

“No Paper Weight” Marketing Initiative Positioning



This document provides positioning, and descriptive information on the “No Paper Weight” marketing initiative. The internal code name for the project is “Big Bite”, derived from a presentation entitled “How To Take A Big Bite Out of the Cost of Compliance”

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Whole Product Statement

The “No Paper Weight” marketing initiative is

For

- Organizations that are currently storing paper records either internally or with a Commercial Records Center (CRC).
- Prospects and existing customers that may or may not already use IBM or other ECM systems or components
- Large and SMB organizations customers, government and commercial, throughout the globe

Who Need

- To reduce the **Risks** of using and storing paper records with improved disaster recovery, better security and better access
- To reduce **Costs** associated with physical records storage by improving business and record keeping processes
- To improve **Visibility** into paper based business processes to support better business decisions
- To obtain better worker efficiencies currently lost in paper based business processes
- To address the risk and costs associated with litigation, as well as the constantly changing regulations and enforcement initiatives like the new rules of civil procedure.
- A flexible, adaptable approach that enables cost-effective demands with visibility and control for content and processes to lower business and financial risk.

IBM Provides

- An integrated Enterprise Content Management (ECM) platform that provides the Records Management, Process Management and Image Management capabilities that capture electronic and paper records and manage them throughout their life cycle by combining Content, Process and Compliance.
- Automation of records-based activities, eliminate burdensome end-user participation, enforce compliance and create business advantage while reducing the cost of compliance and risk management and provide greater visibility into business processes.
- Support a single source for a complete unstructured information compliance architecture including audit control, retention rules management, records management and email management.
- Supports a comprehensive legal discovery solution including search, retention and hold, audit control and semantic analysis.
- Federated records management and search capabilities across multiple repositories and applications and improves records controls and searching using electronic content and related metadata, auditing and reporting tools.
- An active content solution that integrates into a larger software architecture including email, forms and file system management, server and storage technologies.
- A comprehensive professional services offerings from trained and qualified IBM consultants and IBM business partners

Unlike

Iron Mountain, Recall, EMC, Open Text, Oracle, CA, Microsoft and others that provide solutions that are not fully integrated with best-of-breed physical and electronic records management, image management, file system management, and business process management capabilities required to achieve cost and risk reduction and improved visibility.

IBM's Offering

Helps customers automate the key functions impacted by paper based processes. These include the Business Processes, the Records Transition, and Records LifeCycle Management phases by

- Reducing operational costs by providing process efficiencies and reduction of direct costs such as paper storage and labor
- Mitigating risk of spoliation, theft, loss, and disasters with sound back up capabilities and advanced security controls
- Capturing physical and electronic content and automating processes while providing a robust auditing and reporting capability not available in a paper based environment

Hypothesis Behind the No Paper Weight Initiative

The marketing campaign focuses on one of the greatest compliance burdens placed on organizations – Paper. It still used in business processes and then stored either internally or with Commercial Records Centers (CRCs). The continued use of paper to record critical business transactions can weigh an organization down with the related costs and risks.

Our goal is to get our customers and prospects to accept that they have serious business problems in a paper environment.

Organizations continue to suffer the weight of paper when advances in technology can enable them to capture electronic content in its native forms and to digitize the remaining paper. Technology can not only reduce costs and risks, but can also provide greater visibility into the various business processes core to many organizations. Technologies such as Electronic Records Management systems, forms recognition, email management software and business process management. These well-established ECM technologies provide tremendous productivity gains, a rich set of metadata for auditing and reporting, and significant savings opportunities – all while helping organizations better meet today's compliance requirements.

Our customers, and IBM, have become complacent about paper, storing it out of sight and out of mind. We suspected that no one had recently examined the new compliance dynamics and cost factors to determine the true costs of managing paper records – much less the potential return on investment, or ROI, that might be available. So we asked ourselves these questions, not only about the ROI potential but also about the risk

mitigation possibilities and the capacity to improve our customers' visibility into core business processes with metrics and metadata that may not be available in paper-based processes.

- 1 ***How do the new economics of Compliance combined with technology advances enable transformation of physical records storage?***
- 2 ***Does this same dynamic also enable new methods of business intelligence?***

Some key dynamics have changed since customers first looked at the justification for utilizing ECM technologies. The volume of content that must be managed is growing exponentially year over year. Part of this content still includes paper, which is just not going away. The costs of storing and using it have risen as well. Paper is also used in many business processes, with slow retrieval times that not only effect customer service but cause a tremendous loss in user productivity as they "shuffle" paper in doing their jobs.

