

IBM Smarter Business and Technology Series

Lotusphere and InformationOnDemand Come to You

Get Social. Do Business. Gain Insight. Optimize Results.

1st March 2011 Bangkok, Thailand

ECM Innovations for Business & Industry

Michael Pomponio
ECM Practice Leader





Agenda

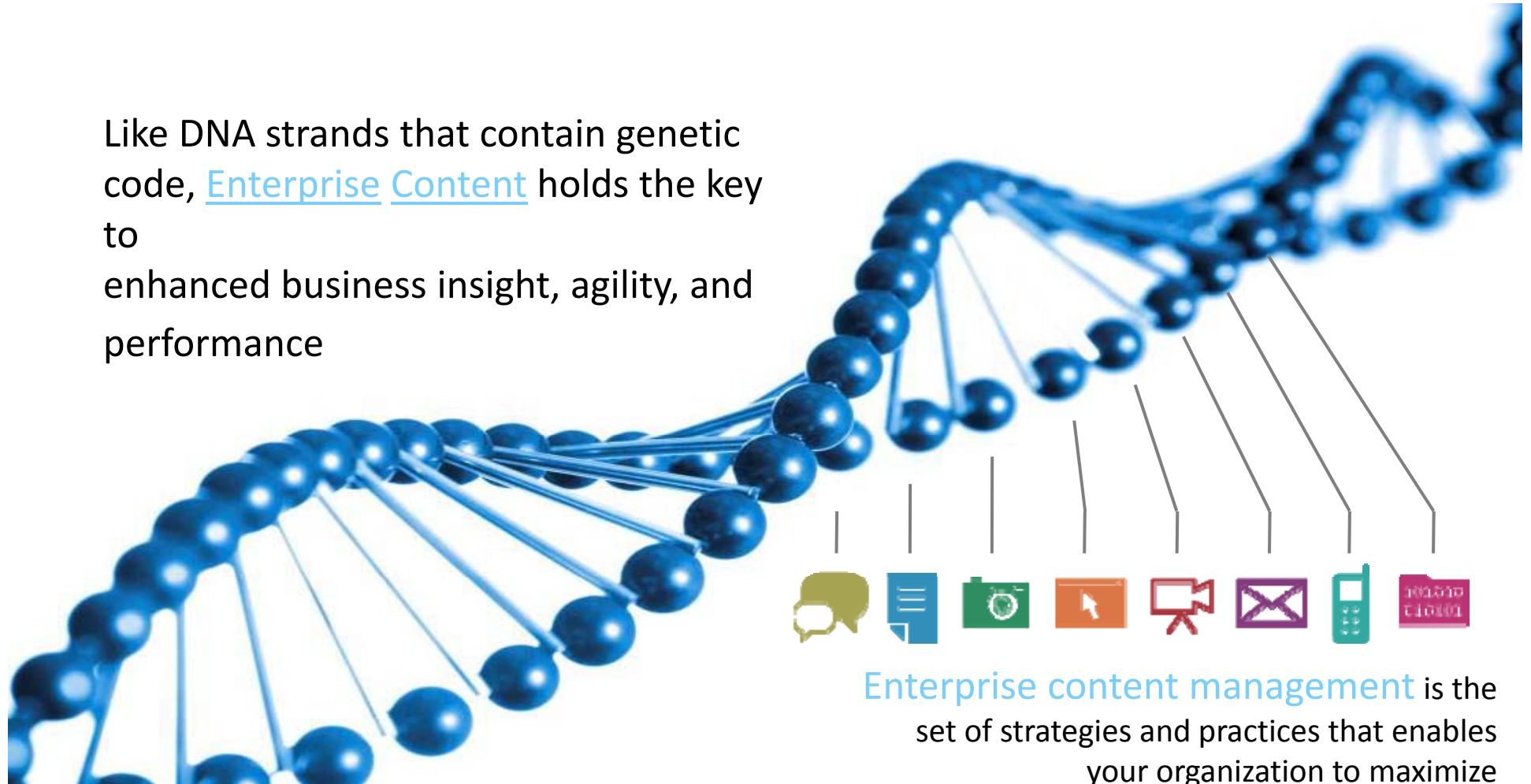
- Today's Business Challenges
- Why Does ECM Matter to You?
- The Smarter IBM Enterprise Content Management
 - Advance Case Management



Enterprise Content: Your Organization's DNA

How will you unlock its potential, why is it so important?

Like DNA strands that contain genetic code, [Enterprise Content](#) holds the key to enhanced business insight, agility, and performance

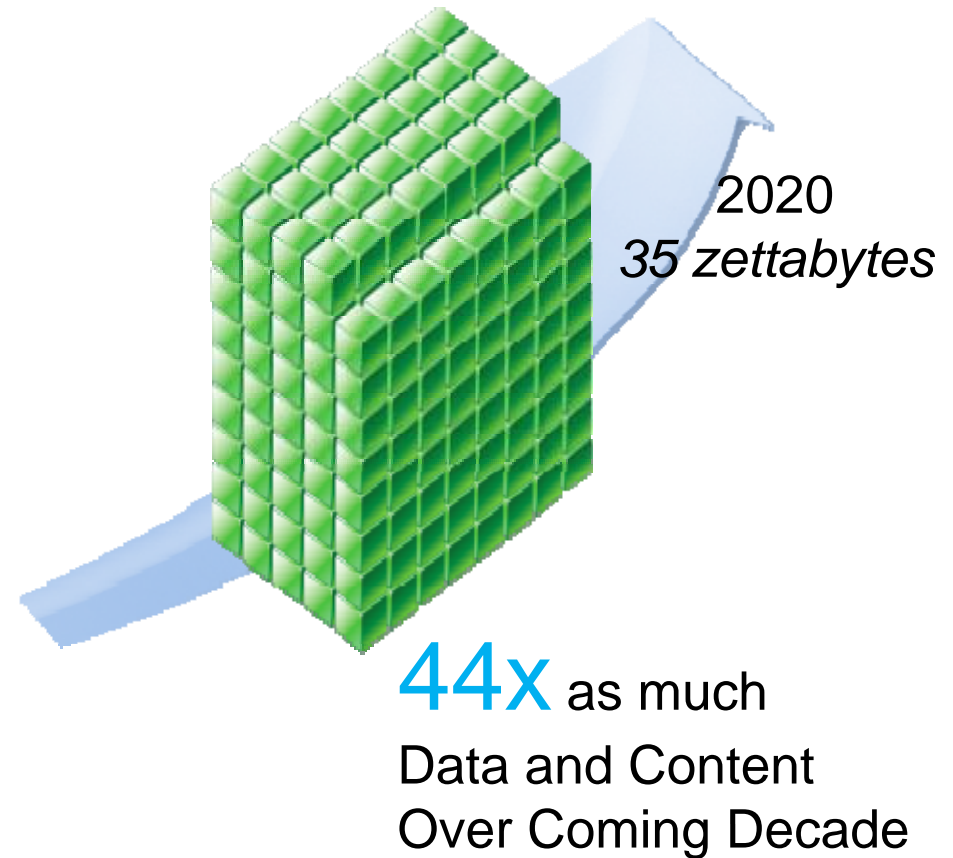
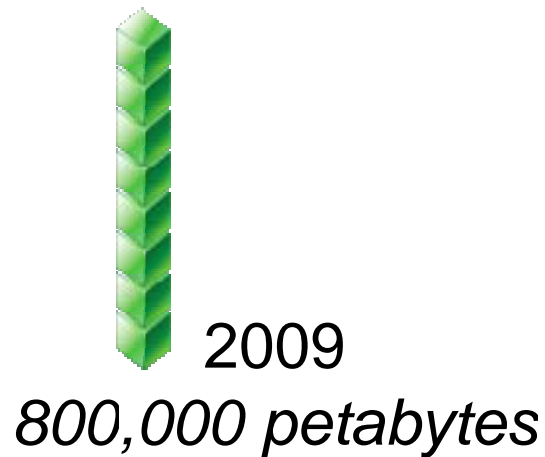


