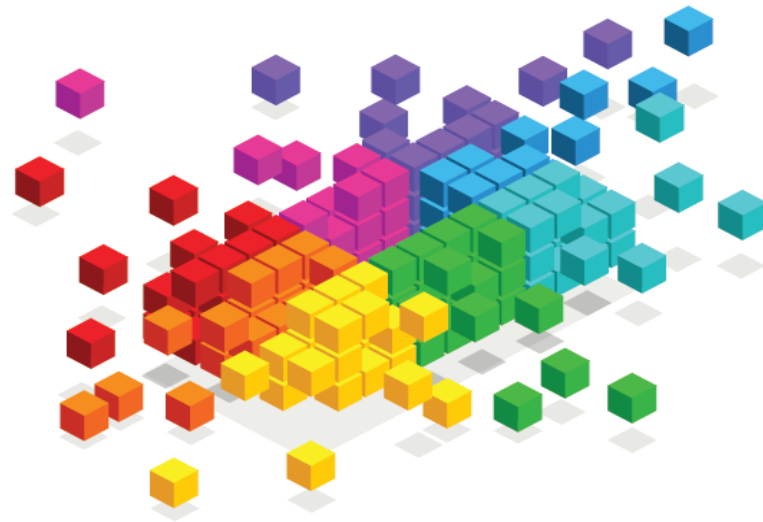


How marketing, product management, facilities, customer service and human resource organizations use IBM ECM to increase efficiency, reduce costs, improve quality and go home early on Friday afternoons

Putting Content to Work
ECM UserNet 2011

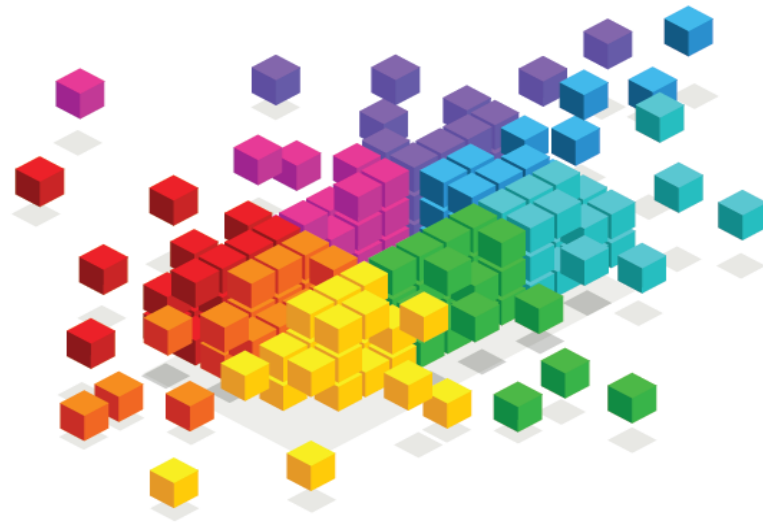


Objectives for This Session



- Share actual experiences, best practices and benefits of other customers' implementations
- Provide use-case examples relevant to line-of-business (and enlightened IT) attendees
- Offer new ideas about use or extension of your IBM ECM investment
- Stimulate discussion regarding broad applicability of IBM ECM in your organization

Putting Content to Work
ECM UserNet 2011



Marketing

Industry: Media & Entertainment

Challenge

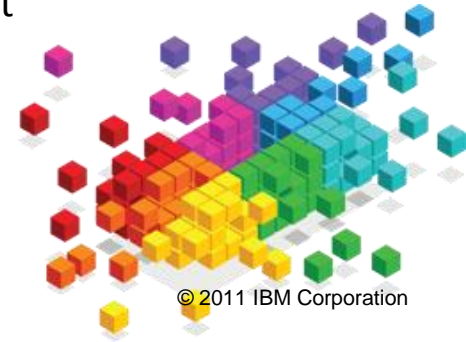
- Provide richer web experience related to 2010 World Cup coverage
- Accelerate the publishing process
- Classify content to more easily and accurately aggregated across disparate sources

