

9 Lines of Business that can Benefit from ECM



Agenda

- ECM and key LOB systems
- 9 Lines of Business
 - Human resources
 - Marketing
 - Product management
 - Procurement
 - Sales
 - Customer service
 - Finance/accounting
 - Operations
 - Legal
- SPACE
 - Suppliers, products, assets, customers, employees

Complement Critical Applications and Systems to Improve Enterprise Efficiency

capture

LOB documents



Microsoft Office



SIEBEL

customer service

email



mobile



PEOPLE Soft

LAWSON
ORACLE

Applications

SAP

JDEdwards
Enterprise Software

ERP & supply chain



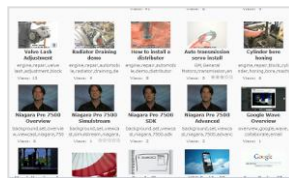
commerce



collaboration

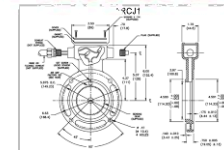


asset management



digital assets

AutoCAD



technical documents



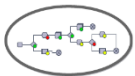
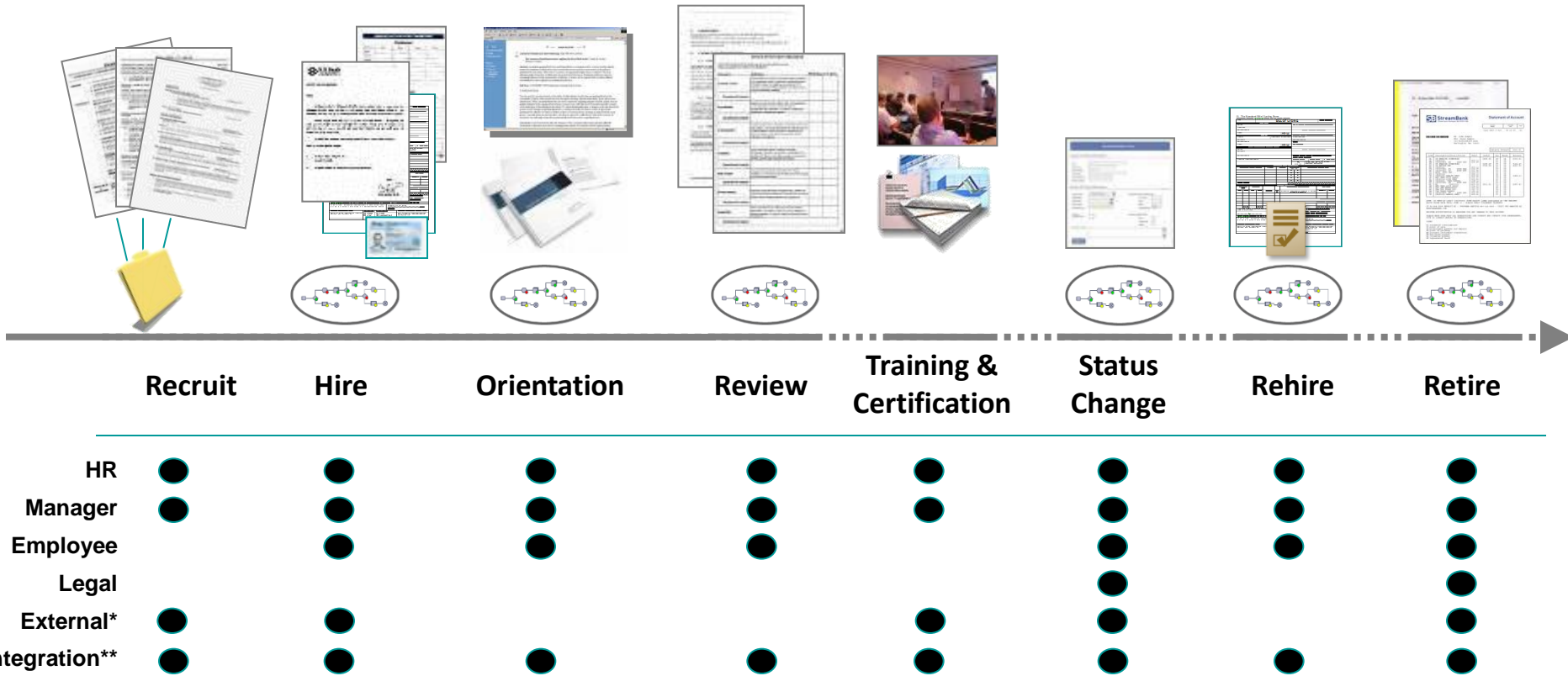
statements & confirmations



legacy repositories & file shares

Employee Lifecycle Management

- Provide efficiency and consistency in hiring and on-boarding processes
- Facilitate “single view of employee” and employee “self service”
- Eliminate costs and inefficiency of managing paper files



Indicates areas where business process management can significantly reduce costs and improve efficiency.

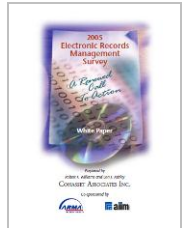
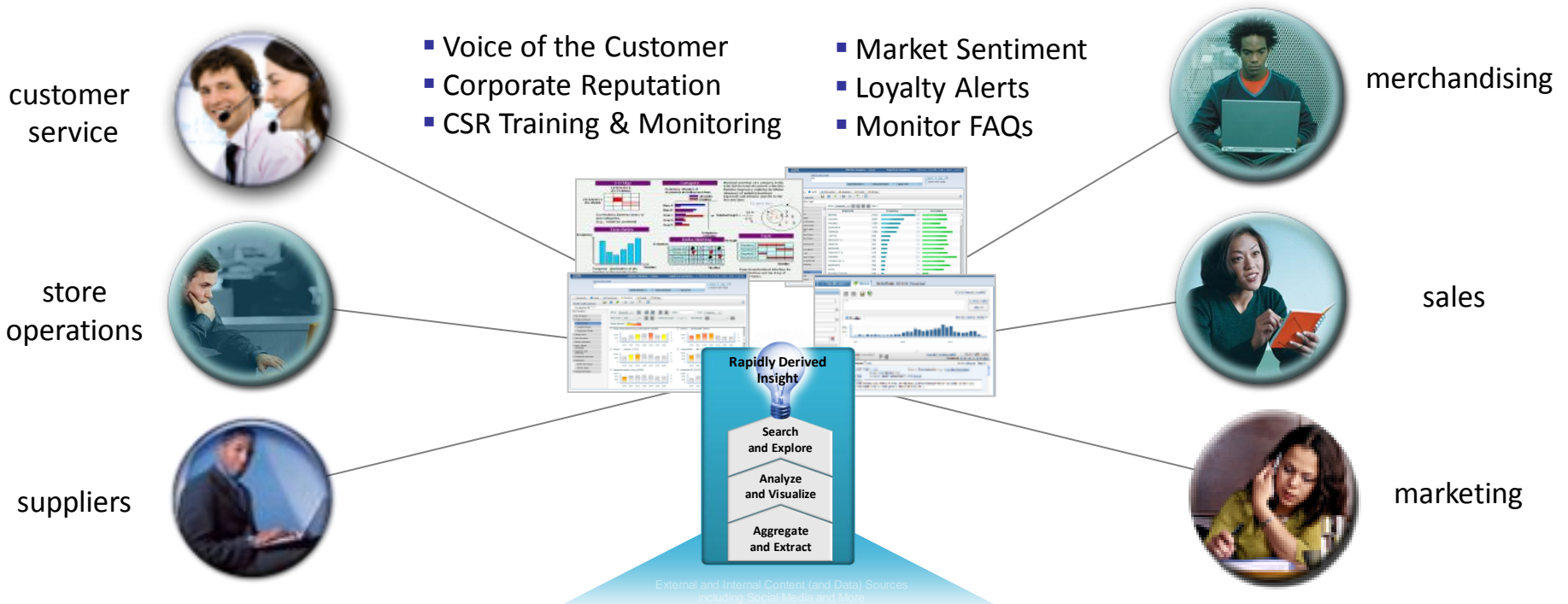
* Includes employment agencies, insurance providers, medical providers, government agencies, unions, etc.