Another key dynamic is the rise in litigation, with most large organizations being involved in hundreds of cases at any one time. This means that better discovery tools are demanded by both plaintiffs and defense attorneys. Locating paper content relative to a law suit or audit is extremely difficult and expensive, and can often result in fines and sanctions if paper records cannot be located. The advanced search tools available from IBM can make searching for and retrieving electronic content extremely successful, while meeting the new requirements found in the new US Federal Rules of Civil Procedure (FCRP). And of course this technology, both hardware and software, have become less expensive over time.

Based on these new factors, we decided to find out the answers to our hypothesis to see if we could indeed find savings that may not have been there in the past. The study showed that the subject bank could realize an **\$11 Million saving in year one**, and **\$36 Million over three years**, or **263% ROI**. This confirmed that there were significant savings and risk mitigation opportunities with the added benefit of business intelligence to enable customers to make better decisions faster.

The Market Opportunity

The overall market for replacing paper with digital content is tremendous, with more paper produced now than ever before. This can be seen in virtually every organization's warehouse, storeroom, hall ways and even conference rooms where paper is housed. This is in spite of an estimated 80% of it being created in a digital format and then printed, processed and stored. The opportunity for IBM and its partners lies in software, hardware and professional services sales, with the primary offering IBM P8 compliance and other ECM software. The market opportunity for stopping the flow of paper to storage and converting it to digital formats is not tracked by any analyst, because it represents an

entirely new spending opportunity that is not currently represented in the traditional ECM market segments. Indeed, it is an opportunity to breathe new life into our ECM and related products with the availability of new dollars not previously addressed. The key market indicator is

Customer spend in the Commercial Records Center (CRC) market today

The market opportunity can be best characterized by the size of the Commercial Records Center market, those organizations that provide physical records storage and retrieval services. PRISM International, the CRC trade association, estimates that there are over 1200 companies in the US offering these services, ranging in size from Iron Mountain with over 2.4 Billion in revenue to the majority of companies that have less than \$3 million in revenue. Prism International, the trade association for the Commercial Records Center industry, estimates that globally 45% of organizations outsource their physical records management.

As validation, Iron Mountain (IM), www.ironmountain.com is the leading provider of physical records storage services in the world, offering Records Management, Data Protection and Recovery and Information Destruction, They provide services in 953 locations and employ 18,600 people to support over 90,000 clients in 37 countries and five continents. Iron Mountain's 2006¹ revenues were \$2.4 Billion with a 13% revenue growth over the previous year. This included \$1.5 Billion in revenue from paper records storage services that grew 10% in 2006. This represents the yearly inflow of \$150 Million in new physical records stored. And while they provide destruction services for their clients they continue to store 3 to 4% more boxes per year than they destroy, for a sustainable growth model.

Iron Mountain estimates that the world wide addressable market for all of their services is \$40 Billions, with, so their revenue represents only 16.6% of the market. As illustrated in Table 1, the Iron Mountain revenue from paper storage is 63% of their revenue, with 63% of the total \$40 billion **market for paper storage being \$25 Billion**. Based on the Iron Mountain yearly revenue growth (10%) from storage, this means the **market opportunity resulting from the No Paper Weight campaign to be \$2.5 Billion dollars in 2006**. This translates to a major new opportunity to replace customer spend on storing paper to buying IBM ECM software and the other IBM and partner products and services referenced below.

No Paper Weight Market Opportunity	\$ Millions				
	2006	2007	2008	2009	2010
Overall Market For Iron Mountain Services 1	\$40,000	\$44,000	\$48,400	\$53,240	\$58,564
Iron Mountain Total 2006 Revenue 2	\$2,400	\$2,640	\$2,904	\$3,194	\$3,514
Iron Mountain Revenue for Paper Storage 3	\$1,500	\$1,650	\$1,815	\$1,997	\$2,196
IM % of Revenue from Paper Storage	63%	63%	63%	63%	63%
Market for Paper Storage	\$25,000	\$27,500	\$30,250	\$33,275	\$36,603
IM Growth of Paper Storage Revenue	10%	10%	10%	10%	10%
Market Opportunity for Stopping Inflow	\$2,500	\$2,750	\$3,025	\$3,328	\$3,660