Solution

- IBM Content Analytics
- Identify concepts embedded in story, news feed, statistics, etc
- Editors review/approve/reject concepts/tags
- Concepts (metadata) stored in database
- Metadata enables dynamic page aggregations for teams, groups and players

Outcomes

- Editorial workflow transformed from manually publishing stories and index pages to journalists writing content and verifying suggested tags or concepts are correct
- Dynamic, individualized online experience, as pages automatically aggregate and create links to other relevant stories based on user queries & preferences



Product Lifecycle Management

analyze

- email, call-logs, blogs, web sites, social media for: market trends, customer sentiment, product ideas, competitive threats
- develop product concept

plan

- create business case
- develop product specifications
- evaluate & select suppliers
- initiate project

develop

- collaborate and coordinate across departments - marketing, research, manufacturing, engineering, partners, suppliers
- IP & licensing agreements
- develop product documentation, pricing, collateral, media assets
- FAQs

launch

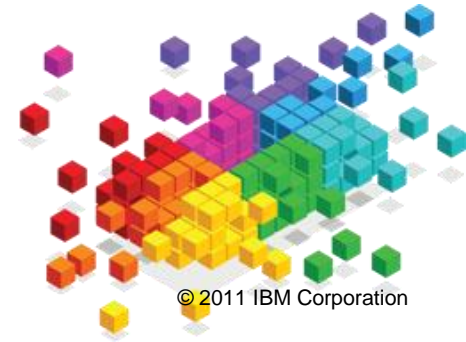
- enable sales – call center, retail, web and partners
- collaborate with advertising agency
- execute campaign
- capture orders
- assess market sentiment

support

- update FAQs, product information, supporting materials, technical materials, warranty claims
- assess market sentiment

Results

- Accelerate time to market
- Lower cost of product development
- Improve product quality
- Demonstrate compliance



Product Management

Industry: Telecommunications

Challenge

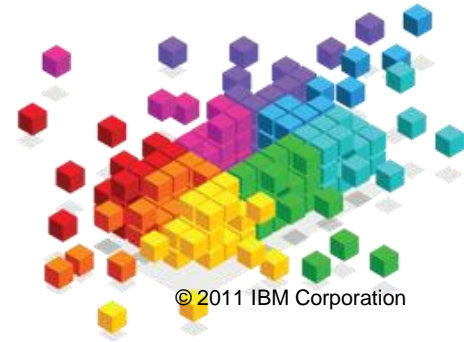
- 130 new product/service introductions
 - 60 day cycle
 - 750 deliverables
- 250 product/service improvements
 - 15 day cycle
 - 400 deliverables

Outcomes

- Collect and retrain all information and deliverables for reference, repurpose and compliance
- Easily monitor progress status, and related planning and budget information
- Reduce process lead time
- Annual savings of €200,000
- 50% faster time to market

Solution

- BPM, Content Management
- Integration with Microsoft Outlook
- Completion of one activity automatically starts the next
- Manage document review and approval cycle
- Manage document versioning and storage
- Monitor processes' timing for every action
- Establish SLA for processes



Customer Lifecycle Management

analyze

- email, call-logs, blogs, web sites, social media for: market trends, customer sentiment, product ideas, competitive threats
- develop market & product plans

attract

- develop advertising collateral
- publish product information
- promote with partners

acquire

- capture customer information
- execute order & fulfillment process
- provide product information
- manage corporate/business sales agreements

support

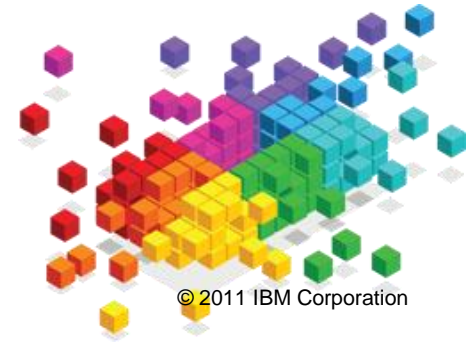
- resolve customer inquiries across all channels
- provide product information and FAQs
- facilitate x-sell and up-sell
- update customer information
- enable self-service (web site)
- assess support quality

statements

- paper, email or on-line
- retain as legally required
- custom offers per customer profile