** Includes ERP, human resources, payroll and any legacy systems that may maintain employee data

Human Capital Management – Optimizing Critical Human Resource Processes



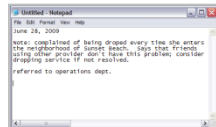
Rapidly Obtain More Detailed and Accurate Market and Customer Insight



industry reports



market research transcripts



call logs



on-line surveys



blogs



email

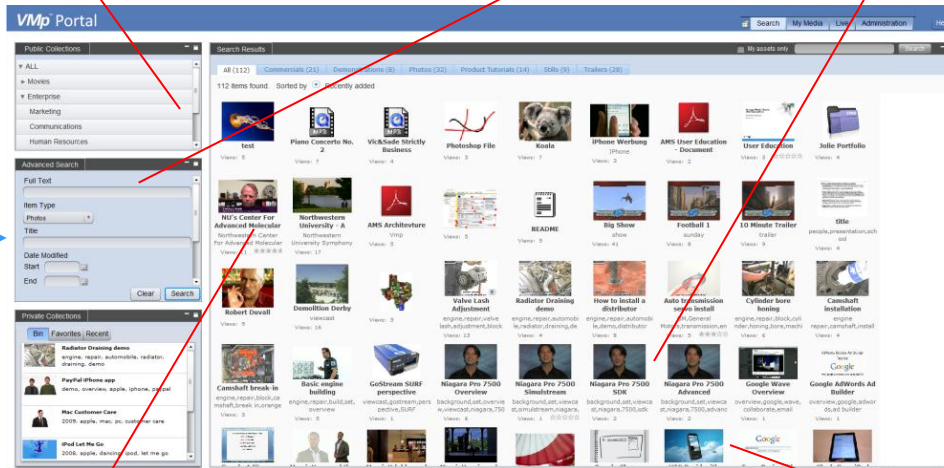
Digital Asset Management

- Single, secure point of access to effectively organize, manage the lifecycle of media and brand assets
- Enable multi-channel distribution of digital/media assets
- Promote consistency in the use of media and brand

distribution for publication, CDN support

organize content for efficient search & retrieval

versioning



taxonomy & metadata bring ECM discipline to media assets

automated creation of production-ready video & images

Lotus Connections

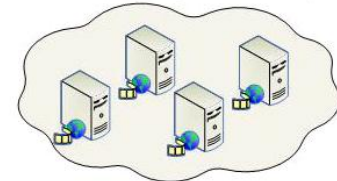
portal

WCM

streaming server

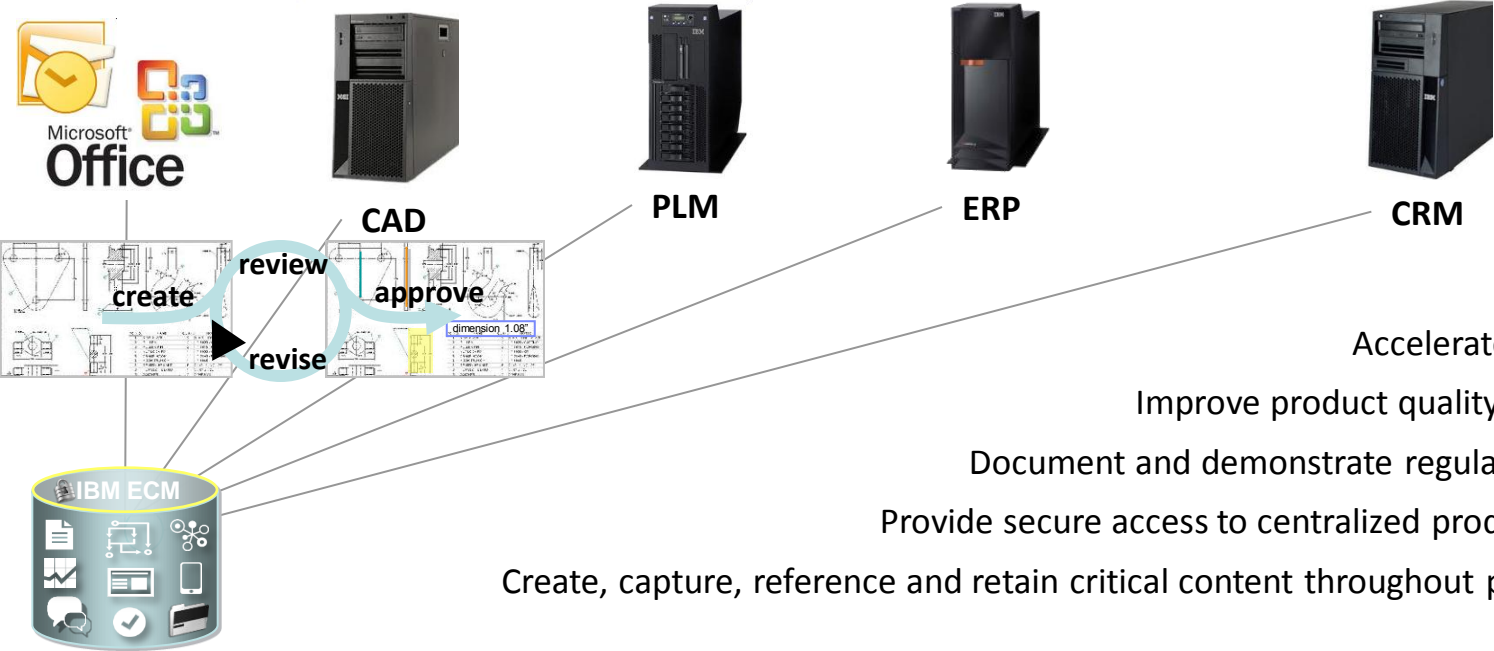
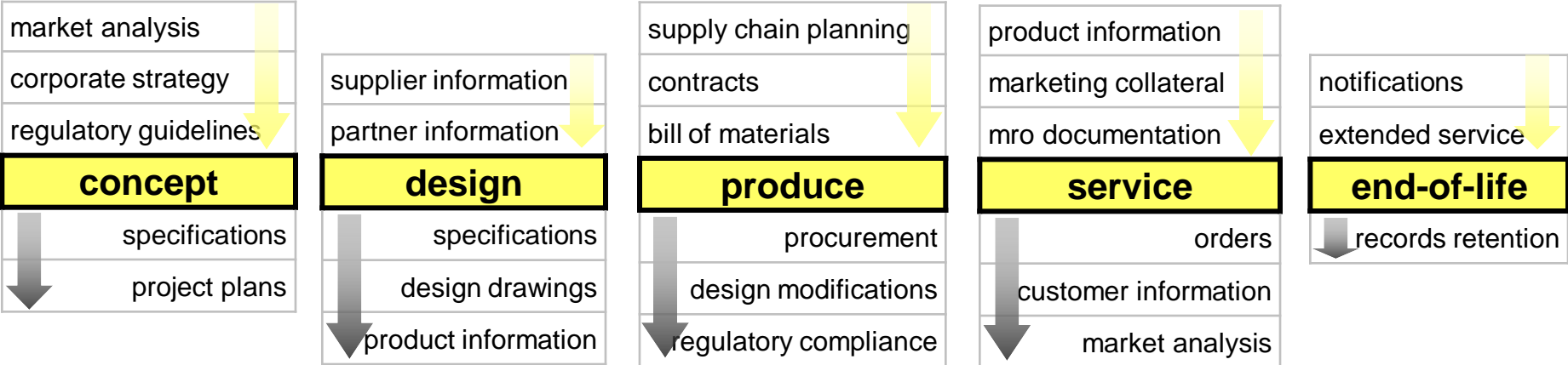