Enterprise content management is the set of strategies and practices that enables your organization to maximize value from content



The Continued Explosion of Information

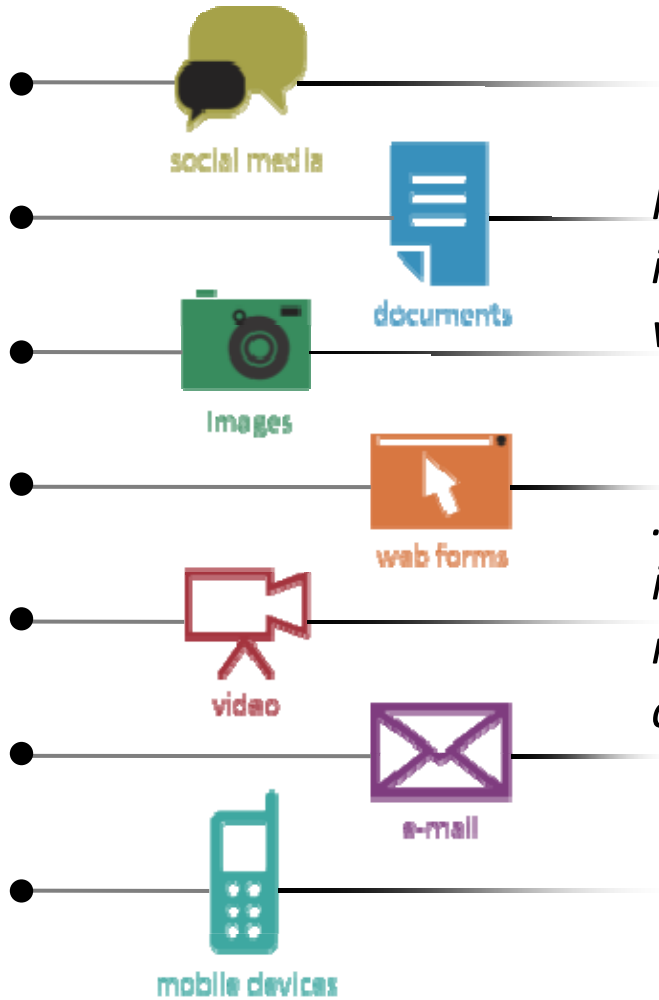
80% of new information growth is unstructured content, with 90% of that unmanaged



The volume, variety, and velocity of information is driving unprecedented complexity.

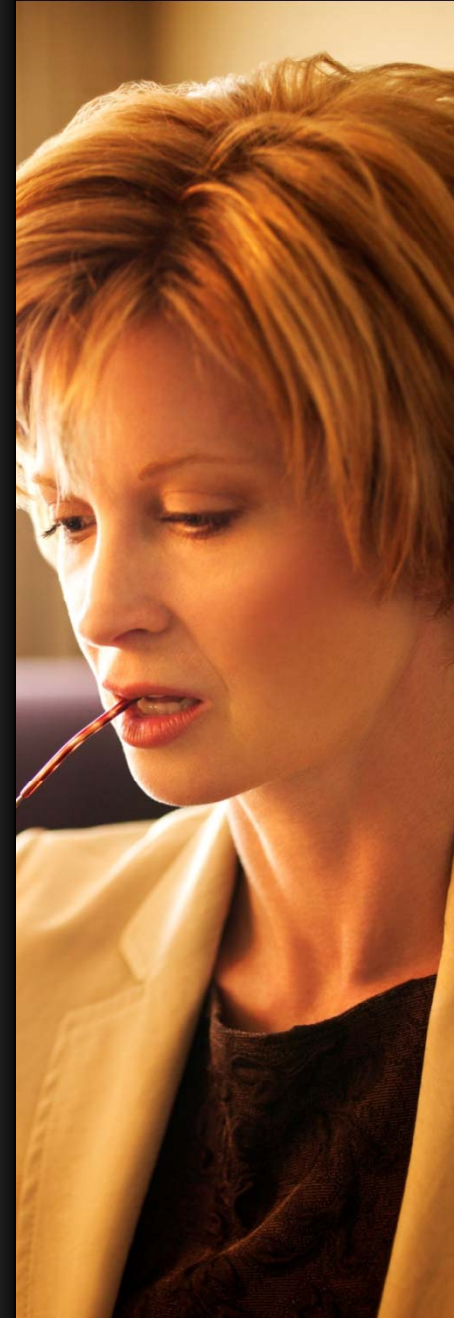


Current business challenges...



Knowledge workers in all industries must do more with less...