Results

- Accurately target customers
- Efficient customer “on-boarding”
- Reduce printing & postage
- Reduce support costs



Customer Service

Industry: Rental Car

Challenge

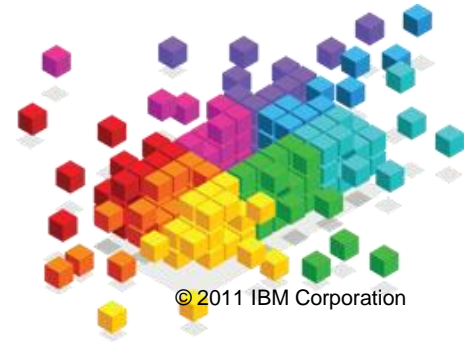
- Eliminate manual review and classification of customer feedback
- Rapid identification & resolution of customer issues

Outcomes

- improved accuracy and speed of analysis and classification process
- Almost doubled what had been achieved manually
- Quickly adjust staffing levels to address issues
- Focus managerial attention on priority issues

Solution

- IBM Content Analytics employed by Mindshare Technologies
- Apply to 1,000s of comments from web surveys, emails and text messages
- Automatically categorize feedback related to Vehicle Cleanliness, Staff Courtesy, and Mechanical Issues.
- Identify customers who request a phone call or those who mention customer loyalty program



Customer Service

Industry: Broadcast & Communications

Challenge

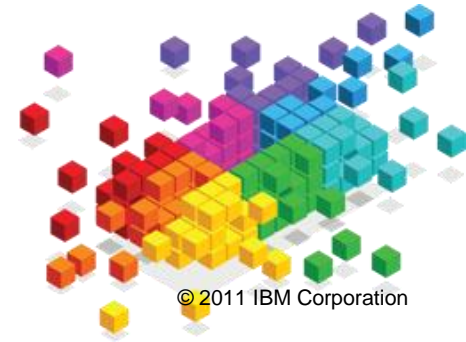
- Provide consistent customer service across all lines of business
- Process thousands of customer “white mail” and email received daily
 - Contracts, checks, mandates, email, paper correspondence
- Reduce average backlog of 40,000 “cases”

Solution

- Capture, BPM, Content Management, email management
- Integration with CRM & HR (skills database)
- Classify and map to LOB workflow
- Assign to CSR with appropriate skill set
- Utility to re-assign CSR resources to meet changing demands of work load

Outcomes

- Initial rollout to 250 CSRs, expanded to 2,500 CSRs, now expanding to 6,000 CSRs
- Customer satisfaction +15%; Employee satisfaction +20%
- Match “cases” with CSR skills for faster resolution
- Operating benefits realized in < 6 months
- Faster call resolution - complete correspondence history available to CSRs



Employee Lifecycle Management

hire

- capture résumé
- complete application
- review and route
- schedule interview(s)
- negotiation
- offer
- acceptance

orientation

- “read and sign here”
- benefits packet
- policies & procedures
- role-specific training
- development plan

status change

- performance review
- medical leave
- relocation (local & international)
- benefits
- dependents
- departure

re-hire

- simple or complex?

retire

- knowledge capture
- benefits
- retirement “package”

Results

- “single view” of employee development
- reduce administrative overhead
- employee “self service”
- eliminate paper records
- improved security



Human Resources

Industry: Electronics & Network Technology

Challenge

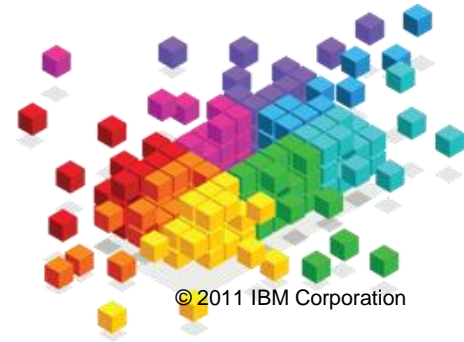
- Imminent loss of physical storage space
- Maintain 25,000 active & historical employee files
- Manual access to 5,000 employee files (average of 8 transactions per file per year)
- Inefficient filing of new personnel documents