transcode engine



content delivery network

Product Lifecycle Management



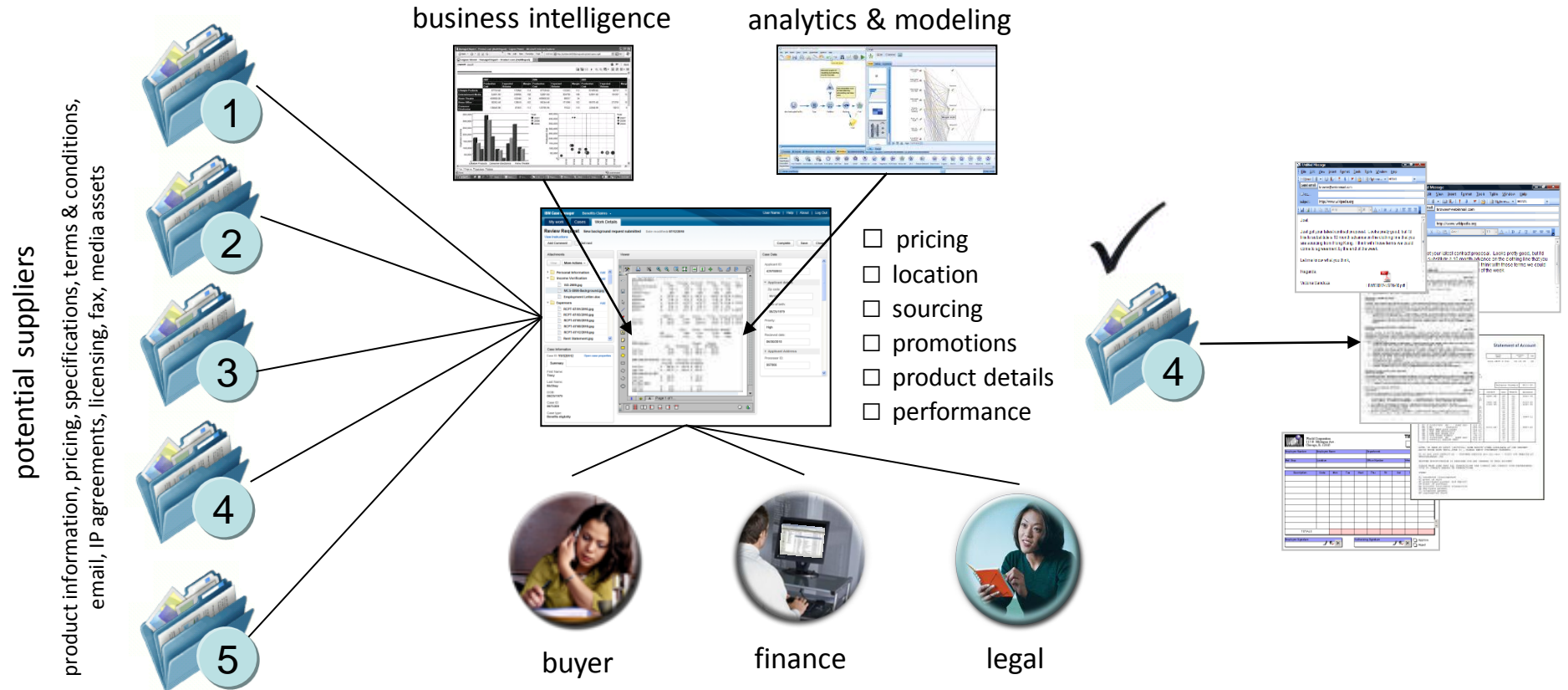
- Accelerate time to market
- Improve product quality and capabilities
- Document and demonstrate regulatory compliance
- Provide secure access to centralized product information
- Create, capture, reference and retain critical content throughout product lifecycle

Supplier Evaluation & Selection

- Accelerate supplier evaluation and selection process
- Execute holistic assessment of potential suppliers
- Establish single point of access for all supplier content & communications
- Streamline contract negotiations

Evaluation & Selection

Contract Negotiation



Contract Lifecycle Management

Draft

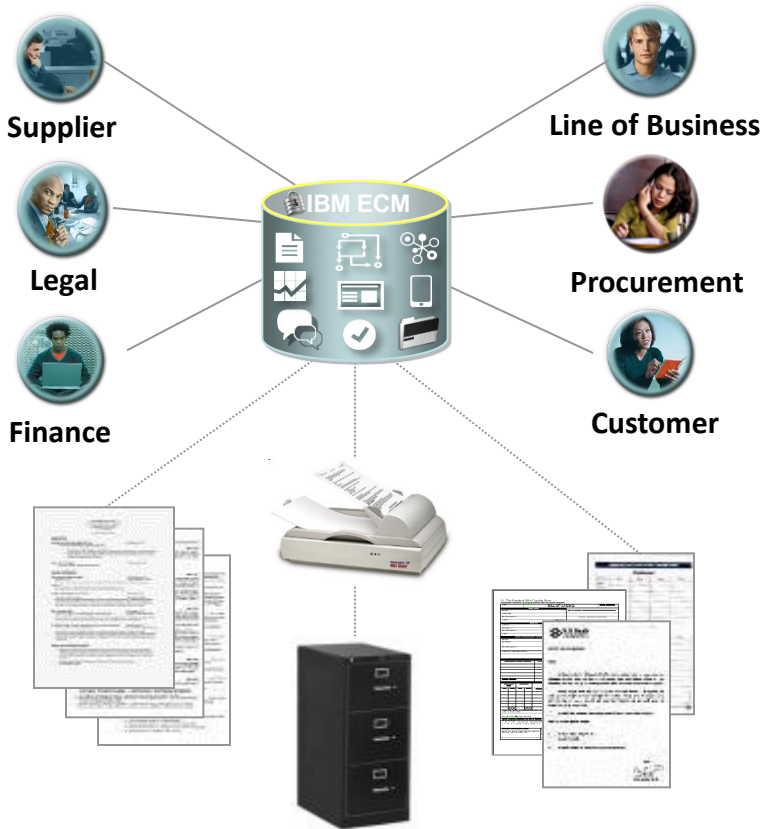
Negotiate

Approve

Storage & Management

Administration & Compliance

Renewal & Optimization



Classification
Retention
Security



CRM



ERP



Automatic
Renewal
Notification

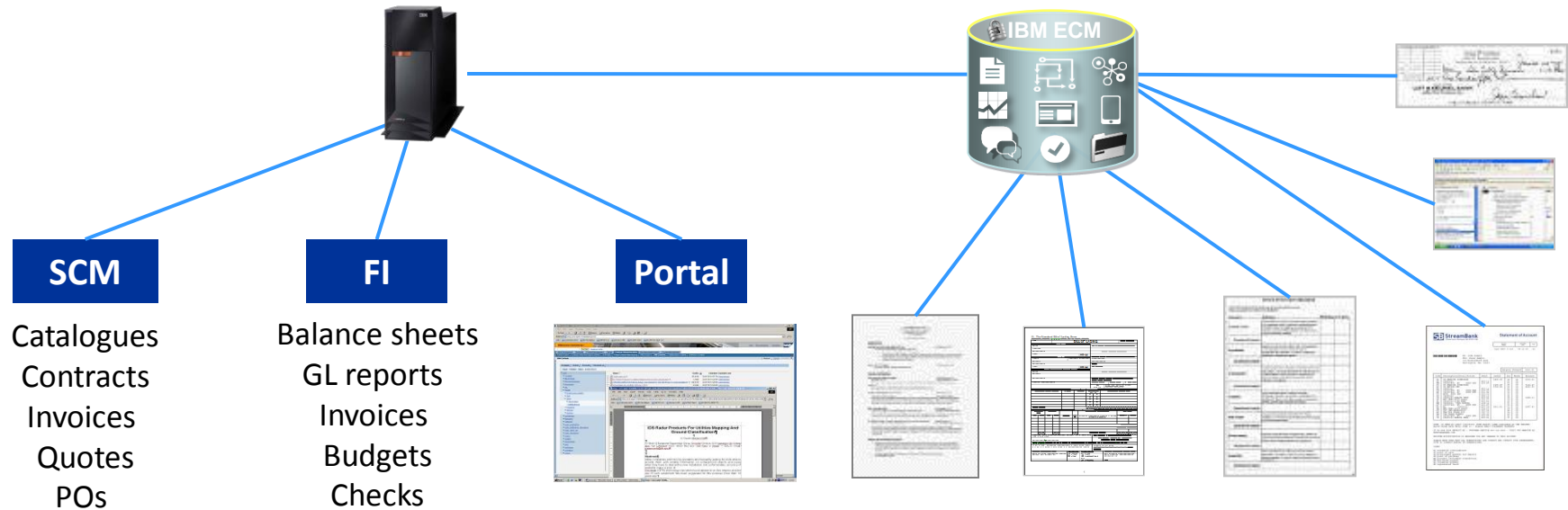


Process &
Performance
Analysis

- Incorporate historical or current contracts
- Accelerate creation of new contracts
- Automatically retain contracts and any supporting document
- Secure access to contracts from ECM, CRM or ERP
- Automatically trigger review & renewal process
- Analyze and audit contract processes and performance

