

The slide features a dark background with a perspective view of a road or tunnel with many light trails leading into the distance. A large, thick, blue wavy ribbon curves across the top right. A green and blue wavy ribbon curves across the bottom left. The main title and subtitle are centered in white text.

IBM Enterprise Content Management

New innovations for business and industry value

ECM Keynote Presentation: Chas Kunkelmann
Gerardo Leon

IBM is in a leadership position with tools to help customers deal with content, process and compliance problems...

- Leader in ***BPM, Compliance, Imaging, Report Management, Federated Records Management and Collaboration***
- Leader in ***Content Integration/Federation***
- Leader in ***Scalability***
- Best ***ECM Vision and Strategy***
- Broadest ***ECM Product Line***
- Broadest ***Partner Solution*** Portfolio
- Largest ***Customer Base***
- Most ***Customer Choice & Flexibility***
- Deepest ***Commitment to Customer Success***



Addressing Compliance Requirements with IBM eDiscovery



Challenge

- A short term requirement of archiving all email correspondence and storing in a single and secure repository that was seamless and easy to use and search within.
- A strategic solution that could be used as a repository for HR documentation and correspondence supporting the HR department from a litigation perspective.
- In addition, they needed a better mailbox management system and needed to reduce their storage costs which were escalating.

Solution

- IBM's Email Archiving solution to archive their 1.3 million emails & attachments which are indexed for rapid search and retrieval

Business Benefits

- A strategic solution that could help them improve their ability to address their compliance requirements for SOX & the FSA
- The same technology can be used to archive data from their SAP application for compliance as well as improve the performance of the application
- Due to the IBM compression technology built into IBM Content Manager, Toyota has already seen a storage savings

"IBM Business Partner Neocol has demonstrated excellent responsiveness in providing ongoing support of the CommonStore system. We feel sure that our future requirements will also be met to fill our internal skills gap."

Toyota Financial Services (UK) PLC

Leveraging eDiscovery To Meet E-mail Archiving, Retention And Compliance Needs

THOMAS
MILLER

Challenge

Industry and government regulations and legal discovery drove the need for a more effective method of managing, retaining and producing electronic information in a timely manner.

Solution

- IBM Business Partner, Neocol, implemented the IBM eDiscovery solution on the existing Wintel architecture and installed a separate 3.3 TB disk array
- IBM eDiscovery provides search, legal hold, and export of case-relevant archived email for discovery purposes
- IBM Content Manager manages all e-mail content across multiple platforms, databases and applications
- IBM CommonStore for Lotus Domino provides e-mail archiving and retrieval, and manages growth for any Notes database or server platform

Business Benefits

- 30,000 daily e-mails and attachments are archived and indexed for rapid search and retrieval capabilities
- 23 million e-mails retroactively archived in case relevant format and eDiscovery ready
- Deep compression and single instance storage functionality reduced storage space by 60%
- Full search & retrieve eDiscovery capability makes it easier for users to comply with legal demands
- Users benefit from unlimited mailbox mgmt

"IBM's e-mail management offerings provided us with the stability and functionality that we needed to address and meet our e-mail archiving, retention and compliance regulatory requirements."

Rashid Mahmood, Lotus Notes Systems Manager, - Thomas Miller Group

Castilla y León Social Services Agency

Castilla y León Regional Government administers social services with IBM ILOG

Business challenge:

Spain's recent passage of a law promoting care and autonomy for dependent people compelled the agency to reengineer its IT systems to comply with new regulations as well as provide better service to citizens.

Solution:

Implementation of a centralized process-oriented management system for granting benefits, automating the agency's work and shortening services delivery. The new system is based on:

- IBM FileNet® Business Process Manager as its business process management (BPM) system, and Micro strategy for statistics and scorecard balancing.
- IBM WebSphere® ILOG JRules® to facilitate the development, deployment and maintenance of the business rules governing the complex decisions to be taken in the process.

The system has allowed the agency to adapt quickly to the new regulatory framework, and provides greater flexibility for implementing future policy changes.

Benefits:

- Better service
- Rapid compliance
- Business user access to rules
- What-if simulation
- History of rules

- **Industry:** Government
- **Solution:** Social benefits eligibility
- **Deployment country:** Spain
- **Product:**
 - IBM FileNet Business Process Manager
 - IBM FileNet P8 Platform
 - IBM WebSphere ILOG JRules



Business Process Transformation Enables Cost Reductions, Improves Efficiency and Increases Revenue



Challenge

J.B. Hunt needed to implement a new business process management solution to support its "Perfect Invoice" initiative, in which the company aimed to bill the correct amount the first time for all services provided and to receive full payment in accordance with the customer's terms. To accomplish this, the company needed an innovative way to identify and properly apply accessorial charges for driver delays at shipping facilities, known as power detention.