Iron Mountain Data source: 2006 Annual Report
 1 13% yearly growth factor based on IM 2006 revenue growth
 2 10% yearly storage revenue growth based on IM 2006 revenue growth

¹ Source: Iron Mountain 2006 Annual Report

Table 1 – No Paper Weight Market Opportunity

This market is primed for reducing dependence on paper and managing businesses with electronic content. Recent changes to the Federal Rules of Civil Procedures now make it mandatory for customers to manage records in their original digital format. This means that less paper will be printed and stored as records, with IBM poised to provide the technology solutions. The paper storage industry will be disrupted by the No Paper Weight market initiatives and will afford new opportunities that can leverage our existing product lines and leverage core capabilities. This means that the market currently served by Iron Mountain and other CRCs will be available for capturing a large portion of the customers spending dollar.

The new market addressed by the campaign is not tracked in the overall IBM Global Market Value, but does represent currently undefined opportunity in ECM GMV segments. The ECM segments are broken down into Core Solutions, Solution Enhancements, and Value Drivers, and are defined in the Product Definition section. The GMV segments are shown in Table 2 below.

No Paper Weight	ECM GMV Categories
Core solution	Content Centric Bus Process Mgmt
	Production Image Mgmt
	Records Mgmt
Solution Enhancement	Content Capture
	Discovery Infrastructure
	Discovery Solutions
	E-Mail/Collab Archiving & Mgmt (IM)
	E-Mail/Collab Archiving & Mgmt (Tivoli)
Value Drivers	Simple Discovery
	Basic Content Services
	COLD / Ent Report Mgmt
	Content Centric Apps
	E-Forms
	Team Collaboration Mgmt
Web Content Mgmt	

Table 2 – No Paper Weight GMV Categories

Every Enterprise content Management opportunity will usually include additional opportunity from the sale of other IBM software, hardware and professional services. The opportunity identified above does not include this “drag” opportunity, which could be substantially high than just that of ECM software opportunities.

Key Business Requirements

Paper based records place a huge burden on companies in terms of risks and cost while simultaneously hindering visibility into business processes. And as paper records move through their lifecycle, they move from an active to an inactive stage, through three phases we call the Business Processes, Transition and Records Lifecycle phases. As represented in Figure 1 below, content, that may or may not be formal business records, is produced and used in various business processes. These might include some of the types of Line Of Business applications listed in the left column. During the Transition phase, paper records are typically routed to centralized locations where they are boxed, labeled and indexed for pickup by either internal staff or by the Commercial Records Center. So as the paper enters the Transition phase it is funneled into a single point of consolidation. The third phase involves the management of the records from the time they become inactive to the point that their retention period has expired and they are destroyed. It is in this phase that records are returned to the business unit if needed, vital records are afforded additional protection, and where legal discovery is also supported.

Managing Paper Records



Line Of Business Processes	Transition	Records Lifecycle Management
Where Records Are Made	Traditional Active / Inactive Model	How Records Are Managed
<ul style="list-style-type: none"> ▪ Statements ▪ Consumer lending ▪ Claims processing ▪ Underwriting ▪ Collections ▪ Customer service ▪ New account onboarding ▪ Project management ▪ Case management 	 <ul style="list-style-type: none"> ▪ Single point of consolidation for transfer ▪ Event or process causes worker controlled files to move to file room or warehouse CRC ▪ Tracking/indexing with Excel or a database 	 <ul style="list-style-type: none"> ▪ Retention (time and event based) ▪ Legal holds ▪ Legal discovery ▪ Security and privacy ▪ Vital records review ▪ Long term preservation ▪ Disposition

Figure 1 Managing Paper Records

Business Challenges

As mentioned earlier, the key business challenges today in this market are:

Risks

- The industry is highly regulated and faces new reporting and auditing requirements
- The organization had been unable to produce key records required in a legal discovery order

Costs

- The organization wanted to reduce costs and improve efficiencies
- Paper records have been lost or miss-placed and the organization was unable to prove a financial transaction resulting in a substantial monetary loss.
- The organization is in the process of re-negotiating its services contract with their CRC

Visibility

- The organization is required to maintain records and report on activities under the Sarbanes Oxley Act, the SEC and other federal and state regulators
- The organization needs to improve its visibility into the business processes that produce and use various records as evidence and proof.

Mapping these business challenges to the paper lifecycle explained above is shown in Figure 2 below.

