

Brent Bussell, WW Sales leader, Document Imaging and Capture

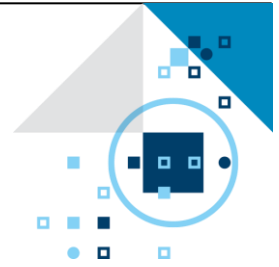
29th April 2014

Documents Now!

Mobile and Distributed Capture for Real Time Business Outcomes



Agenda



- **What do we mean when we talk about content?**
- **Customer Experience Depends on Content Management – Three stories**
- **How could document imaging improve the outcome?**
- **Join the second wave of document capture**
- **Rise of the Knowledge worker - Market driver for Advanced Document Imaging**
- **The three models of capture**
- **Mobile and Distributed Capture – state of the industry**
- **Document Classification – Understanding the Document**
- **Benefits To The Integrated Approach to Imaging**
- **Questions**

Content concerns what's important to people



Shelter

Health

Business

Investments

Family

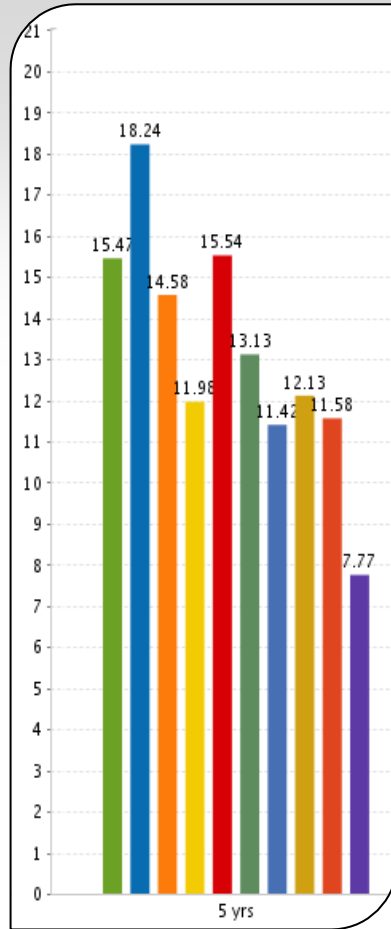
Legal

Car

Education

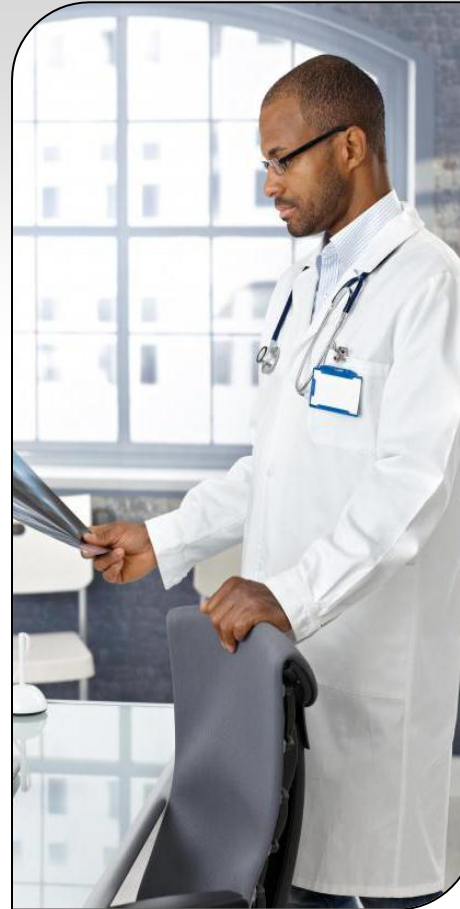
Content Management Impacts Customer Experience – Example 1

Jack Phelps



Content Management Impacts Customer Experience – Example 2

Rose Karlson



For the above named patient. For your convenience, this information is available upon request.

	CHARGES
	3,254.00
	2,628.00
	292.52
	137.52
	3,552.48
	6,580.11
	35.60
	55.18
	28.48
	21.36
	505.01
	235.55
	121.14
	25,157.79
	3,906.63
	258.10
	18.12
	482.04
	667.44
	1,014.60
TOTAL CHARGES	\$48,951.67
PAYMENT / ADJUSTMENT TO DATE	
DATE DUE FROM INSURANCE	

MEDICAL CENTER

Content Management Impacts Customer Experience – Example 3

Roger Gorman



Advanced Document Imaging can make a difference

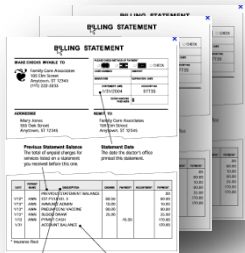


Onboarding

Documents:
Proofs of address,
income,
Identification,
Applications,
orderforms,
statements etc.

Scan Customer Documents from Branch Office

- Supports MFPs, portable scanners, Mobile devices
- Converts e-mail or PDFs, Microsoft attachments to image
- Document request prompts make it simple for branch personnel
- Secure log-in and encryption provide security



Classification / OCR with Datacap

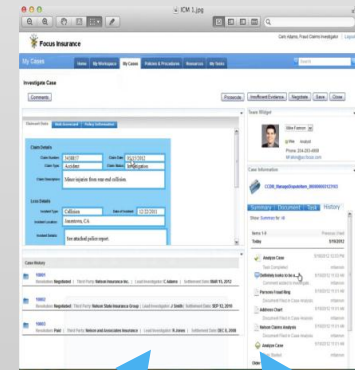
Doc ID Application

- Are all required documents present?
- Are all required fields and signatures present?
- Are proper index values assigned to each document type for search and retrieval?



Populate Customer Account Information

- Customer file is populated with all customer information
- Customer Service/Employees have all documents and data required for the customer



Customer Service Personnel



Bank Branch Employees

Patient Registration

Registration Capture

Documents:
Registration, HIPAA disclaimer, ID, Insurance cards, transfer documents, medical records, test results, etc.