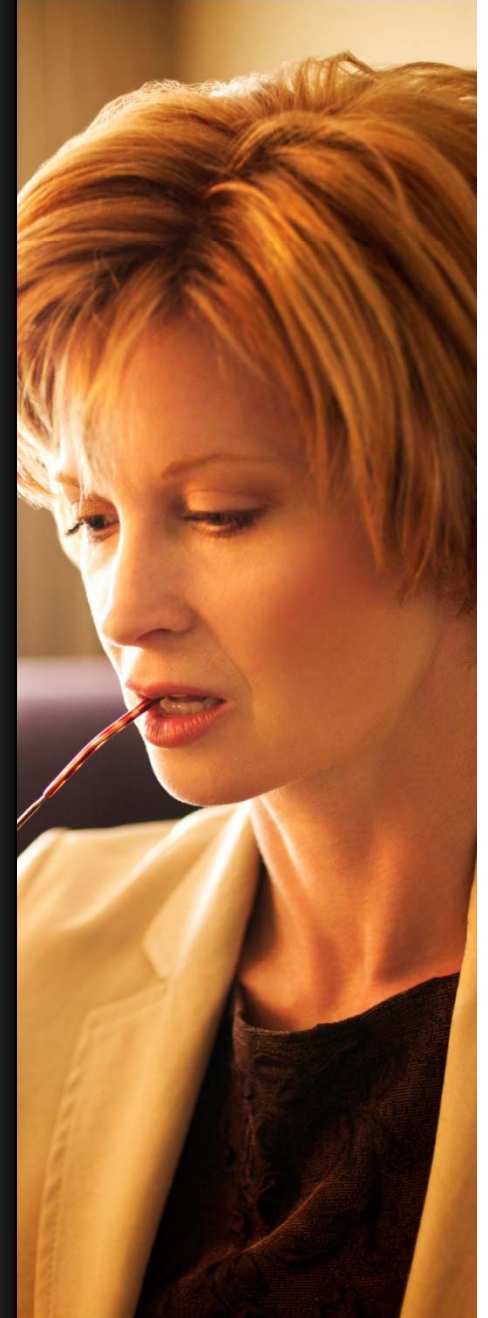
...yet businesses need to improve service and manage risk while controlling costs





Current business challenges...

- *Automation has handled the routine; many automated processes are outsourced; exceptions are now the norm*
- *The volume and variety of information can be overwhelming, and it is arriving faster every day*
- *Flexibility is essential to responding effectively to opportunities or threats*
- *Regulatory or legal risks require consistent adherence to critical policies and rules*





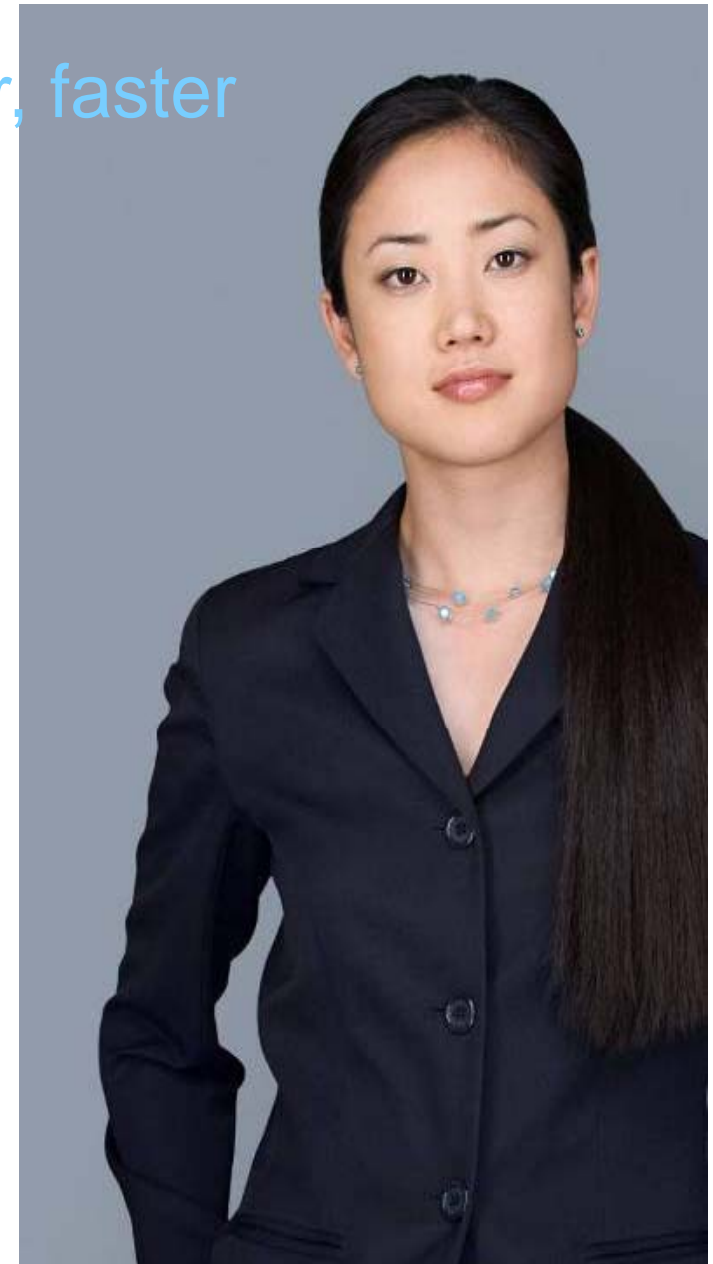
To achieve competitive edge

Organizations need to be smarter, faster

- **77% of CEOs** say they do not have real-time information to make key business decisions
- **1 in 3 business leaders** frequently make business decisions based on information they don't have, or don't trust
- **1 in 2 business leaders** say they don't have access to the information they need to do their jobs



Companies that invest in business insight outperform their peers, showing 33% higher revenue growth, 12 times more profit growth, and 32% higher return on invested capital.





To accelerate service delivery

Knowledge workers demand agility and autonomy

- **Only 11% of knowledge workers** claim to have well-defined and mapped Case Management processes
- **40%** cite difficulty adding or changing processes as their biggest case-handling problem
- **Nearly half** have access to fewer than 40% of customer records required for case processing



Companies that invest in business agility outperform their peers, showing 10% higher revenue growth, 40% higher profit growth, and 60% higher return on invested capital.





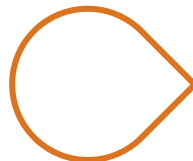
To enhance customer intimacy and employee collaboration

Business is becoming more social

- **69% of executives** report gaining measurable business benefits from social technologies
- **52% of organizations** plan to increase investment in social media and collaboration tools in 2011



“Social media has shifted control of the corporate message away from the organization and towards consumers and other stakeholders. Running away and hiding is no longer the safe option.”



