Orchestrate your Work
The Business Case for Case Management

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Agenda

Why Advanced Case Management for content

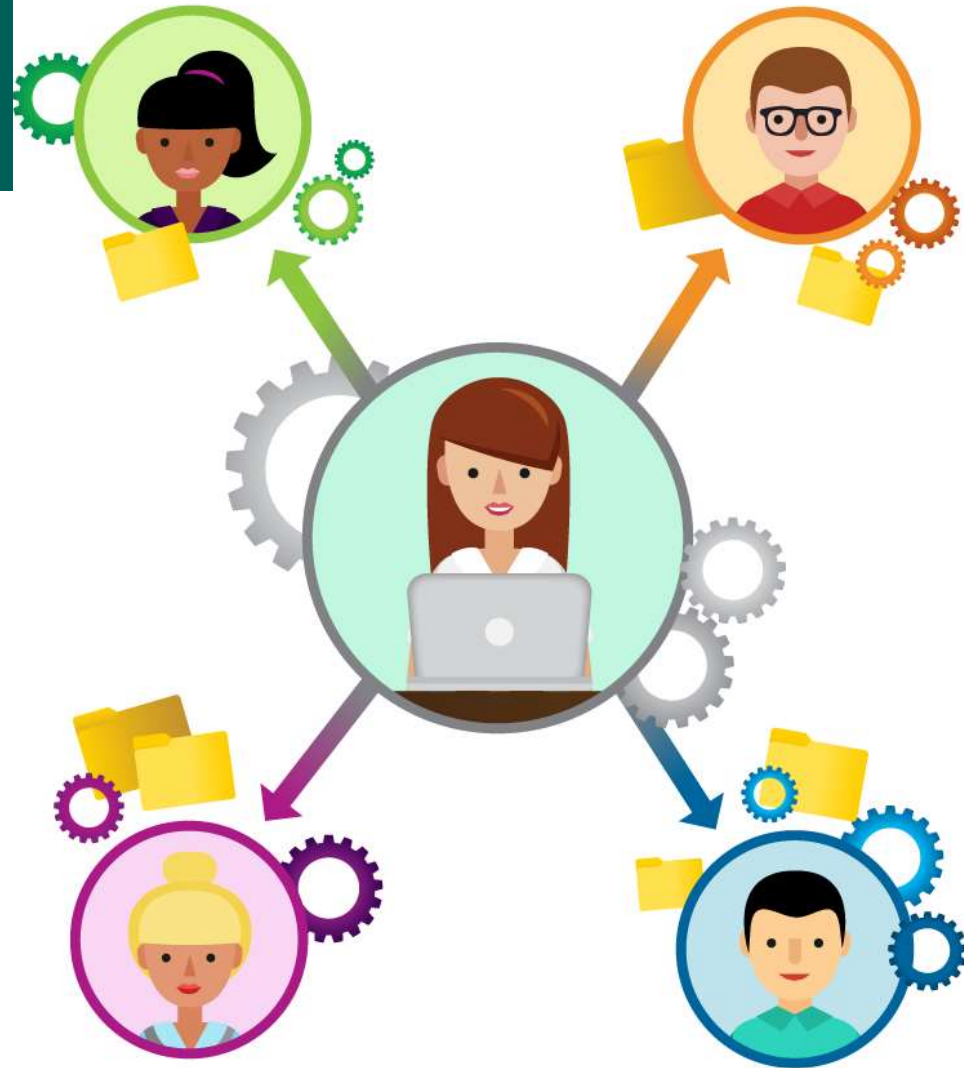**Why Business values IBM Case Manager**

Why IT Values IBM Case Manager

Why IBM for Advanced Case Management

How do people work?

They do common things:

- Gather facts

- Assemble materials

- Apply knowledge

- Get help from experts

- Make decisions

- Complete tasks

- Record job completed

Common Obstacles

- No easy way to bring together content, data, paper, video, social media

- Multiple systems and multiple screens to apply analytics, collaborate, workflow, actions