- MFPs, portable scanners, Mobile devices
- Converts e-mail or PDFs, attachments to image
- Document request prompts make it simple for check-in personnel
- Secure log-in and encryption provide security



Classification/OCR with Datacap

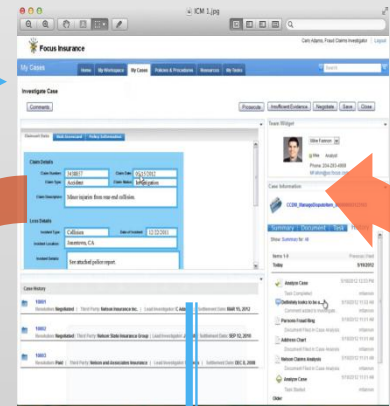
Doc ID HIPAA disclaimer

- Are all documents present?
- Are all required fields and signatures present?
- Are proper index values assigned to each document type for search and retrieval?



Case Management

- Healthcare providers have all records and data needed to offer optimal patient care



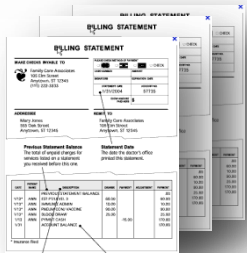
Additional document requests

Case worker requests documentation, Additional input



Claims Processing

Claim documents:
Claim, accident report, damage report, repair estimates, photos,



Document conversion

- Scan with MFPs, portable scanners, input fax, email and attachments
- Mobile capture enables claims adjusters to input immediately
- Document request prompts make it simple
- Secure log-in and encryption provide security



Classification/OCR with Datacap

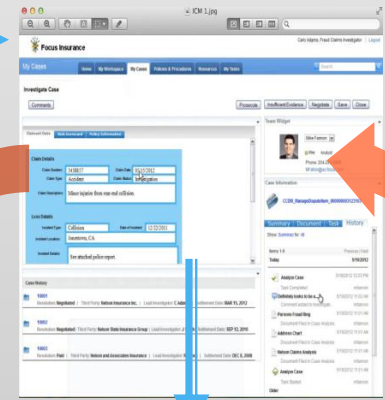
Doc ID Estimate

- Are all required documents present?
- Are all required fields and signatures present?
- Are proper index values assigned to each document type for search and retrieval?



Case Management

- Knowledge workers have all documents and data required to move the claim through the approval process swiftly and accurately



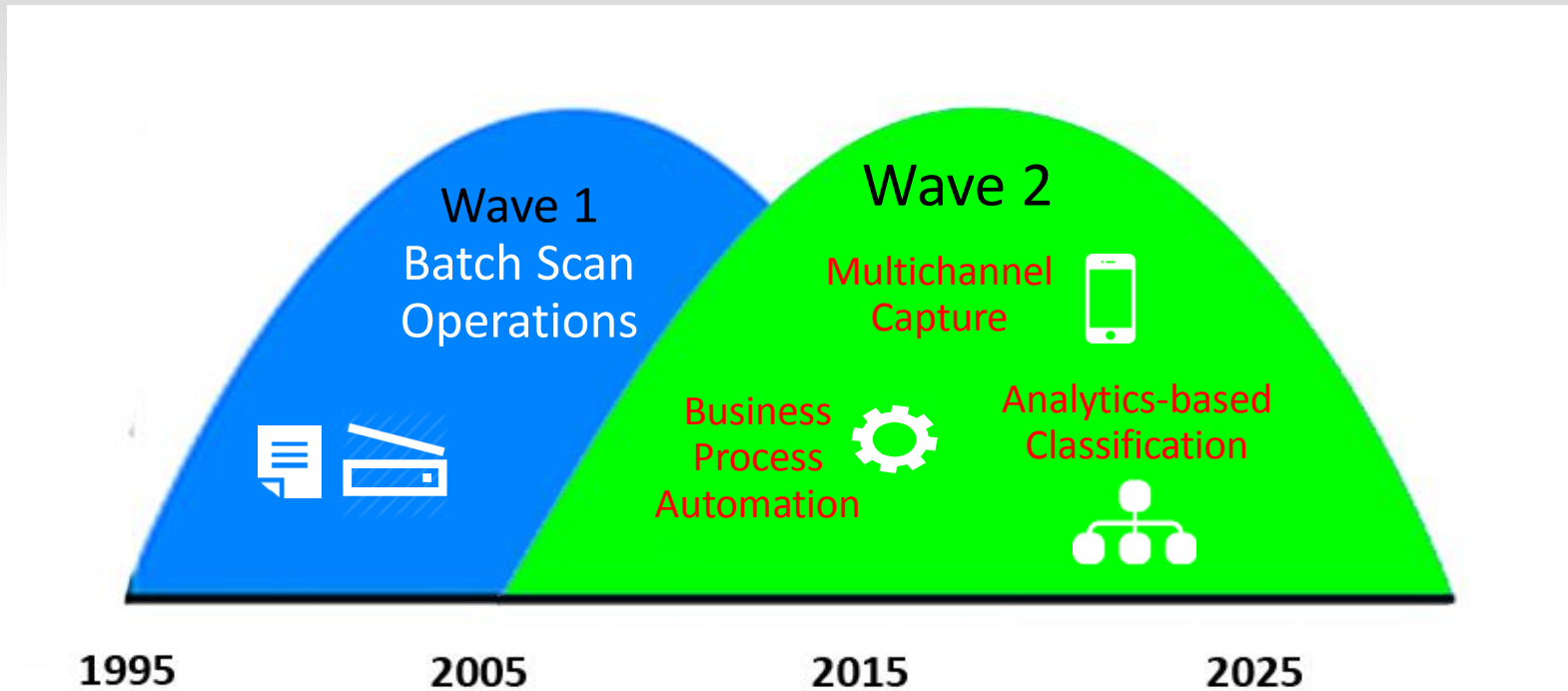
Additional document requests

Analyst requests further documentation, Additional input



The Second Wave of Document Capture

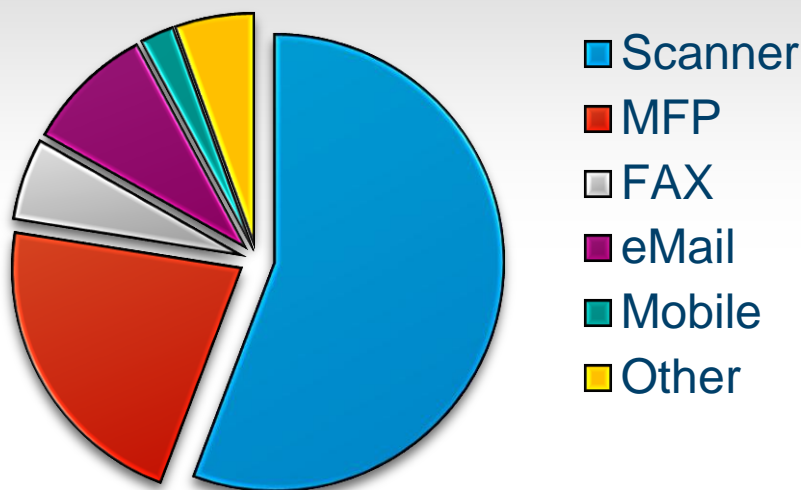
Analyst Harvey Spencer has identified a major shift in Document Capture



