

Enterprise Content Management (ECM) and Industry Trends in the Australia Marketplace

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The World of Information

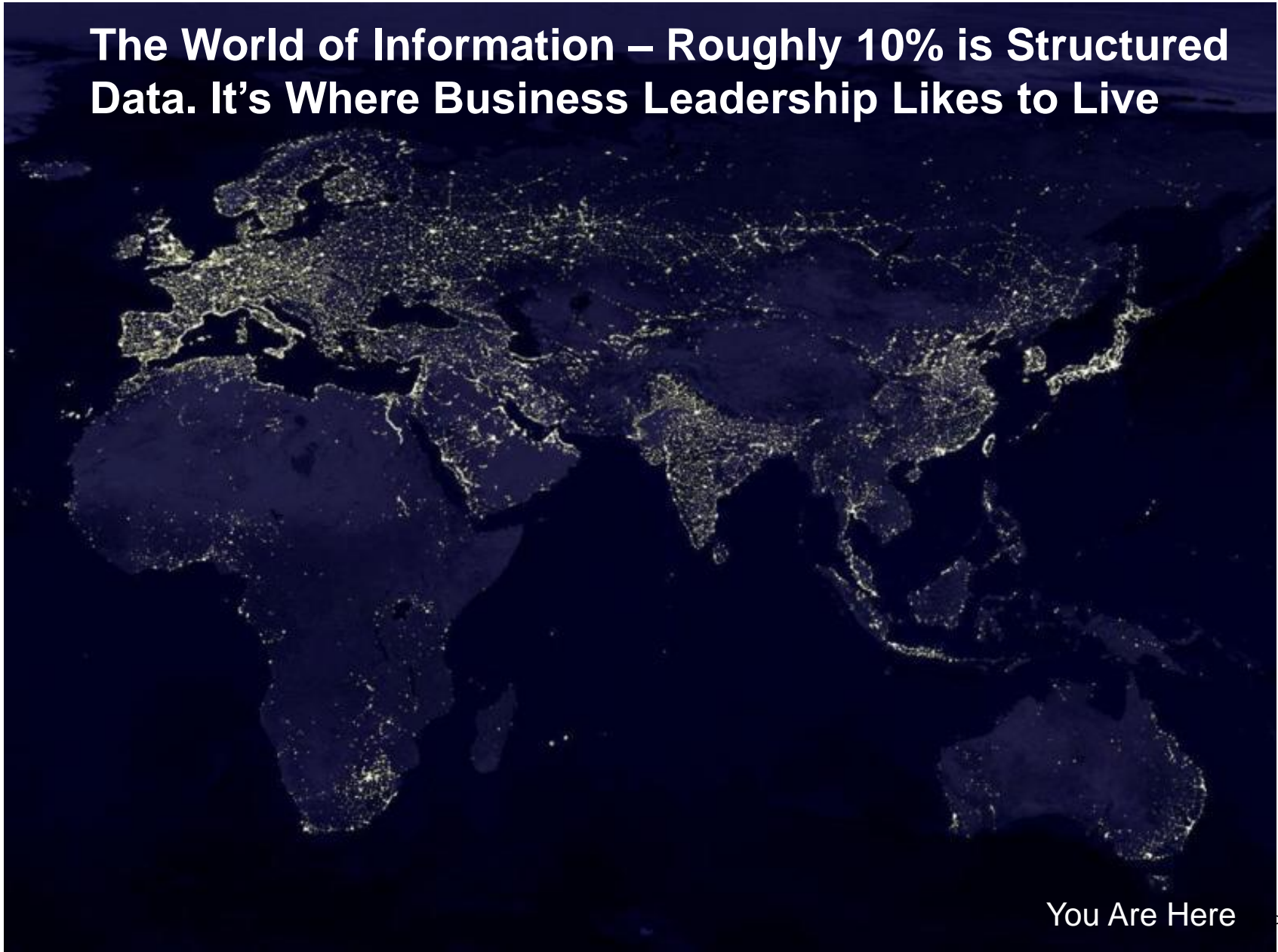


The World of Information – Night View



You Are Here Corporation

The World of Information – Roughly 10% is Structured Data. It's Where Business Leadership Likes to Live



The World of Information – 90% of Surface Seems Inhospitable Despite Being Composed of Content *

* Content is Information Designed Primarily for People to Consume

ECM means strategy + technologies. Start by knowing what to manage and what business outcomes to expect.



“Bad Content”



“Good Content”

Fuji Xerox Document Management Solutions helps its clients reduce costs with new service offerings

AUD27 million annually

saved by Fuji Xerox clients due to implementation of the new solution

Customer-centric

focus helped the company facilitate Smarter Commerce

Supports ongoing growth

By enhancing customer experience with flexible, scalable and federated hosted services



Business Need: The Fuji Xerox Document Management Solutions Pty. Ltd. wanted a document management solution that would grow with the business and support evolving customer service models.

The Solution: The company used IBM® Content Manager OnDemand for AIX® software to build a flexible, scalable, federated solution that provides document management as a hosted Software as a Service (SaaS) offering.



Solution Components

- IBM® Content Manager OnDemand for AIX®
- IBM WebSphere® Application Server
- IBM Content Integrator

“IBM was right along with us as we evolved from offering a printing-centric solution to a customer-service solution to a customer self-service solution.”

*—John May, Head of Solutions, Technology and Professional Services,
Fuji Xerox Document Management Solutions Pty. Ltd.*

Smarter Content, Smarter People



Business Content is Everywhere

Marketing manager posting on-line product videos

AP manager paying invoices

eCommerce product manager updating product photos

Telecom billing manager preparing customer bills

Insurance adjustor processing claims

Government agency processing benefits

Hospital searching medical records

Leasing sales manager mining contracts

Branch manager accepting a mortgage application

Taxi driver giving a receipt

Salesman submitting a sales order

How are your people engaging with Business Content?





Smarter Content, Smarter People

Put business content to work to realize new value



Capture



Protect



Activate



Analyze



Engage

Where Can You Begin?