ERP Supply Chain Transactions

- Initiate a transaction via automatic capture of document
- Access all relevant transaction documents via the ERP interface
- Accelerate transaction processing with best-of-breed BPM
- Cost-effectively archive ERP data and reports



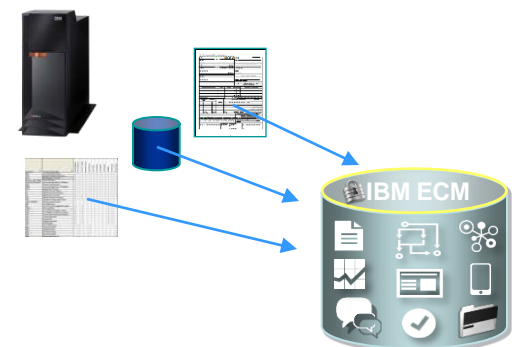
associate documents & transactions



best of breed process management

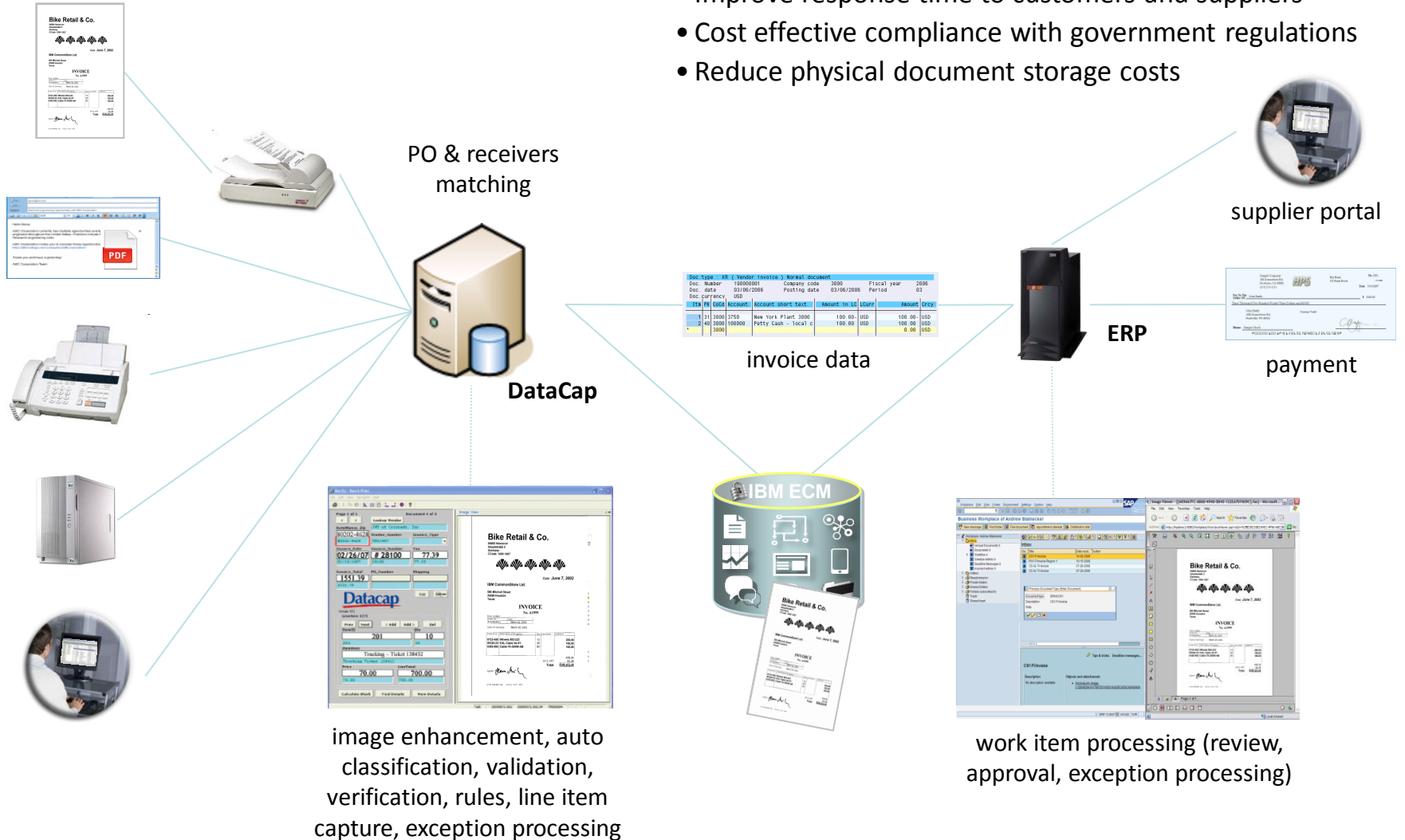


archive & retrieve ERP-generated documents, data & reports



Invoice Processing

- Reduce or eliminate manual data entry and associated errors
- Streamline invoicing and payment validation
- Eliminate write-offs due to lost invoices
- Improve response time to customers and suppliers
- Cost effective compliance with government regulations
- Reduce physical document storage costs



Sales

- provide accurate, current and complete product/service information
- provide consistent information and process across channels
- enable mobile consultation and transactions
- facilitate easy and accurate acquisition of information
- retain record of transactions and communications to support “single view of customer”