Moving From Central Processing To Multi-Channel Capture

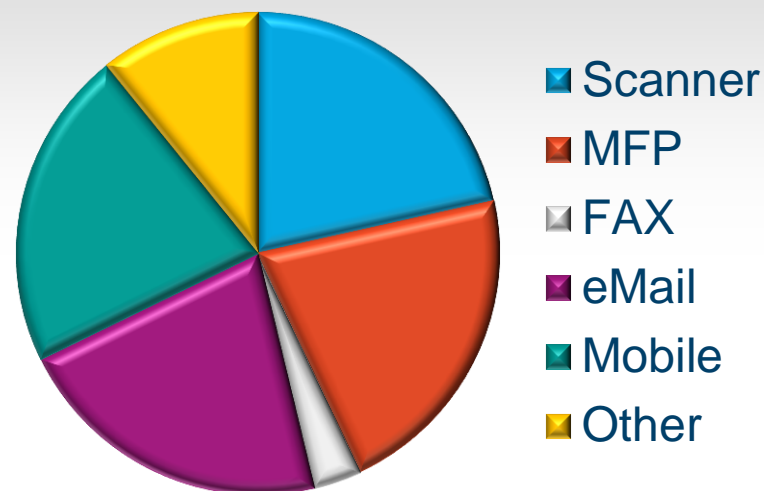
New technologies and new market forces are creating new opportunities

Input Source - 2012



- Centralized batch processing
- Manual classification with separator sheets
- Basic optical character recognition for index data

Input Source - 2018



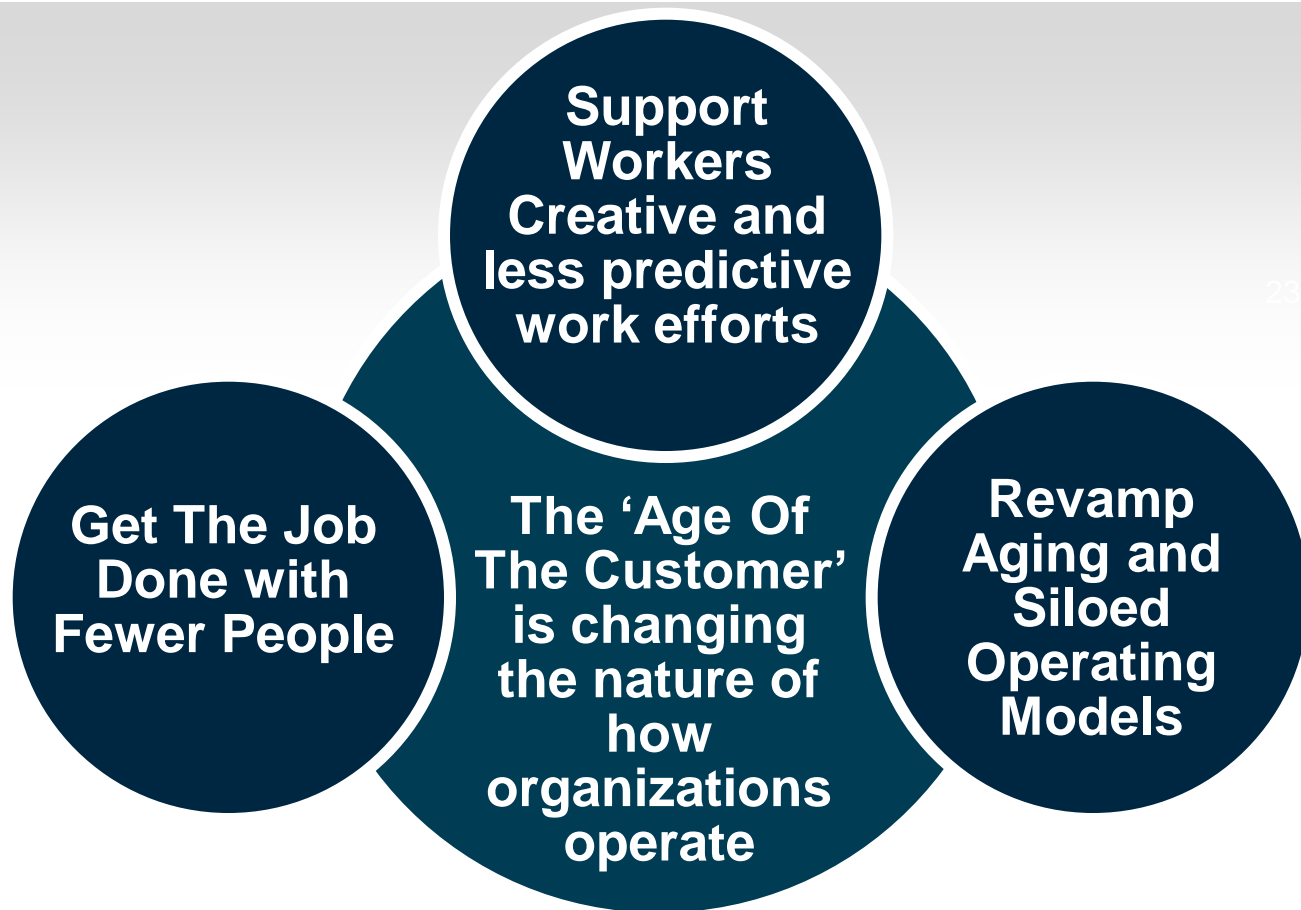
- Broad variety of capture devices
- Classification driven by analytics
- Improved OCR and natural language input
- Multiple input types and modes
- Mobile capture is accelerating

Source: HSA Original Research



Market Driver - More Work is Becoming Knowledge Work

“There are far fewer production workers who perform repetitive tasks like data entry and responding to simple information requests” - ForresterResearch



SOURCE: Knowledge Work Pushes The Dynamic Case Management Market by Craig Le Clair and Derek Miers, March 28, 2014.