Analyze

Reveal new insight hidden in content

Improve business decisions, assure Next Best Action

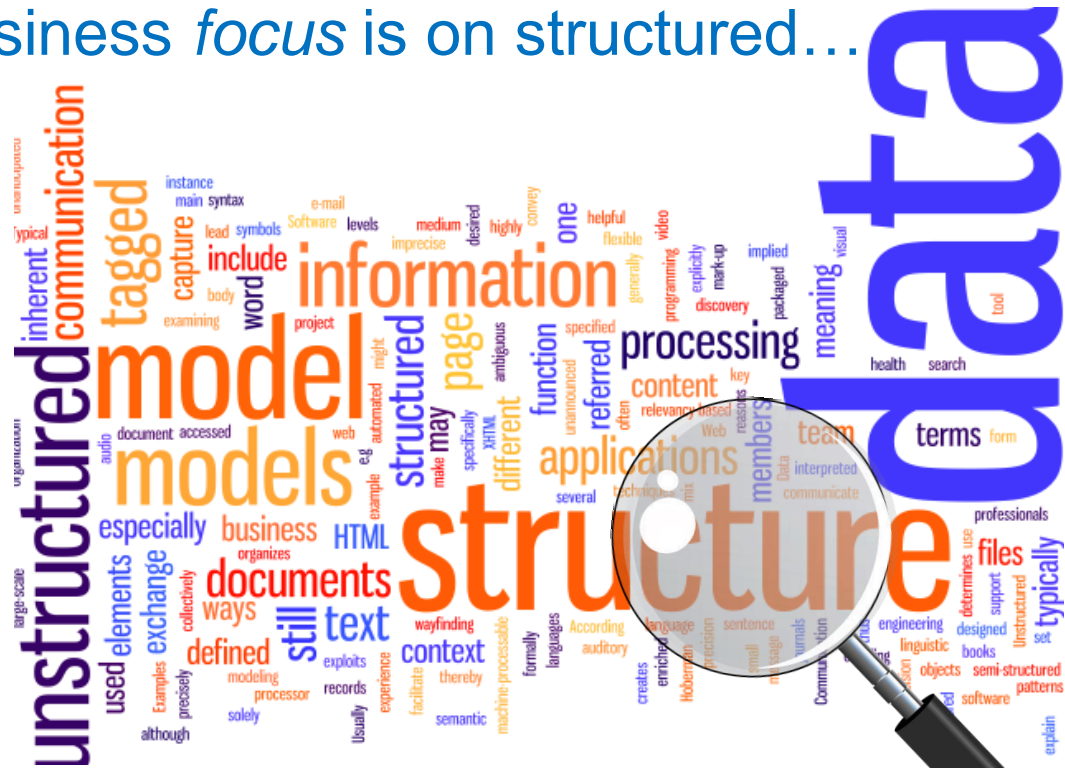
Improve performance of people and systems



Content = Unstructured Data Information Designed to be Consumed by People

- ➔ 90% of business information is unstructured *
- ➔ 90% of business *focus* is on structured...

Volume,
Veracity,
Variety,
Velocity.



What about *Valuation*?

* Source: IDC, 2014 Study

Identify, Analyze and Act on Unstructured Data

Secure High Business Value Content

IP, Pricing, Sales, Marketing, Contracts, Patent, Planning

Remediate Regulated Content

PII, PCI, HIPAA, HR, Financial Records, Customer

eDiscovery Identification and Collection

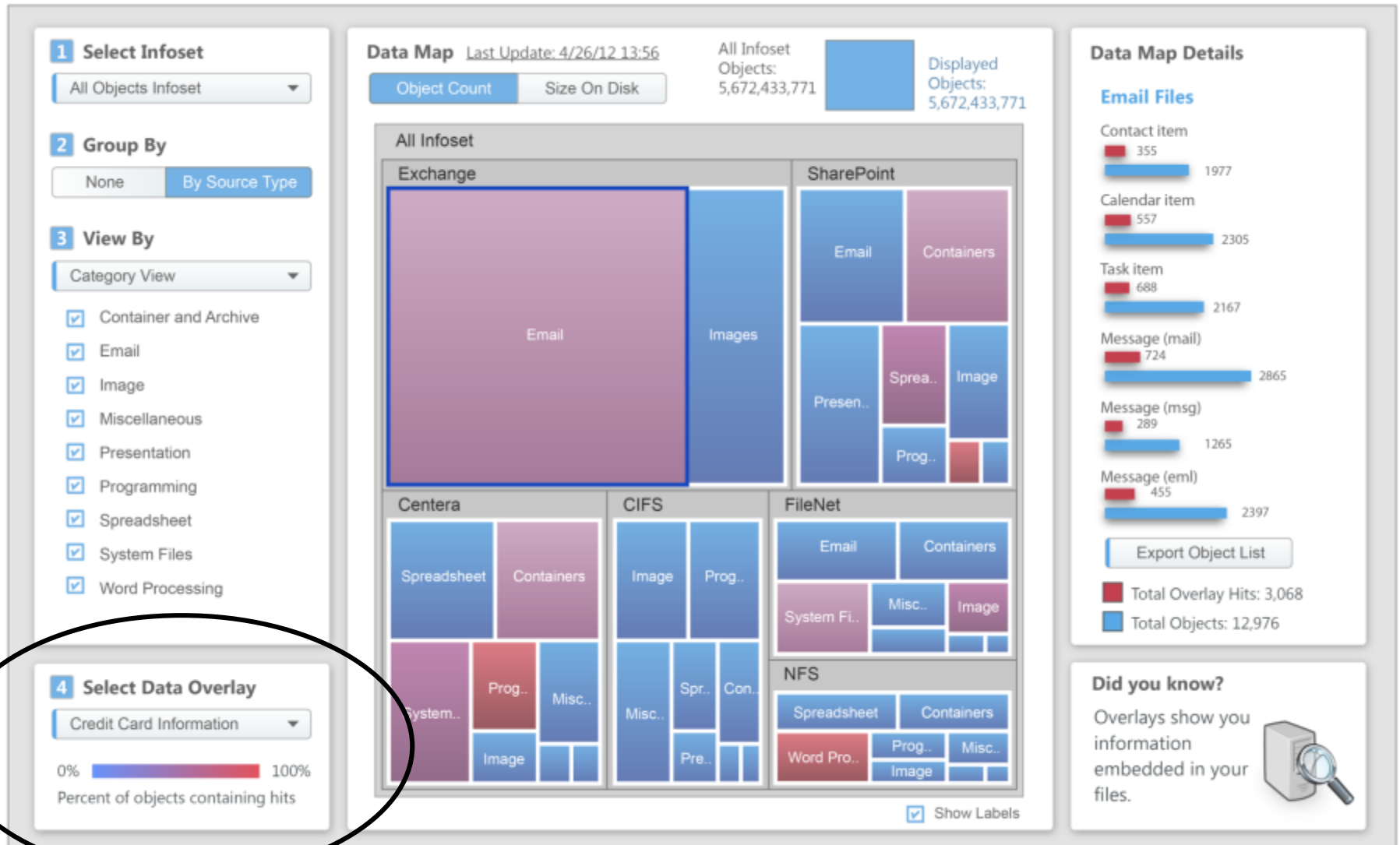
Early Data Assessment and Targeted Collection

Cleanup ROT Content

Redundant, Obsolete and Trivial Content

Reducing Risk: Identify potential compliance issues

IN-PLACE Data Analysis





A spectrum of different types of analytics, which can position business content in context for deeper understanding and insight

Content Analytics



Understanding

- Search and discovery
- Document classification
- Historic trend analysis
- Social media trends