Burson-Marsteller
“The Global Social Media Check-up,” February 2010





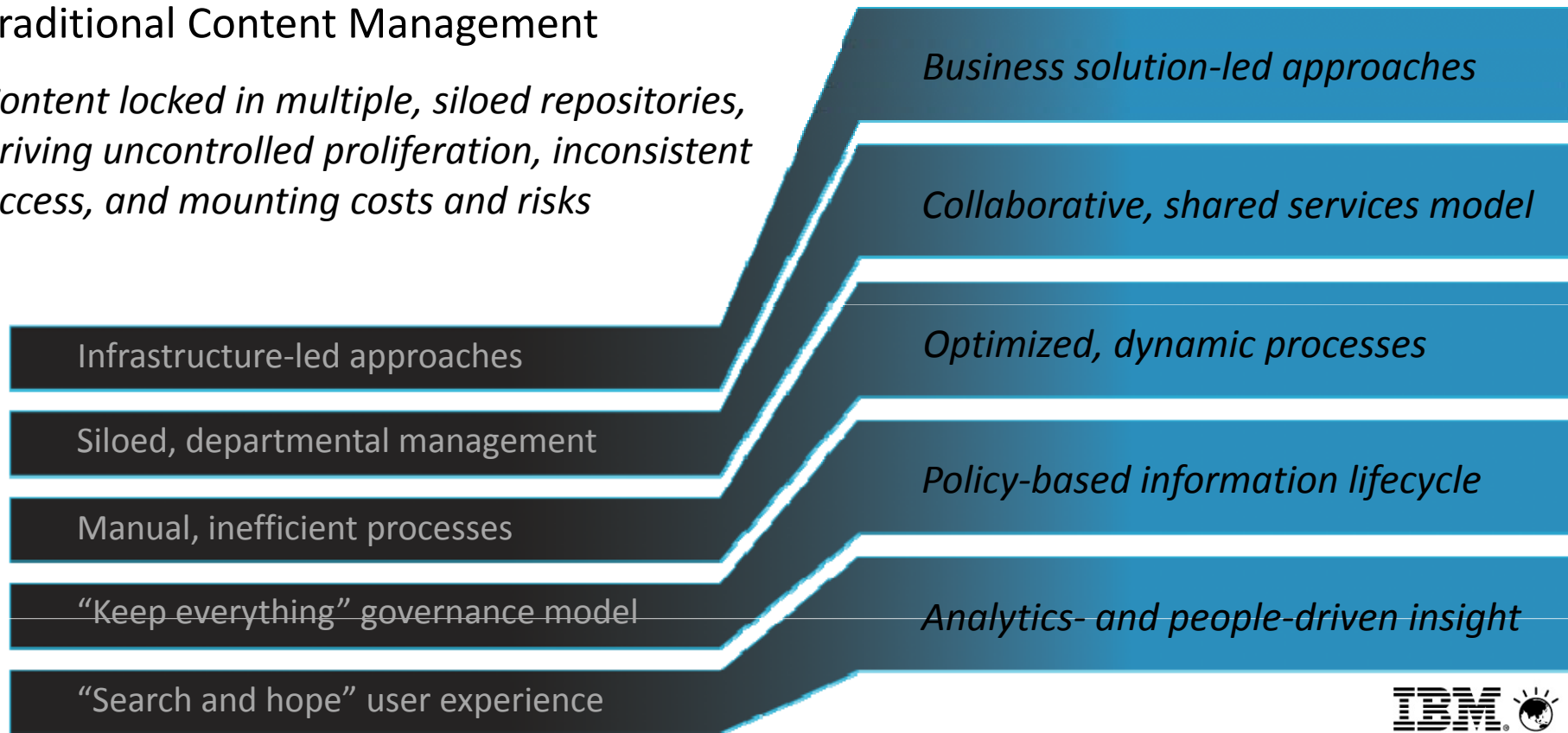
Smarter models are emerging

→ Smarter Content Management

Content in a shared services model, delivered in context to specific business users and processes, driving faster insight and action

Traditional Content Management

Content locked in multiple, siloed repositories, driving uncontrolled proliferation, inconsistent access, and mounting costs and risks





How IBM Helps Manage Information Smarter

IBM Enterprise Content Management

Essential Content



- Production Imaging & Capture
- Enterprise Report Management
- Office Document Services
- ECM Standardization

Advanced Case Management



- Comprehensive Case Mgmt
- Integrated Collaboration & Rules
- Case Analytics
- Content-centric BPM

Information Lifecycle Governance



- Content Collection & Archiving
- Advanced Classification
- Records Management
- eDiscovery Management

Content Analytics



- Content Analytics
- Content Assessment
- Master Content
- Enterprise Search

Better Decisions, Faster



IBM Acquires Datacap

Datacap strengthens IBM's production imaging leadership

- Best-of-breed technology for capture automation to improve business processes
- Expertise in a wide variety of industries and solutions: accounts payable; explanation of benefits, tax and more
- Strong cross-ECM portfolio integration:
 - IBM Content Manager; IBM FileNet Content Manager/BPM, IBM FileNet RM plus several non-IBM repositories



Product News:

- Datacap Taskmaster
 - ✓ Batch, distributed and in-process capture
 - ✓ High-speed data extraction
 - ✓ Advanced recognition for OCR, ICR, OMR and barcode recognition
 - ✓ Locate data on structured, semi-structured and unstructured forms
 - ✓ Open SOA-based procedural rules management. Rules can be called as services within capture processes and by external applications

Bottom line:

Datacap brings much needed Remote/Web based scanning plus advanced form recognition technologies.



IBM Acquires PSS Systems

Complements and extends IBM Information Lifecycle Governance



An IBM Company



Product News:

- PSS Atlas suite
- ✓ Analytics and integrated business process applications for rigorous discovery, value-based retention and defensible disposition
- ✓ Coordinates policy decisions across stakeholders and links obligations and value to information assets
- ✓ Atlas integration available to IBM eDiscovery Manager
- ✓ Supported by CGOC community

- A recognized leader in legal information governance and legal holds pioneer
- Helps organizations eliminate unnecessary legal risk and costs through rigorous eDiscovery, value-based retention and defensible disposition of data
- IBM + PSS Atlas provides an end-to-end enterprise solution for legal and information lifecycle governance
- Brings expertise and credibility

Bottom line:
ECM know provides full Legal Information Lifecycle Governance for information.



Content Analytics

Gain insight, decommission content, reduce costs and risks

- Derive new and unexpected insights by exploring your enterprise content
 - Build custom solutions with modeling tools
 - Deliver key insights to other systems, users, and applications for complete business view
- Decommission unnecessary content to reduce storage and system costs
- Extend Advanced Case Management and Cognos BI usage

Bottom line:

Business Analytics delivers insights to drive better outcomes.