store



online



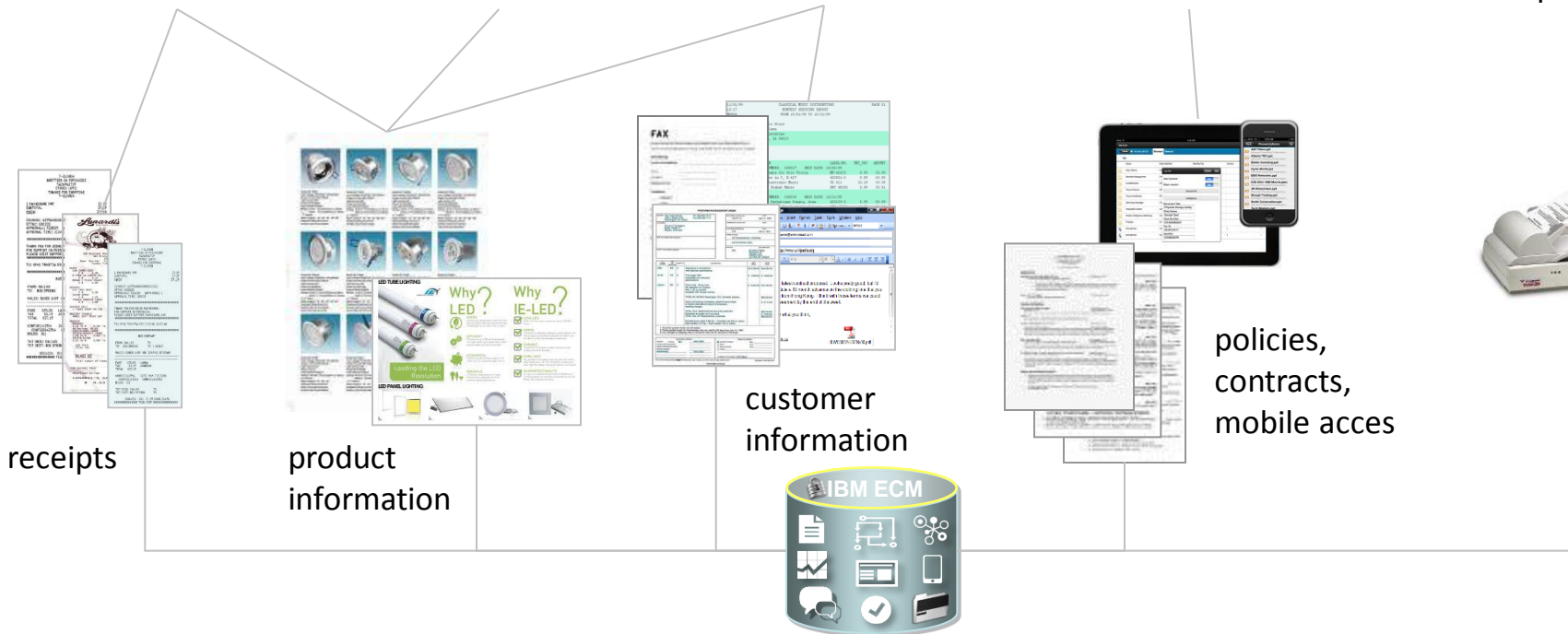
call center



home



print



Receipts & Statements

- Eliminate print and postal costs for high volumes of statements/reports
- Improve customer service and provide online self service options
- Maintain history of customer transactions
- Capture millions of documents daily



BI reports

Period	Balance	Payments	Charges	Interest	Minimum Payment
01/01/10	\$1,234.56	\$100.00	\$50.00	\$10.00	\$20.00
02/01/10	\$1,184.56	\$100.00	\$50.00	\$10.00	\$20.00
03/01/10	\$1,134.56	\$100.00	\$50.00	\$10.00	\$20.00



store operations

DATE	TIME	AMOUNT
01/01/10	10:00	100.00
01/02/10	11:00	200.00
01/03/10	12:00	300.00

store operations

billing

billing

Account Number	Account Name	Account Type
123456789	JOE EMPLOYEE	Personal Credit

store reports



financing

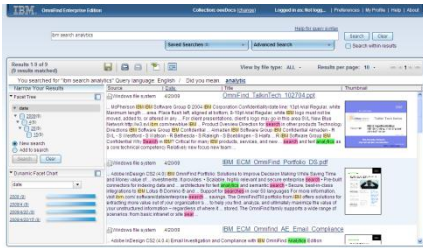


customer service/returns

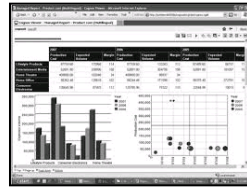


Customer Service

- Consistent process to manage customer inquiries and requests
- Inquiry classification to reduce resolution time
- Capture and retain customer correspondence to facilitate resolution



search relevant product, service, supplier, customer, procedure, policy information



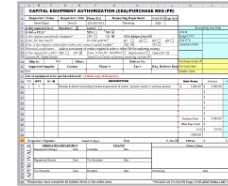
system reports



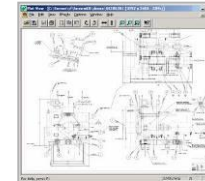
SLA



product information



transaction receipts



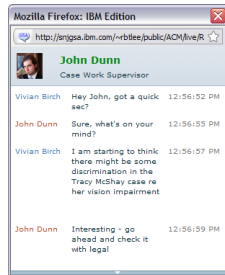
technical documents



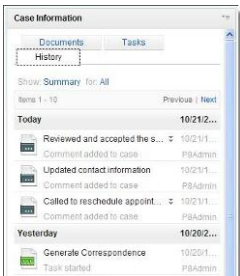
track in/out-bound communications



aggregate & retain relevant information



real-time collaboration



capture SME notes & comments

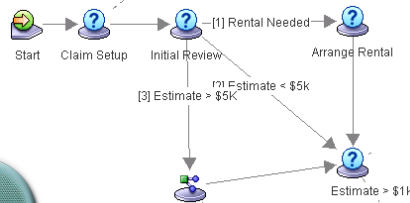
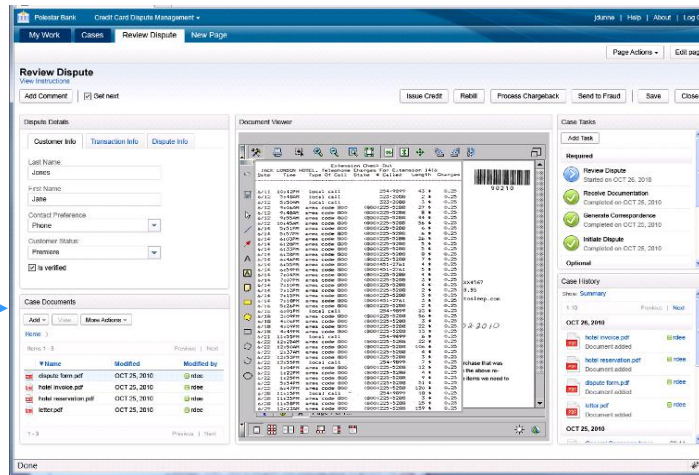
Complex Customer Issue Resolution

