



# IBM ECM Capabilities and Partnerships

## Tom Hutchinson BUE Smarter Content Asia Pacific



@IBM\_ECM

## Social, mobile and cloud has changed how we live...



More **convenience**,

**75%** of customers approve of retailers using personal data



Information is everywhere,

**90%** of data is unstructured



More **socially connected**,

**55%** of consumers share their experiences on social media



More **multi-tasking**,

Short term memory can only store **5-9** items at once



More **media channels**,

**684,478** items posted to Facebook every second

# ...causing an explosion in data...

## 2 days



The time it takes to generate in the same amount of data as in all of 2003

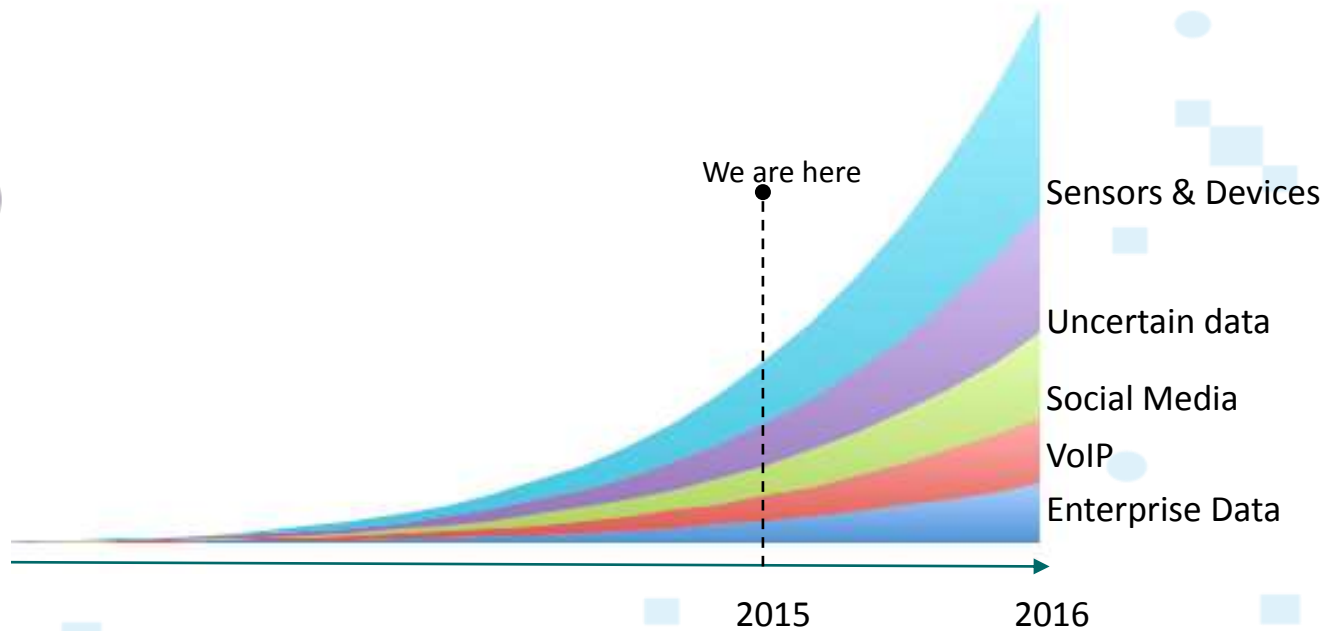
90% all data is unstructured data and growing at 15x the rate of structured data



## 1 billion



Volume of tweets produced every 3 days



...forcing companies to address the new reality

**Rising customer expectations**

**2/3 customers**  
will not return to a business that lost their personal information

**Need to manage costs and ensure integrity**

**67%**  
of information in most companies has no business, legal or regulatory value

**Competition for customers**

**61%**  
of consumers use digital channels as part of their purchasing journey

Explosion of new forms of data causing significant challenge of dealing with data from non-traditional sources



# Smarter Content, Smarter People

Put business content to work to realize new value



Capture



Protect



Activate



Analyze



Engage





# Capture



Capture documents at the point of origin

Extract valuable business data from content

Reduce cost of manual document processing

# Paper-based Loan Process

Transporting and processing paper adds time and expense

Customers fill out loan application



...submit required documents at the branch



Loan officer makes a personal copy of loan documents

Courier service picks up documents



Average cost is \$40 per branch per day

Fraud specialist analyzes loan



Manual data entry



Loan operations



Approver reviews financials



Exceptions managed



Reviewer completes documentation



Average loans processed per FTE per day = .2

# Capture-enabled Loan Process

## Eliminate transportation and speed processing

Customers fill out loan application



Loan officer scans all documents

Encrypted images and data accessible in real time via ECM system



Automated data entry



Analytics checks for fraud



Approver reviews financials



Exceptions managed



ECM  
Loan operations

Average loans processed per FTE per day= 1.2

### Result:

- Savings: \$10,000 per branch per year
- 600% improvement in loans processed per FTE