Solution

- J.B. Hunt teamed with IBM to develop a business process management system based on IBM FileNet software
- They use a web based application to allow dray carriers to select work assignments, confirm deliveries, and submit invoices
- The project focuses not on small quantitative gains but on a complete transformation in the way power detention – driver delays – events are captured, administered and invoiced.

Business Benefits

- Increased % of automatically processed bills from 60% to 90%
- One billing clerk now manages work previously done by 6 clerks
- Complete billing process visibility – ability to quickly identify bottlenecks
- Completely automate dray carrier assignments and payments
- Estimate an additional \$870K in additional revenue captured annually
- Estimate staffing savings of \$160K annually

"The success of the HAWK Power Detention System has demonstrated the value and potential of IBM FileNet P8 for J.B. Hunt. As a result, other divisions within the company are exploring business process management as a way to remove non value-added work and add dollars to the bottom line."

Tarek Taha Engineering Manager JB Hunt



Becoming A National Cost-Efficiency Leader with IBM Content Manager OnDemand Solution



Challenge

OZ wanted to digitize, automate and streamline its manual document processing system, reduce paper usage, improve customer service, and reduce costs.

Solution

- OZ chose IBM Content Manager and IBM Content Manager OnDemand as well as an Enterprise Document Presentment (EDP) solution from IBM Business Partner StreamServe
- Content Manager, stores OZ's document templates and other content captured by StreamServe in its common repository as either flat files or portable document files (PDFs), and makes the content easily and instantly accessible throughout the enterprise
- Content Manager OnDemand stores and archives all digital content and can be accessed by StreamServe to retrieve files for assembly and presentment. Content is distributed to the appropriate end-users via a workflow management system OZ developed using Lotus Notes and a Content Manager application programming interface (API)

Business Benefits

- 100% of claims processed within expected timeframe
- 75% greater productivity for claims processors
- 60% reduction in paper usage
- 90% greater efficiency with traditional mailings
- 47,000 USD savings from reduced IT staff time
- 20% reduction in full-time equivalent staff
- Improved customer service and Web self-service
- Production of documents for service providers and internal staff in minutes, not days and months
- 100,000 USD savings annually through reduced printing, distribution and storage costs
- ROI of 100% in two years

"IBM Content Manager and Content Manager OnDemand offered the complete document management functionality we needed in a user-friendly package that we could implement on our own."

Bob van Eijk, Systems Administrator, OZ

Achieving Enterprise-wide Information Sharing, Cost-Efficiency and Innovation with IBM ECM



Challenge

After having made its first investment in IBM FileNet five or six years ago for a microfiche replacement project, Citigroup decided to extend its use of the solution from pure imaging to a strategic platform for content and core business processes.

Solution

- The IBM FileNet Content Manager, Business Process Manager, and FileNet Image Manager supports the areas of loans, private finance, credit card application process, termination process, and issue or complain handling
- All customer communications are first presorted, scanned, and indexed before a workflow is activated and the documents are archived
- IBM FileNet handles up to 100,000 images per day and 1,000 COLD reports, some of which can be 1,000 pages in length
- For data security purposes, the system has disaster recovery support via a “mirror” system in a separate location in Frankfurt. There is a daily complete synchronization of all business processes

Business Benefits

- Cost savings of around \$5 million
- Centralized data delivers faster response times & better customer service
- Citicard application processing time cut from over 2 weeks to just 2 days
- More efficient use of manpower resources
- Clear ROI as all divisions can leverage the ECM technology
- Centrally managed, enterprise wide solution delivers timely, accurate information

"We chose IBM FileNet because of its market leadership and financial performance. Migration to IBM FileNet P8 provides advanced technology and long-term support, enhanced scalability to support mission-critical applications, and greater flexibility. The open architecture also facilitates integration."

Marco Diehl, 1st Vice President, Cititech

IBM ECM Latin America Partners



Dumago



GestionTech



BRQ

Escala



The 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
– and opportunity

1990

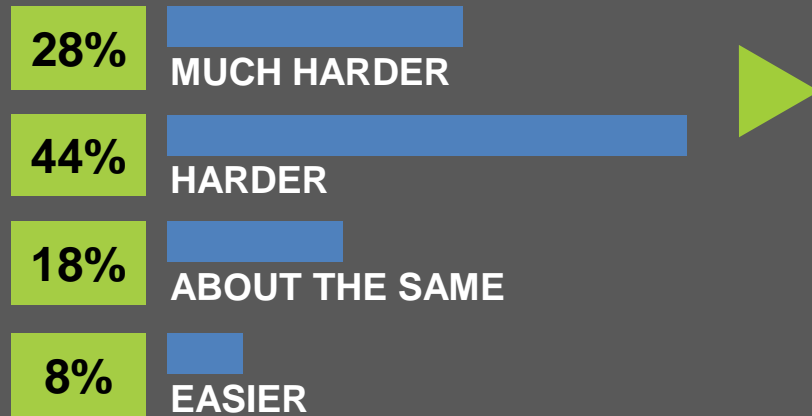
2000

2010

2020

Can You Find Your Information?

