliminates paper and content centric transactions to bring desired business agility
- Implemented in one department and then rolled out across LOBs; improves response time, service levels and compliance at the bank across processes

North American Bank

Efficiency in audit management and risk mitigation

- Case Manager enables upload of medical charts from a variety of sources and viewing of these charts based on security groups
- Improved Healthcare Effectiveness Data and Information Set (HEDIS) benchmarking thus improving state-level accreditation and federal incentives; saves utpo $20M by elimination penalties.
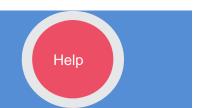
Molina Healthcare

High value business decisions made easy with ICM

- Case as the main user interface with a very customized workflow ensures very quick decisions at the executive level, for large value business transactions like M&A, joint venture, etc
- Real time collaboration, options to define rules for assignment of sign-offs / validations dynamically an reduced errors are the key in this low volume, very niche but high value implementation

International Consumer Products Company

Help | Understand | Ask | Help | Demonstrate | Progress and Close

Thought Leadership:

Forrester Research Forrester Wave: Dynamic Case Management report, 2014
Recent webcasts: Webcast Replays

2013 Global Awards for Excellence in Case Management

Texas Office of the Attorney General

2014 Global Awards for Excellence in Case Management

TIAA CREF

Winner for Excellence in Financial and Banking

State of Hawaii

Winner for Excellence in Social Services (with Imagine Solutions)

Leader in the Industry

'The largest ECM vendor in terms of market share and total content revenue, IBM has an increasing focus on high-value solutions.'

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

Gartner

FORRESTER

Sources: Gartner, Market Share Analysis: Enterprise Content Management Software, Worldwide, 2011 G00222424. Forrester, The Forrester Wave™: Dynamic Case Management, 2011

Demonstrate | Understand | Ask | Help | Demonstrate | Progress and Close

Progress and Close *the Opportunity*

5

- [ACM Sales Play additional resources](#)

Sales Support

Sunil Murtha

Business Unit Executive, WW Channels, Case Management solutions, ECM

sunilmur@us.ibm.com

Marketing Support

David Jenness

WW Market Segment Manager, Case Management, ECM

djenness@us.ibm.com