- Systems are confined to one way of doing things

- Difficult to record all data, content and events for audit and compliance

Case Management focuses all the elements required to Improve Business Outcomes
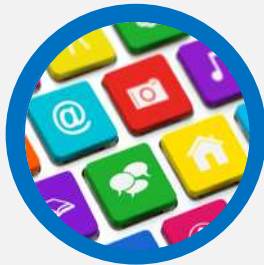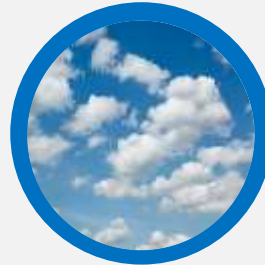
People **Content** **Workflow** **Analytics** **Cloud** **Mobile**

IBM Case Manager is a solution platform that engages people with data, process and analytics empowering them to achieve better business outcomes anywhere and everywhere
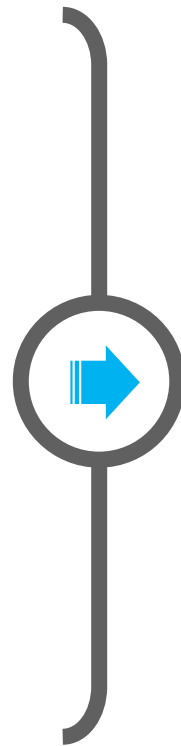
Flexible Auditable Secure Reportable Persistence 360^0 view
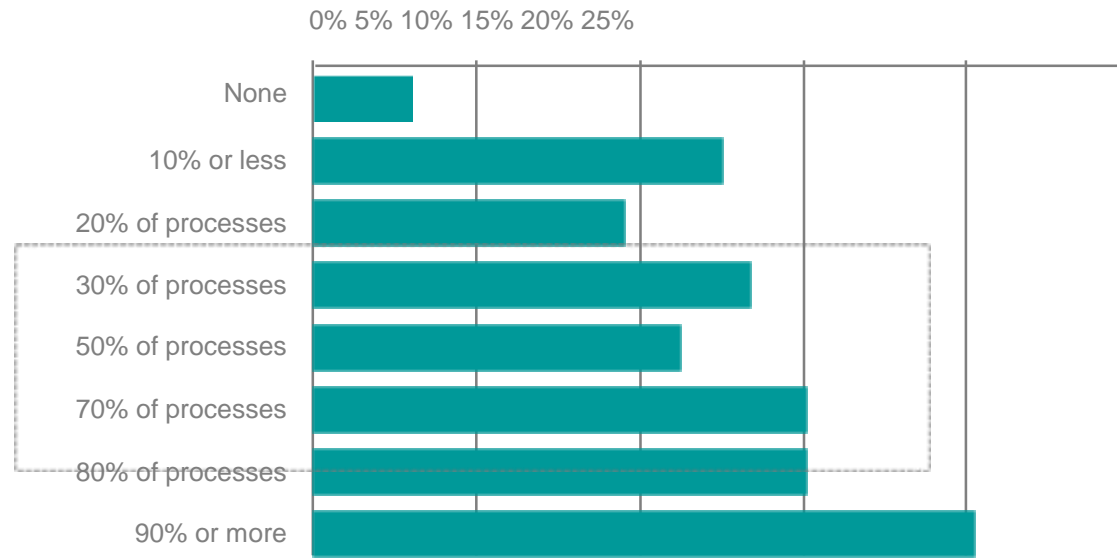
Marketplace View

More than

60%

of respondents indicate that 50 percent or more of their processes involve casework

What proportion of your main line-of-business (LOB) processes would you say involve a case file, claim file, proposal, bid, incident report, service ticket, etc.?

	0% 5% 10% 15% 20% 25%
None	
10% or less	
20% of processes	
30% of processes	
50% of processes	
70% of processes	
80% of processes	
90% or more	

SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf. © AIIM 2013 www.aiim.org/© IBM 2013 www.ibm.com

Common Use-cases

- Underwriting
- Loan Origination
- Benefits Administration
- Negotiated Documents
- Project Support
- Customer Service
- Product Change Requests
- Claims
- Customer Onboarding

