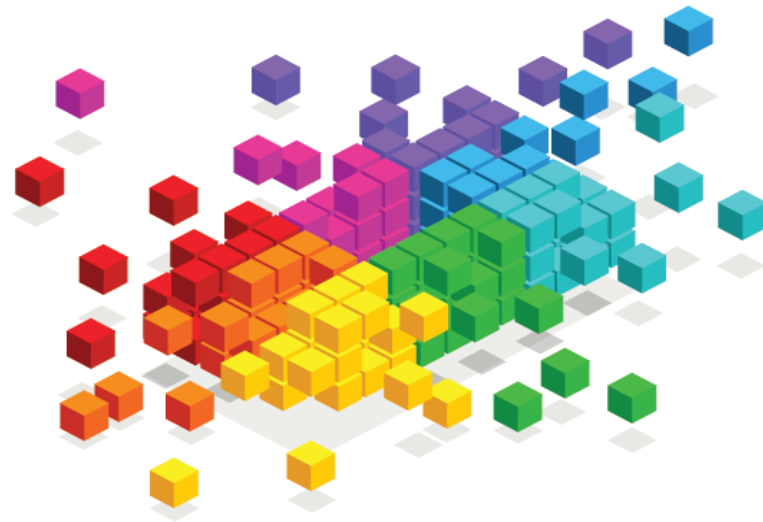# Reducing the Costs of Explosive Information Growth with a Smarter Approach to Archiving
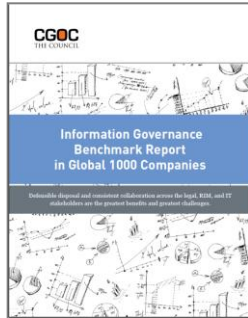
Putting Content to Work
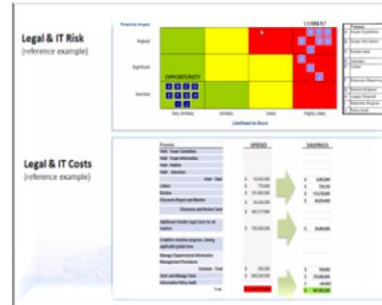ECM UserNet 2011

Our Program Goal

Help you identify opportunities to leverage your skills and investments on high-cost, high-risk information governance challenges your organization faces with sessions on:
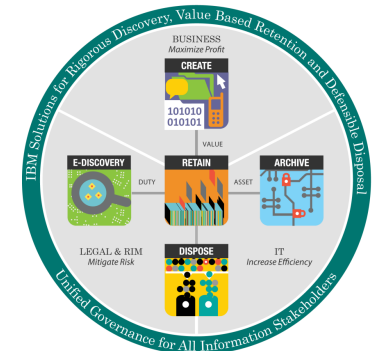
1

Executive
Challenges &
Recent Findings

2

Executive Points of View
on the Challenges
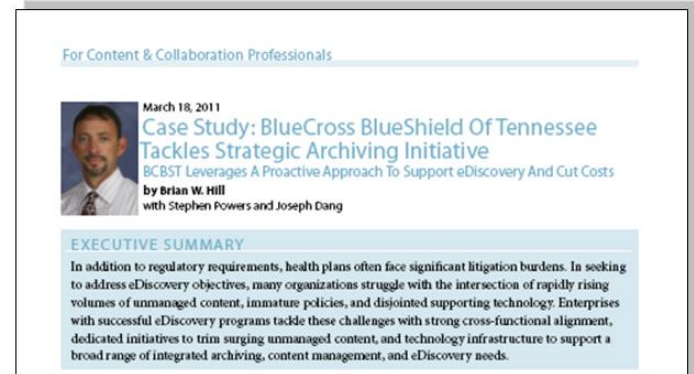✓ CIO
✓ General Counsel
✓ Risk & Compliance

3

ECM Building Blocks
✓ Value Roadmap
✓ Product Roadmap

Leadership Opportunities for ECM Practitioners

- *"Working with other content and collaboration professionals at BCBST, **Andy Jacobs, the company's lead enterprise content management (ECM) architect**, sought to address [the challenges of surging volumes of content … including mounting legal expenses when relying on high-cost, third-party services organizations for identification, collection, and downstream eDiscovery efforts]"*