Solution

- IBM Partner HR solution
- Integration with IBM FileNet P8 and SAP Human Resources module

Outcomes

- “Single view of employee” = 90% reduction in costs related to managing employee files
- Consistent classification and organization of documents added to employee files
- Enables central management of personnel files in branch offices
- Reduced copying and courier costs
- 2 year ROI



Asset Lifecycle Management

plan

- assess business need
- conduct cost-benefit analysis
- create business plan
- establish budget
- conduct environmental impact analysis

evaluate

- prepare RFx
- collect and manage vendor presentations, proposals, technical specifications, consultant reports, analyst recommendation, bid evaluations

procure

- negotiate contract, lease, agreement
- issue purchase order(s)
- file regulatory or environmental reports

operate

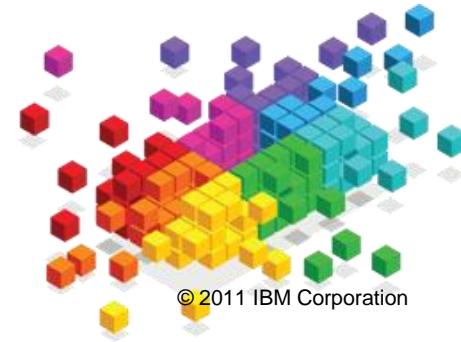
- manage operation manuals, technical docs, repair notes, technical docs, service bulletins, environmental guidelines
- publish safety procedures, hazardous material plans
- retain work orders, invoices
- integrate with ERP, EAM & GIS

dispose

- conform to hazardous material procedures and recycling laws
- document disposal

Results

- Accelerate asset time to value
- Extend asset lifetime
- Lower asset management costs
- Demonstrate compliance



Facilities & Infrastructure

Industry: Utility

Challenge

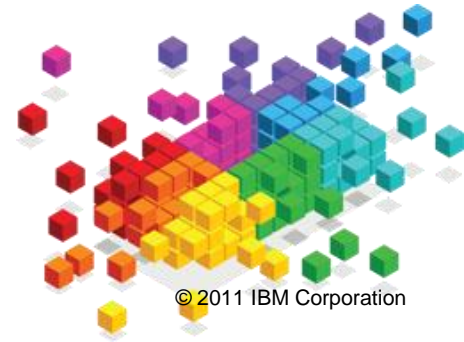
- Inefficient management of documentation (safety manuals, design drawings, operations manuals, schedules, manufacturer updates, engineering drawings, maps, repair tickets, supplier invoices) associated with wastewater processing infrastructure
- Incomplete information related to work orders

Solution

- Capture, Content Manager, Maximo
- Convert 300,000+ documents to digital format
- Establish process for updating asset documentation

Outcomes

- All relevant asset information immediate available (via Maximo) to maintenance crews
- Distribution of new safety information, reduced from weeks to 2 days
- Greatly reduce print and distribution costs
- Maintain history of all changes to quickly respond to audits.