Customer Engagement

- Audit requests
- Compliance and fraud
- Mergers and acquisitions
- eDiscovery
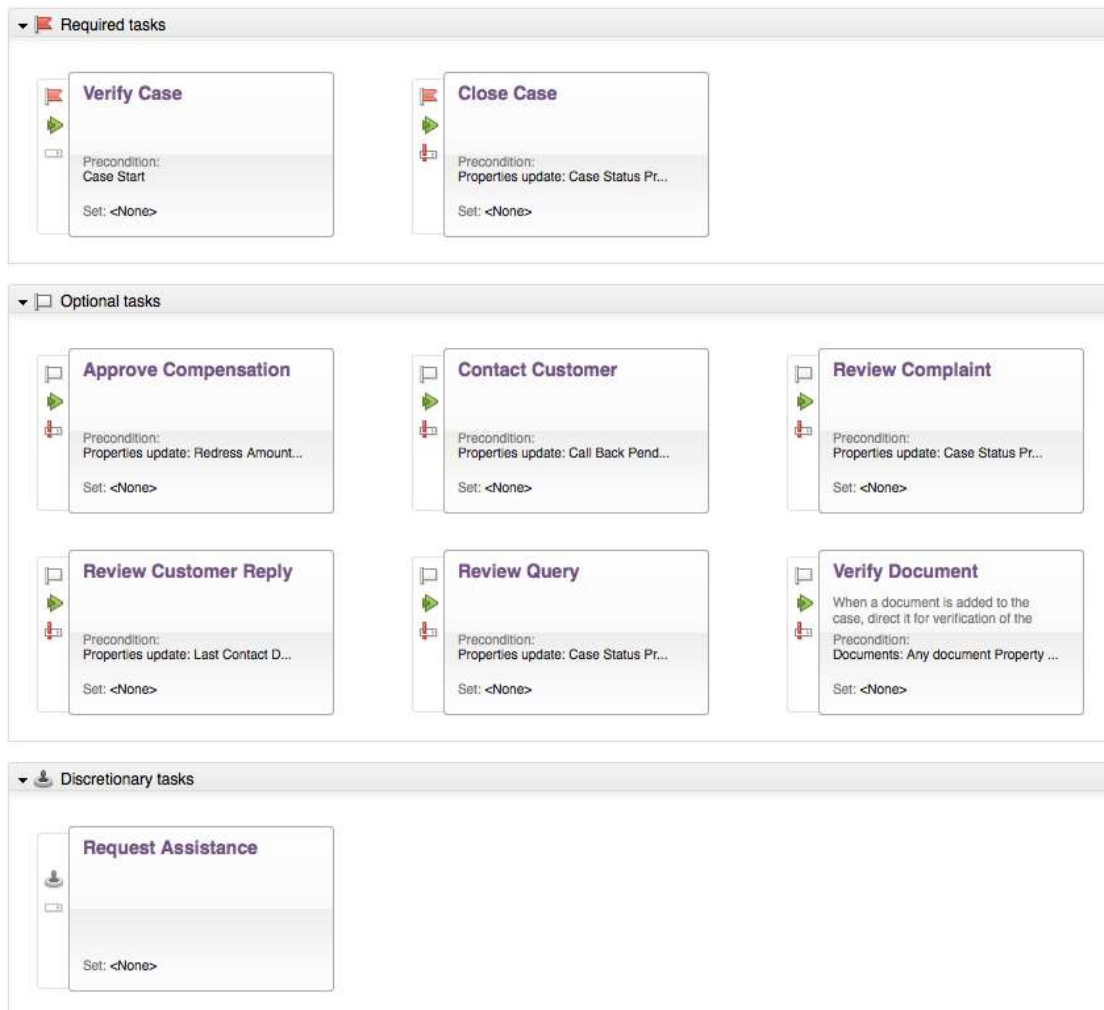- IT governance
- Regulatory queries

Investigations

- Dispute resolution
- Compliant management
- Quality management
- Acute healthcare
- Patient medical records
- Adverse event reports
- Order exception management