# 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

## Days to minutes

reduction in process speed with virtually 360-degree customer view

## Months to weeks

in time saved deploying new workflow-automation applications

# Protect

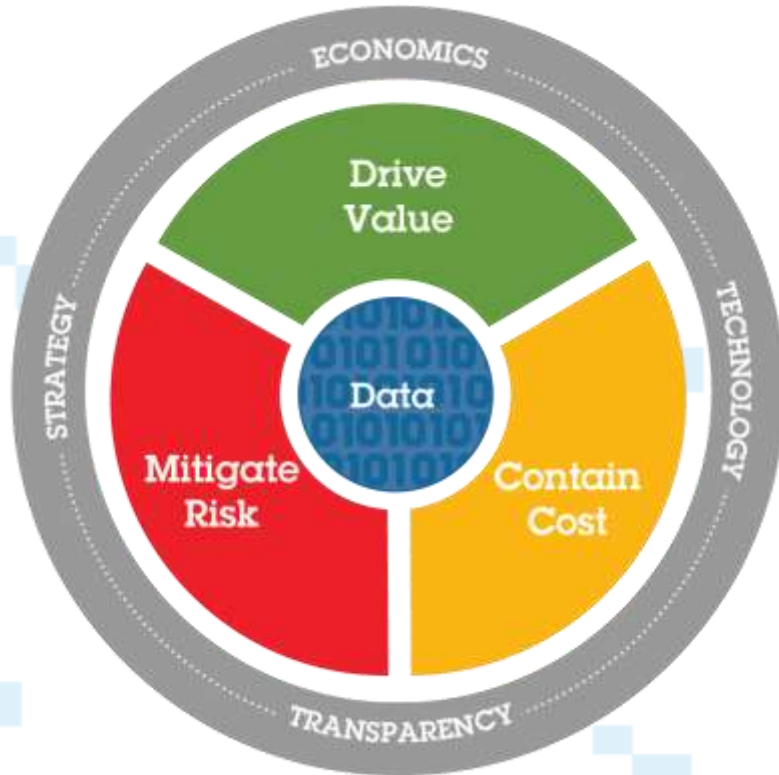
Assess and understand content you have

Manage risk by  
securing data

Optimize content retained to comply  
with regulations



## Protect the organization by protecting data



## Lower the total cost of information while increasing **its** value:

**Eliminate unnecessary cost** by defensibly disposing of unused content and data, often called “value-based archiving”

**Reduce information risk** by enforcing privacy, e-discovery and regulatory policy across the data environment

**Realize information value as volumes increase** with in-place analytics, content management and collaboration

# Apache Corporation



Apache has far greater confidence that the data it sends and keeps is accurate.

## Improved Process Efficiencies

Find relevant content for land sales and share only what's needed when acquiring or divesting

### 83% acceleration

Acquisition process reduced from over 12 months to just 2 months

### Reduced risk

Eliminates errors to reduce legal risk and protects personal information to reduce risk of fines

# Activate

Apply content across business processes

Increase speed of  
decision-making with flexible workflow

Eliminate silos between departments



# Place Business Content in Context

The best search is no search at all



People



Content



Workflow



Analytics



Cloud



Mobile

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

- Case Details:** Shows case information for 'Case INCID\_Incident\_000000350007', including contact details (Name: Ma, Email: ma@mymail.com, Phone: 949-555-1212, Location: London, UK), incident date (30/09/2014), and source (Twitter).
- Jobs View:** A pie chart titled '5 Cases due today' with a legend for 'Open', 'In Progress', and 'Closed'.
- Video:** A video player showing a snowy landscape.
- Images:** An image of a silver LG DW1100 dishwasher.
- Maps:** A map showing the location of the case in London, UK.
- Social View:** A social media post from a user named 'Capt\_Name' regarding a warranty claim for a dishwasher.
- History:** A list of tasks and events, including 'Close Case' (14:34) and 'Product warranty had expired, Responded to customer that service costs would not be covered.' (14:33).
- Customer Communications:** A table listing product registration cards with columns for Product, Description, Purchased, and Warranty State.
- Related cases:** A list of related cases with details like 'Warranty Service #180312' and 'Troubleshooting #140334'.
- Analytics:** A search results page showing a list of documents related to the case.



# TIAA-CREF



## Improving Customer Engagement and Worker Experience at a TIAA-CREF

### 360 degree visibility to all stakeholders

Cases now consistent across all channels

**Cut 10 systems to 1**

---

### Advanced analytics capabilities

to provide adaptive and dynamic work queue management

---

### Audit trail of processed activities

for compliance and reporting

Winner 2014  
WfMC Global Case  
Excellence Awards



## Forrester Study: Total Economic Impact of Case

### \$25-\$50M

Volume of funds retained by the customer due to cross-selling rather than being directly withdrawn



### 238% ROI

Payback <1 month  
NPV of \$12.4M



### 40% lower cost

Per customer onboarding costs reduced by implementation of case workflow



### 57 minutes

Average minutes saved per transaction case.