Investigative Analytics



Quantitative

- Predictive Analytics
- Fraud Detection
- Entity Relationships

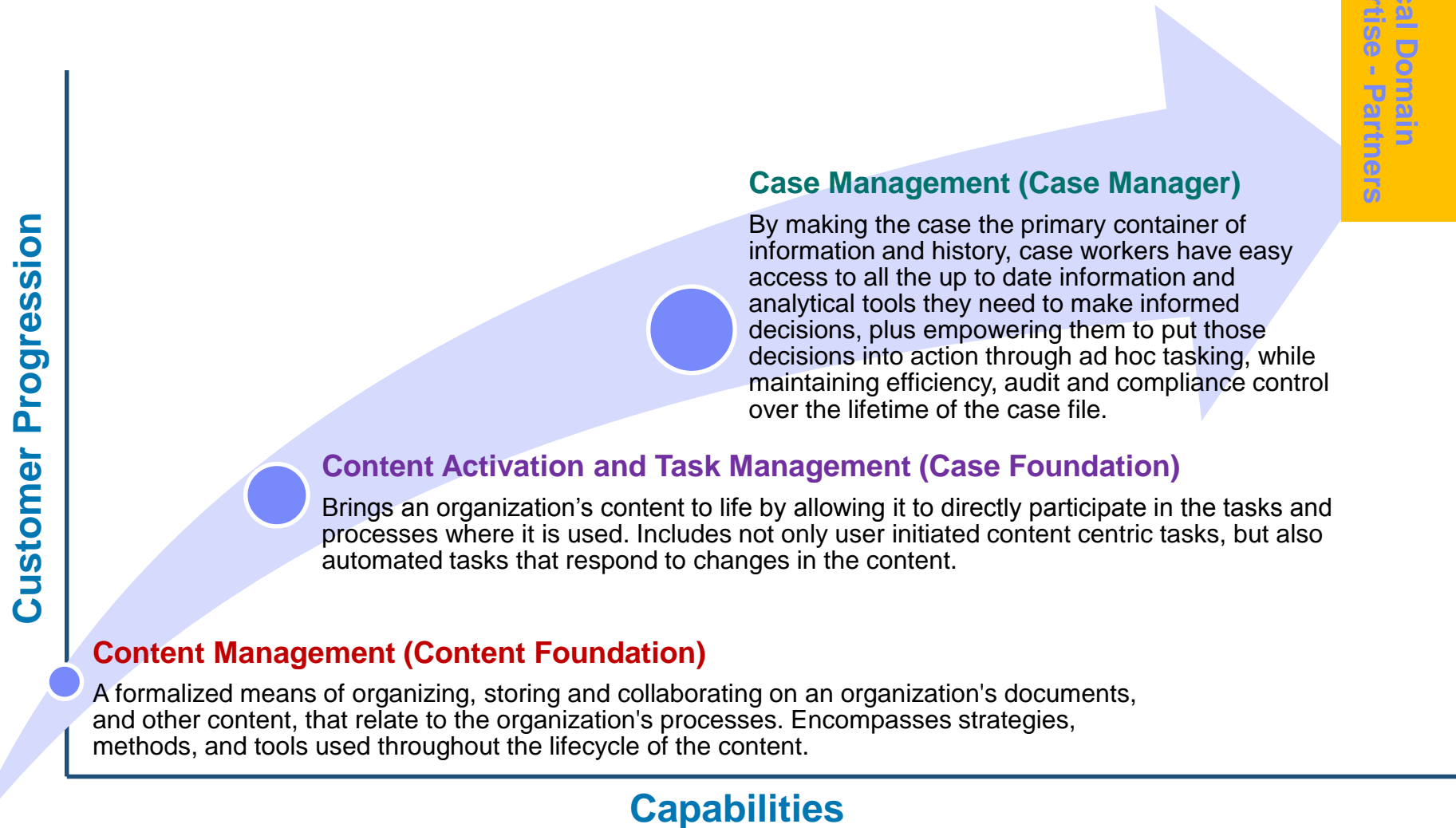
Case Analytics



Qualitative

- Performance metrics
- Team analysis
- Real-time case insight
- Resource optimization

ECM Capability and Value Progression

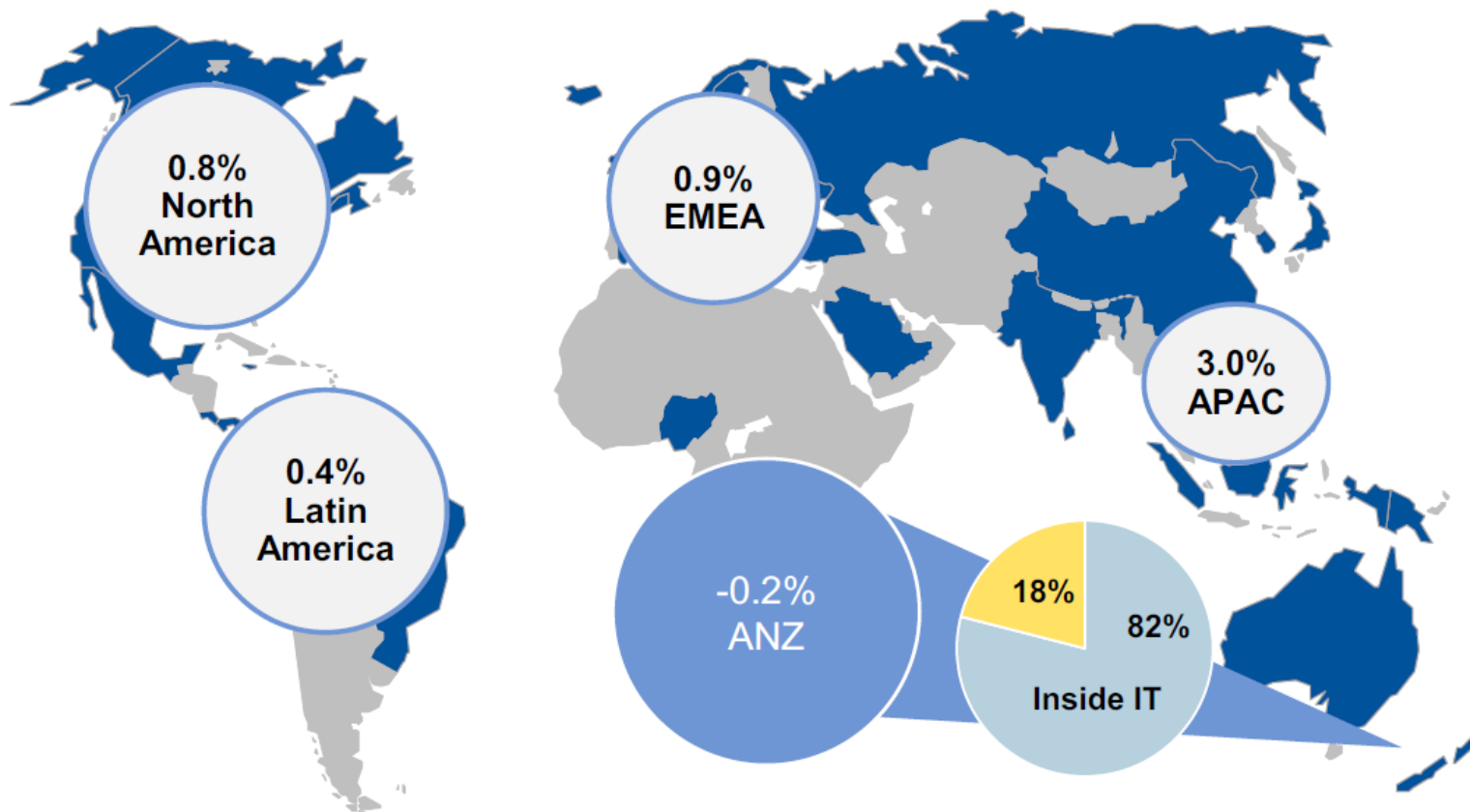


Market Overview

IN CONTEXT: ECM IN ANZ

ANZ IT Spend is expected to fall. But 82% of all IT spend is still controlled by CIO budget. Expect there to be a struggle as Digital Innovation spurs cost.