Business Processes	Transition	Records Lifecycle	
<ul style="list-style-type: none"> • Natural or man made disasters • Increased litigation and related discovery issues • Volume of Records increasing • Competitive environment demands higher levels of customer satisfaction • Increase in data that demands better security • Fines and Penalties incurred for non-compliance 	<ul style="list-style-type: none"> • Natural or man made disasters • Volume of Records increasing • Increase in data that demands better security • Records may not be captured, or not indexed correctly 	<ul style="list-style-type: none"> • Natural or man made disasters • Increased litigation and related discovery issues • Volume of Records increasing • Increase in data that demands better security • Fines and Penalties incurred for non-compliance • Records not destroyed, too soon, too late, or not at all • Difficult to locate records for users retrieval, recovery 	Risks
<ul style="list-style-type: none"> • Labor costs for processing paper increasing • Business Processes require Re-engineering • Costs of storing paper rising • Cost of legal and audit discovery rising • Volume of Records increasing • Shareholders require cost cutting • Need to reduce costs and improve efficiencies 	<ul style="list-style-type: none"> • Labor costs for processing paper increasing • Costs of storing paper rising • Volume of Records increasing • Transportation and Retrieval fees rising 	<ul style="list-style-type: none"> • Labor costs for processing paper increasing • Costs of storing paper rising • Cost of legal and audit discovery rising • Volume of Records increasing • Records past retention period 	Costs
<ul style="list-style-type: none"> • New reporting and auditing requirements • Increased litigation and related discovery issues • Volume of Records increasing • Difficult linking paper to transaction • Difficult to analyze and improve user productivity • Inability to truly understand business and processes 	<ul style="list-style-type: none"> • Volume of Records increasing • Weak audit trail and chain-of-custody 	<ul style="list-style-type: none"> • New reporting and auditing requirements • Increased litigation and related discovery issues • Volume of Records increasing • Poor visibility into box contents • Weak Audit trail and reporting • Weak chain-of-custody 	Visibility

Customer Engagement Model

While most customers and prospects have a paper burden, they don't realize it. The goal of the No Paper Weight campaign is to help them understand that they have a problem and get them to take action to address it by buying IBM and partners' solutions. Most customers do not realize they are experiencing the kinds of costs and risk inherent in paper records processes. They have put the problem away in a warehouse and put their head in the sand and ignored it. Customer must be shown their exposure and how to get substantial benefits by stopping the flow of paper records to CRCs.

The steps to educating customers and providing a solution can be characterized as shown in Figure 3 and described as follows.

1. Paper Burden - Customer is using paper in their Business Processes and storing it as described in Figure 1. IBM should use the No Paper Weight tools, collateral and marketing events to educate them about the cost, risk and visibilities burdens they face.

2. Problem Acceptance - Customer says "I agree we have a problem but I don't know the exact magnitude of the problem. The IBM response should be to offer introduce 10 question tool; output will be "you spend \$X today on CRC", either as a download or with the assistance of an IBM sales representative or a qualified partner.

3. Customer Agrees they want to spend money (if they don't, then there is no Big Bite opportunity)

At which point the customer will either:

4a. Buy & implement -, do it themselves via custom coding, common in ECM sales

OR

4b. Further Analysis - Customer says "I'm willing to spend \$ to get help on how I would address this". The IBM response should be to introduce GBS, or one of the other certified partners listed in the Appendix

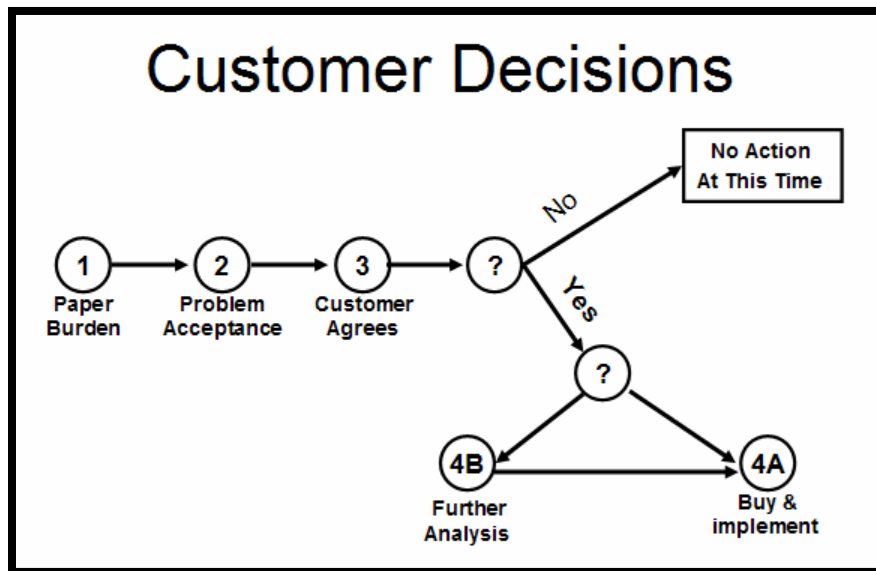


Figure 3 Customer Decisions

The tools and resources available through the No Paper Weight campaign will enable our customers to utilize a No Paper Weight analysis for:

