

# Orchestrate Your Work –The Business Case for Case Management

*purpose built for the evolving digital enterprise*



## Please note

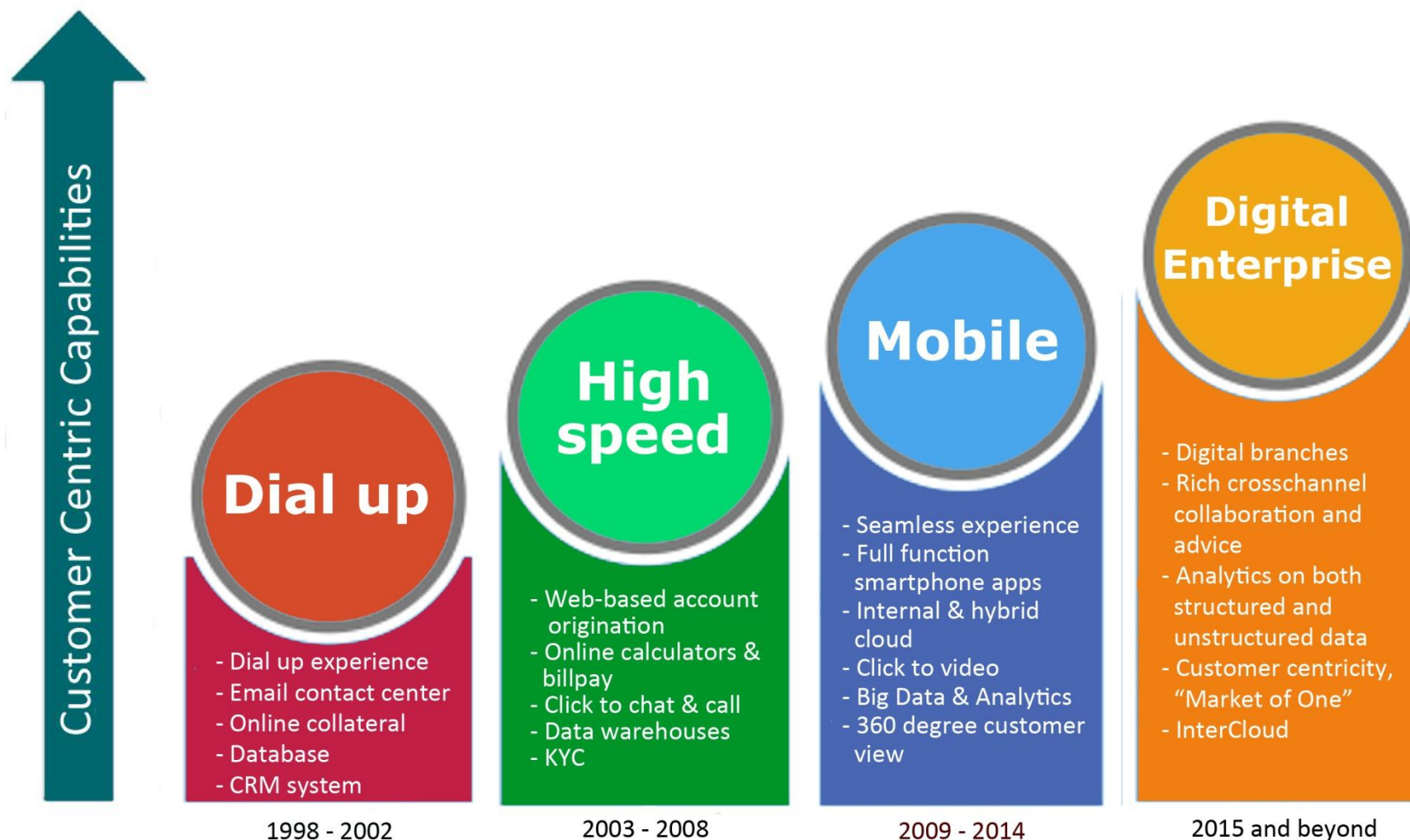
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Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

# The Evolution of the Digital Enterprise



# Inside Out View

## Organization Focused

A company-centric, “inside-out” view, driving scale, efficiencies and controls



# Outside-in view:

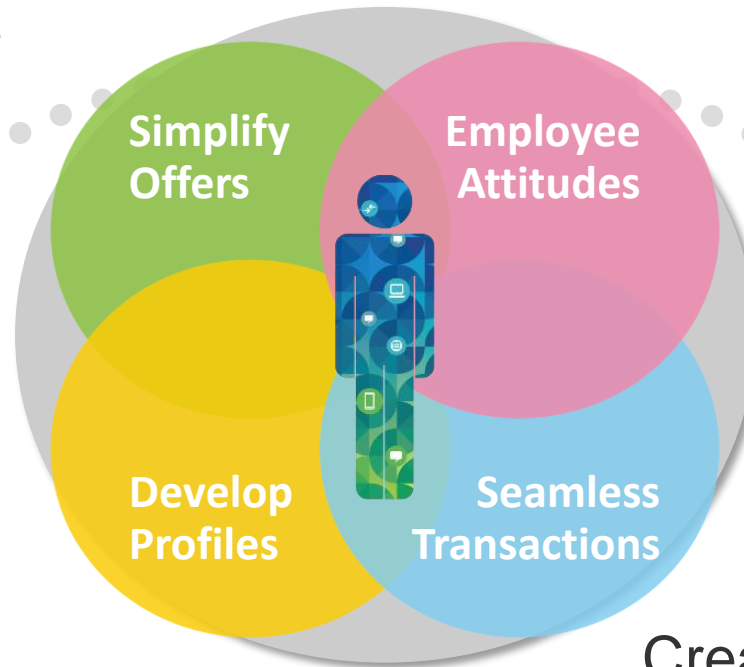
## Customer Focused

A customer centric approach drives better engagement over time and across channels



# Customer Centricity is a New Way of Acting

Service the unique need of each customer while reducing product complexity



Enhanced customer service through empowering employees to focus on rapid resolutions

Effective use of analytics and deep knowledge of customer

Creating improved customer experience with unified channels and more responsive processes and staff

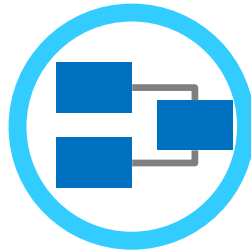
# Harvesting the Value of Information for Customer Centric Applications



people



content



workflow



analytics



cloud



mobile

**IBM Case Manager is a solution platform that engages people with content, analytics and workflow enabling them to make better decisions and achieve better business outcomes anywhere and everywhere**