How easy is it to research information and documents held on your own internal systems compared to the Web?



For 72% of companies, it is harder to find information they own, than information they don't

4 Waves of ECM Innovation

Advanced Case Management



- Content-centric BPM
- Advanced Work Management
- Case Analytics

Trusted Content Analytics



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

Information Lifecycle Governance



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

Essential Content



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



Content Management Essentials

- Revisit imaging to drive out costs of paper
- Expand report management for “green” benefits and better customer service
- Extend the desktop and collaboration sites with IBM ECM
- Consolidate access and security to content anywhere



Essential Content



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

Information Lifecycle Governance

- Extend the value of your repositories by governing information over its lifetime to reduce costs and risks
- Deploy across enterprise or in modules, looking closely at archiving, records management and eDiscovery
- Leverage your ECM repository as the basis for a Smart Archive strategy, including SAP and data archiving



Information Lifecycle Governance

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

Trusted Content Analytics

- Use IBM Content Analytics for Assessment to decommission content, reducing costs and risks
- Leverage and exploit the value of your content with IBM Content Analytics, collaborate with your BI team to determine their text analytics plans
- Evaluate the effectiveness of your enterprise search



- Content Assessment
- Master Content
- Enterprise Search

Advanced Case Management

Advanced Case Management

- Optimize case outcomes with information, process and people
- Unifying capabilities from across IBM Software and IBM Research
- Content, process, rules, events, collaboration, social software and analytics – *in the context of a case*
- Extensive ecosystem of partners delivering case management solutions



IBM Advanced Case Management Strategy



- Product that unites content, process and people
- Delivers optimized case outcomes through analytics, rules, collaboration and social computing
- Supports work management of structured and unstructured activities
- Delivers trusted information to the case
- Enables new levels of insight in decision making
- Manages & governs the entire case lifecycle
- Provides an extensive ecosystem of partners delivering case management solutions
- Shortens time-to-value with better tools, out-of-the box solutions and templating capabilities

FINANCE, AUTOMOTIVE: Loan Origination and Servicing



Business Problem

- Paper case documents
Created bottlenecks, impacted customer service & audits required to insure information integrity
- Lack of visibility
No view into 'in progress' cases & case bottlenecks
- Volume of Information
Faxes, emails, letters, phone calls & mainframe information for tens of thousands of loan processed per year

Solution

- End to end process automation
Electronic forms, business process, system integration & governance optimize case outcomes & record decisions
- Customer Service
Access to case content & status, regardless of source
- Analytics
Compare overall process performance to industry benchmarks. Real time cust associate activity for mentoring.

Outcome

- *Process times cut from days to minutes*
- *Customer service and information quality improved*
- *Can handle increased loan volumes with current resources*
- *Associates elevated from 'paper pushers' to knowledge workers – focus on exceptions that requires thought and intelligence*
- *Estimated \$202,000 in annual projected savings*
- *Efficiently comply with records policy through auto declaration*

- **Case Mgmt Components**
IBM FileNet Content Mgr & BPM, Cognos Now! eForms, Records Mgr, ILOG BRMS, WebSphere DataPower

UTILITIES: Facility Construction and Management



Business Problems

- Delayed Maintenance
Construction/maintenance orders get delayed significantly; workers have no on-site access to view or update information about regulations, building codes, work orders, building plans
- High risk of failure
Mission critical business processes are heavily reliant on paper documents
- Disparate Systems
Departments run separate

Solution Needed

- Electronic case information
eliminating paper, allowing office staff as well as on-site workers complete and up-to-date access to all documents
- Integrate legacy systems
In order to create a 360° view of the maintenance order the staff needs full access to legacy systems in a combined view
- Track work orders
To ensure timely response to city's work orders a BPM solution is needed to track

Outcome

- Case Mgt Components
Tritek Trans@ction eXpress
FileNet Content Manager
FileNet BPM

• **CONSOLIDATED EDISON**

On-site construction specialists access, update the most recent site documents in real-time with laptops, and collaborate with office employees eliminating the risk of losing paper and costly maintenance delays.

Process optimization and providing full access to all information at all times resulted in an ROI of \$500k

Key Takeaways

- IBM ECM will continue to lead and innovate for our customers
- Build on core foundation to maximize value
- Start today with both case management and analytics for improved ROI
- Utilize skilled business partners and IBM resources to accelerate and simplify ECM deployments

Advanced Case Management



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- Advanced Work Management
- Case Analytics

Trusted Content Analytics



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- Content Assessment
- Master Content
- Enterprise Search

Information Lifecycle Governance



- Content Collection & Archiving
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- eDiscovery Management

Essential Content



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