- justification and budgeting for records management or ECM budgets purposes,
- re-negotiating their contracts with their Commercial Records Center
- identifying their costs of Discovery
- Analyzing their compliance risks
- Looking for new ways to gather intelligence about core business processes to aid in better decision making

This analysis should be used at either of the two points illustrated in the customer engagement cycle illustrated in Figure 4.

- 1 The analysis should also be positioned as a way for customers to identify their business problems caused by paper and help them accept that they have risk, cost and visibility issues. This should be translated into the business opportunity for the customer from stopping the flow of paper to the CRCs.
- 2 The second point would be to verify the success and ROI metrics of an implementation to aid in further deployment of the solution.

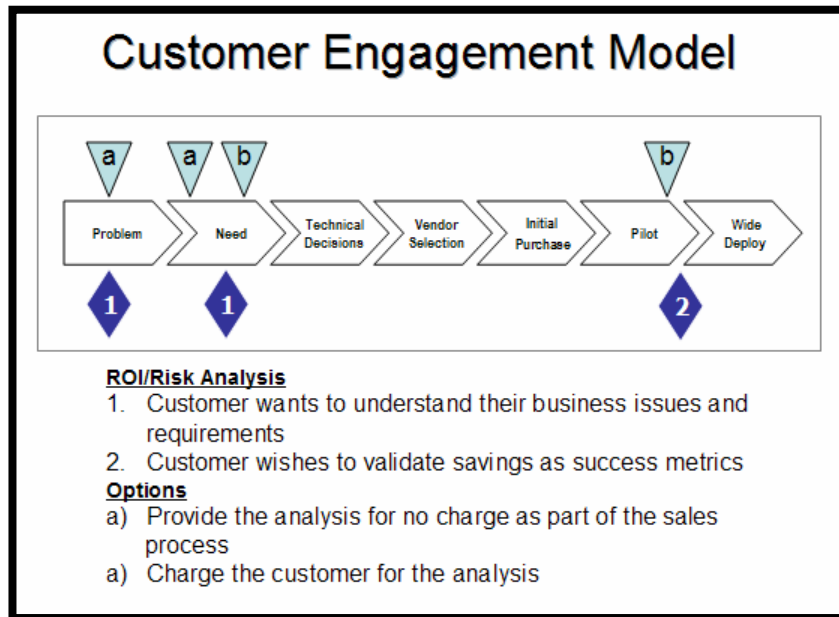


Figure 4 – No Paper Weight Customer Engagement Model

There are two options (a and b) when using the tool at the first point in the sales cycle, as illustrated in Figure 4.

a) Provide the analysis for no charge as part of the sales process

Customers or prospects may wish to use the free, simple ROI analysis tool IBM provides. This tool may be downloaded by customers registering at www.complianceroadmap.com. It may also be downloaded by IBM sales representatives at from Xtreme Leverage/EnterpriseContentManagement/Sales/SalesInfo [URL](#). The Field Technical Sales Specialist (FTSS) can use the tool to work with the customer to complete and initial high-level ROI analysis that will meet many customer's requirements. The tool should be leveraged by customers and/or the FTSS to learn more about the customer's The tool can provide customers with additional insight into their business and opportunities to reduce costs, improve efficiencies and mitigate risks.

While the tool will meet many customer requirements, other customers may wish to go to a comprehensive, detailed ROI analysis which can require help from a Professional Services provider. However, this but can also be a lengthy process that may impact the sale cycle timelines significantly. Option B may chosen by the customer and trained, qualified Business Analysts from IBM GBS and partners can provide a No Paper Weight analysis.

b) Charge the customer for the analysis

Option b) should be considered if the customer requires a complete, more detailed ROI analysis. However, the primary goal should be to sell the solution and its strategic value, with professional services only a portion of the opportunity. The detailed analysis can require a considerable amount of time to

complete, depending on the scope of the project. Customers will want to focus on the business units storing the most paper.