# Empowering Positive Outcomes

Access to Information wherever it  
is maintained

and

Analytics for context

plus

Case centric workflows

leads to

Empowered Employees

who drive

Positive Customer Outcomes





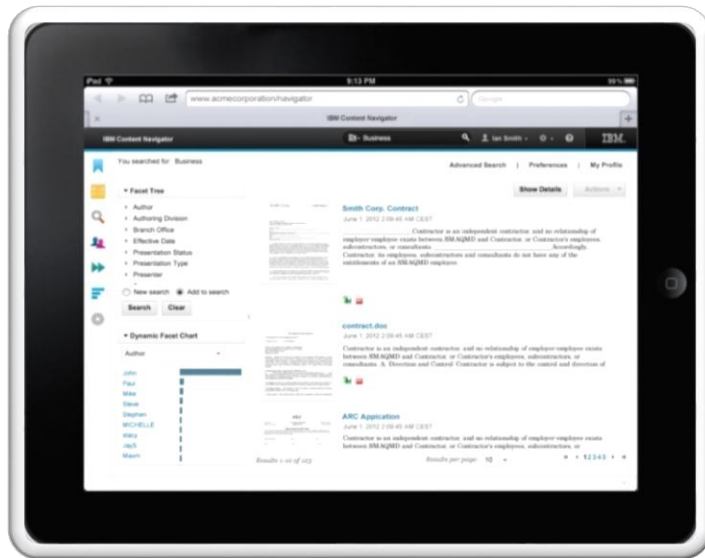
# Access Anywhere and Everywhere



## Omnichannel UI enhances IBM Case Manager by:

Channeling all information assets through a single, customizable, and user-friendly interface

Capturing images and documents, single interface for all content services and initiating cases remotely



# Filter Business Content to place it in Context

## The best search is no search at all

The screenshot displays the IBM Case Manager interface with several key components and views highlighted:

- Case Details:** A central form showing incident information for Case INCID\_Incident\_000000360007. Fields include Contact Name (Mo), Incident Date (30/09/2014), Contact email (mo@mymail.com), Incident Category (Social Media), Source (Twitter), Location (London, UK), and Case Stage (Investigating). A description notes "Negative customer sentiment found by Watson Content Analytics Social Media Crawler".
- Jobs View:** A pie chart titled "5 Cases due today" and a table of tasks with columns for Case ID, Short Name, Due Date, and Last Modified.
- Video:** A video player showing a snowy landscape.
- Images:** A photograph of a silver LG DW12 dishwasher.
- Maps:** A map showing the location of the incident in London, UK.
- Social View:** A social media post from LG (@LG\_APPL) regarding a dishwasher issue.
- History:** A timeline of case events, including "Close Case" (Task completed, 14:24) and "Product warranty had expired. Responded to customer that service costs would not be covered." (Comment added to case, 14:33).
- Customer Communications:** A table of product registration cards with columns for Product, Description, Purchased, and Warranty State.
- Related cases:** A list of related cases, including "Warranty Service E9953 12" and "Troubleshooting E943 34".
- Analytics:** A section showing search results for a specific case, with a blue label "Analytics" overlaid.

# Decision Platform



Work Cases Home **Review Claim** Focus Insur

### Review Claim | Triage

View Instructions

Comments

Investigate Close-Insufficient Evidence

Business Information

Worker Driven Next Steps

Real Time Collaboration

Prescriptive Analytics

Case History

Content

Search Related Cases

Policy Claim Counts Analysis Identity Analysis

Claim Number: 999-99-991407 Claim Status: Draft  
Claim Type: AUTO Claim Amount: 45,000  
Last Name: Batke First Name: Christal  
Street Address: 15 Sanded St.  
City: Bawif State: AB Zip Code: TOB OJO  
Loss Description: Collision turning left. Multiple vehicles involved.  
Loss Type: Collision Cause: Collision while turning left.  
Loss Date: June 1, 2013 Reported Date: June 1, 2013  
Loss Location: 15 Sanded St. null, Bawif, AB, TOB OJO  
Police Report: Theft  Independent Witness Count: 2  
Medical Expenses: 10,000 Total Injuries: 1 At Fault:

Facts that Triggered the Investigation

Alert Summary for claim number 999-99-991407

Policy ID: 999-99-999876 Entity ID: 9001  
Alert Severity: K Alert ID: 2  
SPSS Risk Score: 0.01

First Name: Christal Last Name: Batke  
Address: 15 Sanded St. Bawif, AB TOB OJO  
Phone: 760-781-2074

Alert Description:  
Relationship with fraudulent entity  
Medical monetary declaration high AND automobile damage low  
Identify association with flagged entity

Investigation

Select Group

Carly Social Network An  
Bill Customer Service

Investigation Details and Progress

Documents Tasks History

Add View More Actions

Case History

Case Analytics  
Modified: P8admin | 7/8/2013 6:08 PM

Correspondence  
Modified: P8admin | 7/8/2013 6:08 PM

Evidence  
Modified: P8admin | 7/8/2013 6:08 PM

Alert Summary for claim number 999-99-991407  
Modified: P8admin | 7/8/2013 6:08 PM

ISO  
Modified: P8admin | 7/8/2013 6:08 PM

Witness Statements  
Modified: P8admin | 7/8/2013 6:08 PM

Medical Claim Summary  
Modified: P8admin | 7/8/2013 6:08 PM

Search

Claimant Name batke

Search Advanced Search

Search Results

Investigation Case  
Modified on: 4/23/13 8:33 PM | Modified by: John | Size: 41 KB

Inv: Kristina Batke 5/29/2013  
Modified on: 2/23/11 1:32 PM | Modified by: Carly | Size: 5.3 KB

Inv1306072013  
Modified on: 2/16/13 10:20 AM | Modified by: John | Size: 4.7 KB

Inv1306101146  
Modified on: 11/30/12 4:13 PM | Modified by: Rich | Size: 46 KB

Application for medical Assistance  
Modified on: 7/4/13 9:58 AM | Modified by: Carly | Size: 8.1 KB

# TIAA-CREF



## **360 degree visibility to all stakeholders**

Cases now consistent across all channels

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## **Advanced Analytic Capabilities**

to provide adaptive and dynamic work queue management

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## **Audit trail of processed activities**

for compliance and reporting

Winner of 2014 WfMC  
Global Case Excellence  
Award



# Forrester Total Economic Impact: TIAA Cref



**238%**  
Return on  
Investment



**< 1 Month**  
Payback



**\$12.4M**  
Net  
Present  
Value



**\$25M-\$50M**

Volume of funds that are retained by the customer due to cross-selling instead of being directly withdrawn.



**40%**

Decrease cost per customer through rules and workflow.