Forrester Case Study:
BCBST Tackles Strategic Archiving Initiative

- *"His key steps included: Creating a strong cross-functional team…. **Jacobs collaborated with the company's records manager, associate general counsel, and other stakeholders** to understand requirements, identify areas of highest legal risk, and capture sufficient detail to scope and justify the program."*
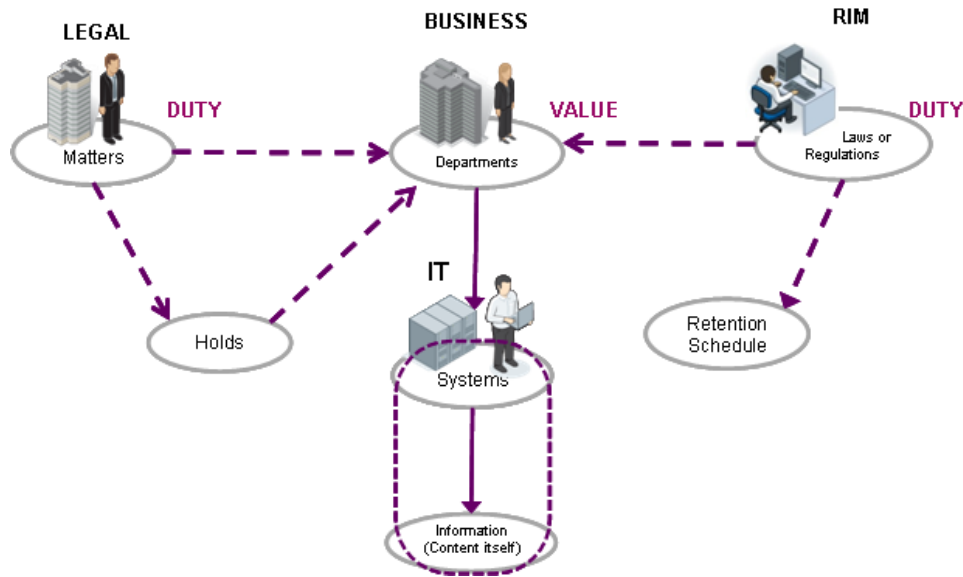
Topics

1. The CIO's pain points

2. Addressing the problem

3. Building on your expertise and ECM investments

4. Developing the business case for change

5. Resources to learn more

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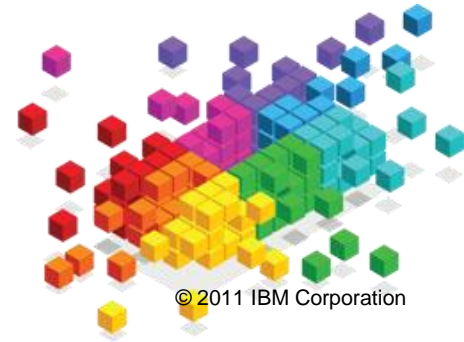
Enterprise Information Management Challenge

Legal & RIM understand information obligations

- ✓ Manual or siloed process not systematically visible to IT

- ✓ 10,000s of duties that vary by case, country and line of business

LEGAL — DUTY — Matters
BUSINESS — VALUE — Departments
RIM — DUTY — Laws or Regulations
Holds
IT — Systems
Retention Schedule
Information (Content itself)

Business teams know the value of information

- ✓ No modern mechanism to communicate specific value to IT (or legal)

- ✓ 1000s or 10,000s of departments doing various business functions with variable info value

IT has the information but *no visibility to its obligations or business value*
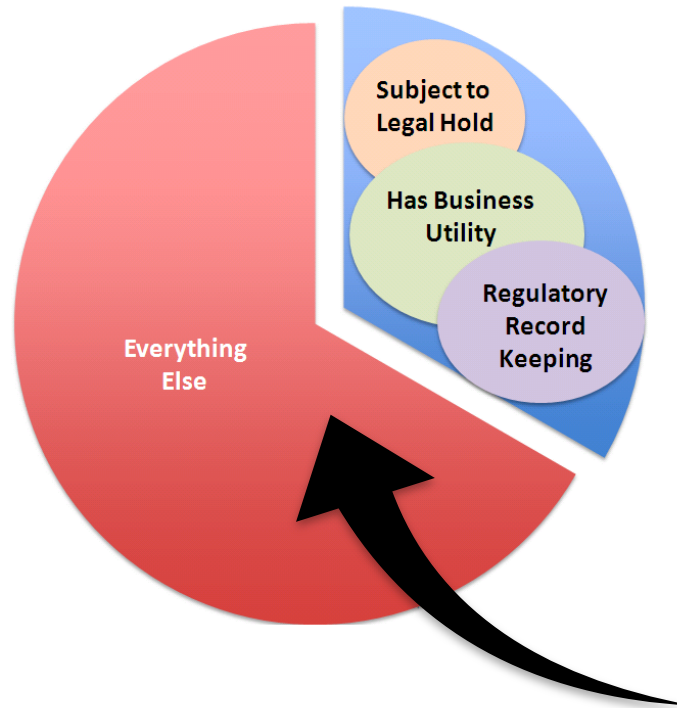
- ✓ No safe disposal, serious constraints on migration and consolidation
- ✓ Uses capital to manage garbage rather than information of utility to the business

Simple Logic

If you know what you need to keep for litigation and regulations

And you know what you need for its business value (and for how long)

Then you can throw everything else away

If you can't determine specific value and legal duty, you must:

✓Manage everything as if of value

✓Guess if you're in compliance

✓Spend too much to manage unnecessary data

✓**Spend too much to preserve and produce it unnecessarily**

Do Nothing Scenario

Risk

Data

Litigation Cost

Reliability
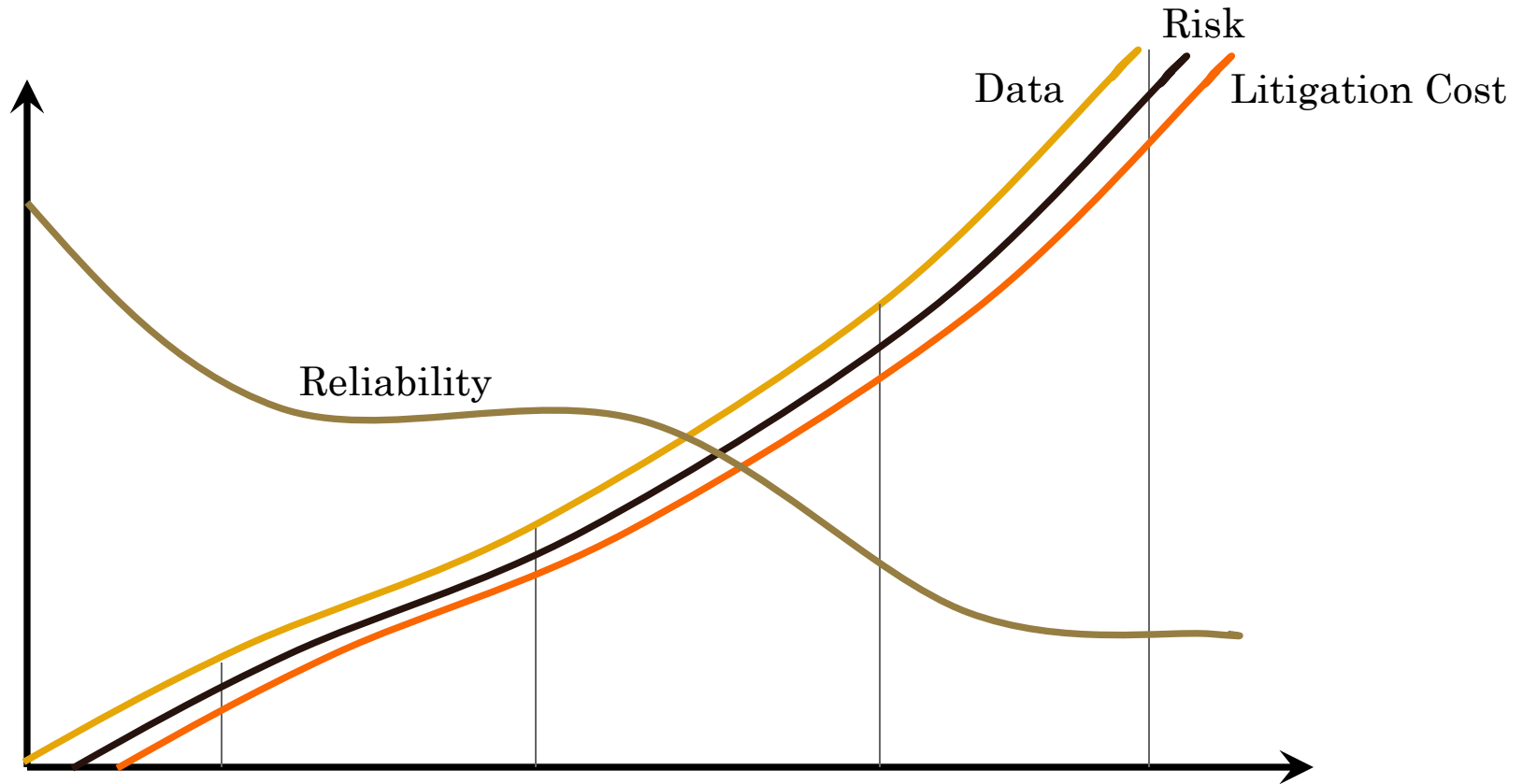
Exponential information growth

Outpaces IT budget

Outpaces risk control systems and processes

Outpaces business system capacity and compromises accessibility in key business processes, litigation discovery

Quantity and accessibility increase discovery risk and total litigation cost exposure