Global Weighted Average: 1.0%



n = 2,711

Source: Gartner (January 2015)

ANZ CIO focus on Analytics, Cloud, and Mobile perfectly reflect the IBM ECM strategy – and changing dynamics of how Digital Business gets done

Australia and New Zealand

1. BI/Analytics
2. Cloud
3. Mobile
4. Infrastructure and Data Center
5. ERP
6. Digitalization/Digital Marketing
7. CRM
8. Networking, Voice and Data Communications
9. Legacy Modernization
10. Security
11. Industry-Specific Applications
12. Applications Development

ROW

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12. Enterprise Applications

Source: Gartner (January 2015)

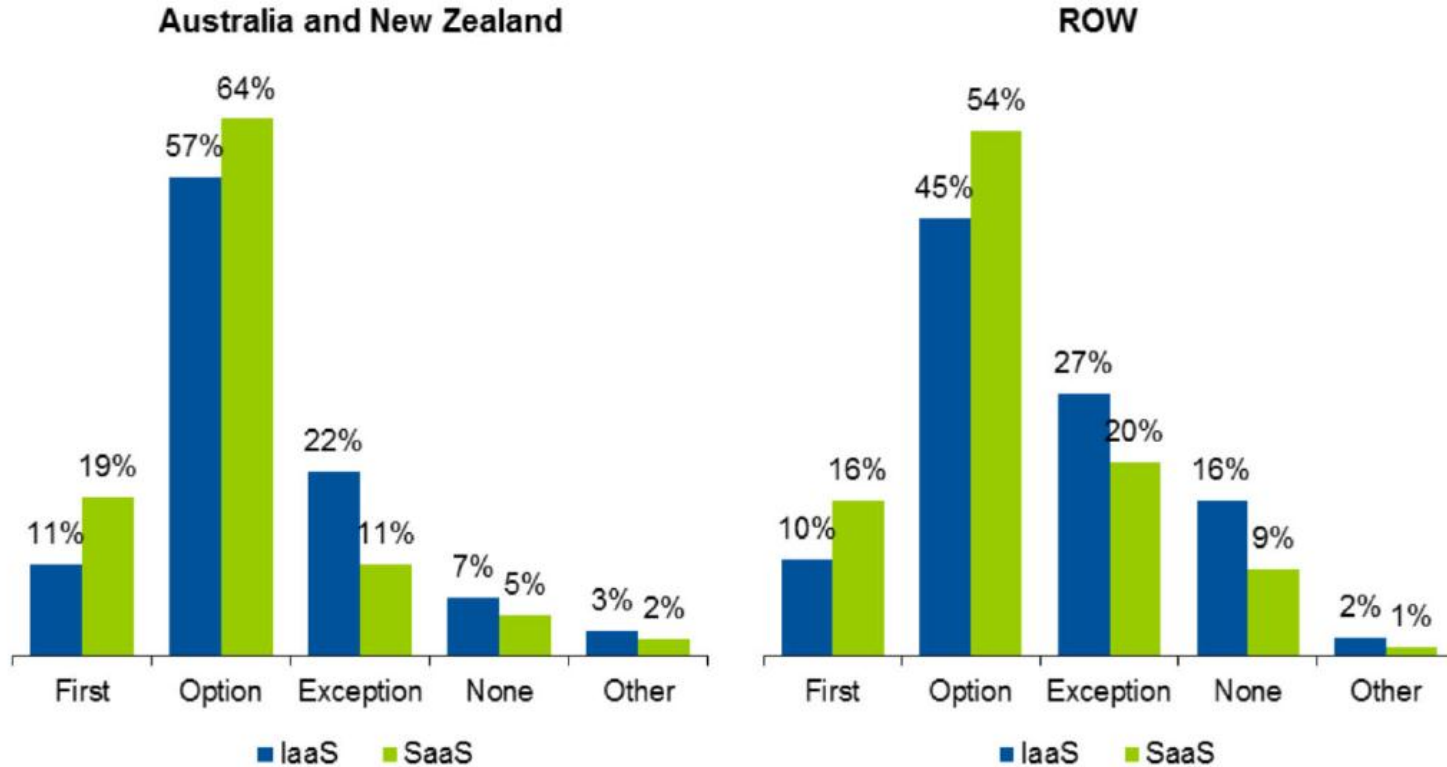
ANZ CIO focus on **Analytics**, Cloud, and Mobile perfectly reflect the IBM ECM strategy – and changing dynamics of how Digital Business gets done

		Percentage of CIOs Who Agree	
From	To	Australia and New Zealand	ROW
Passive analysis of data	➔ Active experimentation informed by data	84%	80%
Backward-looking reporting	➔ Forward-looking predictive analytics	82%	79%
Structured information	➔ New types of information, including social and multimedia	66%	65%
Separate analytics	➔ Embedded analytics	60%	63%

Source: Gartner (January 2015)

“CIOs must also recognize that vendors alone cannot derive the business value expected of BI. For example, a bank, implementing IBM's Watson as part of its BI initiative, invested in its own talent and people (not just in the IT but also in the innovative thinking and culture change needed to position itself to be successful in harvesting the benefits from its investment in the Watson-based solution).”

ANZ CIO focus on Analytics, **Cloud**, and Mobile perfectly reflect the IBM ECM strategy – and changing dynamics of how Digital Business gets done