**57**

Average minutes saved per transaction case.



**98%**

Efficiency gain that reduced onboarding case times from 3 hours to 3 minutes.



**10**

Systems that knowledge workers do not have to log in to in order to process a case.



# 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

# Accessing, Understanding and Retaining: Information Federation and Case Persistence



**Provide access to all related case information, wherever it is stored**



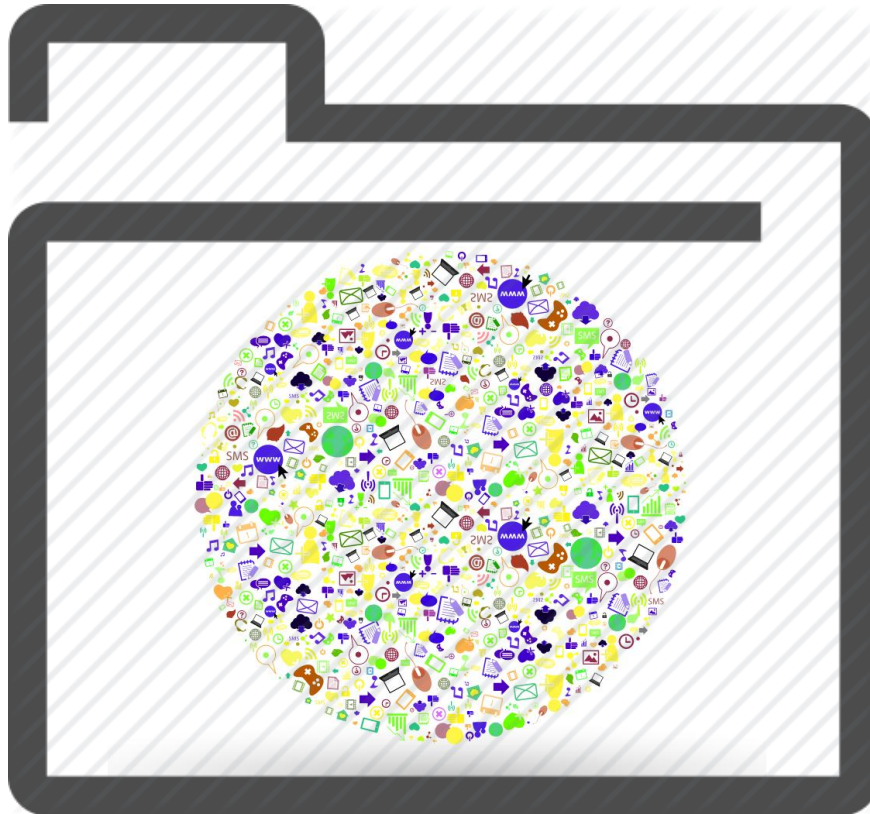
**Access analytics to find related cases, similar decisions and provide context**



**Store all case artifacts in a persistent container for entire case lifecycle**

# Securing Case Content: History and compliance

Customer information is important to the enterprise. It must be protected and only disposed of according to strict rules.



- Control access through role-based permissions (LDAP)
- Automated Audit control
- Data encryption in transit and at rest
- Maintain business information in the case file
- Retention rules
- Integrated Records Management