Accessibility, reliability and utility undermine decision processes

Integrity and accessibility compromise financial reporting

Reliability, integrity and accessibility impact business performance

Operational Impact on IT and Its Customers
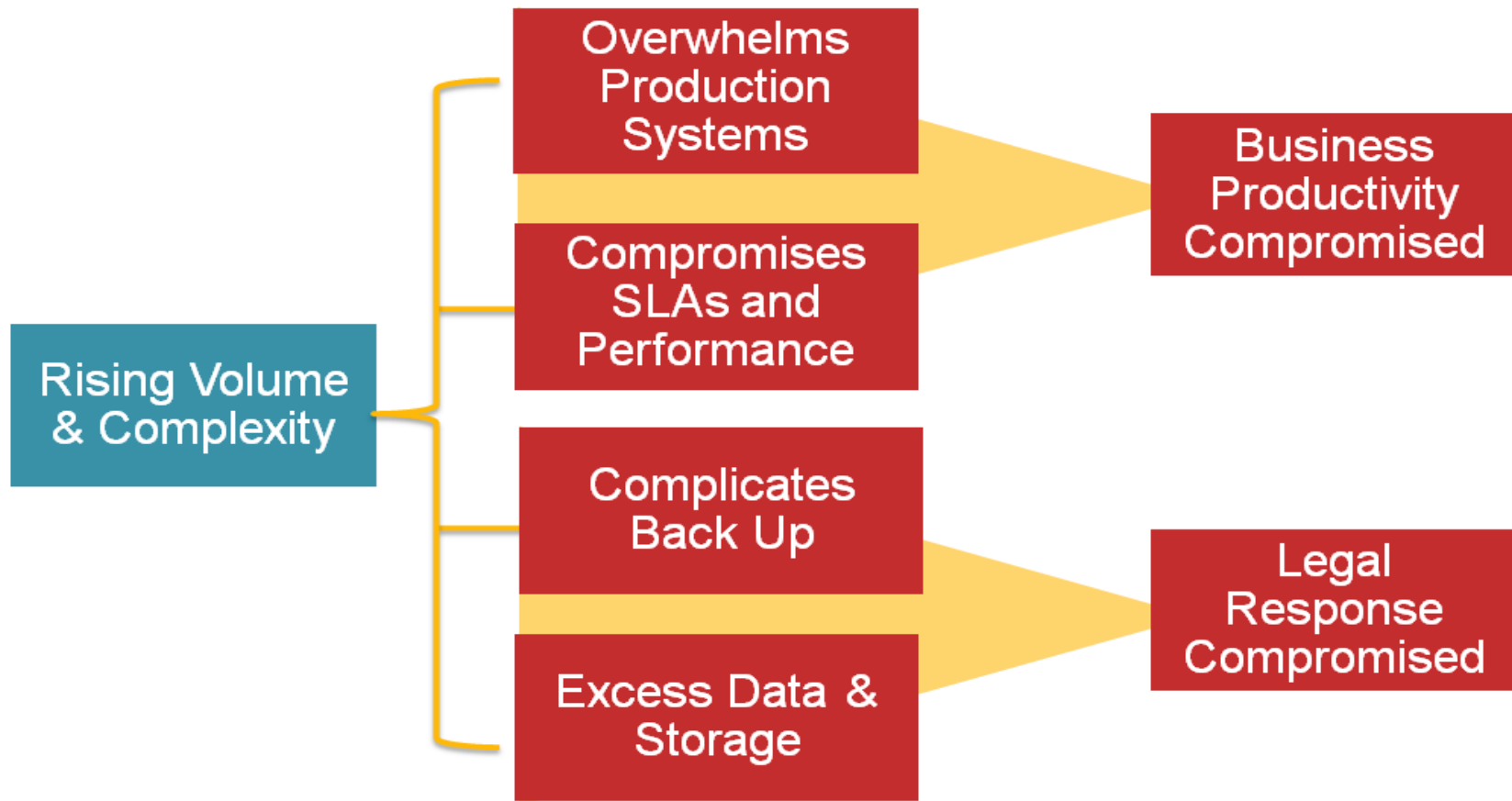
Key Questions for CIO & Director of IT

WILL IMMEDIATELY TELL YOU HE IS TRYING TO CONTROL RUNAWAY DATA VOLUME AND COST ...

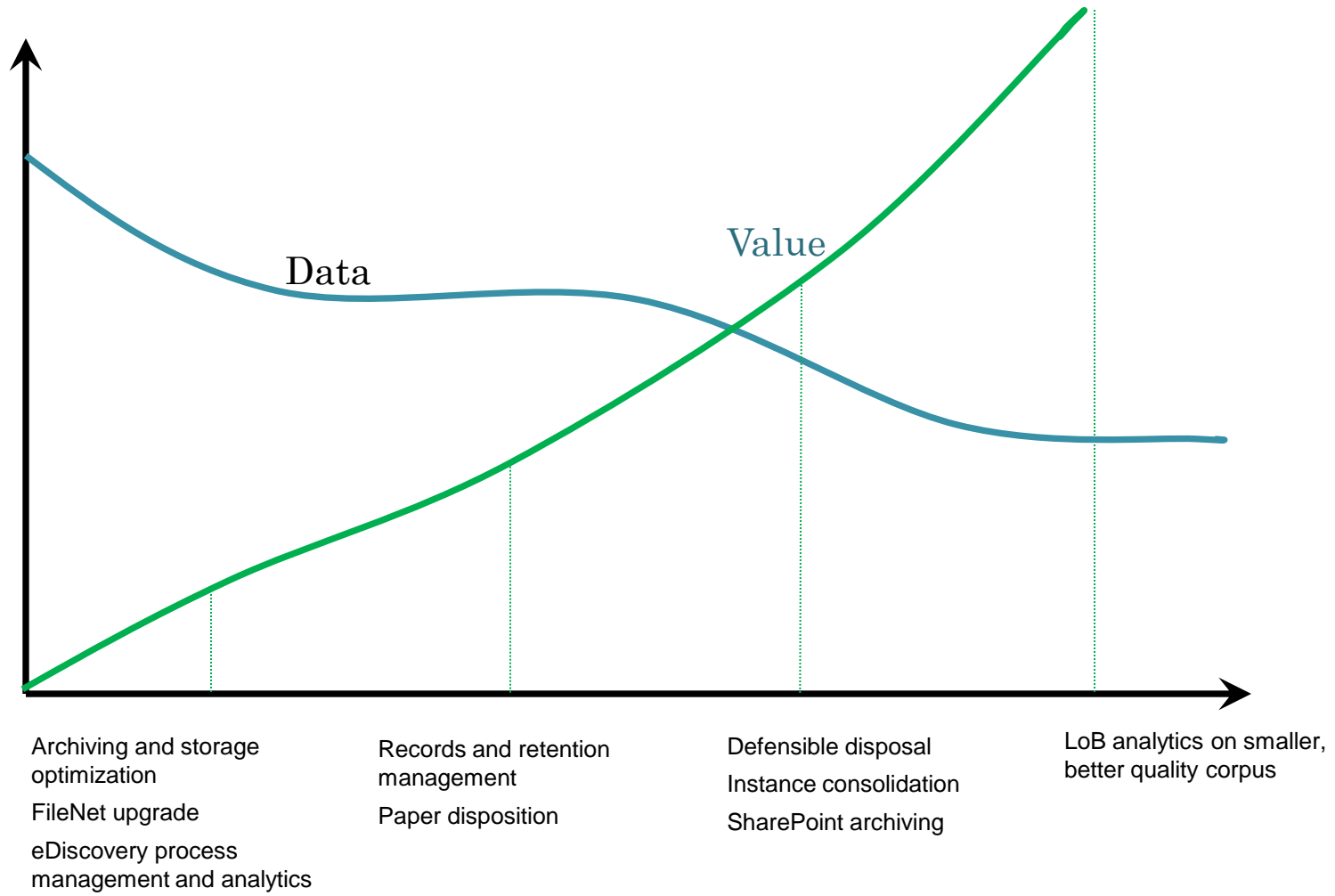| How big is the gap?	Strategy and tactics to close the gap?
Budget growth in 2011: Data volume growth in 2010: Revenue growth in 2010:	❑ How are you closing the gap between 50% data growth and 1% budget growth? ❑ Stretching your budget or changing the curve?
❑ Would you like to know how you can reduce the amount of storage costs by 60% or more?	❑ Do you de-duplicate email or other content? ❑ Do you know you can regain about 80% of the storage capacity for other uses?
❑ Are your legal department and business units asking you to keep everything? How much of the information actually has business value or some legal obligation?	❑ Do you know you can classify content on the basis of its value and then archive appropriately?
❑ Are you regularly experiencing poor performance in your production email systems? ❑ Are your eDiscovery searches in your email systems taking long and proving to be expensive?	❑ Do you know you can regain about 80% of the storage capacity for other uses if you can eliminate multiple copies of emails/attachments? On an average one email gets forwarded 12 times and stored in many locations/schedules resulting n 121 copies.
❑ How much user productivity is lost due to users having to look for content (eg. paper documents, invoices, faxes, emails) that is outside the control of the application, but is linked to the business process managed by the application?	