Incident Management

Modelling how people work is impossible with traditional workflow
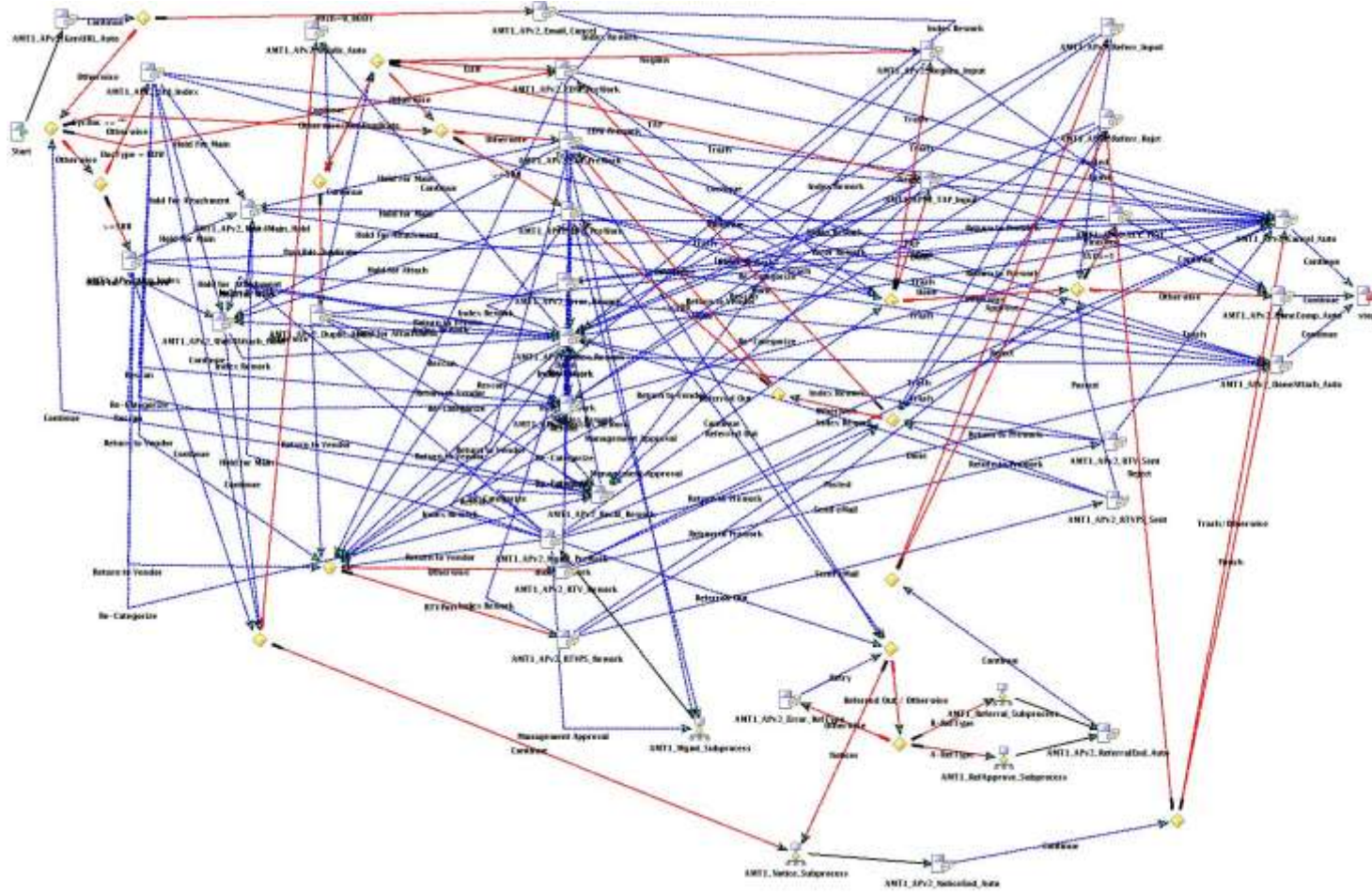
Model the way people work to get to outcomes

- Describe the problem as all the possible tasks that need to occur to get to resolution