Product News:

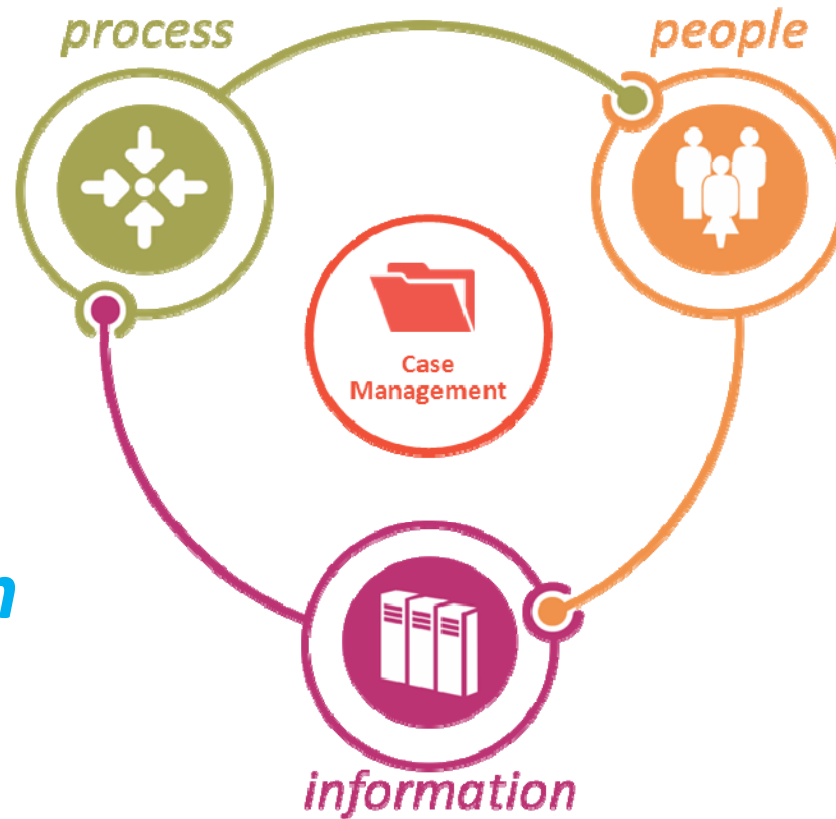
- IBM Content Analytics
- IBM OmniFind Enterprise Edition
- ✓ New tooling speeds time to value for creating industry solutions
- ✓ Improved ease of use with new visualizations and plug-in custom user interfaces
- ✓ Better integration and improved support for content assessment, Cognos BI and Advance Case Management
- ✓ Make faster decisions with improved access to information with knowledge-driven search



IBM Advanced Case Management



*brings
people,
process
and
information
together ...*

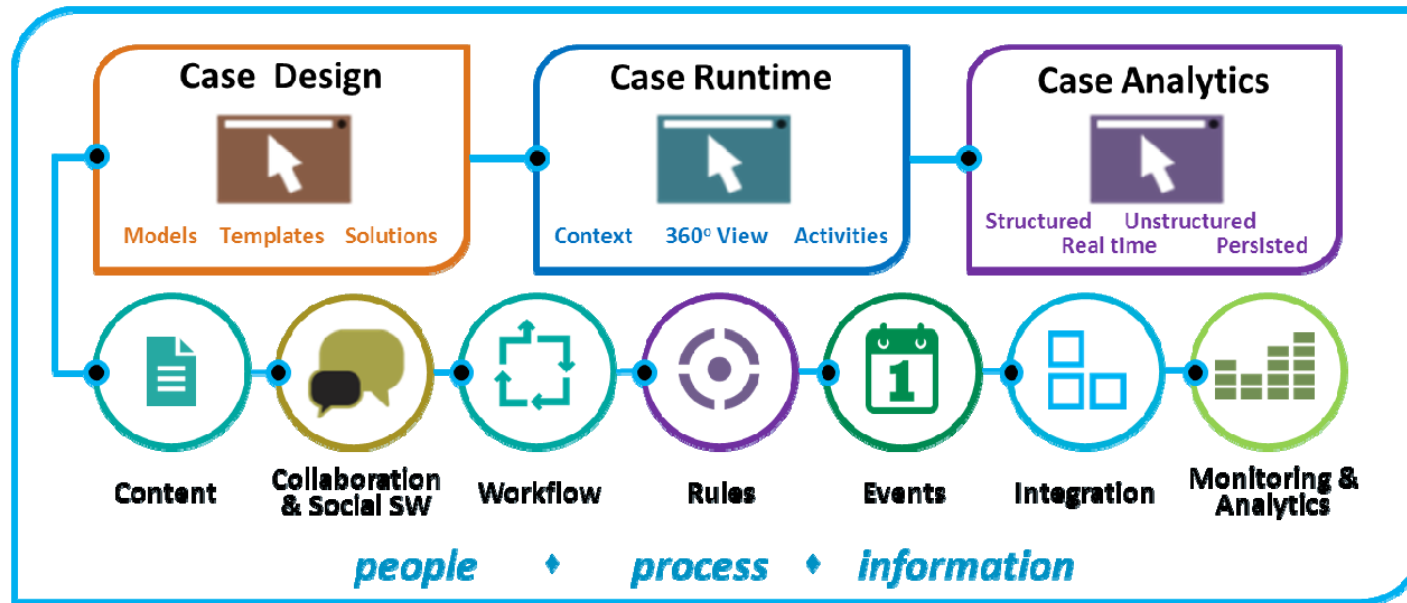


*... in context
of a case*



IBM Case Manager

Simplifying the delivery of case-based solutions



- Built on IBM FileNet P8 Business Process Manager
- Includes Content Analytics, WebSphere ILOG jRules, Cognos RTM, Lotus Sametime and Mashups – for use within case solutions
- Extensible to the entire ECM portfolio
- Deep integration to WebSphere Process Server for connectivity



What is Case Management?

- Case Management refers to the **coordination** of business services to **achieve** a specific business function that typically **involves people, process and content**
- *Examples include taxpayer records, grants, patient records or a contract.*
- This typically includes **creating a case folder** and following a **collaborative**, dynamic, human, and information-intensive **process** that is driven by outside **events** to resolve a case.
- The case folder would include all the documents, data, collaboration artefacts, policies, rules, analytics, and other information needed to process and manage the case.
- After a case is closed, case information is typically **retained for compliance** for long-term periods





Case Management is in most industries

Although a “case” may be expressed differently depending on your business ...



Invoice, Contract, Employee, Vendor, Customer, Project, Change Request, Complaint, Exception, Incident, Audit, Electronic Discovery, etc...



- Policy
- Underwriting
- Claim
- Annuity
- ...



- Loan
- Mortgage
- Account
- Credit Card
- ...



- Patient case
- Claim
- Member
- Provider
- ...



- Grant
- Court case
- Citizen
- Tax payer
- ...