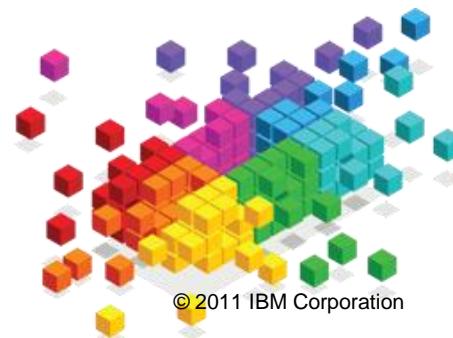
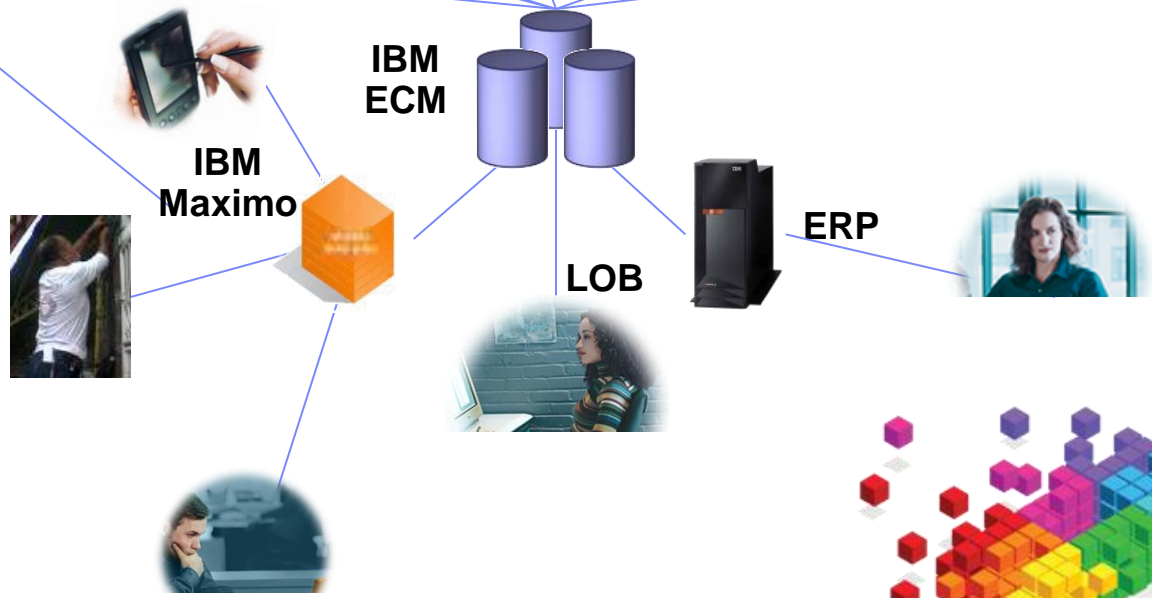
Central Access Point for Facilities & Asset Documentation

Plan	Evaluate	Procure	Operate	Maintain	Dispose
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market analysis, business plan, cost-benefit, budget	RFx, presentation, proposal, technical spec, bid evaluation	contract, lease agreement, purchase order, invoice	safety procedure, operation manual, license	technical docs, service bulletin, repair record, invoice	regulations, hazardous procedure, disposal record
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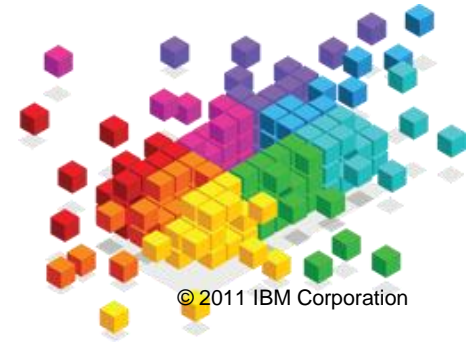


- Mobile workforce readiness, etc.
- Planning & scheduling activities
- Service level management
- Facilities management
- Field service & repair
- Audits & inspections
- Asset database
- Work activities
- Spare parts
- Reporting
- Inventory
- ERP, GIS, SCADA integration



Let's All Go Home Early on Friday

- **Employee lifecycle management**
 - Hire through retire
- **Product or service lifecycle management**
 - Concept through end of life
- **Asset lifecycle management**
 - Planning through decommissioning
- **Customer lifecycle management**
 - Market analysis
 - Customer on-boarding
 - Single view of customer
 - E-statements
- **Project management**
 - Planning through completion
- **Supply chain management**
 - Contract lifecycle management
 - ERP transactions
 - Accounts payable
- **Corporate legal**
- **Information lifecycle management**



Improving the efficiency, accuracy and cost effectiveness of core business activities

Enable better management of product, customer, employee, asset and supply chain information through enterprise content management



Customer lifecycle management

Incomplete market analysis

Customer lifecycle management begins with carefully targeted marketing that reaches products or services with those most likely to accept the offer. Companies conduct careful market analysis based upon information in the data warehouse and business intelligence systems, but frequently ignore the wealth of marketing insights contained in customer email, blogs and social networking sites. More detailed analysis, utilizing a wider range of market information, has the potential to reduce customer acquisition costs and improve overall customer service.