- The tasks can perform workflows as required

- The path that needs to be taken will be driven by the way people work

What is a case?
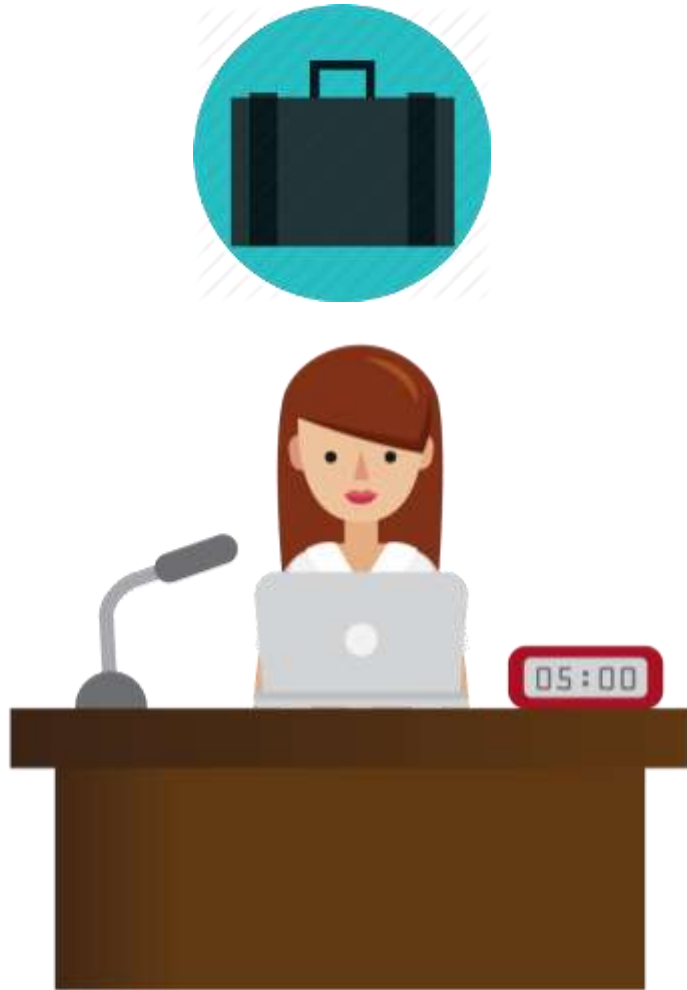
The case is your business objective

It could be:

- Customer, Patient, Citizen, Employee, Student

- Product, Service, Offering, Solution

- Process, Investigation, Incident

Everything is recorded:

- Evidence

- Incidents

- Decisions

- Discussions

- History

A case varies depending on the industry and organization

Advanced Case Management is a Solution Platform for all Content-related work

Access to content and data wherever it exists

Analytics for content in context

Action through case-centric workflows and adhoc tasks

Assurance that workers have the right data at the right time

Archive all data, content, decisions and actions for compliance and audit

Helping people achieve better business outcomes

05:00

Evolution of Enterprise IT – IBM POV

1990-2010   2005-2020   2015+

Systems of Record

Systems of Engagement

Systems of Insight

Drive every decision
Fuel every interaction
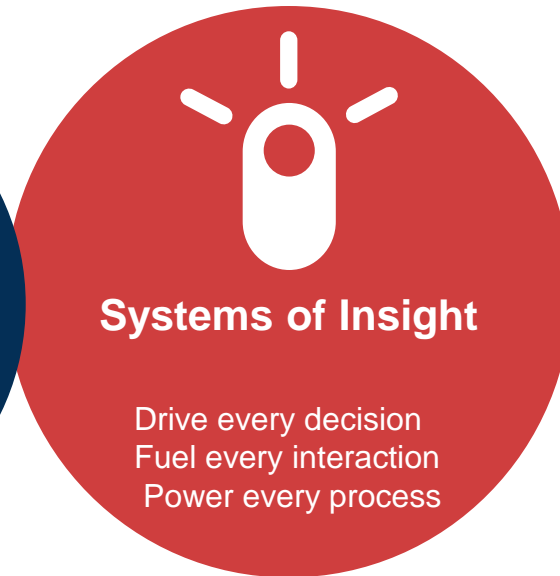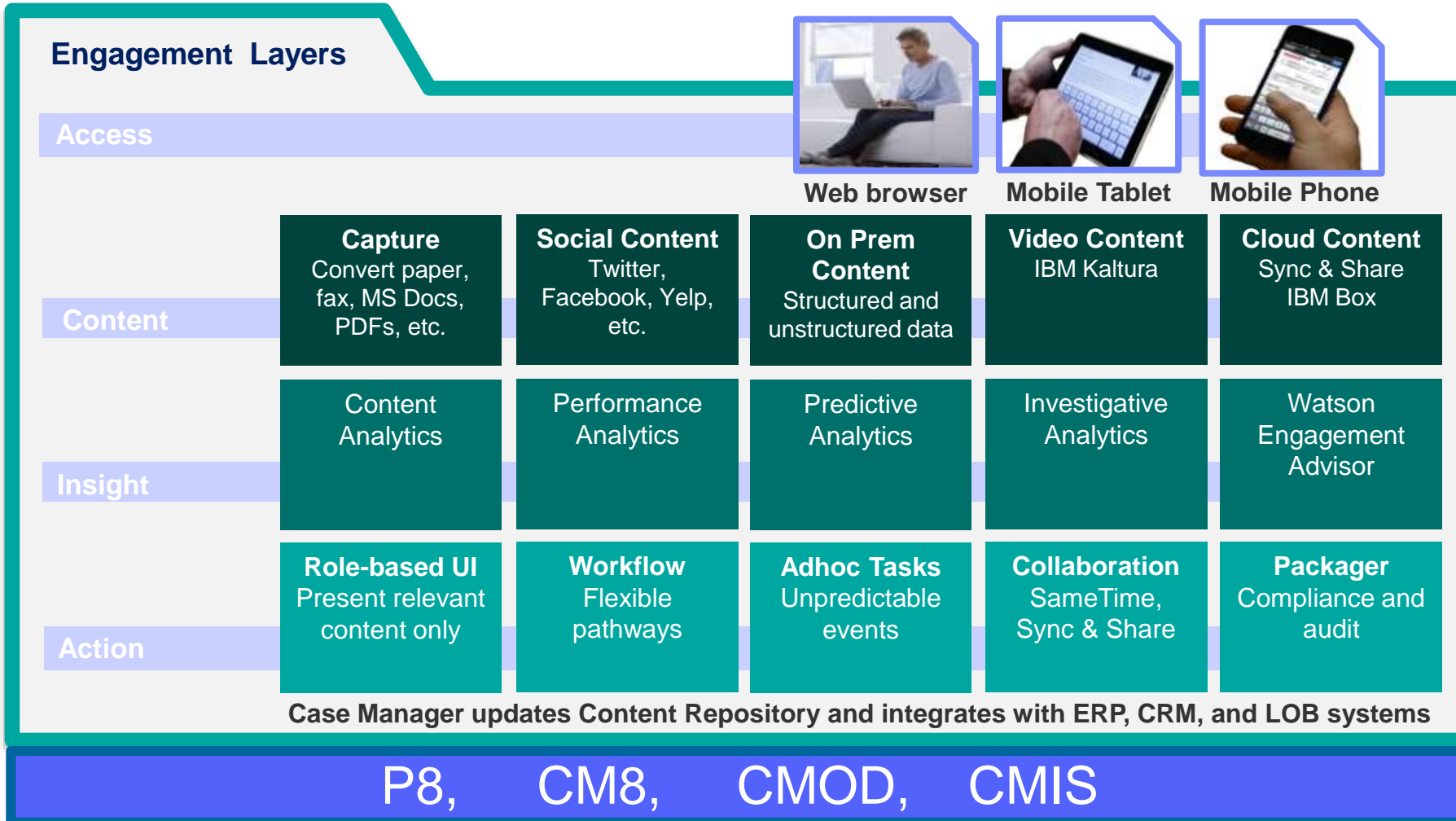Power every process

Databases and Content repositories
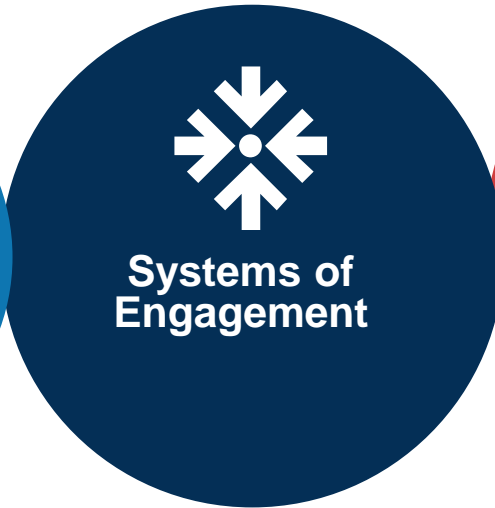
Case, Collaboration, Cloud, Mobile apps

Case is the Action Platform for Analytics

Case Management Platform Requirements

Engagement Layers

Access

Web browser   Mobile Tablet   Mobile Phone

Content

| **Capture** Convert paper, fax, MS Docs, PDFs, etc. | **Social Content** Twitter, Facebook, Yelp, etc. | **On Prem Content** Structured and unstructured data | **Video Content** IBM Kaltura | **Cloud Content** Sync & Share IBM Box |

Insight

| Content Analytics | Performance Analytics | Predictive Analytics | Investigative Analytics | Watson Engagement Advisor |