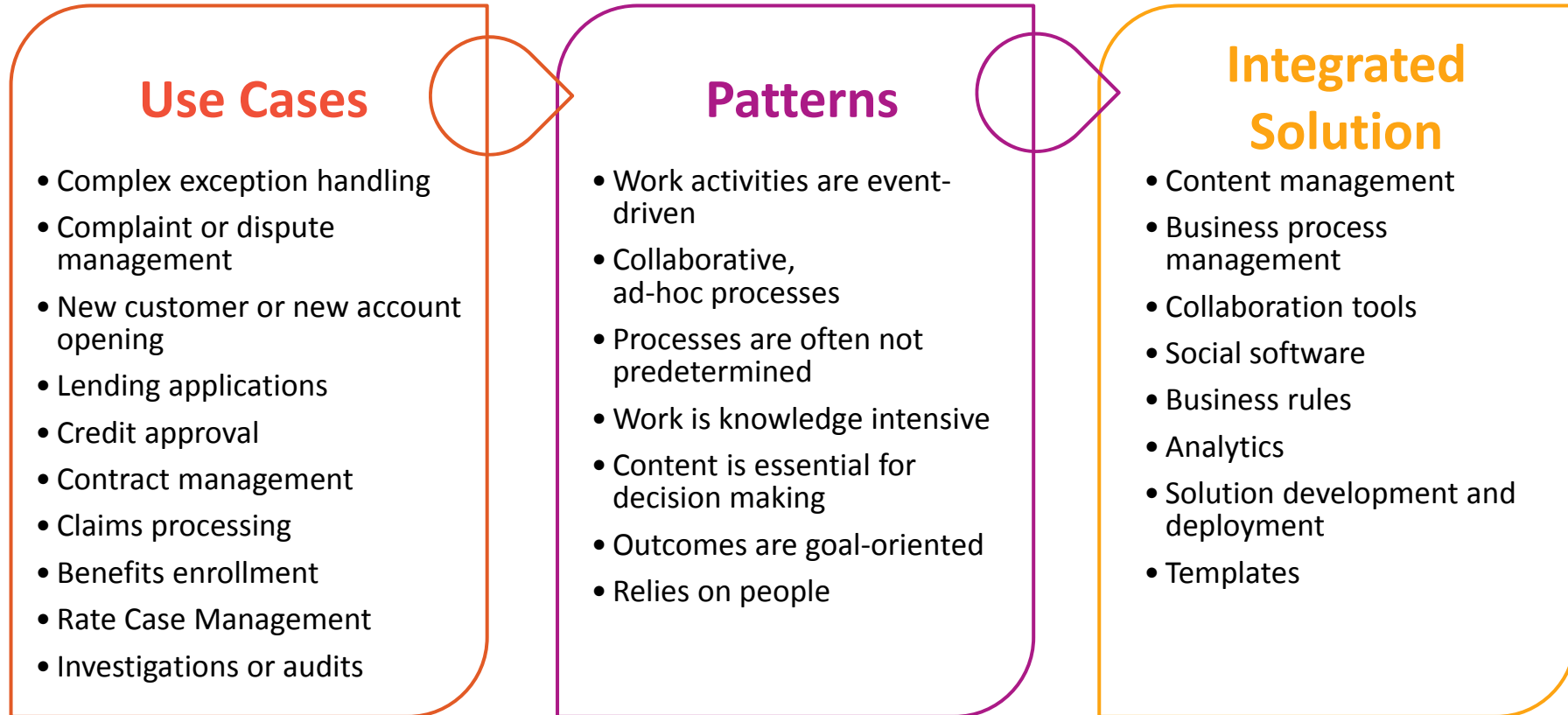
- Rate Case
- Permit
- Land
- Property
- ...



... a common pattern of challenges exists across all industries



IBM's approach to Case Management



KEY: Both *horizontal* and *vertical* in nature

KEY: A *case* is the primary focus of the system

KEY: Solution is optimized for the *context* of a case



Case Management solutions for your specific needs

Banking



- Commercial / consumer lending
- New account origination
- Online brokerage account administration
- Investor servicing
- Mortgage processing
- Asset record certification and deficiency resolution

Energy & utilities



- Engineering project management
- Rate case submission management
- Pre-construction project mgmt
- Emergency permit requests & processing
- Critical safety compliance management

Government



- Administrative and trial court management
- Budgeting and planning
- Licensing
- Child support payment collections
- Citation management
- Fraud investigation
- Grant management
- Retirement administration

Healthcare



- Credentialing
- Electronic health records
- EHR integration
- Patient financial services
- Release of information
- Health info management
- Patient records billing
- Medical records mgmt
- Patient records mgmt

Insurance



- Claims processing
- Customer care
- New product development
- Policy management
- Complaints and appeals
- Healthcare enrollment
- New business
- Underwriting
- Wholesale insurance management

Chemicals & petroleum



- Asset management
- Plant lifecycle management
- Engineering project management
- Document lifecycle control
- Critical safety compliance management
- CAD drawing management
- Workplace safety management

Retail



- Automated invoice processing
- Single view of customer
- Issues management
- Contracts management
- Customer service

Telecommunications



- Contracts management
- Customer service
- HR on-boarding
- SLA monitoring
- New product introduction



Why IBM Case Manager is different ...



“With this new case management offering, IBM moves the vision forward by making a reality that you'll be able to buy and implement — **Rob Koplowitz, Forrester**



“Next-generation case management requires a different mindset... this new case management will be a huge departure from the workflow/imaging solutions of old and will be based on predictive analytics, business rules, and social collaboration, in addition to core BPM and ECM functionality.” — **Forrester**



“IBM ... has pushed the envelope with its case management solution, IBM Case Manager. Combining document management with robust social, collaboration, and communication capabilities, IBM has integrated a broad array of functionality from its software portfolio to provide a unique business solution. In the end, the whole suite offers far more value than the component parts.” — **Rob Koplowitz, Forrester**





Key Takeaways

- IBM ECM will continue to lead, invest and innovate for our customers
- New advances in Capture and Information Lifecycle Governance can help you reduce costs
- Advanced Case Management and Content Analytics will improve your ROI
- Skilled business partners and IBM resources are accelerating and simplifying ECM deployments



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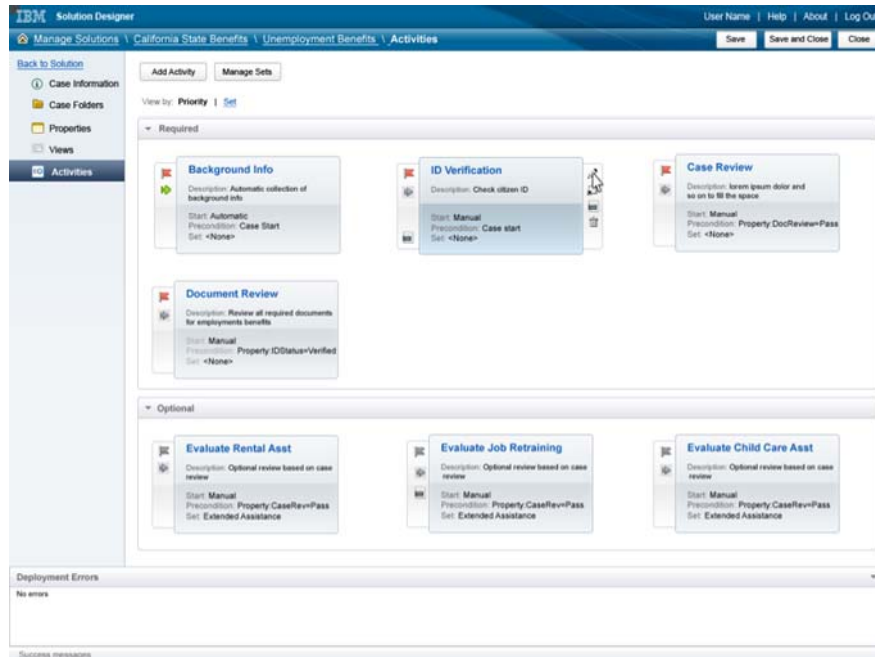