Three Models Of Capture



DISTRIBUTED CAPTURE

- Branch or Regional Offices
- Field Offices
- Scanners and MFPs
- Mobile devices



CENTRAL CAPTURE

- Virtual Mailroom
- Dedicated Scanning
- Multichannel



CAPTURE FOR CASE

- Knowledge Workers and Case Managers
- Multichannel and Mobile

Central Capture

Digitizing The Enterprise Never Ends



Business Challenges

- High cost of paper handling and storage
- Compliance risk for personal/financial data
- Process inefficiencies

Solution

- Multichannel input - paper, fax, email, attachment
- Advanced classification “understands” the document
- Automated data extraction eliminates keying
- Multiple language support
- Knowledge workers have the right documents when needed

Business Outcomes

- Cost savings
- Faster cycle times
- Increased customer responsiveness
- Regulatory compliance

Capture For Case Management

Capture on Command for Fast Case Resolution



Business Challenges

- Adding new documents or images is time-consuming and expensive
- Analytics not effective on “blind” documents
- Empower dynamic workflow

Solution

- Real-time conversion of paper, fax, email and attachments as needed
- Use any device – MFP, scanner, Mobile, fax
- Classification and OCR eliminates manual keying
- Content Navigator provides single UI

Business Outcomes

- Cases can progress without delays
- Cost savings
- Increased customer responsiveness

Distributed Capture / Branch Office Automation

Improve the Customer Experience



Business Challenges

- High cost of branch/regional office operations
- Expensive document courier method
- Poor customer responsiveness

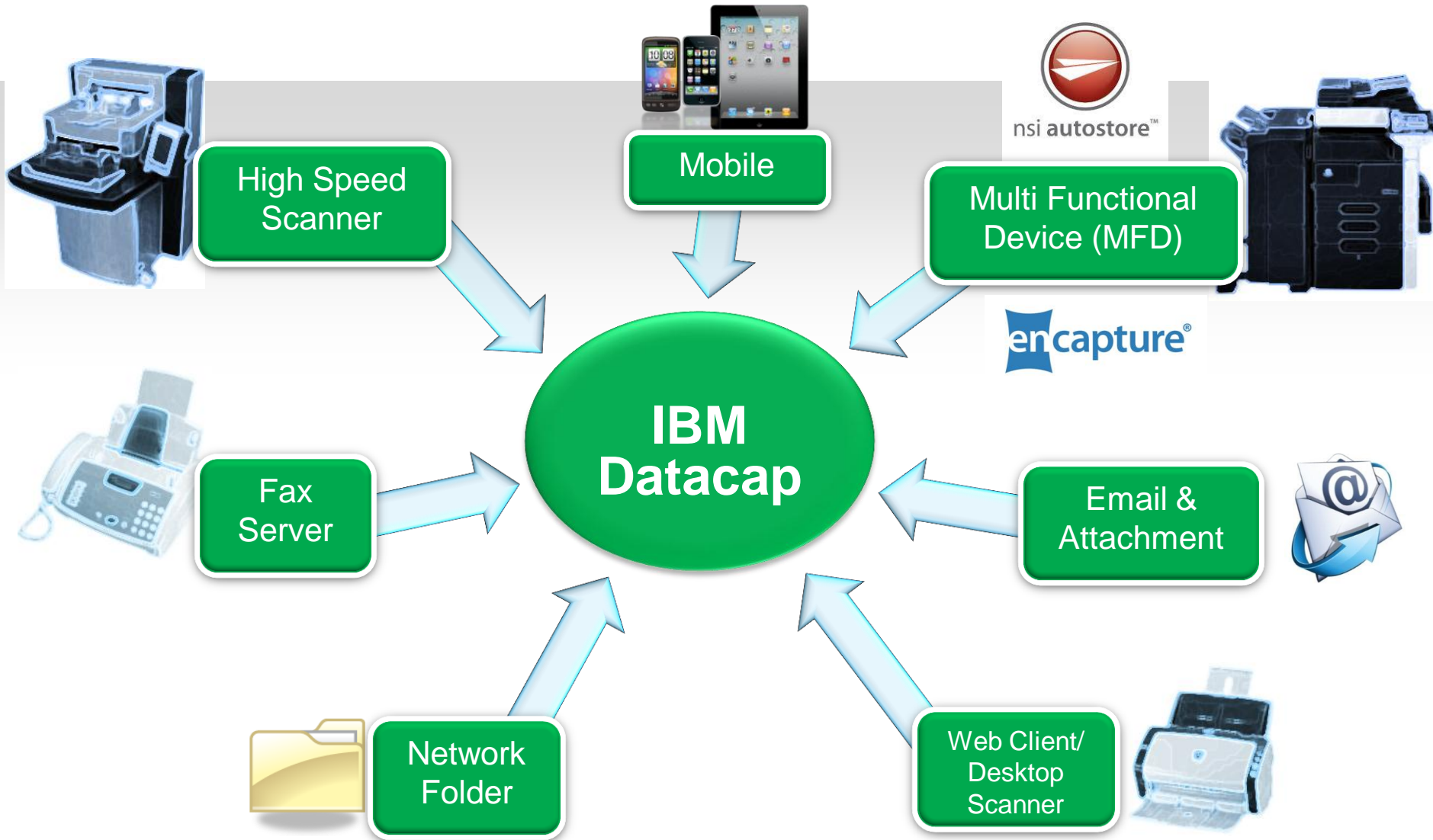
Solution

- Digitize at the Document Point of Impact
- Integrate document capture into MFPs
- Minimize effort and complexity for branch staff
- Enable Mobile capture
- Automate classification and indexing