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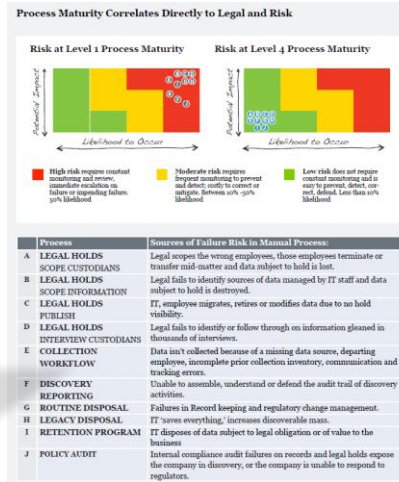
5. Resources to learn more

IBM Addresses Volume & Complexity
Reduce Volume, Increase Efficiency for IT, Legal & Business Users

Curtail Rising Volume & Complexity

- Streamline Production Apps & Systems
- Enable SLAs and High Performance
- Simplify Back Up
- Reduce Data & Storage

Improve Business Productivity

Improve Legal Response, Lower Risk

Defensible Disposal

Smart Archive

E-Discovery & Value-Based Retention Management

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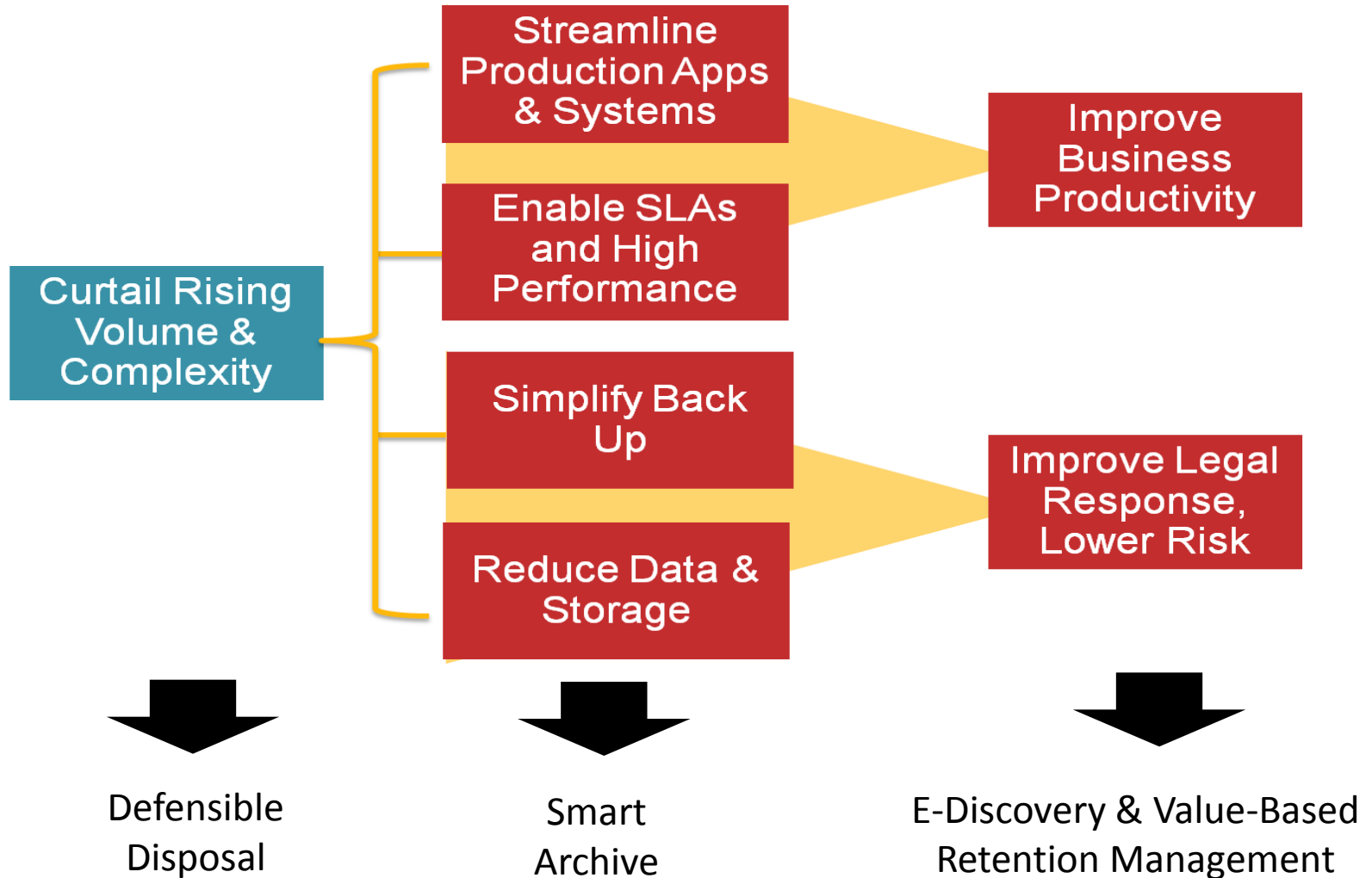
IDC: 3 Key Reasons for Archiving

COMPLIANCE	EFFICIENCY	SCALE
Retention requirements for information	New architectures to replace first-gen approaches	Deployment expansion from earlier point deployments
eDiscovery and regulator inquiry	Consolidation of infrastructure and storage optimization	Unifying approach across communications and content types
Transparency and governance	Control of unstructured content	Tiered storage

IBM Smart Archive Provides Operations ROI

Overwhelms Production Systems	✓ **Increase primary system performance** by offloading less frequently accessed content	**Streamline Production Apps & Systems**
Compromises SLAs and Performance	✓ **Simplify infrastructure** by decommissioning legacy applications with ongoing access to archived data	**Enable SLAs and High Performance**
Complicates Back Up	✓ **Maximize storage capacity** and optimize backup performance by de-duplicating	**Simplify Back Up**
Excess Data & Storage	✓ **Reduce costs and complexity** by managing multiple information types in a modular, extensible platform	**Reduce Data & Storage**

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Archive Less Data with IBM Smart Archive

Curtail Rising Volume & Complexity

- Streamline Production Apps & Systems
- Enable SLAs and High Performance
- Simplify Back Up
- Reduce Data & Storage

✓ **Eliminate cost and risk** by only archiving information with business value or subject to legal or regulatory duty to reduce storage and space consumption

✓ **Avoid perpetual retention and dispose** in concert with compliance by automatically classifying content and applying value-based retention schedules on archived content

✓ **Provide users the limitless capacity** they want without compromising system performance and avoiding arbitrary quota-based deletions that create discovery risk