Fraud Investigation

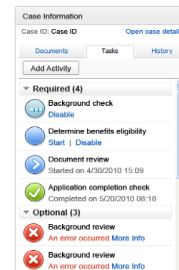
Corporate Account Management

Billing Disputes

Incident/Outage/ or Accident Investigation



ad-hoc workflows



task management



CRM



ERP



LOB

integrate with key information sources



coordinate expertise & skills of SMEs

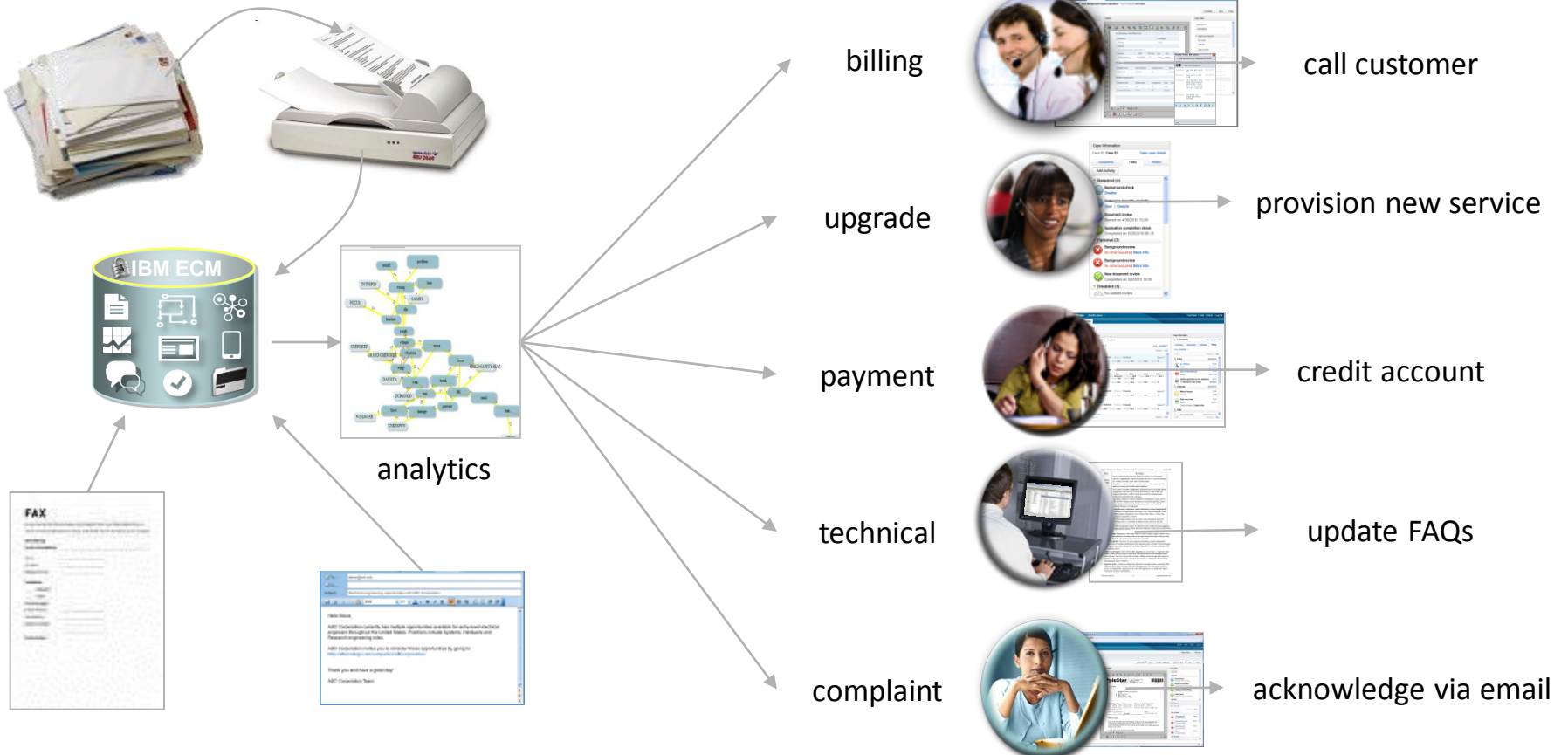
Mailroom

- Provide single processing point for inbound customer communication
- Process “back office” customer requests as efficiently as call center requests
- Classification reduces “re-routing” and facilitates faster resolution
- Retain customer correspondence to enable “single view of customer”

capture & classify

assign

resolve & respond



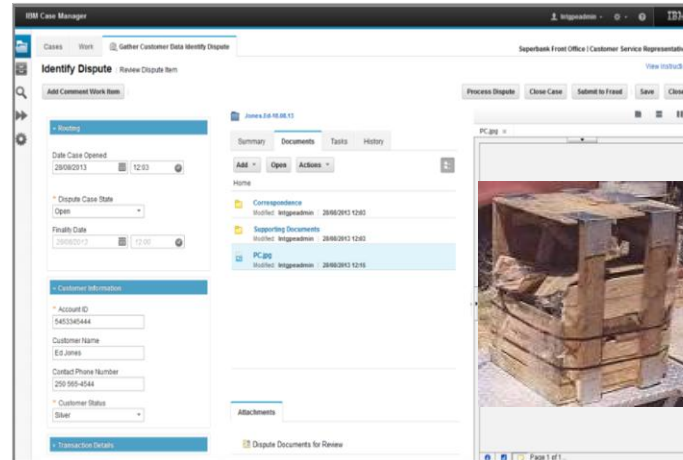
Claims Management

- Establish an automated, auditable claims process
- Provide complete context to analyze and resolve claim
- Retain all relevant documentation and communications as corporate record
- Apply analytics to identify potential fraud or operational issues

Initiate



Investigate



- standard workflows
- mandatory and optional tasks
- collaboration
- business rules
- correspondence
- search



LOB

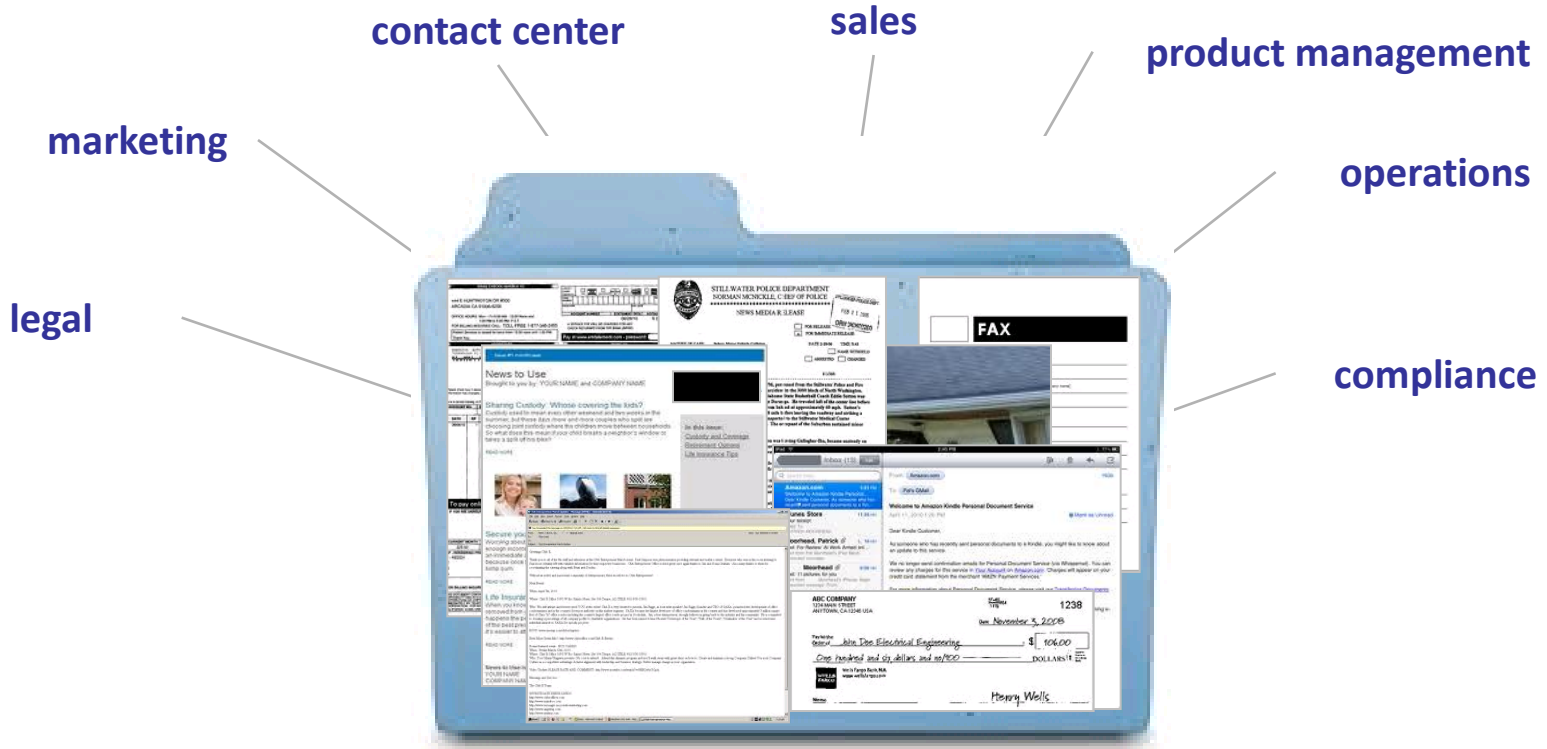


Resolve



analytics

All Relevant Customer Information Via Single, Secure Access Point



content created and captured throughout the customer lifecycle

Single, Secure, Accurate Source for Asset Documentation

Plan

market analysis,
business plan, cost-
benefit, budget...

Evaluate

RFx, presentation,
proposal, technical
spec, bid evaluation...

Procure

contract, lease
agreement,
purchase order,
invoice...

Operate

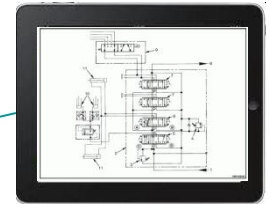
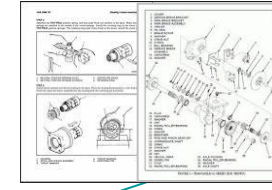
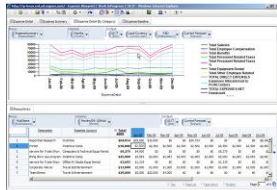
policy, procedure,
operation manual,
video, license,
certificate...

Maintain

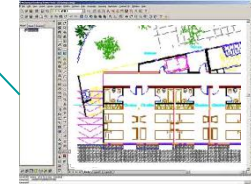
technical docs,
service bulletin,
repair record,
inspection...