Symptoms:

- Important customer trends, issues or solutions remain buried in communications such as written correspondence, email and customer service records
- Valuable customer or market sentiments contained in websites, blogs or other social media is ignored
- Increased marketing and advertising costs as a result of an inability to accurately target products and services

Problematic customer on-boarding

Once activated, customers form an impression (positive or negative) based upon the on-boarding process. For many customers, the initial enthusiasm for a product or service is quashed by the complexity, tediousness and length of the on-boarding process. Fulfillment or delivery of the product or service may also be problematic and protracted if the process is not efficient.

Symptoms:

- Needlessly complex, tedious and lengthy customer on-boarding process
- Incomplete information capture results in problematic ordering and fulfillment processes
- Inability to efficiently process and resolve "exceptions" to customer orders

Inconsistent customer service

Organizations must balance customer service costs with quality of service. High volume customer service requests or "cases" need to be handled consistently and efficiently. Increasingly, customer communications—whether by phone, letter or email—need to be retained. However, customer service representatives often do not have instant access to all relevant customer information to quickly resolve calls. Self-service capabilities that could simplify customer service processes, cut customer service costs and improve customer satisfaction are often inadequate or poorly designed.

Disjointed customer information

In industries where case management is a standard practice, such as healthcare, insurance, government and social services, employees need secure access to all information, regardless of source or format, so efficiently manage casework. However, relevant customer information, which is often unstructured data in the form of email, bills, contracts and other forms, is stored across the organization in various systems and can be difficult to locate.



Ideally, any employee providing customer service should have a "single view of the customer" so efficiently and effectively respond to customer requests—but in reality, employees must often re-enter customer data to process requests or inquiries. Delays in resolving customer issues are the result of a lack of complete or accurate information about customers and the company's products and services.

Symptoms:

- Inability to integrate unstructured customer information with information contained in databases or CRM systems to create a single view of the customer
- Customer service representatives cannot quickly determine the status of a customer inquiry
- Inconsistent processing of client "cases" from initiation through resolution
- Many high-volume customer service activities are manual or paper-intensive
- Reliance upon call centers rather than customer self-service website because of a lack of product or service information

Reliance on printed statements

Monthly printing and mailing of billing or account statements are ideal targets for cost reduction and greater efficiency. Increasing the amount of detail on statements requires higher volumes of paper, production and handling time, and higher distribution budgets. Customers often request statement copies or duplicates, and delivery costs increase as energy prices rise. Depending upon local environmental initiatives, a significant portion of the statements may never be recycled and may end up in the landfill. Call centers can easily quantify the percentage (and cost) of calls related to billing or statements inquiries to help identify areas for improvement.

Symptoms:

- High overhead from printing bills or statements
- A high percentage of customer service calls with billing or statements inquiries
- Inability to achieve environmental goals through reduction of paper usage, printing and postage

How IBM ECM can help

IBM ECM facilitates better customer service, self-service and case handling through efficient management of content and processes associated with customer information and transactions. Electronic forms and BPM support more accurate capture of customer and order information, thereby reducing the number of problematic orders. IBM BPM capabilities can also help accelerate order processing and fulfillment.

IBM ECM can be integrated with CRM to enable a single view of the customer. This helps customer service representatives to quickly resolve customer requests initiated by phone, web, email, written correspondence and in person by giving them access to all relevant information about the customer, from past order details to order frequency and complaints. Complex, long-term customer service requests or "cases" can be more efficiently managed when all relevant information, as well as supporting notes and communications, is captured, updated and made available to knowledge workers supporting the case. The combination of IBM ECM capture, recognition, classification, business rules and BPM capabilities help organizations effectively process the large volume of customer correspondence and inquiries that arrive via a variety of channels: mail room, website, call center, social networking sites and so on.