# Office of State Attorney - Crime Victim Services Division



**Winner 2013  
WfMC Global Case  
Excellence Awards**



**IBM**

## **Faster compensation**

for crime victims with more efficient claims processing

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## **Balances workload**

of staff, helping boost productivity and meet service level targets

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## **Improves response**

to victims and service providers with instant insight into case data

# Put 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

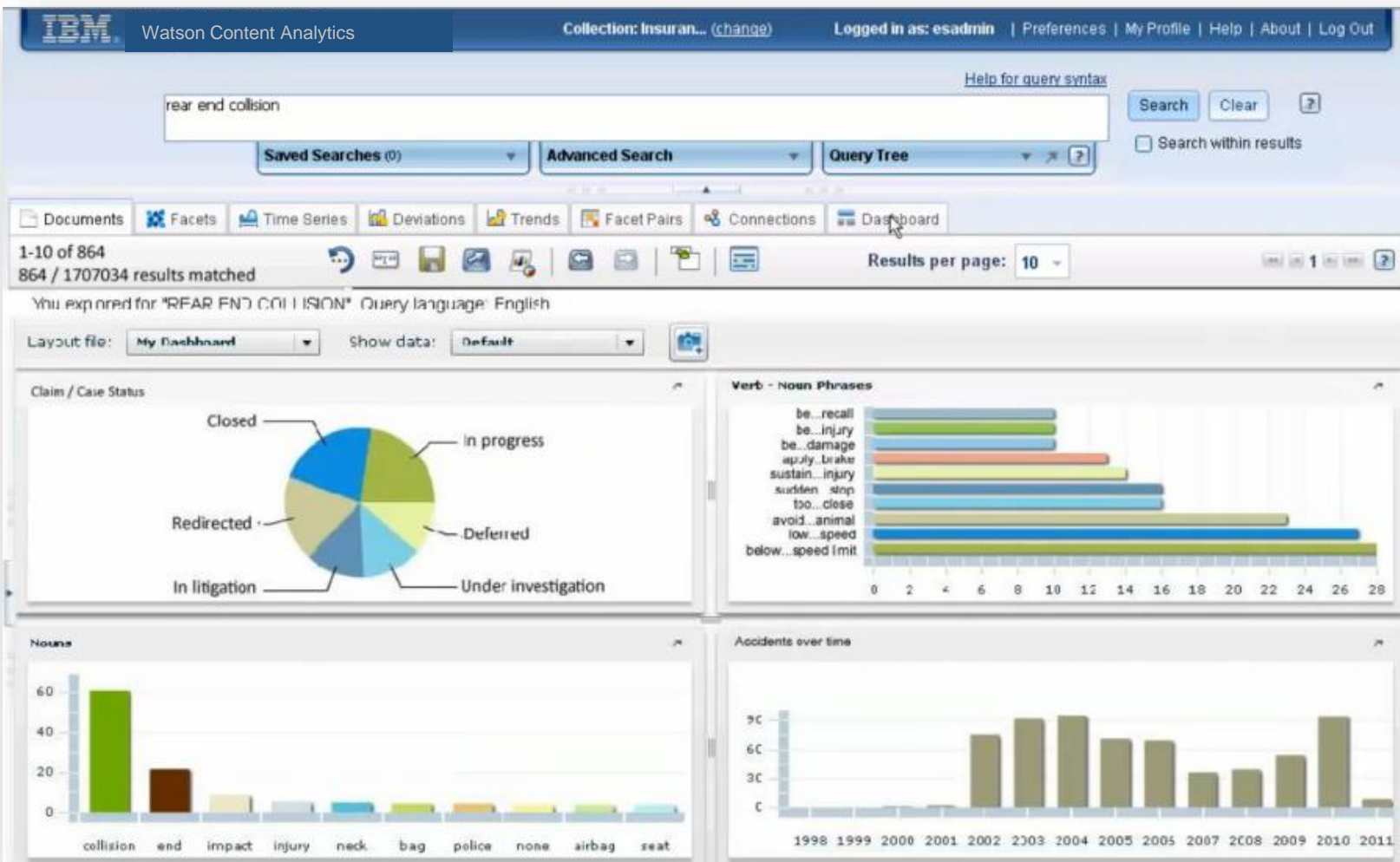
## Case Analytics



### Qualitative

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

# Watson Content Analytics Increases the observation space



# Integrated Analytics Provides Context



**Criminal Case Manager** | John Dunn | ? | [Settings] [Help]

Work Cases Content Analytics Link Analysis Dashboard **Review Case** Criminal Case Management | Unit Supervisor | View Instructions

**Review Incident** | Triage

Comments Actions Check List

Incident Data Persons Vehicles Enriched Data

Investigate Close - Insufficient Evidence Save Close

Documents Tasks History

Add Open Actions

Home

Name
Section 1
Section 2
Section 3 - Subject Information
Section 4
Section 5 - Crime Scene
Section 6 - Miscellaneous

Related Cases

Add Delete

Case ID	Case Type	Creation Date	Created By
CCM_CaseInves	Case Investigation	Sat Jun 14	P8Admin

7/23/2014, 2:18 AM - The 000000120001 folder returned 6 items.

# Major European Bank



IBM integrated Case Manager with the bank's GIS system to deliver all appropriate information in proper context to crisis analysts.

## Real Time Visibility

Analysts have all relevant information of affected geographies and business operations available and can take action immediately.

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## Actions Taken Automatically

or at the judgment of the knowledge worker, including *ad hoc* activities, saving time and providing a decision history of actions taken.

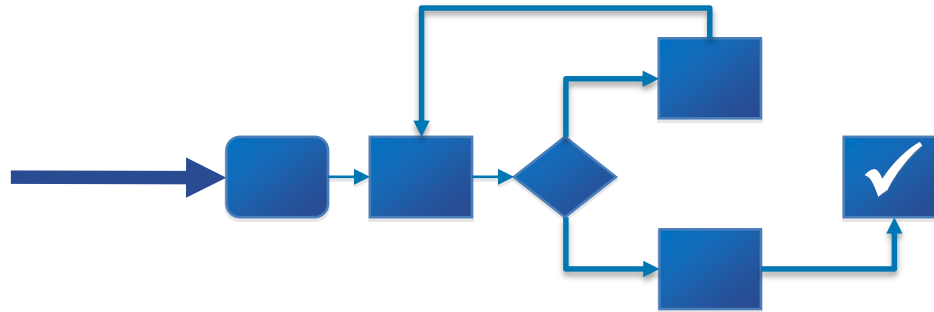
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## Real Time crisis status and history reporting

automatically generated for management; it is also stored for permanent record.

# Flexible workflow for maximum efficiency

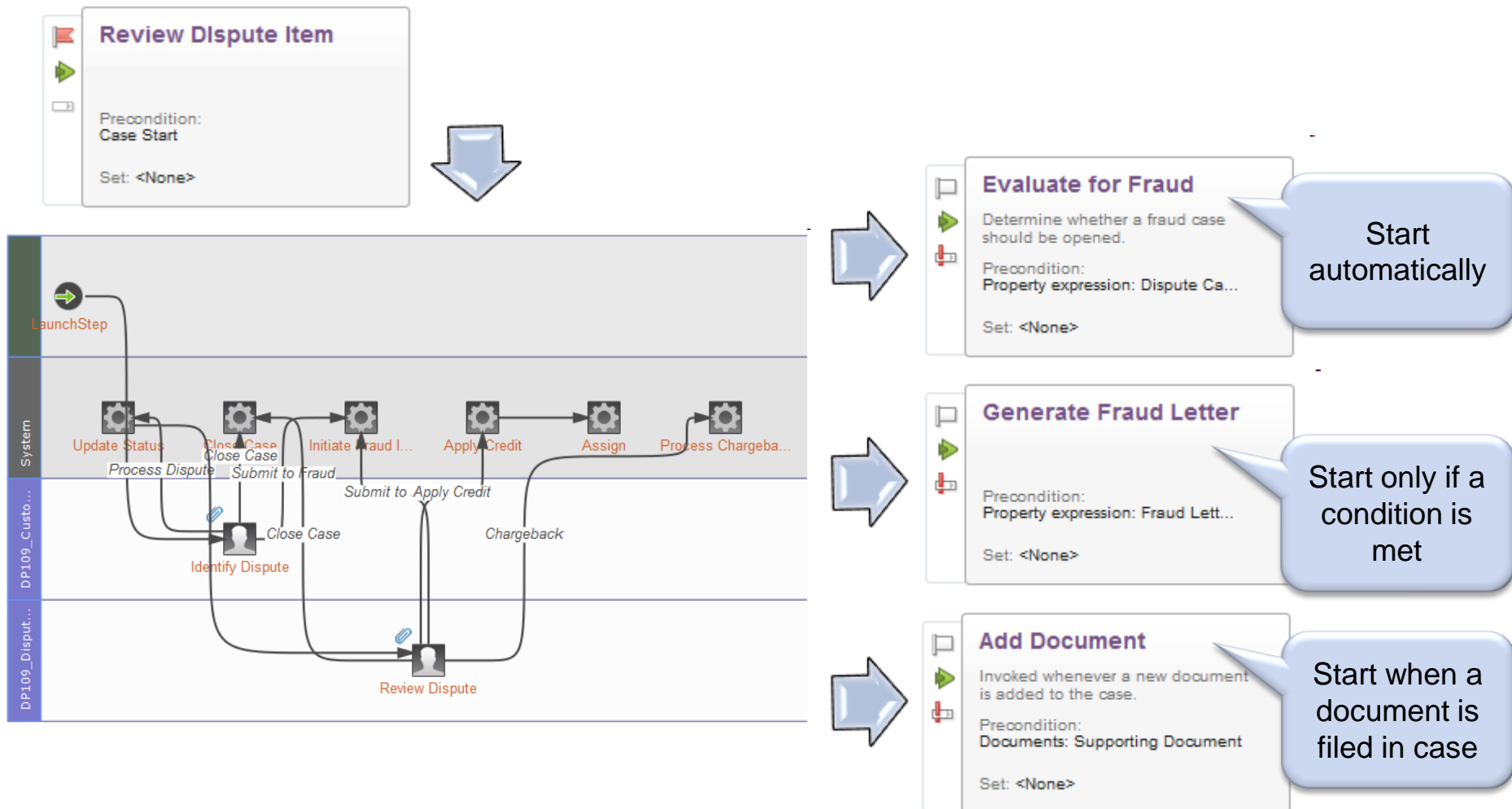
*When a process is unpredictable, Case Manager is ready to launch ad hoc tasks completely at the discretion of the decision maker*