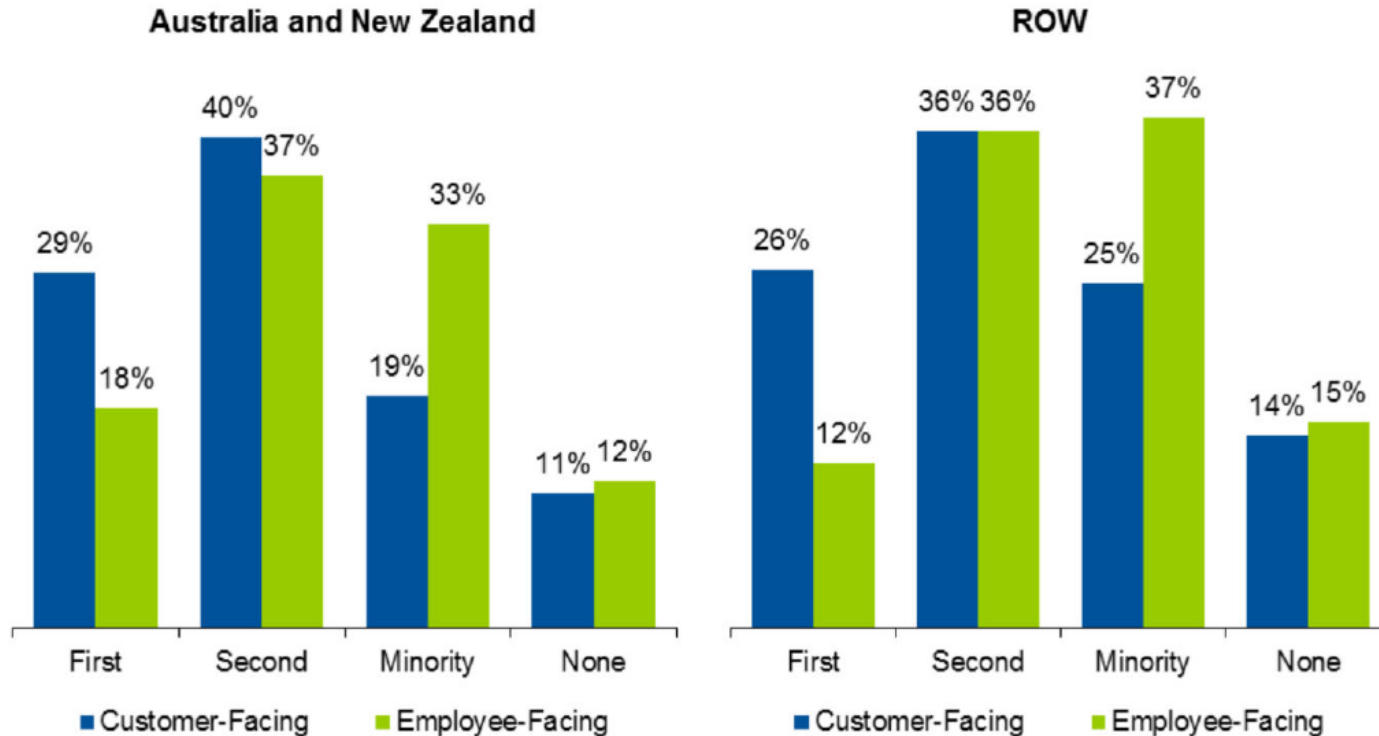


Numbers may not total 100% due to rounding.

Source: Gartner (January 2015)

“Gartner has observed the majority of ANZ federal and state governments release "cloud first" procurement policies during the past 18 months, making it much simpler for public-sector CIOs to procure cloud services.”

ANZ CIO focus on Analytics, Cloud, and **Mobile** perfectly reflect the IBM ECM strategy – and changing dynamics of how Digital Business gets done



Numbers may not total 100% due to rounding.

Source: Gartner (January 2015)

“Mobile apps are an important component of a dynamic digital business. Gartner has observed some ANZ CIOs apply dynamic bimodal IT processes specifically for mobile app development and project governance. CIOs who are yet to embrace bimodal IT should consider building improved agility into their mobile app development as the first step of their bimodal transition.”

Forrester Sees Similar Themes – but through a different lens

Technology Budgets Are Rising Again In Australia And New Zealand

After several down years, CIOs are anticipating that their budgets will increase again in 2015 as technology management's efforts to reduce costs and operate at the speed of the customer give CEOs and CFOs the confidence they need to increase the technology budget.

More Technology Spending Is Happening Outside Of The CIO's Department

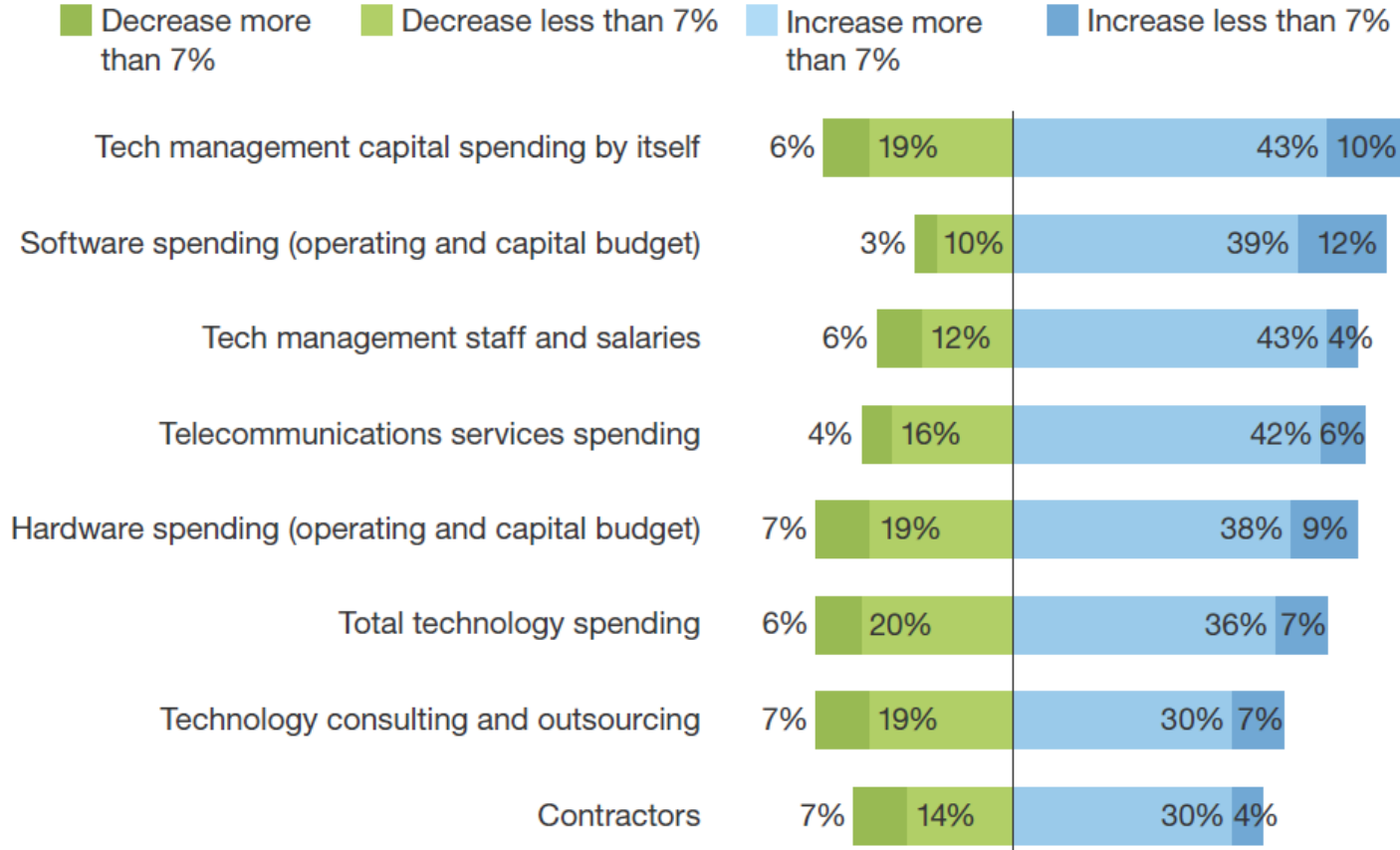
In the age of the customer, business leaders believe that the technology is too important to not be involved, spending significant sums on technology systems. But this is not a reflection on the CIO's team; with technology driving an increasing number of customer transactions, customer-focused teams need to take an active role in sourcing solutions.