### 10 less logons

Systems that workers do not have to log into to process a case



### 98%

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



# Analyze

Reveal new insight hidden  
in content

Improve business decisions, assure Next  
Best Action

Increase performance of people and  
systems



# Apply a Range of Analytics

Gain Insight for faster and more accurate decisions



Content Analytics



Social Media Analytics



Predictive Analytics



Investigative Analytics



Case Analytics



Watson



# Engage



Connect people to content, analytics and process with center of competency

Streamline collaboration with hybrid cloud

Provide mobile access to content anywhere, anytime

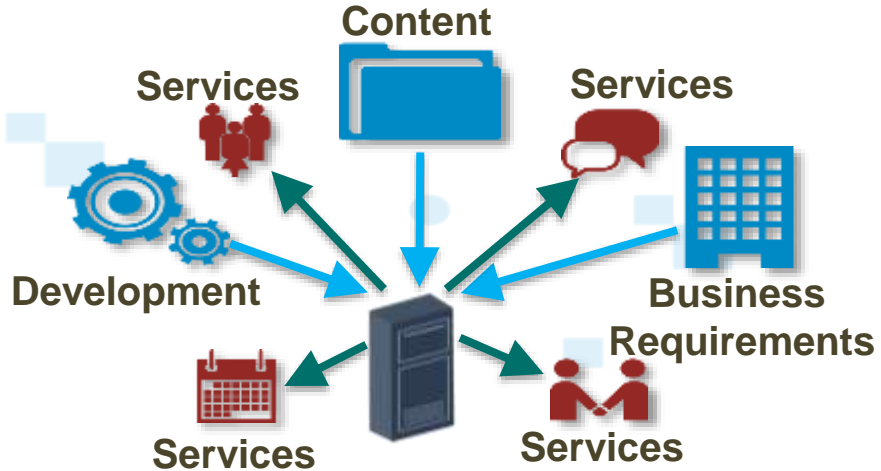
# How can your employees engage with Business Content in smarter ways?





## Shared Services Platform

A Center of Competency for cost-effective deployment of solutions



### Shared Services Model

- **Reuse** the same tools, technologies, and training to deploy new solutions
- **Solution templates** enables common solution patterns to accelerate solution delivery
- **Maintain consistency** through a common infrastructure and development environment
- Shares a **common user interface**, built on IBM Content Navigator

# United Overseas Bank



“ IBM enterprise content management solutions have changed how UOB captures and manages customer information. ”

– Agnes Tay, Head of Scanning Operations,  
United Overseas Bank

## Cuts time and effort

taken to process international wire transfers, increasing efficiency

## Faster processing

**30% reduction** in time and effort required for processing credit card applications

## Better customer service

Real time, **360 degree view** of every customer request helps UOB maintain its competitive edge

# One Experience for Business Content

Unified experience for mobile and web across capabilities



IBM capabilities put content to work for you

IBM Unified Interface



Capture

- Document imaging
- Content classification
- Mobile capture



Protect

- Value-based assessment
- Records management
- eDiscovery



Activate

- Case management
- Flexible workflow
- Mobile Case



Analyze

- Data assessment and cleanup
- Analytics for investigations
- Advanced search



Engage

- Customer communications
- Cloud Sync & Share
- Mobile access



Content Platform  
IBM and 3<sup>rd</sup> Party



## Customer Quotes...

*"Given the highly competitive market that we are in and the demands of a rapidly changing business environment, we needed an extremely flexible and scalable platform for automating our sales and back office processes.*

*The IBM Filenet & Process Management platform is a comprehensive platform for rapid process design, seamless execution and monitoring all processes envisaged as part of our operations, and the right fit for an enterprise/industry such as ours."*

*Krishnakant Gaitonde,  
Head of IT at Avantha ERGO Life Insurance*

*"We selected IBM Filenet based on its proven capabilities and flexible platform features which will be best suited in meeting the growing demands of Biocon's technology initiatives around Quality and Research & Development"*

*Radhakrishan G,  
Vice President (CIO), Biocon Ltd*

*"We selected IBM Filenet with a view to automate our different processes with workflow capability and paperless processing. We automated our loan processing system and able to achieve better efficiency, transparency and more controls in the loan processing. Earlier we were struggling to process 80,000 Loans per month with turn around time of 17 days. Currently we are processing more than 3 Lacs loans per month with reduction in turn around time to 6 days and reduction in manpower "*

*Deepak Ayare,  
CIO, Ujjivan Financial Services Pvt Ltd.*

# Strategic Partnerships: Box, Kaltura & Actiance





## New Partnerships



For organizations who want to **transform** how they work, Box is a **secure content management platform** designed for **digital-age processes and work styles**.