Action

| **Role-based UI** Present relevant content only | **Workflow** Flexible pathways | **Adhoc Tasks** Unpredictable events | **Collaboration** SameTime, Sync & Share | **Packager** Compliance and audit |

Case Manager updates Content Repository and integrates with ERP, CRM, and LOB systems

P8,   CM8,   CMOD,   CMIS

IBM Case Manager Flow

delivering the right content: business content related to the case is assembled

at the right time: workflows are launched, in the forms of tasks, based on the decisions made by the workers

A case is opened

Content

Workflow

Expert workers

Case closed

to make the right decisions: workers use the content and their expertise to drive the case

IBM Case Manager Solution Platform

IBM Case Manager Builder

- Solution design environment

- Comprehensive case solution assets such as properties, roles, in-baskets, case types, tasks, document types

- Built-in Page and Data Layout UI design

- Built-in Rules

- Templates

IBM Case Manager Client

- End-user interface, built on the Content Navigator experience platform

- Customizable, out-of-the-box user interface

- Streamlined access to information

- iPad app

IBM Case Manager Analytics

- Case Analyzer for historical reporting

- Case Monitor for real time dashboards

- Content Analytics for discovering patterns, trends and insights across cases

Knowledge workers require flexibility to drive better business outcomes

Case Builder

Case Builder - Designer

•Templates •Solutions •UI Layout
•Model •Tasks •Rules

Case style solutions
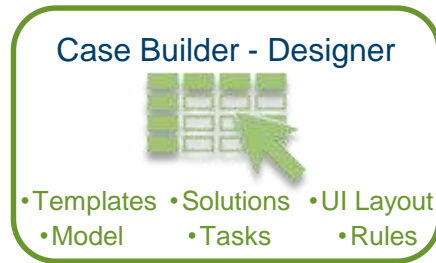
A business-friendly design environment allows the LOB to initiate and participate in the creation of case style solutions

Input can be used to quickly modify and redeploy the solution as business needs change

Give knowledge workers in the LOB the flexibility to decide the right next steps based on their expertise and the insights they gain from the business content

Case Client

- **Role-based and personalized**
  End user gets exactly the information they need to progress the case

- **Flexible and extensible**
  Can be configured to meet unique business requirements

- **Provides deep context for case work**
  No more disjointed jumping between application

- **Brings people, process and content together**
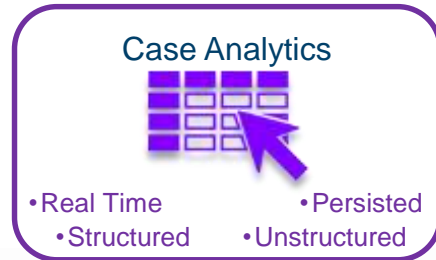 to drive case progression and better outcomes

Case Client - Runtime

- Context • 360º View • History
- Web • Mobile • Navigator

Case Analytics

Case Analytics

•Real Time   •Persisted
•Structured   •Unstructured

- **Case Monitor – Real-time dashboards**
  Threshold monitoring and alert generation

- **Case Analyzer – Historical Reporting**
  Dynamic - Drill down, slice and dice, filter, etc. High performance, large volume analysis

- **Watson Content Analytics**
  Crawl and index case structured and unstructured content, comments, and metadata. Discover patterns, trends and insights across cases