Australian And New Zealand Businesses Are Embracing The Mobile Mind Shift

The three areas that will see the largest increase in spending in 2015 are smartphones, tablets, and mobile applications and middleware. Businesses in Australia and New Zealand are embracing the mobile mind shift and supporting their employees and partners in their mobile moments.

Forrester Sees Similar Themes – but through a different lens

“How do you expect your spending on the following categories to change in 2015 compared with 2014?”



Base: 69 technology decision-makers in Australia and New Zealand

Source: Forrester’s Business Technographics® Global Budgets Survey, 2014

Forrester Sees Similar Themes – but through a different lens

The age of the customer calls for greater agility — and retail banking is responding

While the financial sector is a leading adopter of cloud computing in the US and Western Europe, its cloud moves are typically led by investment banking. [In Australia, the move to cloud is led by retail banking due to high citizen adoption of mobile technologies.](#)

The government taps cloud to alleviate funding woes

We found that where federal governments talk a good game about cloud, local and state governments are moving forward in Australia because they have no choice if they want to modernize, scale to serve growing constituencies, and improve citizen engagement. Flat and shrinking budgets simply won't accommodate these growing needs, and government CIOs know they are in the age of the customer.

Consumer empowerment implores retail use

Much like the rest of the Western world, Australian retailers understand the power of informed, mobile customers and are moving aggressively to empower them. [This means delivering mobile experiences, crunching customer behavior, and analyzing data closer to real time and adapting to social media inputs — all empowered by cloud-based services](#)

As ANZ adopts cloud technologies, where does ECM fit?

Content Management Technologies	Cloud Maturity Level	Cloud Value Proposition for Adoption
CCM and social content (communities, crowdsourcing and idea management)	Emerging	Easy for users (and IT) to experiment with because of low barrier to entry; early experimentation leads to earlier exploitation for business benefit.
Collaboration and teaming, EFSS, and video content management	High growth	Lessens the effect of skills shortages and makes it easier to move away from older products; improves managing peak loading; secure storage both within and external to the organization.
Content-centric business processes (legal documents, loan originations, claims processing, contracts, proposals and secure email)	High growth	Enables new cross-organizational capabilities with trusted third-party business services (encryption, local storage, audit trails, data privacy, rights management).
Archiving, imaging and WCM	Mature	Exploits providers' economies of scale to drive down cost.

Source: Gartner (July 2015)

Forrester’s CX survey respondents don’t see IT leadership in the mix – how far removed from Digital Business Strategy is CX in your organization?

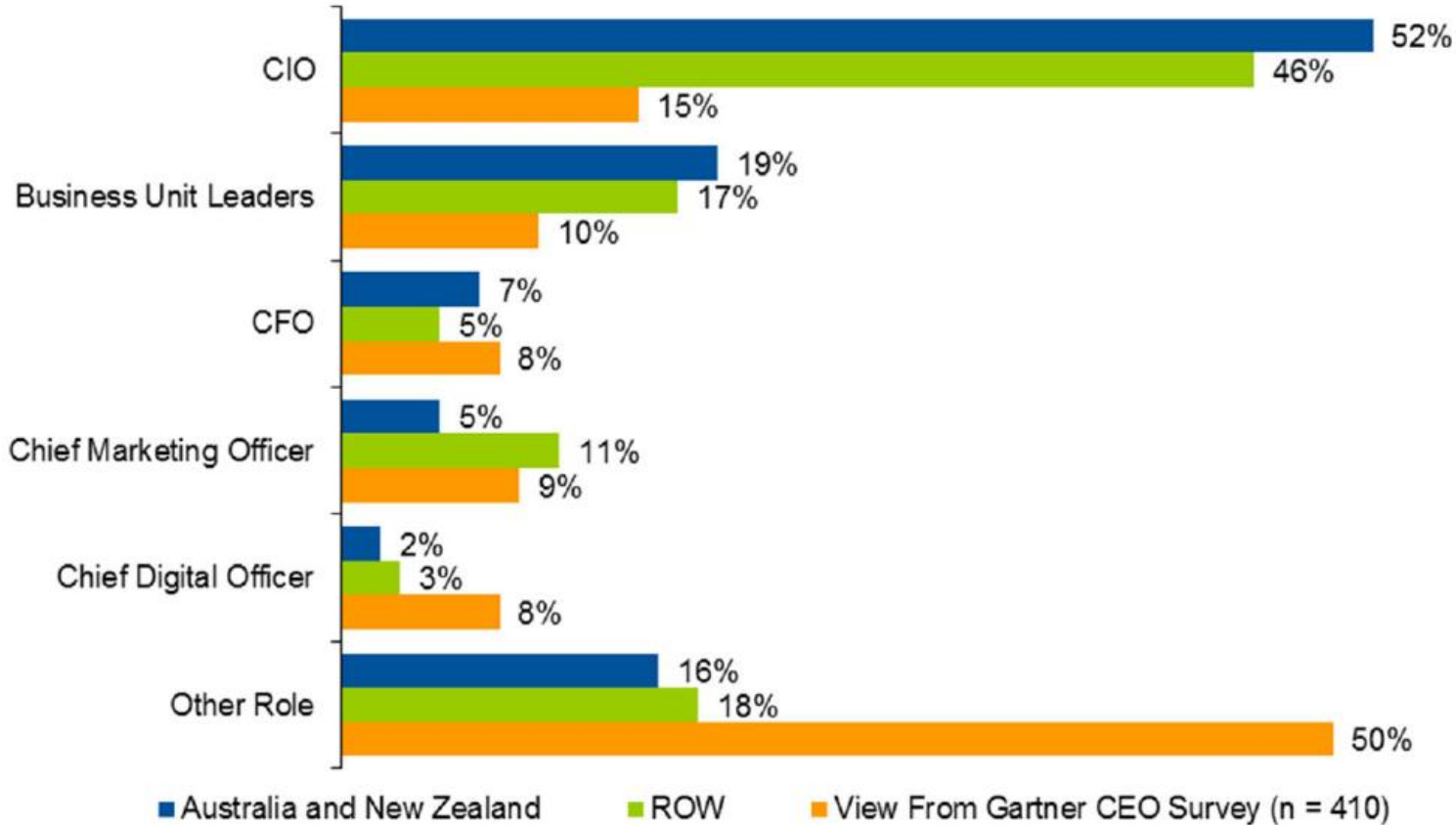
“What is the title of the individual who is in charge of customer experience across the entire enterprise?”



Base: 42 customer experience leaders
 *Base: 47 customer experience leaders

Source: Forrester’s Q2 2015 Australian Customer Experience Maturity Online Survey
 *Source: Forrester’s Q2 2014 Australian Customer Experience Peer Research Panel Online Survey

But, in a separate survey from CIOs, ANZ CEOs don't agree that Digital Business leadership responsibility falls on the CIO, either



"Other Role" includes head of innovation, chief data officer, chief technology officer and head of sales. Numbers may not total 100% due to rounding.