Business Outcomes

- Faster, more accurate business process
- Eliminate expensive couriers
- Increase customer engagement
- 100% payback in less than one year

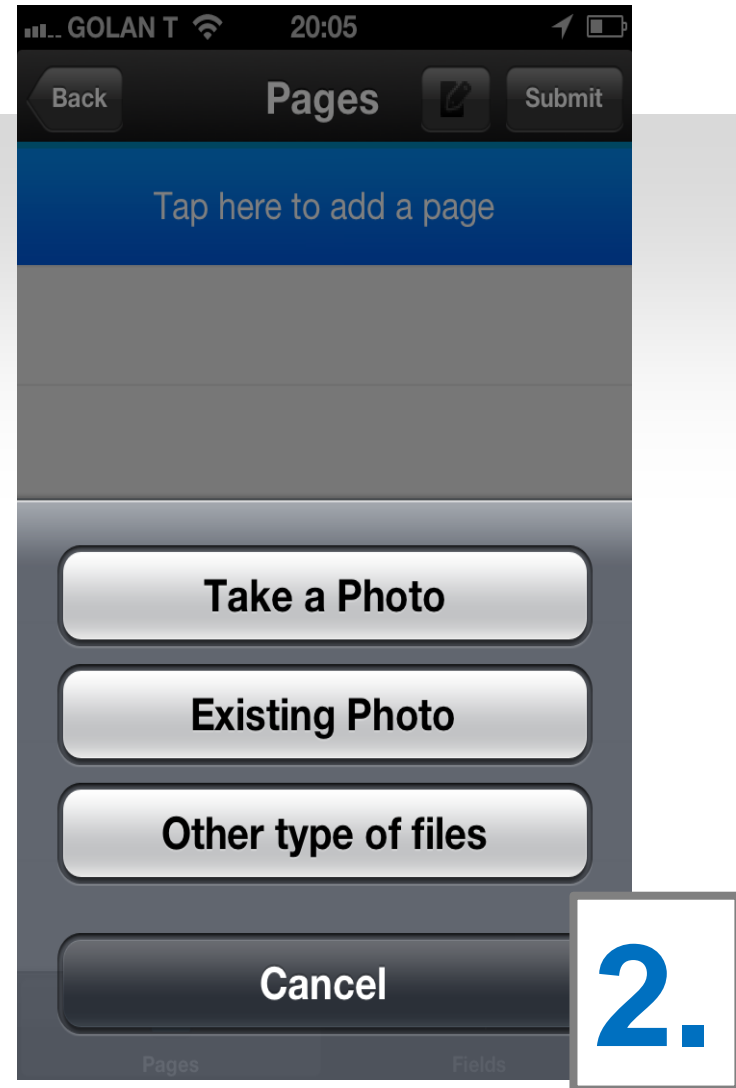
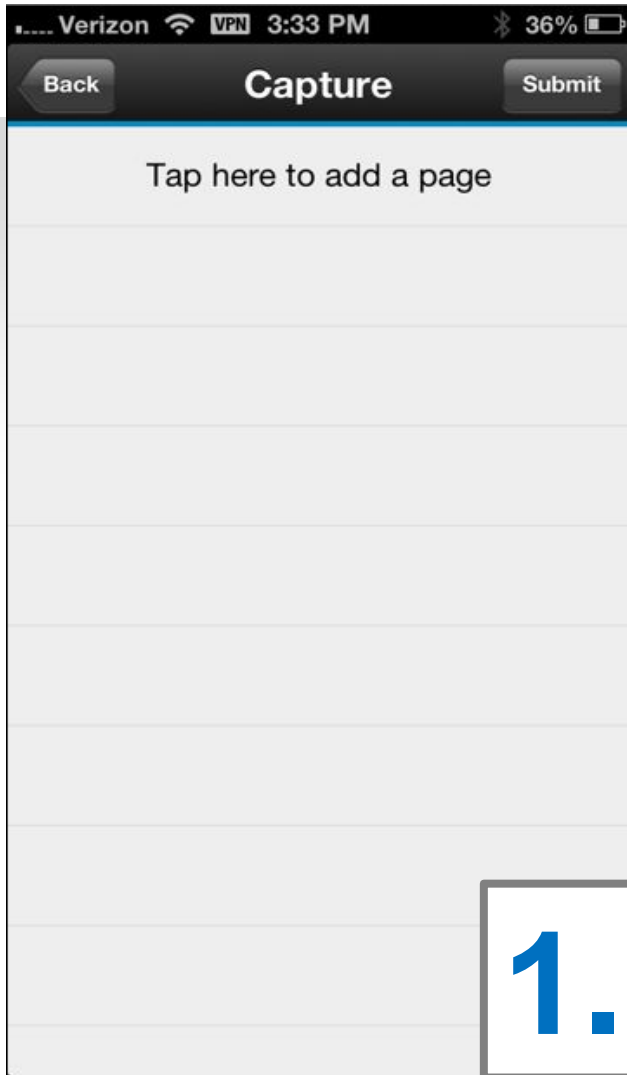
All Three Models Require Multichannel Input Capabilities



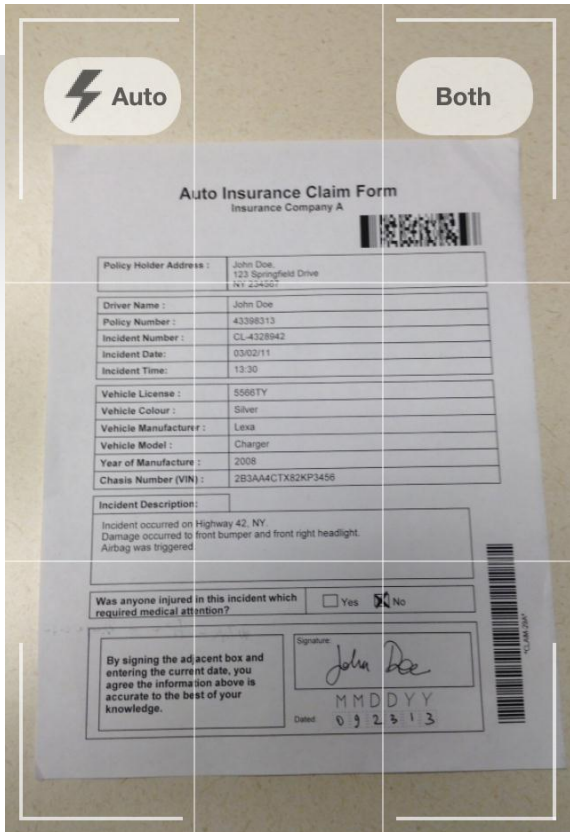
Mobile Capture for Real Time Input Anywhere