Improve Business Performance and Risk Management with Smart Archive

Streamline Production Apps & Systems

Enable SLAs and High Performance

→ **Improve Business Productivity**

Simplify Back Up

Reduce Data & Storage

→ **Improve Legal Response, Lower Risk**
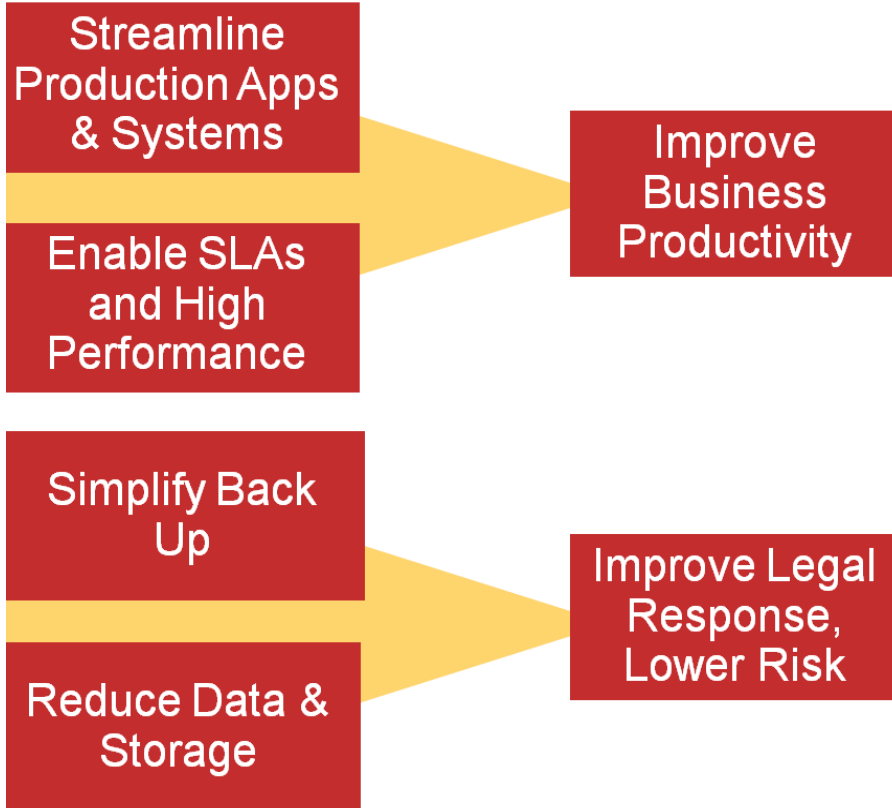
- ✓ **Reduce cycle time** and improve business performance by ensuring transaction documents are available in key business processes

- ✓ **Enable business velocity** with email responsiveness and system performance levels the business needs

- ✓ **Reduce legal risk and cost** by enabling legal to preserve, search and analyze content in place and avoid duplicating data on hold

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Archiving is an extension of your existing ECM investment
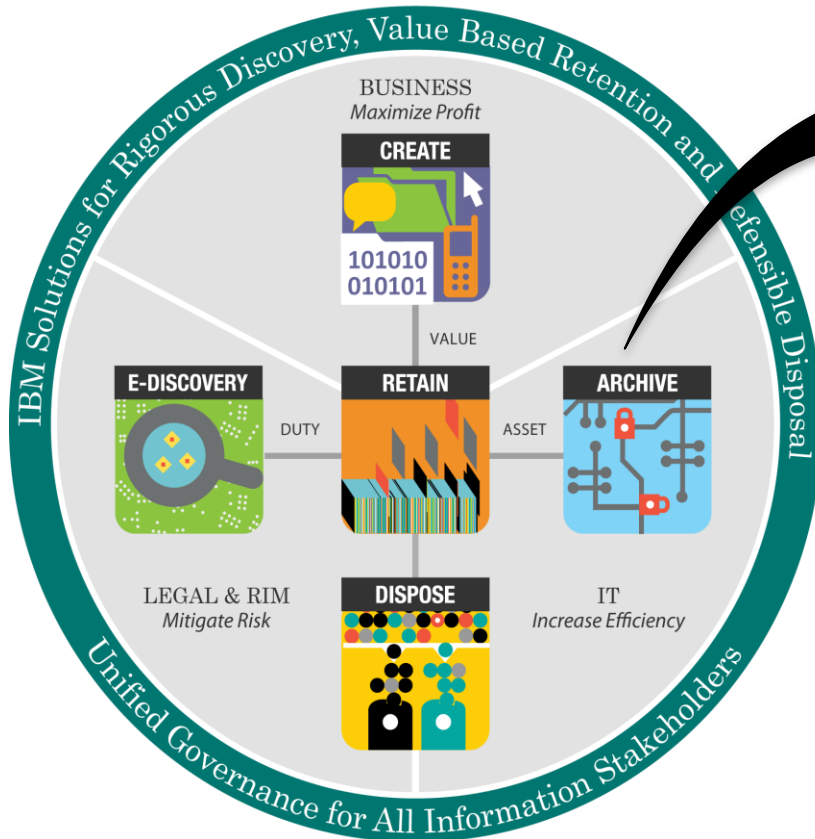
Capabilities	Typical Sources (not exhaustive)	IBM ECM Products
Archive Email	▪ Lotus Notes Email ▪ Microsoft Exchange Email ▪ SMPT Email Programs	▪ ICC for Email
Archive Files	▪ Microsoft File Systems ▪ Desktops (via FastBack) ▪ Data ONTAP (NetApp/IBM NSeries) ▪ Novell Netware File Systems ▪ Other File Systems	▪ ICC for Files
Archive Collaboration Content	▪ Microsoft SharePoint	▪ ICC for MS SharePoint
Archive Application data & documents	▪ SAP ▪ Non SAP (Oracle etc)	▪ ICC for SAP -*New!!* ▪ OPTIM Data Growth
Target Content Repository	▪ IBM Content Manager ▪ FileNet Content Manager ▪ Tivoli Storage Manager	▪ IBM CM8 or CMOD ▪ FileNet P8 ▪ TSM (OPTIM, ICC for SAP)
Content Classification	▪ Emails, Files and Collaboration Content	▪ IBM Classification Module

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Building on Your ECM Investments

Archiving and storage optimization

FileNet upgrade

eDiscovery process management and analytics

Records and retention management

Paper disposition

Defensible disposal

Instance consolidation

SharePoint archiving

LoB analytics on smaller, better quality corpus

ILG Solutions Close Gaps Between Legal, IT and Records Stakeholders to Systematically Lower Cost and Risk