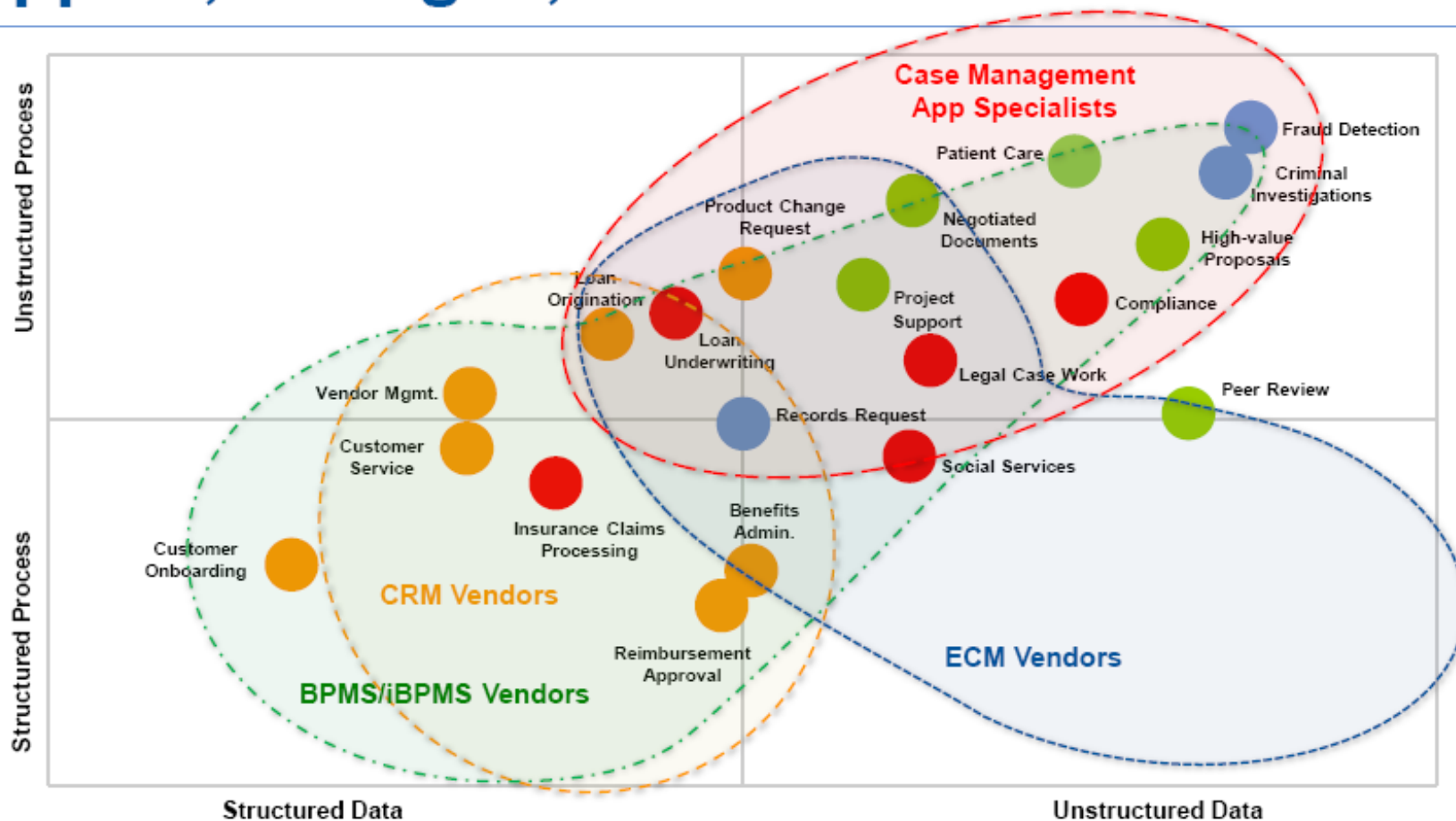
Source: Gartner (January 2015)

AIIM, the global ECM Industry Association, asked its members what key issues IT and business leaders would face in 2020:

Hypothesis/trend	North American ranking	European ranking	ANZ ranking *
The proportion of effort the enterprise has to spend on ensuring privacy and security will increase.	1	1	1
There will be more country-specific regulations and restrictions related to the cloud and privacy than there are now (i.e., governments will become more national and less global in their approach to the cloud).	2	8	
The central role of content management solutions will be to: 1) Determine the human user's current situation; 2) Understand precisely what the person wants; and 3) Use powerful analytical ability to make highly focused and insightful suggestions.	4	1	
Corporations rely on knowledge workers, in partnership with IT staff, to identify new technology that can improve business operations.	6	4	
90% of the world will have broadband access equivalent to today's best Wi-Fi.	3	6	
The procurement model goes from large up-front investments to freemium subscriptions.	7	3	2
The core skills of world-class IT departments will shift from people focused on operations, to people with skills at the intersection between business analyst and IT designer.	5	7	
The percentage of workers telecommuting some hours per week will double (currently 24% for US workers).	11	5	3
The percentage of the workforce now defined as knowledge worker will increase from circa 40% to more than 75%.	8	11	
The business currently controls 35% of technology spending, but this will grow to 90% by 2020.	10	10	

* for the purpose of today's discussion

Case Management: A "Market" of Apples, Oranges, Limes and Blueberries



Orange: Service request (workflow heavy)

Blue: Investigative (data heavy)

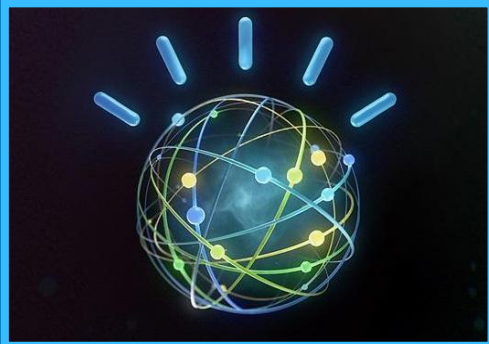
Green: Incident (collaboration heavy)

Red: Process to decision (rules/policy heavy)

Growing ecosystem of IBM and Partner solutions

Smarter Content Solutions

Cross-IBM Solutions



Industry Focused Partner Solutions

 HEALTH

 INSURANCE

 ENERGY

 BANKING

 GOVERNMENT

 TELCO

Gartner named IBM the leader in ECM



Enterprise Content Management Magic Quadrant '14

“Enterprises looking for a strategic infrastructure provider to support many content-related needs should consider IBM.”

“Whereas most of its competitors charge extra for a rich client interface, IBM Content Navigator is included in its core server license, which also serves as an application framework on which IBM builds its ECM portfolio.”