Thank
YOU





Rapid application **case design** for the business



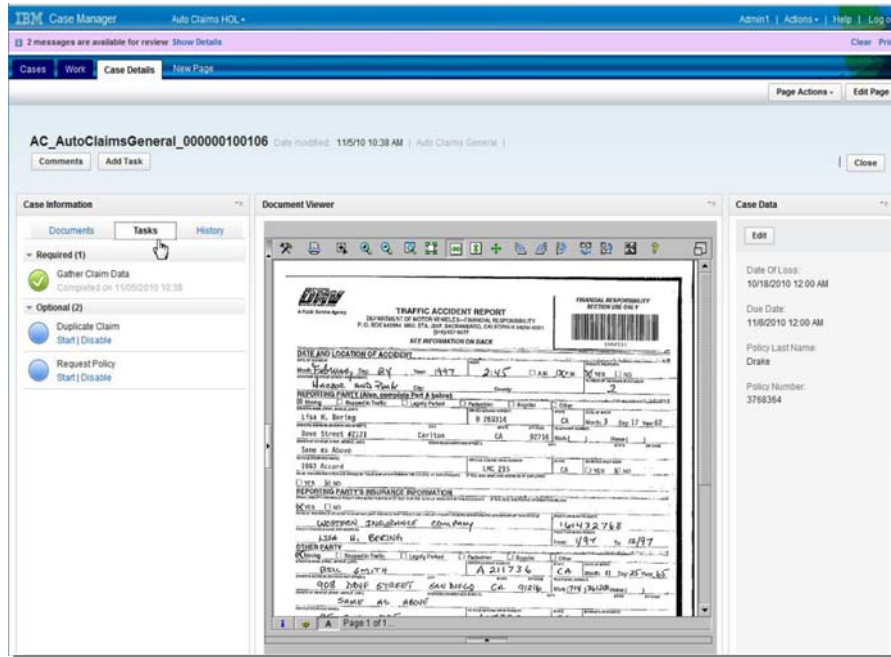
- Easy to use, “Interview Mode” (wizard-driven)
Case designer allows a business user to very quickly build a solution
- Comprehensive across case assets
Case designer can provide 360° view of case
- Leverage templates for a fast start
Represent industry best practices
- Significantly shortens time-to-value for case-style applications

Bottom line:

Deliver end users the solution in a fraction of time of other approaches.



Case worker user experience

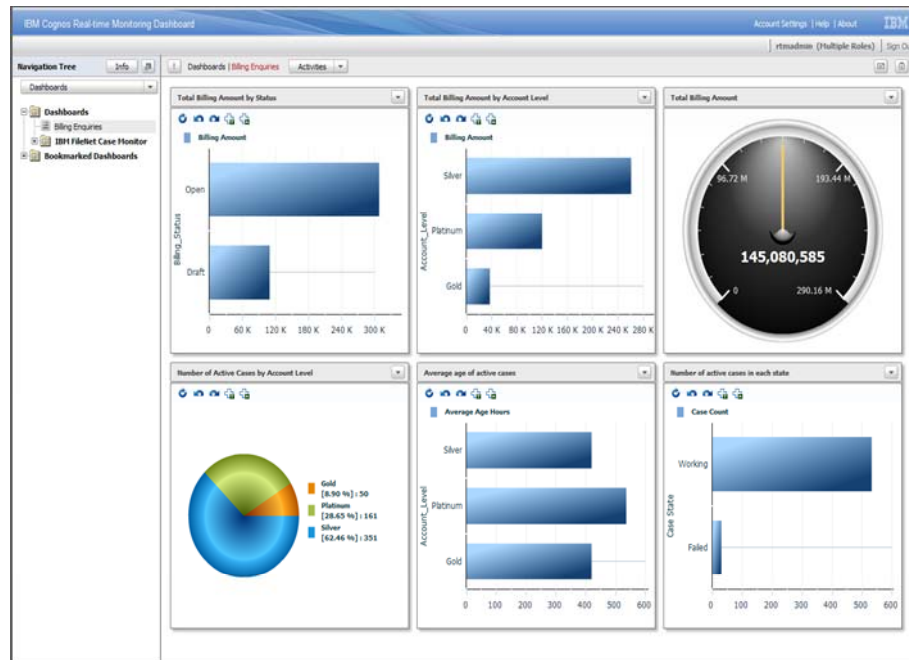


- Role-based and personalized
End user gets exactly the information they need to progress the case
 - Flexible and extensible
Can be configured to meet unique business requirements
 - Provides deep context for case work
No more disjointed jumping between application
- Brings people, process and information together to drive case progression and better outcomes*

Bottom line:
A case worker has all the information they need to improve case outcomes.



Powerful analytics for better case outcomes



- Comprehensive reporting and analysis
Gives case managers visibility across all information types to assess and act quickly
- Real-time dashboards
Understand issues before they become a problem
- Unique content analytics for discovering deeper case insight

Bottom line:

Case managers need insight in order to impact results.



Integrated Collaboration and Social Software

- Case worker can become aware of another's status in Sametime.
- Case workers can chat with others on case related artifacts using web based chat.