Flexible workflow breaks up case requirements into discrete tasks and then allows the decision maker to decide which tasks to run when



# Case Builder – Provides LOB Ownership



# Case Driven Workflow

**Criminal Case Manager** | Dave Adams | ?

Work | Cases | Content Analytics | Link Analysis | Dashboard | **Investigate Case Form** | Criminal Case Management | Detective

**Investigate Case** | Investigate | View Instructions

Comments | **Actions** | Check List

- Record Meeting Minute
- Create Case Package
- Request Case Analytics**
- Request Crime Scene Investigation
- Add Person (Victim/Suspect)
- Witness Statement
- Review Document
- Review Case

Close – Insufficient Evidence | Prosecute | Litigate | Save | Close

Tasks | History

Actions

Miscellaneous

Name

- 1. Taped Statements
- 2. Witness Statements
- 3. Victim Photos
- Witness Statement (Taconelli, Mark)
- Witness StatementForm

**Related Cases**

Add | Delete

Case ID	Case Type	Creation Date	Created By
CCM_CaseInves	Case Investigation	Sat Jun 14	P8Admin

7/23/2014, 2:52 AM - The Section 6 - Miscellaneous folder returned 5 items.



# Large Canadian Insurer



*Improving competitive advantage through a more responsive claims adjudication process*

## **7 Month Deployment Schedule**

Successfully met aggressive timeline

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## **Zero**

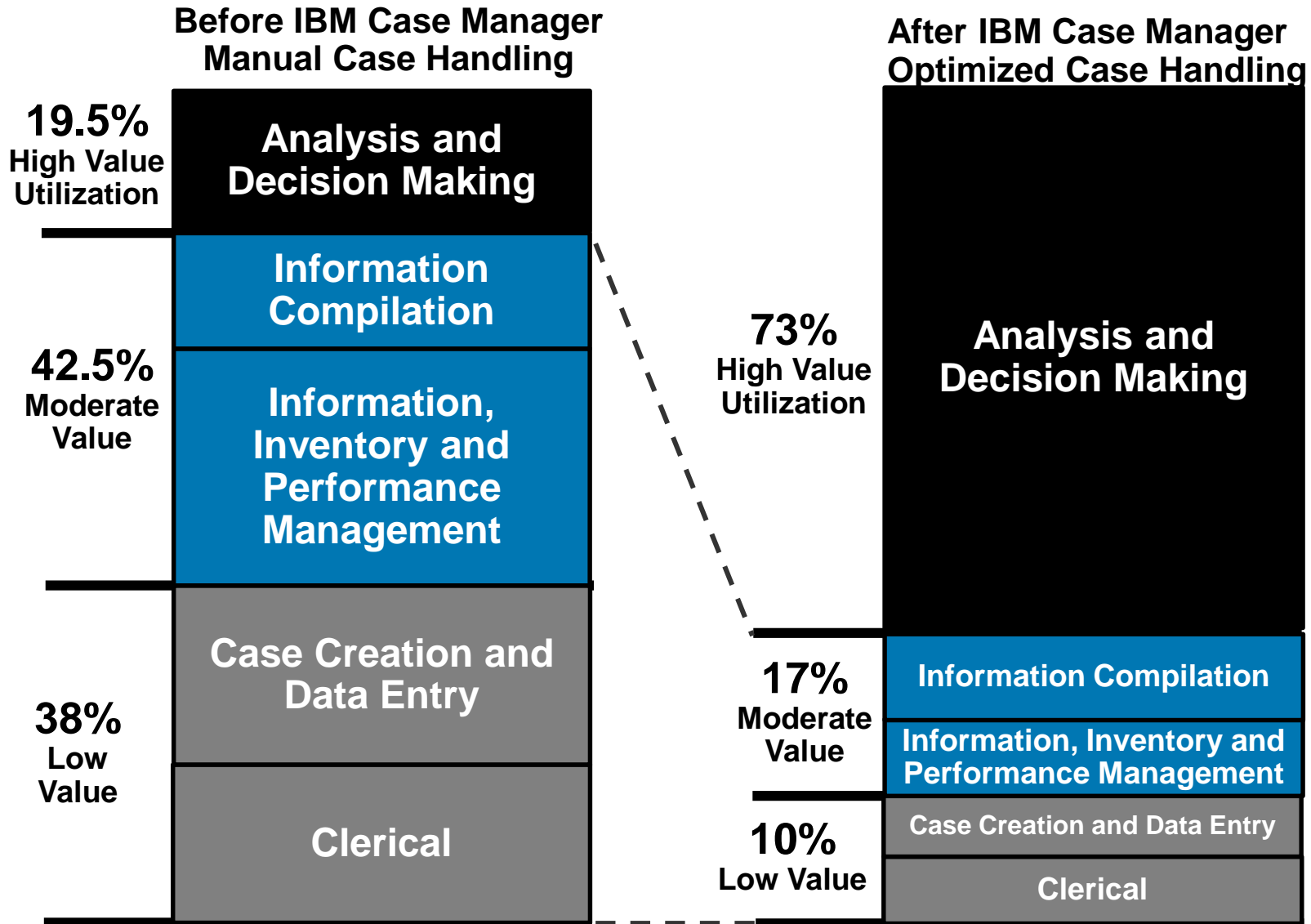
Need for custom application software development

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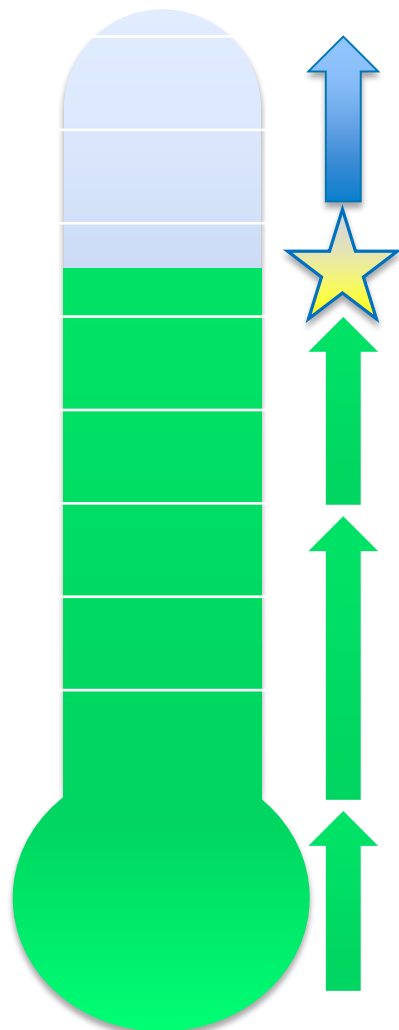
## **Streamline process for competitive advantage**