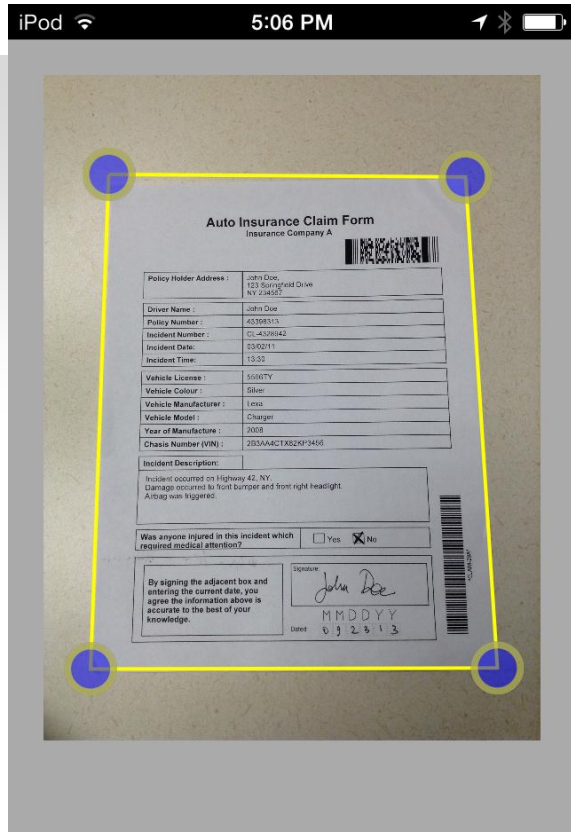
Simple Steps To Create A Batch



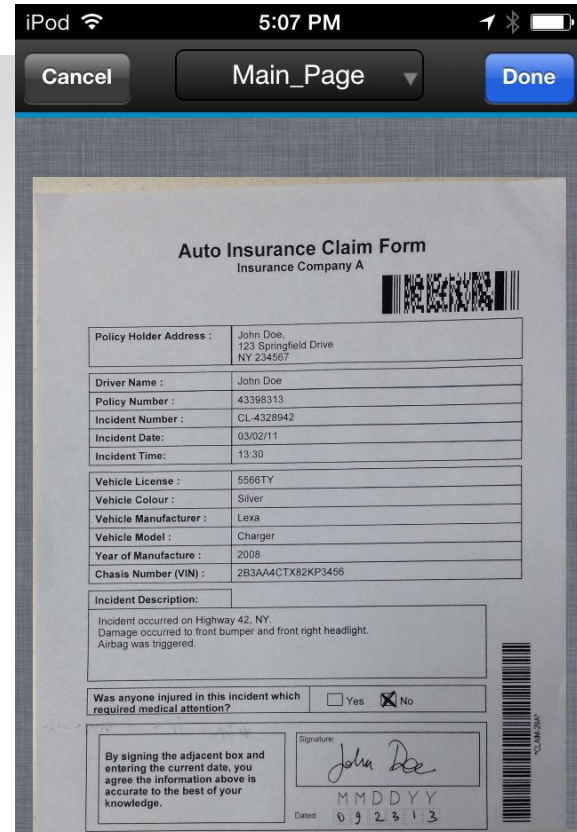
Document Adjustment for Best Results: Point, snap, and rectify



3.

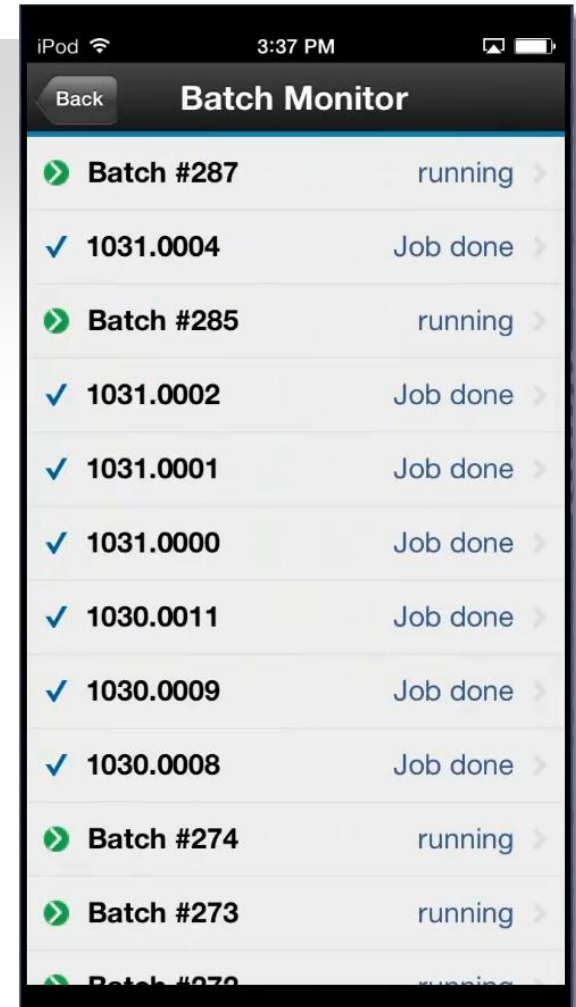
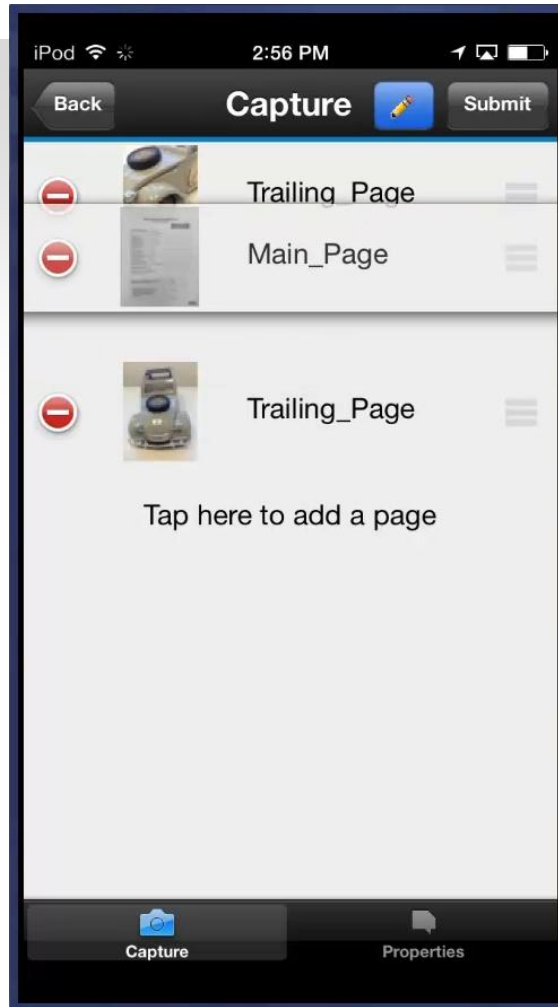