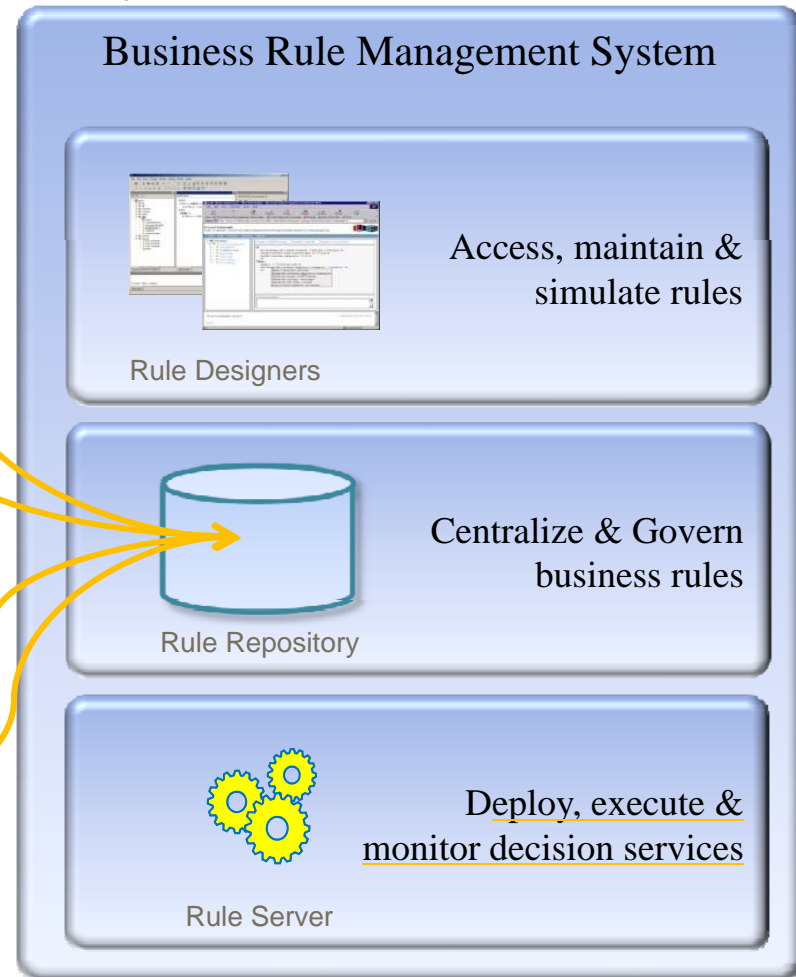
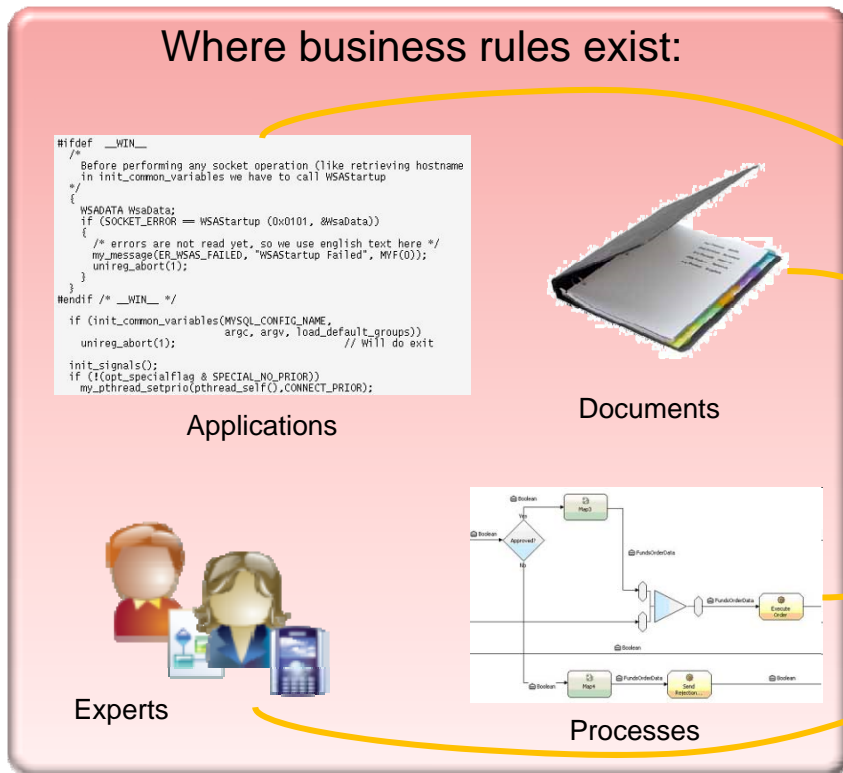
The screenshot displays the IBM Case Manager interface. On the left, a 'Review Request' window shows a list of attachments including 'Personal Information', 'Income Verification' (with files like W2-2009.jpg, MCS-5998-Background.jpg, and Employment Letter.doc), and 'Expenses' (with files like RCPT-07/01/2010.jpg through RCPT-07/12/2010.jpg, and Rent Statement.jpg). Below this is the 'Case Information' section for Case ID: YWS20112, showing a summary of activities and documents added on 06/09/2010 and 06/08/2010.

In the center, a Mozilla Firefox chat window titled 'IBM Edition' is open, showing a conversation between Vivian Birch and John Dunn. The chat messages are:
Vivian Birch: Hey John, got a quick sec?
John Dunn: Sure, what's on your mind?
Vivian Birch: I am starting to think there might be some discrimination in the Tracy McShay case re her vision impairment
John Dunn: Interesting - go ahead and check it with legal

On the right, the 'Case Data' form is visible, containing fields for Applicant ID (429788953), Zip code (95123), Date of birth (08/25/1979), Priority (High), Received date (06/30/2010), and Processor ID (997866).



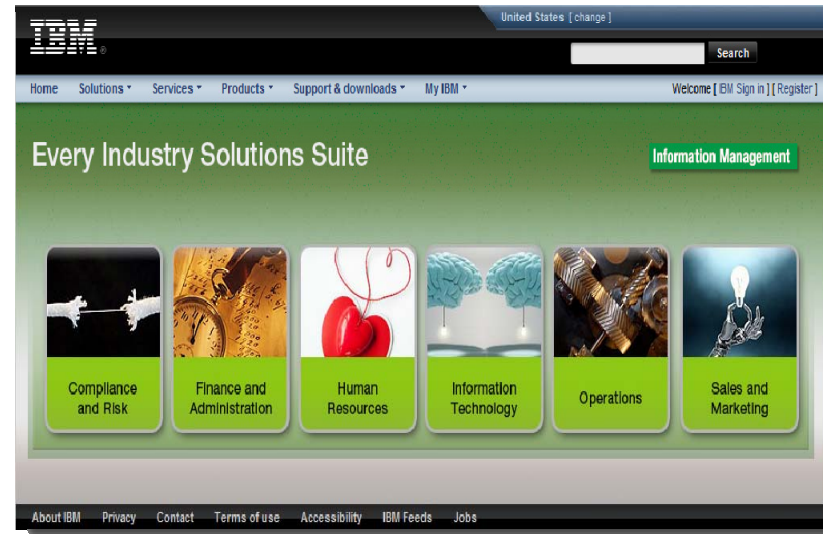
The Smarter Approach: Facilitating change with a Business Rules Management System





IBM Partners with ECM & Case Management Solutions

- 450 ECM Partners; 252 Solutions
- 21,500 Certified ECM Experts
- Industry-specific solutions
- First **ACM** Partner solutions by:
 - Atos Origin
 - Capgemini
 - CENIT
 - EIM
 - GoPro
 - IPD
 - Pyramid
 - Renewtek/SMS
 - Tieto
 - Trittek
 - Vega



Industry Solutions for Every Company

- Compliance & Risk
- Finance & Administration
- Human Resources
- Information Technology
- Operations
- Sales & Marketing