Forrester named IBM the leader in Transactional ECM

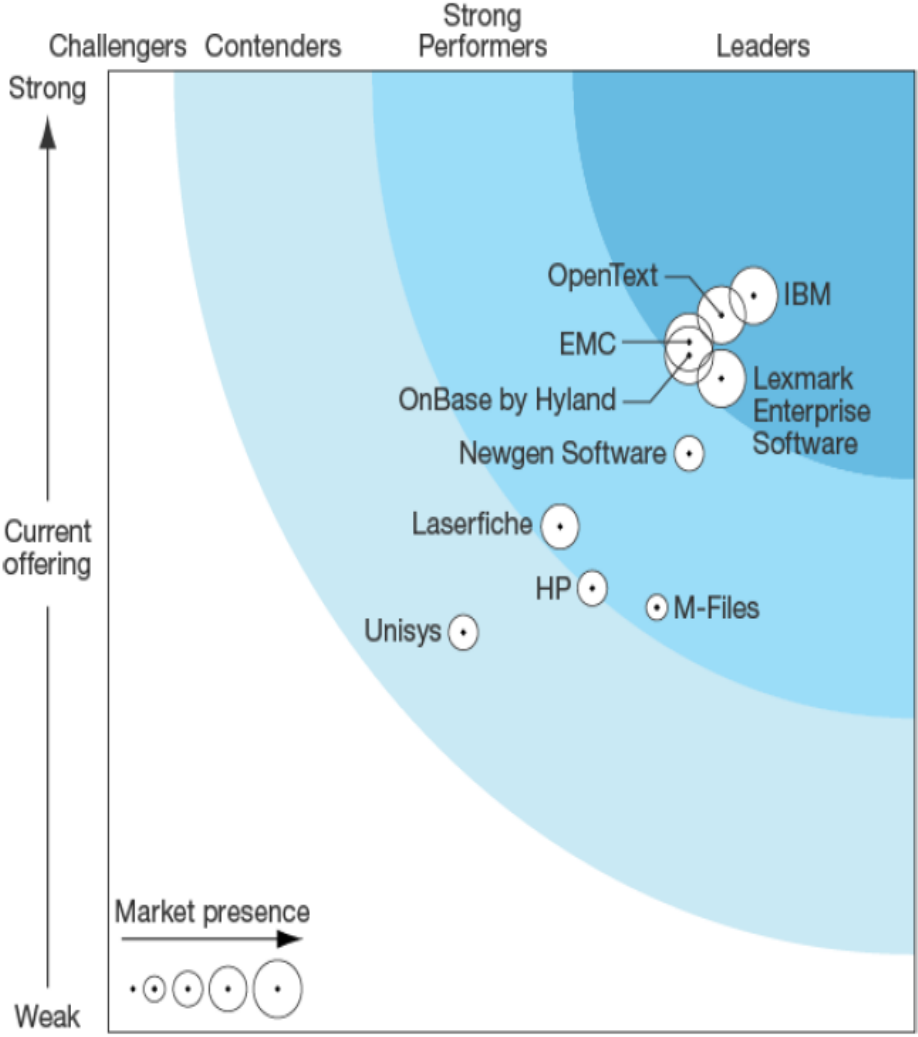


The Forrester Wave™

ECM Transactional
Content Services Analysis'15

“IBM has the broadest and deepest offering in the transactional content field, combined with deep experience in common use cases.”

“IBM is a strong selection for its existing customers to consolidate older repositories and upgrade to meet changing case management needs and for new customers with compliance- and security-driven project requirements.”



Source: Forrester Research, Inc. (July 2015)

Gartner named IBM a leader in Case



Gartner's BPM-Platform-Based Case Management Frameworks Magic Quadrant '15

“A broad range of industry-specific case management frameworks, including IBM Case Manager for Investigations. Business Partners also have extensive vertical and horizontal business domain solutions.”

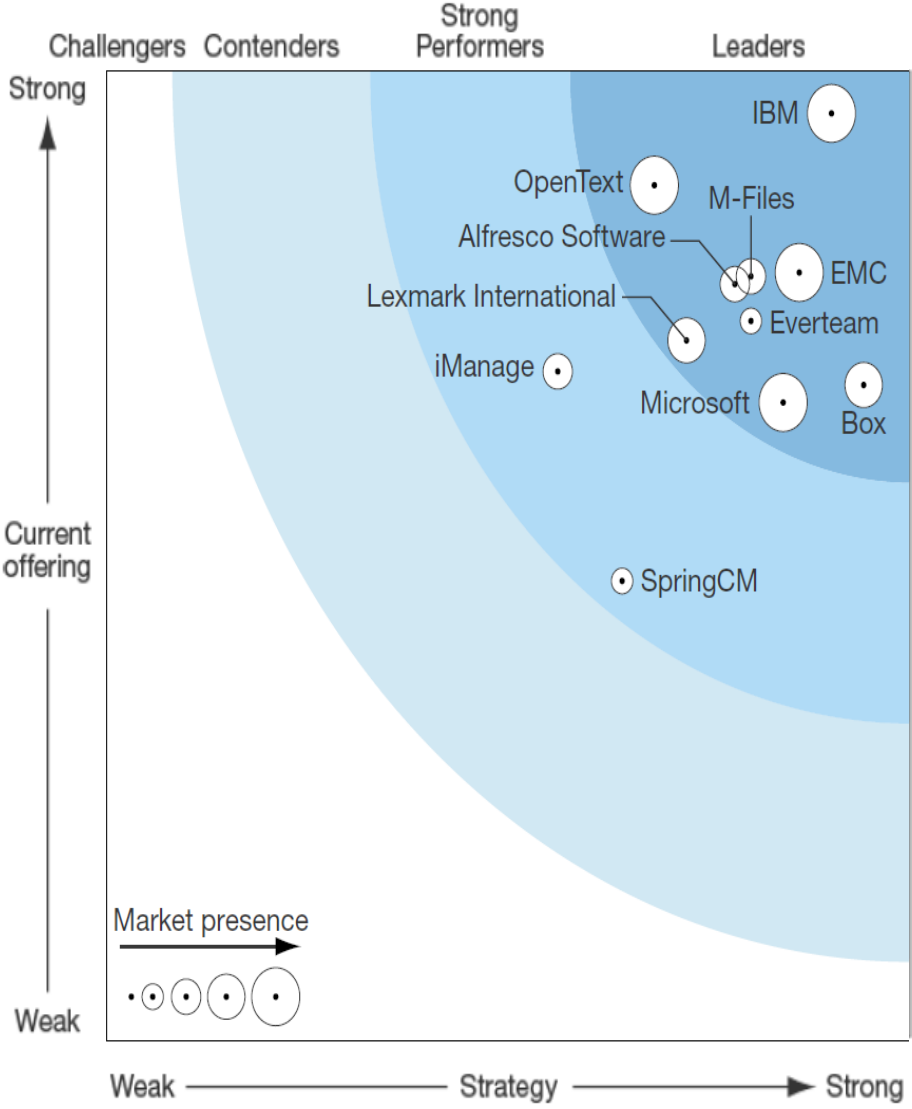
Forrester named IBM the leader in Business Content



The Forrester Wave™ ECM Business Content Services '15

“IBM has made important investments in its universal client, IBM Content Navigator, to offer consistent user experiences across web and mobile content applications.”

“Strong support for modern APIs and interoperability standards positions IBM well in the multi-repository, multi-vendor reality of the largest of enterprises.”





In Short

- IBM provides the most integrated set of ECM capabilities in the industry
- Our ECM platform supports open standards and integrates with non-IBM repositories
- New partnerships will enable you to leverage cloud capabilities in a hybrid environment
- Analytics, Cloud, Mobile, and Collaboration are critical Digital Business enablers – and Australia understands this even better than the rest of the world



Thank you!

Learn more about IBM Smarter Content Solutions

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www.ibm.com/thatsecm/