4.



5.

Finish the Batch - Reorder, index, delete, and monitor status



MFD Capture Turns Any Branch or Regional Office into a Capture Center

Extend Advanced Capture to the document's Point of Impact



**Hundreds of
Models**



IBM Datacap



**LOB Solutions
ECM repositories
Case Management**

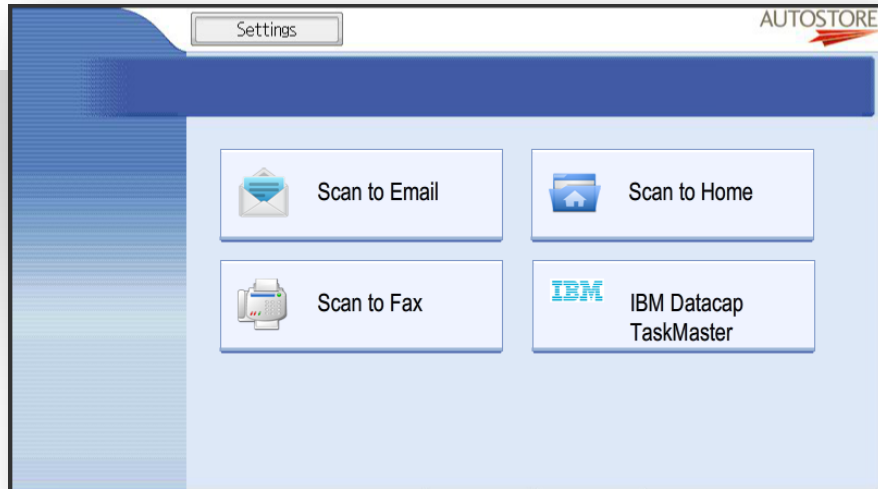
Benefits:

- ✓ Stop the Couriers!
- ✓ Accelerate availability of document
- ✓ Correct errors **where** they happen
- ✓ Reach out to customers with 'document request'
- ✓ Full security and chain of custody

Sample MFP Screen – Buttons are Customizable



Sample MFP Screens - Sign-in Controls Security and Level of Capture



- Easy to understand “app-like” MFP menus trigger a capture workflow
- Present workflows unique to the individual, depending on their rights
- Indexing on the panel with back-end lookups, Picklists
- Image + Index information is forwarded to IBM Datacap for processing and routing on to other systems
- Full Security and Chain of Custody

Classification - Understanding the document and what to do with it

IBM Datacap software offers multiple methods for document classification



Pattern recognition



Benefits of Advanced Document Imaging with Mobile and Distributed Capture



- Put content into the hands of knowledge workers
- Improve customer service with content in context
- Deepen customer engagement with faster responsiveness



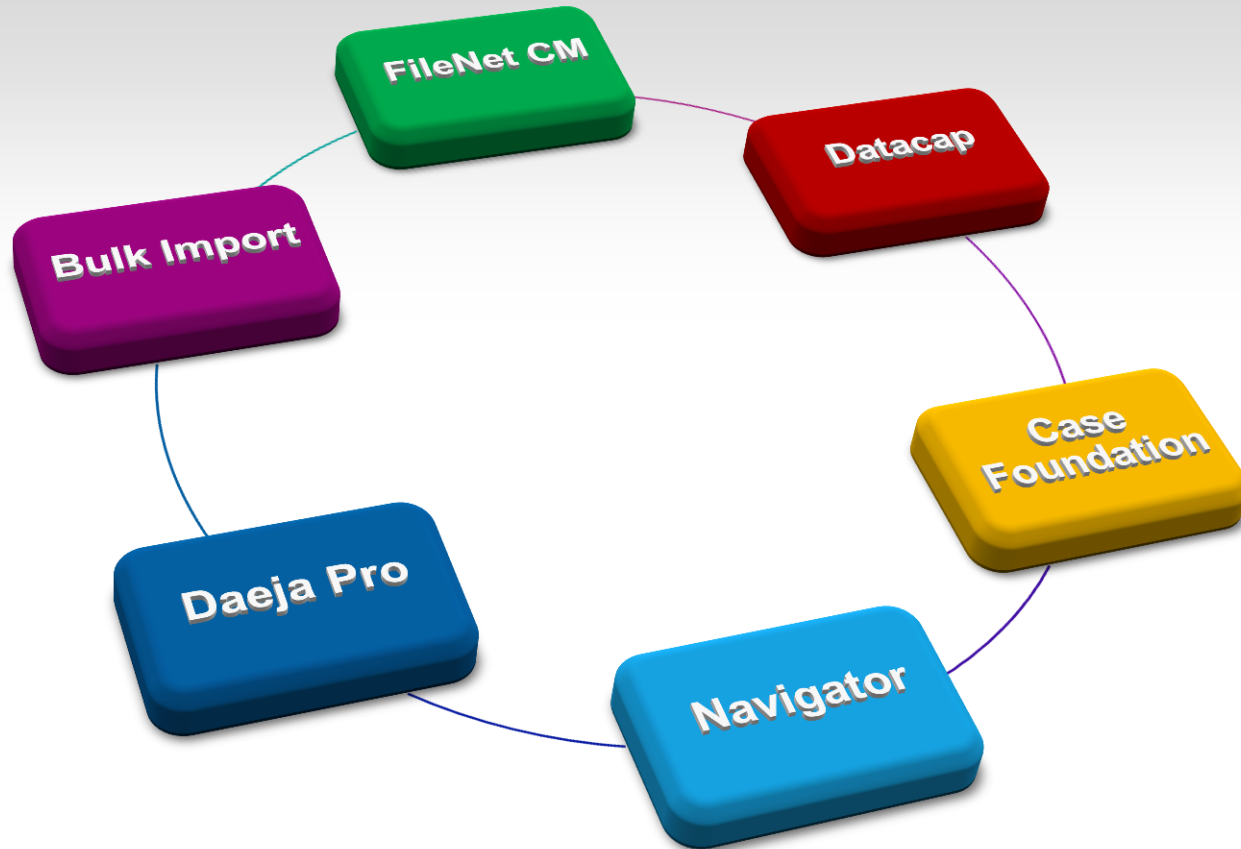
- Significant cost reduction from eliminating manual data entry, document shipping, paper handling and storage
- Reduce typos and lost documents