For long and short term disability claims

# Effective Resource Utilization



# Built for one Purpose – Case Management

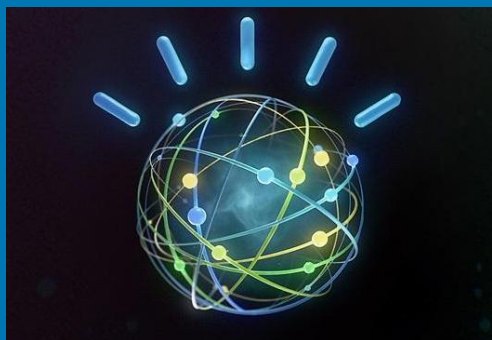


Vertical Solutions	Proven solutions adapted to your industry's specific use cases
Full solution tool set included	Fully integrated Case platform enables rapid time to value initially and for multiple solutions moving forward
Rapid Design and Shared Services	LOB users design solutions themselves using OOTB Templates and maintain ownership affecting rapid compliance to regulatory and process changes
Integrated Best in Class Components	Mobile UI, secure content folders, flexible and rules based workflows, mobile capture, records management
Shared Services	Single implementation, design and UI environment, design once deploy many times across all devices
Open Standards	J2EE, Java, REST, Web Services, CMIS

# A growing ecosystem of IBM purpose built solutions bring value faster

## Smarter Content Solutions

### Cross-IBM Solutions



### Industry Focused Solutions



HEALTH



INSURANCE



ENERGY



BANKING



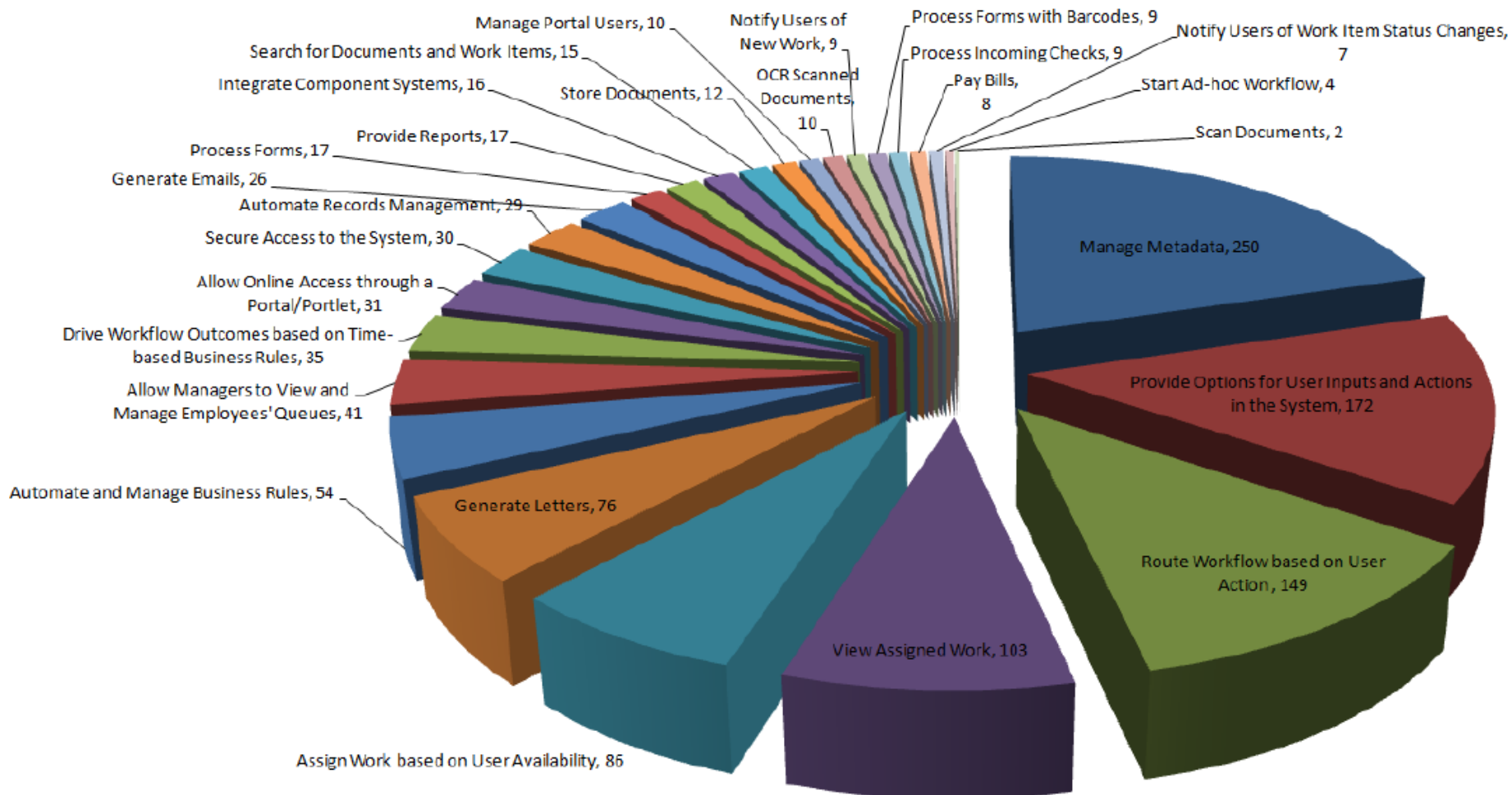
GOVERNMENT



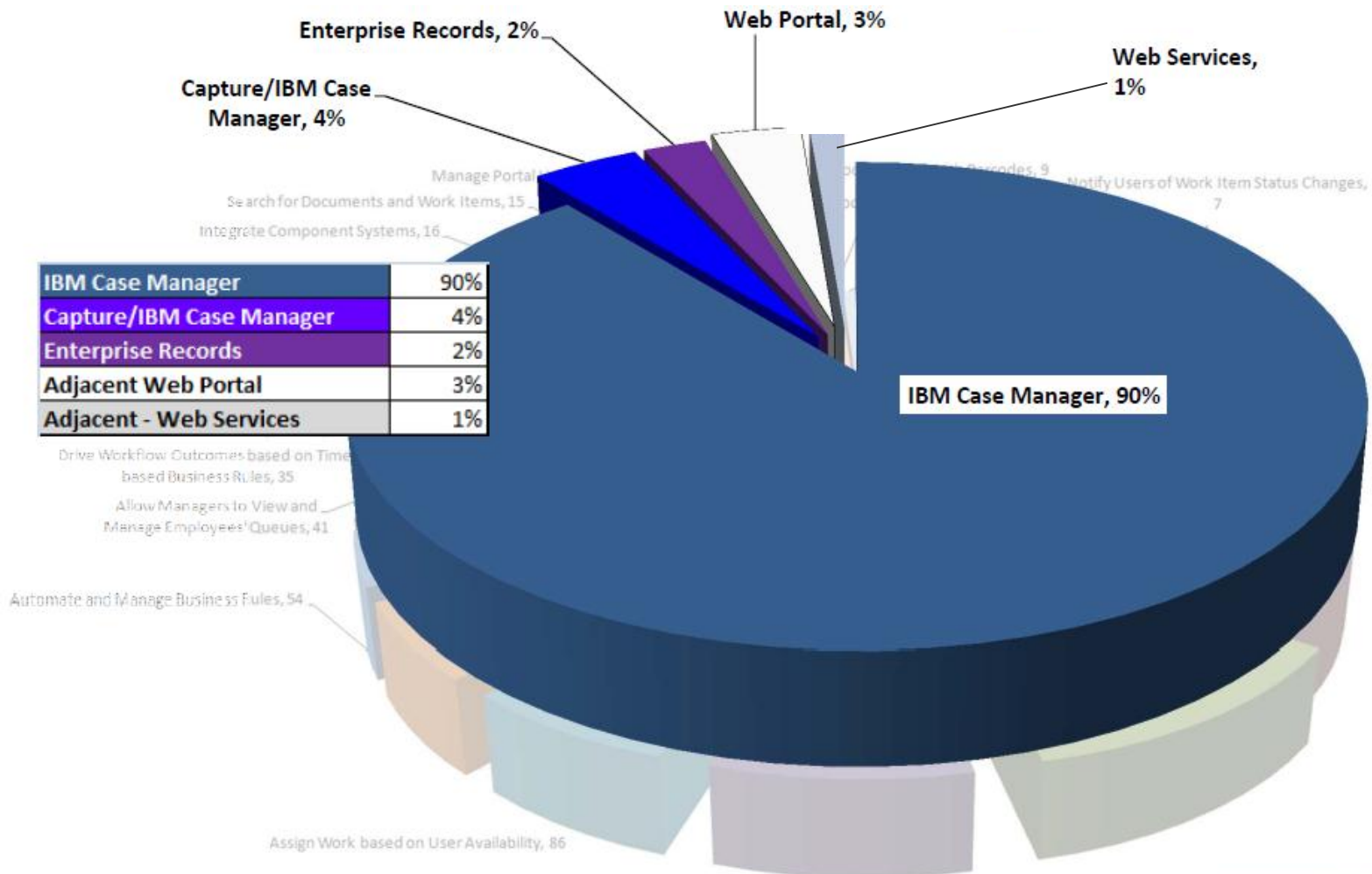
RETAIL

# Real World Solution Requirements

- Over 1,600 Requirements, 27 Categories



# ... met with 90% Out of the Box Case Capabilities





# Union Bank



“ With document capture, Union Bank realized a 70 percent return on investment within 18 months. ”

– Albert Pena, Vice President of Bank Operations  
Union Bank, N.A.

## Rapid Return on Investment

Imaging and workflow improvements helped save the bank \$500,000 annually

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## Days to minutes

reduction in process speed with virtually 360-degree customer view

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## Months to weeks

in time saved deploying new workflow-automation applications

# Shared services enables content for engagement

## Goal 1 – Enable Operational Excellence

- **ECM Center of Excellence to enable cost savings by organizing work for specific skill sets within operating centers**