Dispose

regulations,
hazardous
procedure, disposal
record...



mobile



maintenance repair, operations

design, architecture, engineering

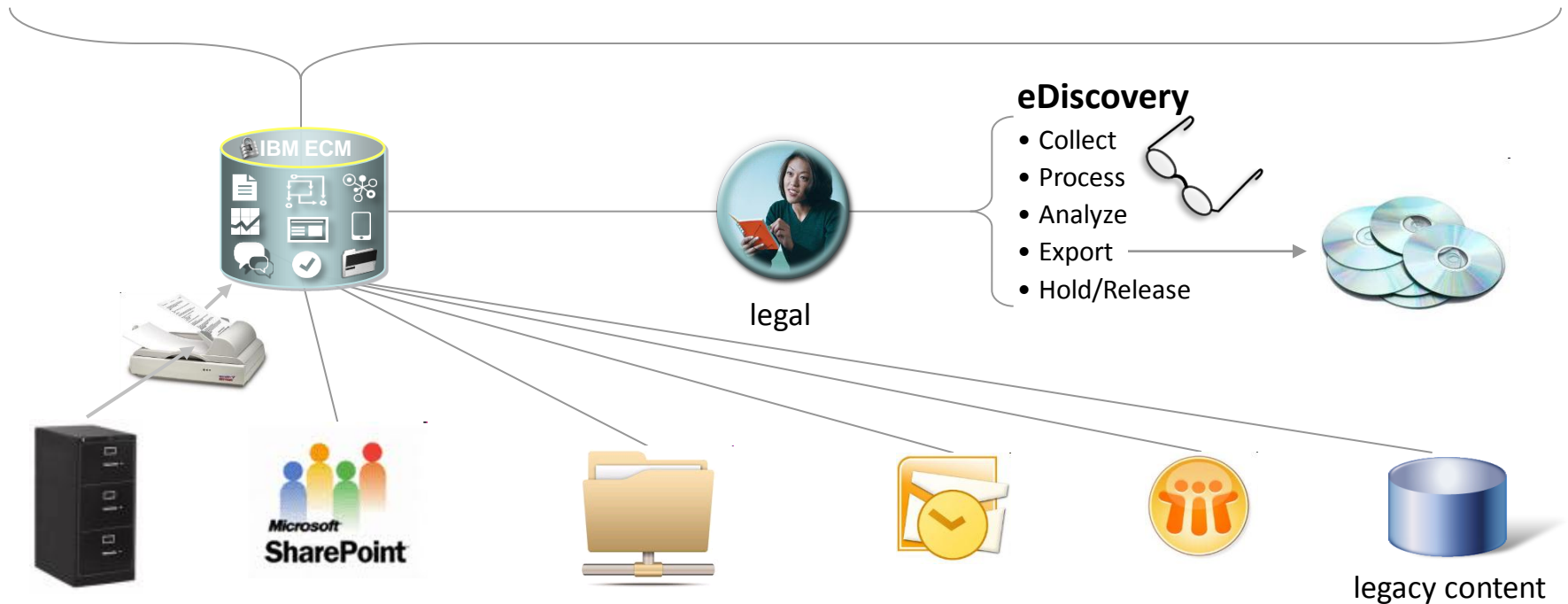
finance/compliance



Corporate Legal

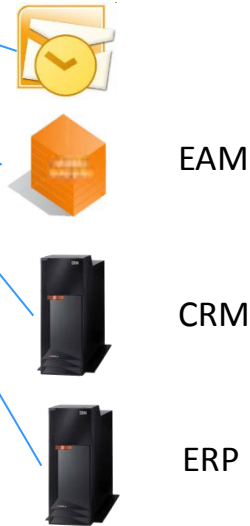
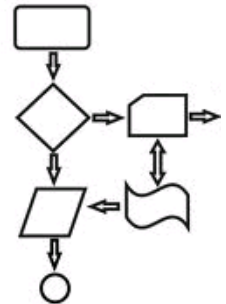
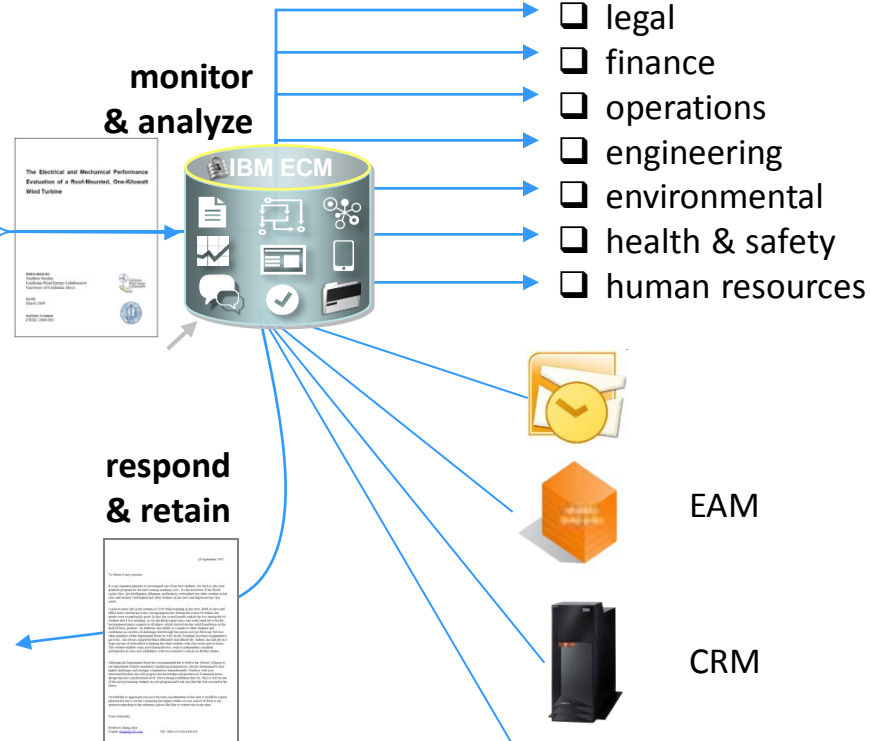
- Enable collaboration on legal matters across departments
- Easily access critical documents associate with LOB legal matters
- Reduce risk by retaining documents no longer than necessary
- Accelerate discovery process and reduce discovery costs

marketing	product management	operations	human resources	finance	IT	suppliers	customers
contracts, branding, trademark licensing	contracts, licensing, IP agreements	policies, procedures, environmental compliance, contracts	policies, labor agreements, disputes, claims	financial reporting, acquisitions, restructurings, audits,	retention, policies & governance	contracts, addenda	claims, litigation



Regulatory Compliance & Reporting

- Monitor local, regional & international regulations
- Accelerate analysis and potential impact of regulations
- Accelerate implementation of regulatory requirements
- Retain critical documents & correspondence
- Reduce cost & time required to respond to audits



Which additional lines of your business could most benefit from ECM?

Employee Lifecycle Management

lines of business

labor relations		labor relations		labor relations
legal	health & safety	health & safety		health & safety
contracts	legal	legal		legal
compliance	compliance	compliance	contracts	compliance
manager	manager	manager	manager	manager
HR	HR	HR	HR	HR