- Establish controls for who has access to documents
- Manage regulatory risks from the moment a document arrives
- Connect disparate sources of content to the enterprise

IBM Advanced Document Imaging

Best of breed capabilities for business value in a single purchase

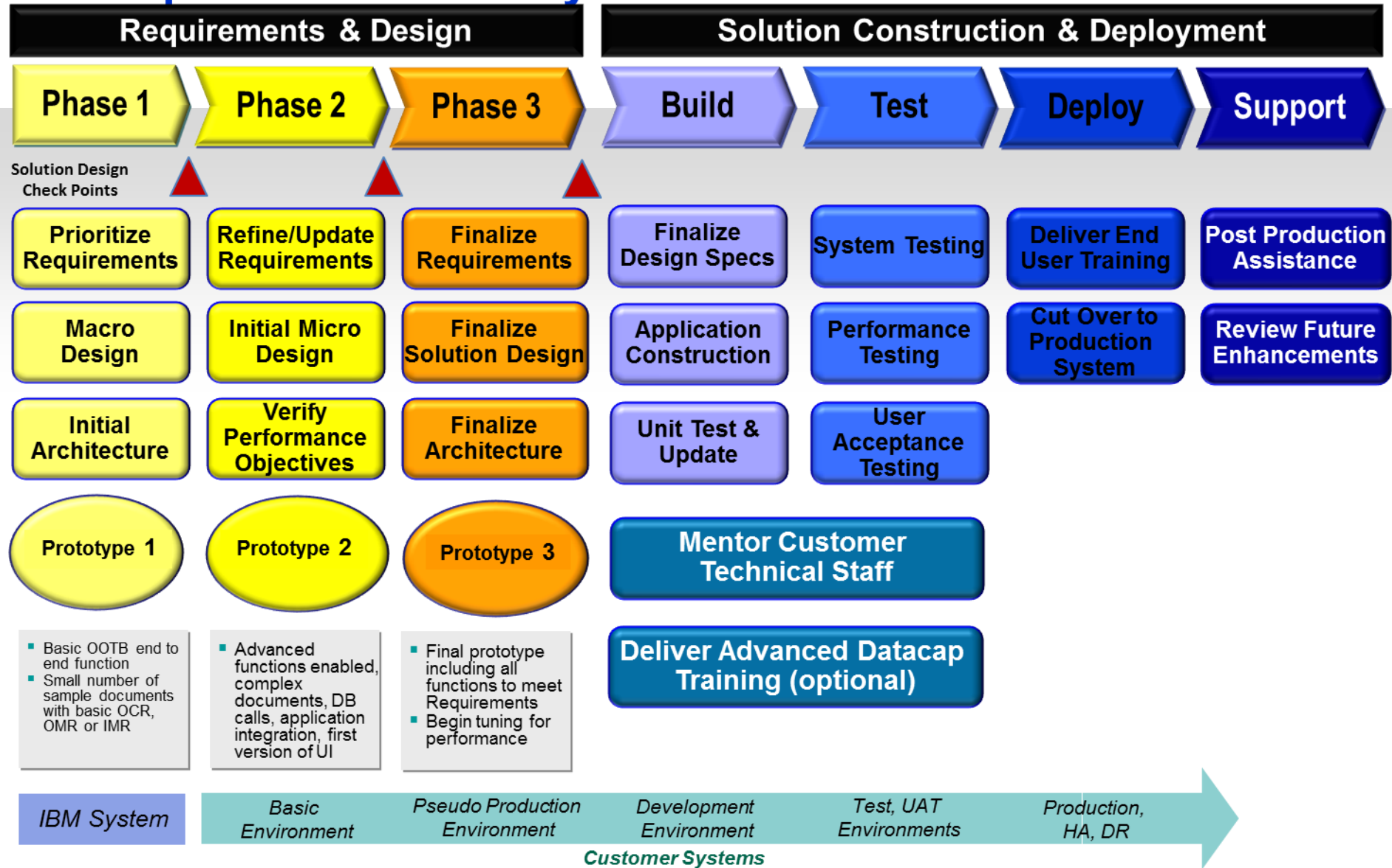


IBM Datacap SWG Services

Uniquely qualified to lead and deliver robust capture solutions

- Staff of senior resources focused completely on Datacap
- Wide range of experience with complex document capture, indexing and designing/delivering solutions with effective recognition rates.
- A prototyping delivery model to rapidly confirm customer requirements and tie them directly to Datacap functions
- Close ties to Datacap Product Development and Support which can be leveraged into rapid assistance during the project
- Tightly integrated with the rest of the IBM delivery team, ensuring smooth communications and project coordination.

Datacap Solution Delivery Model



Thank
You



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