Only IBM links stakeholders and their processes to connect legal duties and business value to information assets.
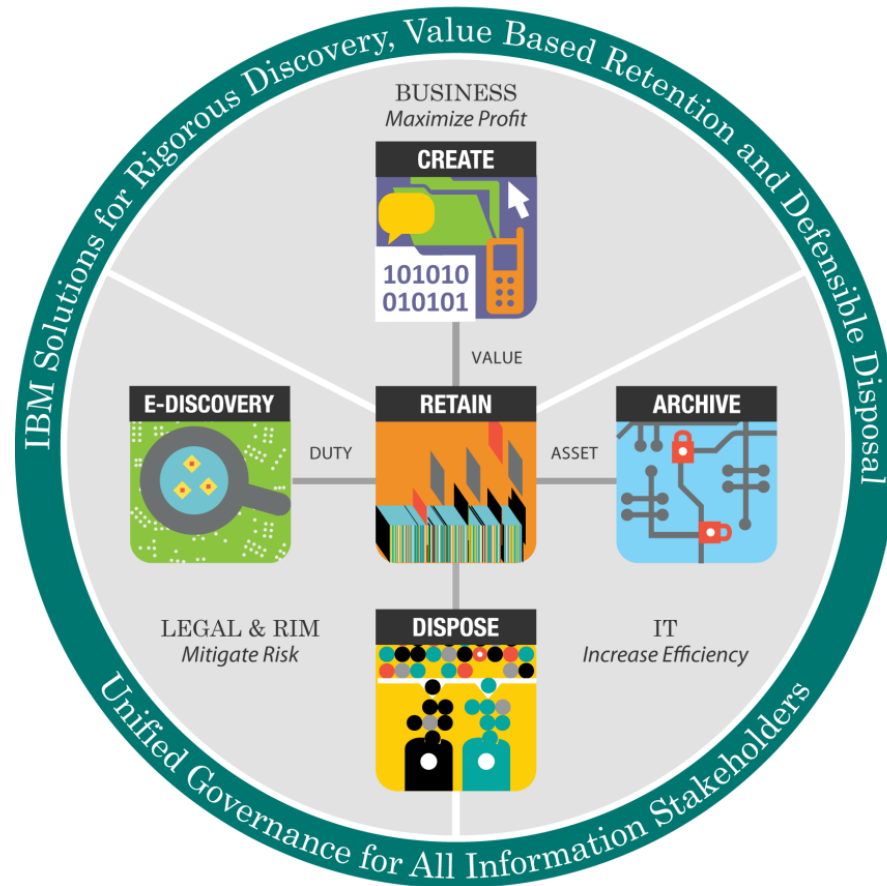
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We Have Tools to Help You Assess Processes, Quantify Risk and Cost and Chart the Course Forward to Lower Cost and Risk

13 Key Processes
Maturity Model and Self Assessment

Risks in these Processes
Current and Future State

Legal & IT Costs of Process
Current and Future State

We Can Assist You with an Assessment

EXECUTIVE ENGAGEMENT

1 Calibrate value

3 Executive report on ROI, Roadmap for action

PRACTITIONER ENGAGEMENT

2 Fact finding on current processes

Cross-stakeholder workshop
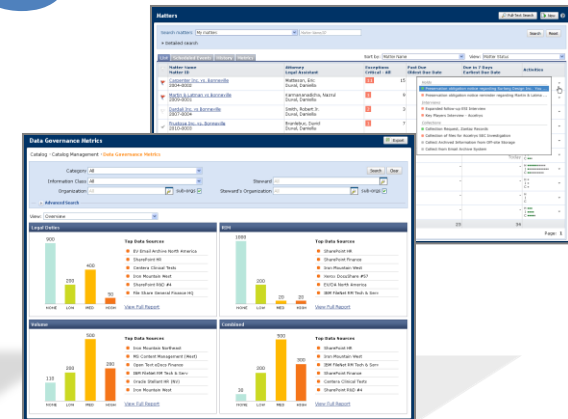
Demonstrate value to each stakeholder community

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CGOC Program

CGOC is a corporate practitioners forum focused on the intersection of legal holds, discovery, retention and information management started in 2004.

✓ Exclusive, invitation only

✓ Highly relevant business content

✓ Not a trade show or vendor event

✓ Customers lead discussions

Learn More About Executive Challenges & How You Can Be Part of the Solution

4:30 PM – 5:20 PM Tuesday

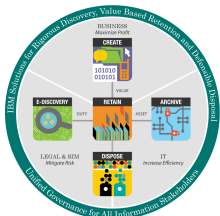**Addressing The CIO's Cost Challenges**

10:15 AM – 11:05 AM Wednesday

Addressing General Counsel's Risk Challenges

11:15 AM – 12:05 PM Wednesday

How RIM Helps -- Aligning Retention Policy with Information Pace

1:05 PM – 1:55 PM Wednesday

A Smarter Approach to Archiving Can Reduce IT Cost and Legal Risk

2:05 PM – 2:55 PM Wednesday

Building on ECM Investments – Value & Product Roadmap