IBM ECM Case Manager Mobile
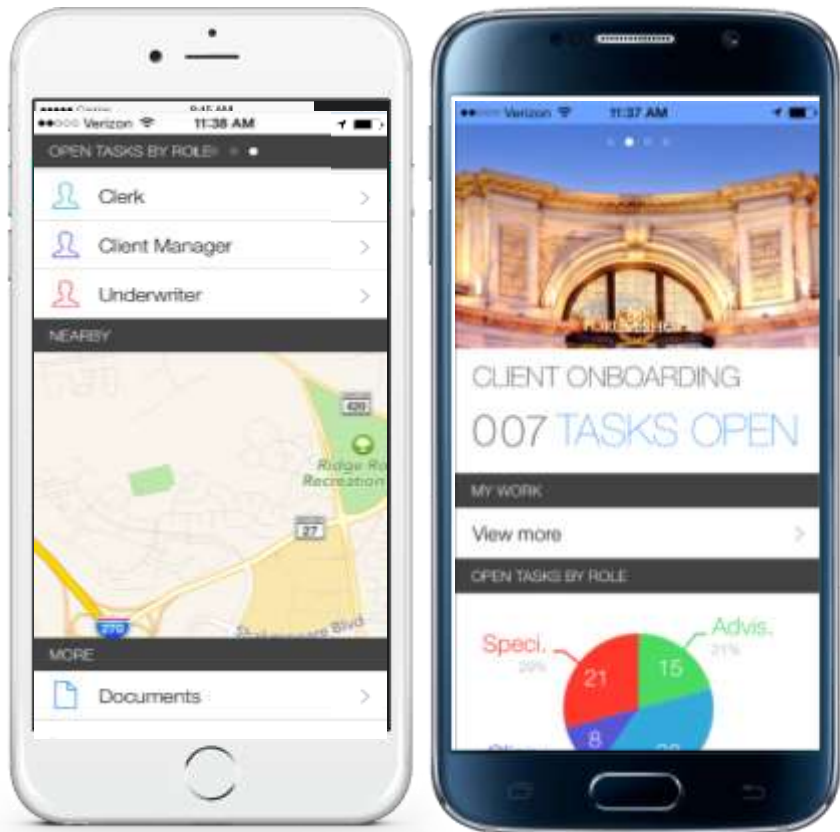
- Act on insights from the palm of your hand

- Build face-to-face relationships with customers away from the office

- Turn field-workers into instant experts

- Check on information when workers need it, trigger tasks, and remotely collaborate with colleagues

- Zero-code branding, theming, and MaaS360 integration

- No more "I'll call you when I'm back at the office".

A worldwide ecosystem of IBM & partner built solutions

Smarter Content Solutions

Cross-IBM Solutions

Industry Focused Partner Solutions

- HEALTH
- INSURANCE
- ENERGY
- BANKING
- GOVERNMENT
- RETAIL

Case Management:
Business content in context to bring value to your enterprise

- Give knowledge workers the **flexibility** they need to make **expert** decisions, driving new tasks at their **discretion**

- Improve business outcomes with **insights, discovery, and content engagement**

- Employ **unique solutions** to quickly adapt to rapidly changing business processes

- Bring IT and the LOB together to deliver **successful business outcomes**
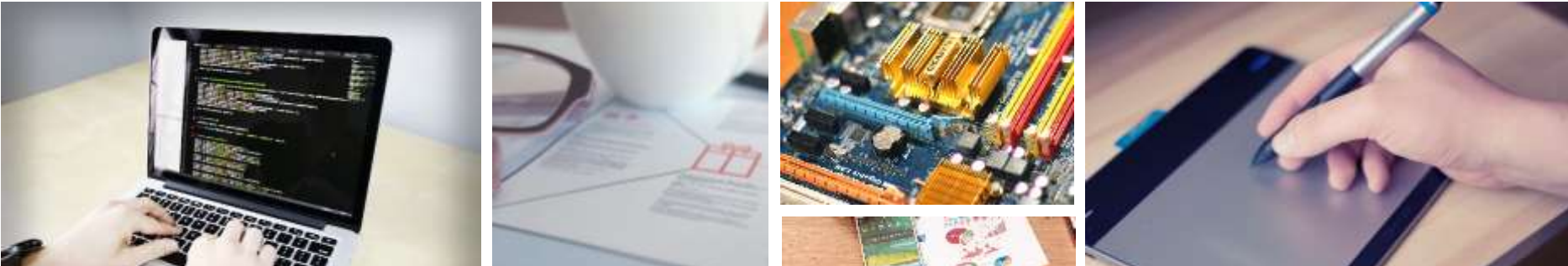
The right content, at the right time, to make the right decisions

IBM's Case Management Market Leadership

Gartner

"The largest ECM vendor in terms of market share and total content revenue, IBM has an increasing focus on high-value solutions."

Forrester

"IBM will drive leadership in analytics in the dynamic case management market."

Leader in the Industry

- A new pattern has emerged that requires new industry solutions to optimize outcomes

- Pre-integrated, high-value solutions to optimize businesses

- Expert Business Partners will continue to expand value

- Maximizing the economic value of information

Sources: Gartner, Market Share Analysis: Enterprise Content Management Software, Worldwide, 2011 G00233424. Forrester, The Forrester Wave™: Dynamic Case Management, 2011

Learn more about
IBM Smarter Content Solutions

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