## Goal 2 – Achieve Process Efficiency

- **Route work across operating centers and teams**
- **Automate business rules and capabilities in a paperless environment**



## Goal 3 – Establish Platform Reusability

- **Create a foundation for development and operational improvements**
- **Realize the benefits of content, capture and case management technologies for competitiveness**





# Implementation benefits from shared services

## Reduced Timeline

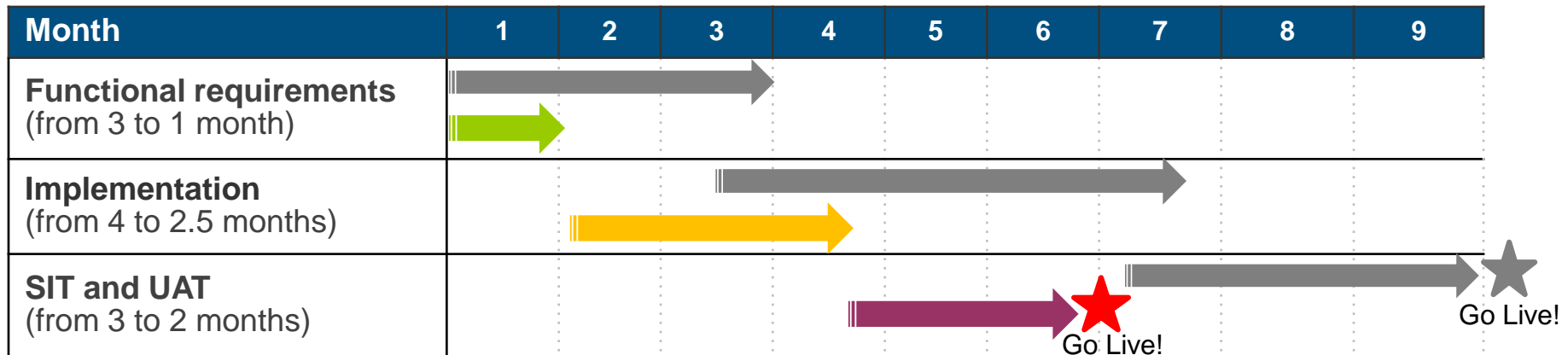
- Standard operational model narrows requirements and reduces misunderstanding
- Reuse of services components drive faster implementation

## Reduced Risk

- Proven process and technology less risky to implement
- Standardization eliminates one-offs or specialized knowledge
- Fewer variations and changes require less testing

## Reduced Cost

- Services are developed once, used many times
- Training is simplified as process is standardized
- Common capabilities can be deployed to multiple business units at one time



# IBM is a leader in Magic Quadrant for BPM-Platform-Based Case Management Frameworks

## IBM Case Manager:

- Best of breed capabilities
- Broad Partner ecosystem
- Superior User Experience

Source: Gartner, Magic Quadrant for BPM-Platform-Based Case Management Frameworks, March 2015, G00262751

Read Gartner's insights on BPM-Platform-Based Case Management Frameworks at: <http://www.gartner.com/reprints/ibm?id=1-2BUGOEX&ct=150318&st=sb>

Figure 1. Magic Quadrant for BPM-Platform-Based Case Management Frameworks



Source: Gartner (March 2015)

*This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from [insert client name or reprint URL].*

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# IBM is the clear market leader for Information based Case Management

“

A growing opportunity for IBM lies in building smarter ECM infrastructures. These industry initiatives span enterprises and ecosystems.