For organizations who need to **capture, manage and archive social communications** and address their **social risk and compliance** requirements.



For organizations who need to **manage video** as a **native data type** in their business processes and capture and maintain this content in their **existing repositories**

## IBM and Box Joint Use Cases



### Hybrid (on-premise and cloud) solutions

IBM will enable Content Navigator platform to access Box content providing a single user interface



### Access Box content from Case Manager

IBM will enable IBM Case Manager to support Box as an external data source.



### Data cleanup or eDiscovery

IBM will enable StoredIQ to access Box for multiple use cases that include data cleanup, eDiscovery and in-place management of content



### Capture to/from content in Box

IBM will enable IBM Datacap to capture content onto the Box cloud content repository as well capturing content from Box

## Upcoming Solutions Powered by Box & IBM Integrations



Use a single interface for content, whether stored on premise in the IBM Content Navigator platform or in the cloud on the Box platform



Access content on the Box platform while leveraging IBM Case Manager or a custom application



Capture content anywhere with IBM Datacap and save and access it on Box. Or leverage industry solutions, including IBM MobileFirst for iOS apps.



Optimize eDiscovery, clean up data, and manage unstructured data with IBM StoredIQ, including content on Box



Partner with Box Consulting to integrate existing data or systems, or to tailor solutions to specific needs

## Kaltura: Specific Use Cases and Benefits



|   | Vertical Use Case                     | Description  |
|---|---------------------------------------|--|
|   | Insurance underwriting and claims     | Customer captured video as part of insurance and claims submission processes               |
|   | Energy and Utilities inspections      | Maintenance records and visual inspection of failures                                      |
|   | Manufacturing health & safety         | Health and safety incident visual recording of circumstances                               |
|   | HR/Legal interviews & depositions     | Recording of phone and in-person interviews for candidate hiring and legal depositions     |
|   | Call center monitoring                | Recording incoming calls into call centers and service support centers                     |
|  | Regulated environment call monitoring | Financial and other regulated industries where all calls for individuals must be monitored |

# Kaltura Video Navigator vs. Kaltura MediaSpace



## Kaltura Video Navigator for ECM



- Existing and new ECM Customers
- Embed Video natively in ECM workflows
- Video, any where, any time, any device optimized for bandwidth and location
- Video is a component of larger business workflows
- [Optional transcription service](#)

## Kaltura MediaSpace™



- Standalone, secure corporate 'You Tube'
- Internal LOB/IT for corporate communications, HR, sales, training,
- External LOB/IT for marketing, public communications
- Video as an engagement and collaboration tool
- [Optional transcription service](#)

## Actiance: Business Benefits



Simplify governance management for all communications and collaboration to lower overall cost of ownership

- Policy Management
- Lower Infrastructure Cost
- Increase Productivity



Ensure all communications are compliant, no matter how your employees connect

- Avoid Sanctions
- Expedite eDiscovery
- Uncover hidden relationships



Empower employees, understand your customers, and build new relationships

- Accelerate Adoption
- Acquire New Customers
- Insight Across all Channels



# The Actiance Platform



Compliance across the broadest set of communications and social channels



*Unified platform for compliance, archiving and analytics*

# IBM and Actiance: Joint Use Cases



**BUSINESS**

- Leverage information for better decisions
- Mobile and localized access to information
- Don't waste budget on unnecessary IT or legal services



**DRIVE VALUE**

- Search, retrieve and share content of value across teams
- Eliminate digital debris to bolster productivity
- Find patterns, insights and structure in aged or loosely organized unstructured data

- Search, monitor, and analyze email, social media, IM, and other communications for business value
- Enable policy-based communications management and feature control



**LEGAL**

- Meet e-discovery obligations cost effectively and efficiently for the enterprise
- Manage conflicting privacy and regulatory duties



**MITIGATE RISK**

- Analyze potential evidence, coordinate and execute legal hold and collection process
- Predict and control e-discovery costs and support review
- Set and enforce retention and disposition policies

- Set and enforce retention and disposition policies on email, social media, IM, and other communications
- Enable additional compliance controls
- Combine data from email, social media, communications and collaboration channels



**IT**

- Minimize "run the shop" costs to increase investment in "grow the firm" activities
- Cut total costs even as total volume rises



**CONTAIN COST**

- Dispose of data debris consistently, defensibly and automatically
- Archive structured and unstructured data as it ages to reduce cost and complexity

- Archive email, social media, IM, and other communications
- Archive data to cloud repository to reduce cost
- Preserve context across dynamic content



# Learn more about IBM Smarter Content Solutions

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