hire

orientation

status change

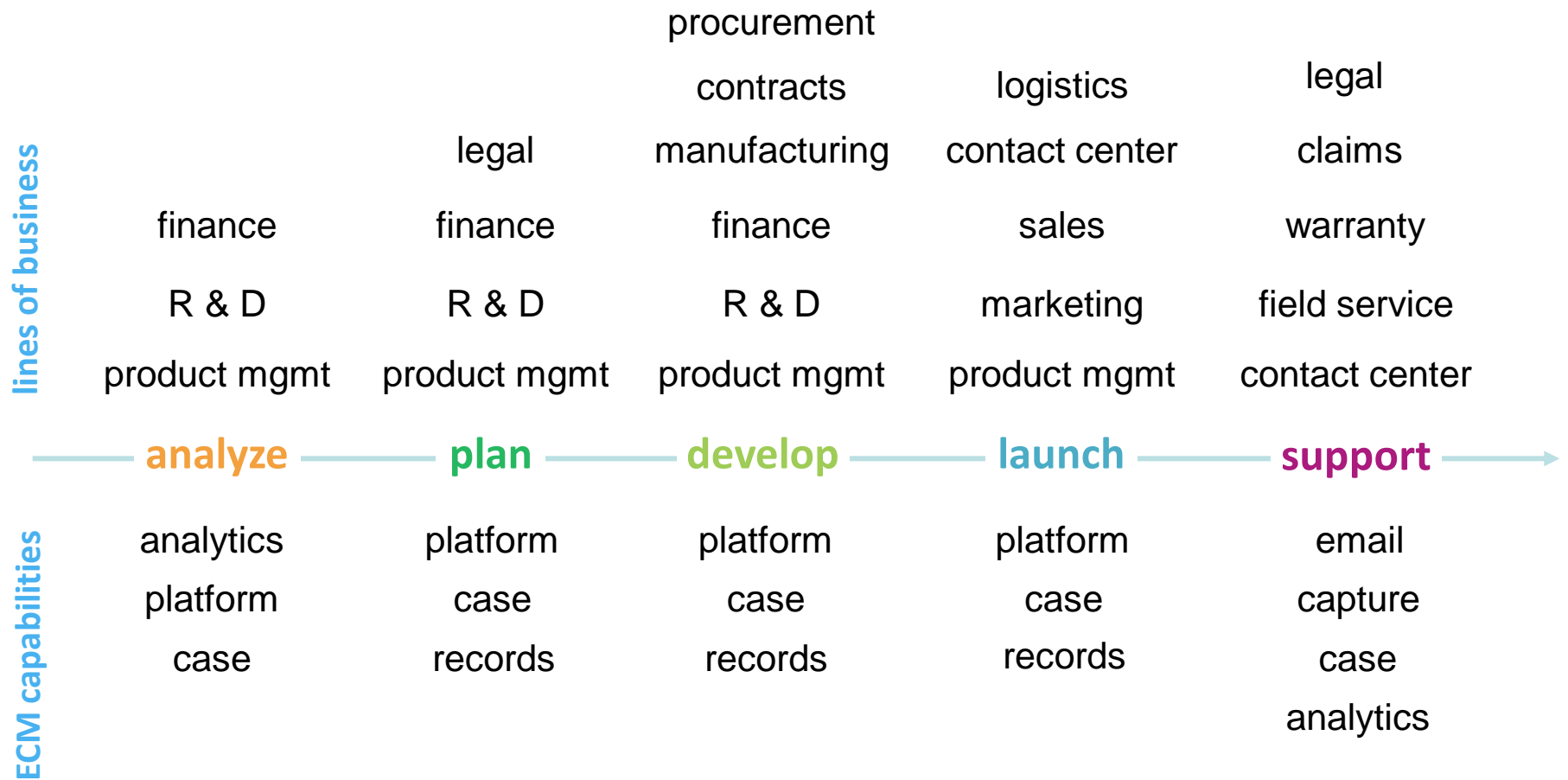
re-hire

retire

ECM capabilities

platform	platform	platform	platform	platform
capture	capture	capture	capture	capture
eforms	eforms	eforms	eforms	eforms
email	case	email	email	email
case	ERP	case	case	case
ERP	records	ERP	ERP	ERP
records		records	records	records

Product/Service Lifecycle Management



Supplier Lifecycle Management

lines of business

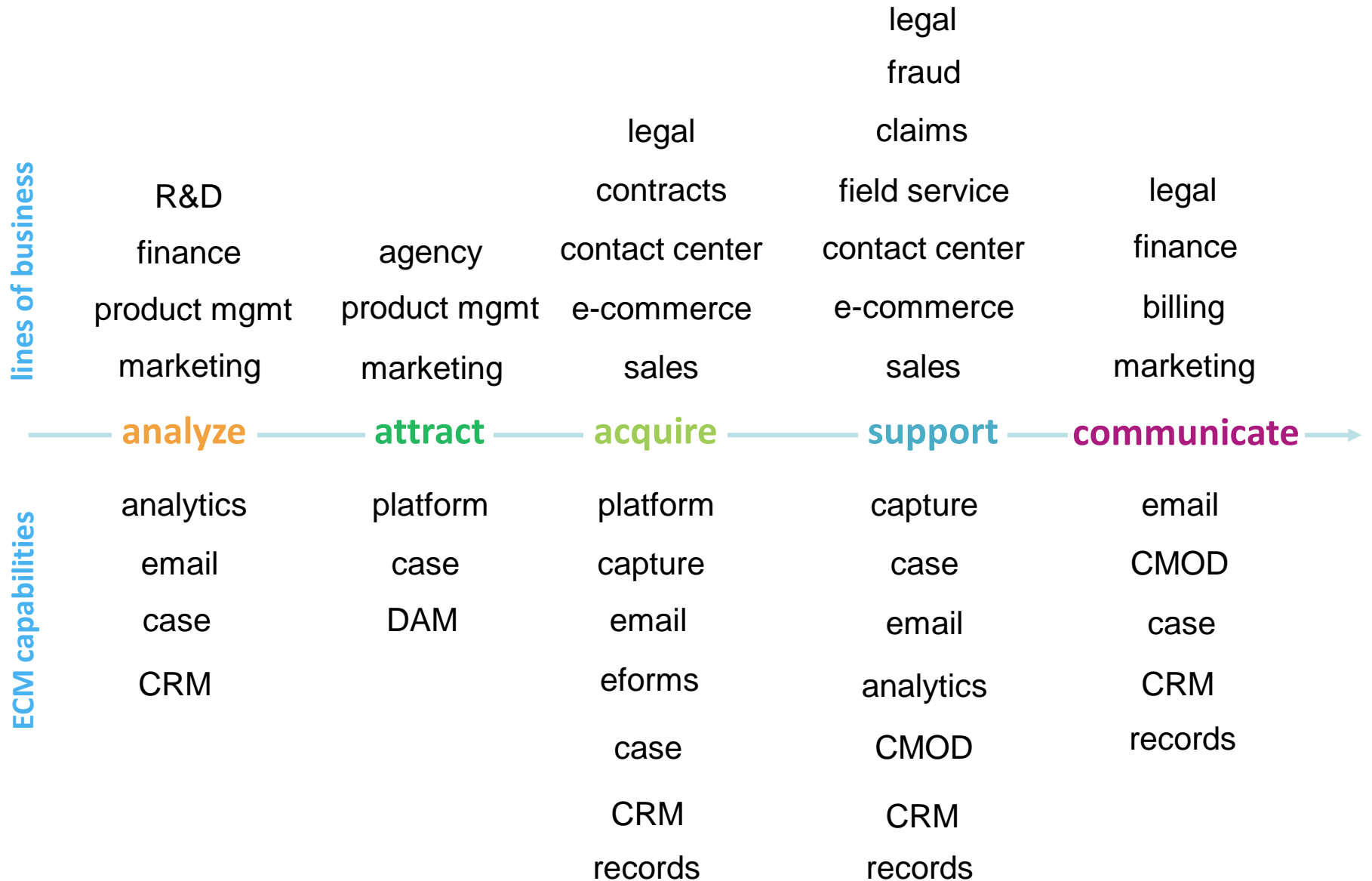
	R&D			legal	
	engineering	compliance	legal	logistics	
	operations	operations	finance	operations	legal
	product mgmt	product mgmt	contracts	product mgmt	contracts
	procurement	procurement	procurement	accounting	product mgmt
				procurement	procurement

— **identify** — **evaluate** — **contract** — **manage** — **renew?** —>

ECM capabilities

platform	platform	platform	platform	platform
email	email	email	email	email
case	case	case	eforms	case
	records	ERP	case	ERP
		records	capture	records
			ERP	
			records	

Customer Lifecycle Management



Asset Lifecycle Management

lines of business

environmental	environmental			
real estate	real estate	real estate		
construction	construction	compliance	real estate	
manufacturing	manufacturing	procurement	manufacturing	environmental
engineering	engineering	contracts	human resources	real estate
operations	operations	operations	health & safety	health & safety
finance	finance	finance	operations	operations

plan

evaluate

procure

operate

dispose

ECM capabilities

platform	platform	platform	platform	platform
case	email	email	capture	records
	case	case	records	
		records	maximo/erp	