”

Gartner, 2014

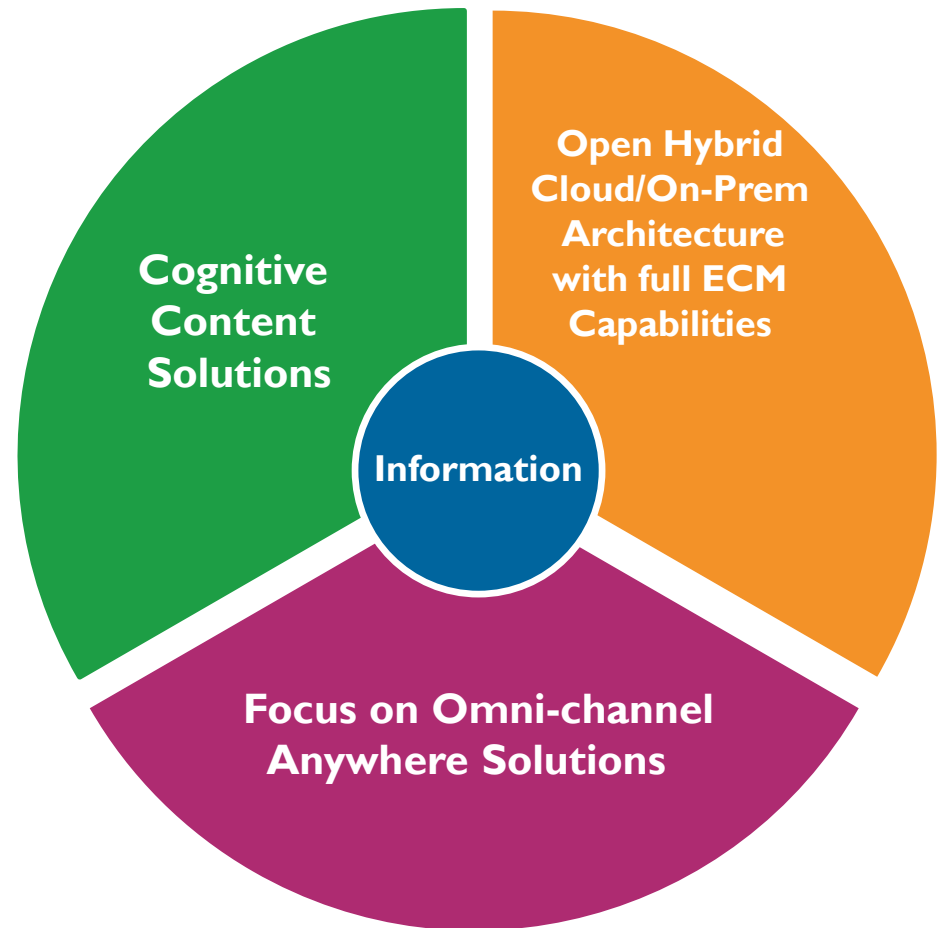


Source: Gartner, Magic Quadrant for Enterprise Content Management, September 2014



# Shaping the Future of Case Management

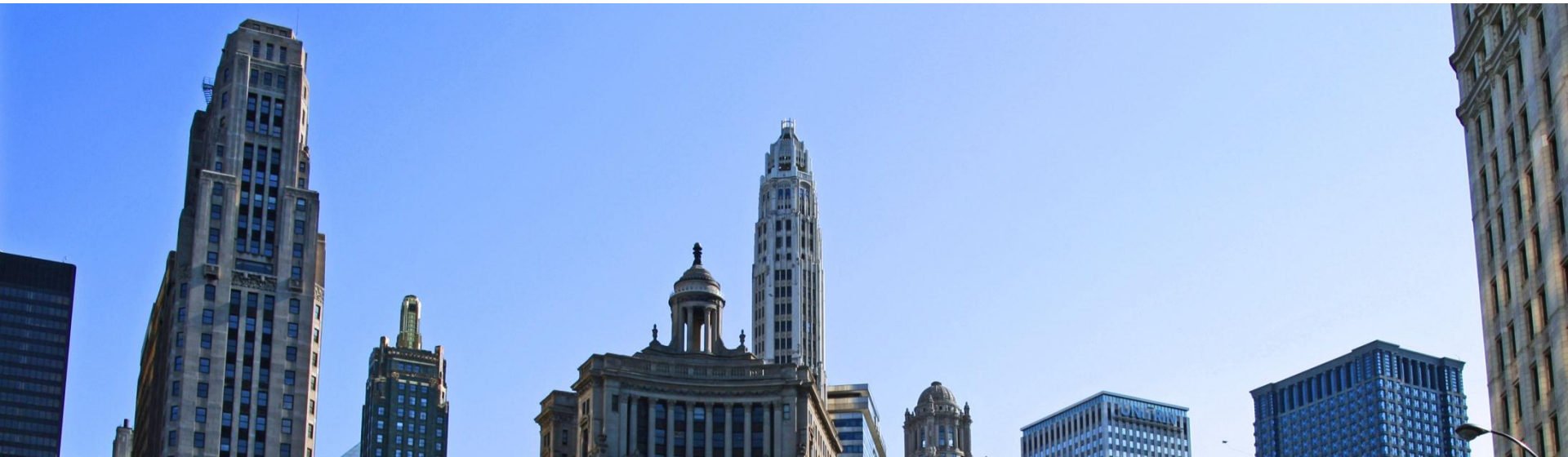
- Hybrid Cloud
- Industry Specific Solution as a Service (SaaS)
- Analytics
- Mobile



# One Experience for Business Content

Unified experience for mobile and web across capabilities





# Learn more about IBM Smarter Content Solutions

[www.ibm.com/thatsecm/](http://www.ibm.com/thatsecm/)