IBM has developed comprehensive, detailed ROI and high-level Risk Analysis tools that can be used to provide the customer with a hard dollar justification based on their current paper processes, storage and other cost factors. A No Paper Weight solution is configured and priced in the ROI model, an Excel tool. The analysis should also include a high-level Risk Analysis, though not attempting to put hard dollar on the risks, just identifying them. Opportunities to improve business intelligence should also be examined.

Ten IBM Partners and IBM GBS have been trained so far in the methodologies and use of this tool to help customers identify their burden and understand its magnitude. A list of these companies and the names of the trained business analysts is included in Appendix A. These partners or GBS can be contacted through the IBM CDMs identified in the Appendix. Additional Professional Services opportunities can be found in the Professional Services section below.

Solution

The ideal solution:

- 1) Reduces cost significantly by automating former manual, paper-based processes
- 2) Reduces risk by providing automated controls to ensure compliance across the enterprise
- 3) Improves visibility by providing tools to understand business processes and to link content to them

Product Definition

The IBM Enterprise Content Management, along with IBM storage, professional services and server technologies provide the tools that can enable customers and partners to build solutions that can help realize the financial benefits and reduce the risks identified in the No Paper Weight study. ECM as offered today can be used to meet the varied customer requirements around using paper and meeting their compliance needs. Many of the requirements can be met with the IBM products listed below. IBM FileNet products are used as examples, but heritage IBM content management products can also provide many of the same benefits. This is by no means a definitive list as additional products; both IBM and other products may be used to meet specific customer requirements.

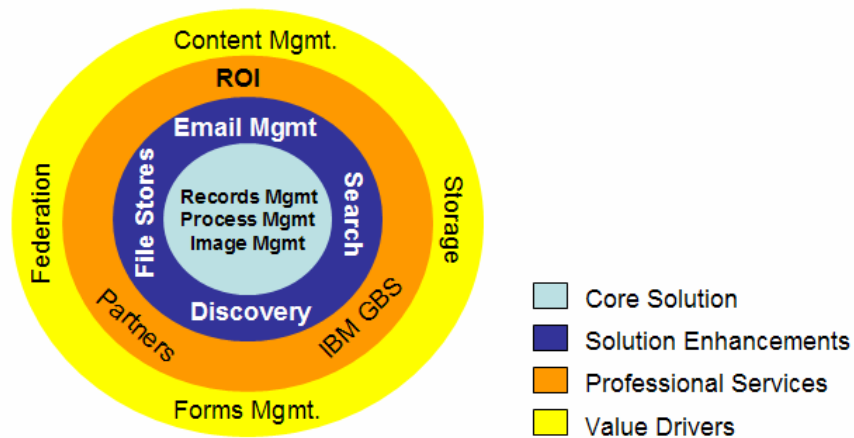


Figure 5 – Whole Product View

As illustrated in Figure 5 above, the core products essential to gain the benefits identifies include IBM FileNet P8 Records Manager, Process Manager and Image Manager. Records Manager is the critical component for ZeroClick automation of records capture and records lifecycle management. Other Compliance Portfolio software includes email and File Store Management, as well as search and discovery offerings. Professional services are a key component and are addressed below. The opportunity crosses other IBM hardware and software brands to provide a comprehensive, integrated platform for managing electronic and physical records across the enterprise, ensuring risk and cost reductions while enabling business intelligence not available in a paper based environment.

Solution Components

Potential solution components contribute to the overall offering in some of the ways described in the table below. While the core components are mandatory requirements, the other components used will depend on customer requirements.

	Offering	Solution Contribution
Core Solution	IBM FileNet Records Manager ECM GMV Category: Records Mgmt	Provides lifecycle records management to meet compliance and discovery requirements
	IBM FileNet Business Process Manager ECM GMV Category: Content Centric Bus Process Mgmt	Automates records creation, capture and process throughout its lifecycle. A key component of Records Manager
	IBM FileNet Image Manager ECM GMV Category: Production Image Mgmt	Supports capture of paper content and conversion into a digital format and is incorporated into business processes
Solution Enhancements	IBM Email Management & Archiving ECM GMV Category: E-Mail/Collab Archiving & Mgmt	Provides capture, classification archiving and management of messaging content and attachments
	File Store Management ECM GMV Category: Content Capture	Provides monitoring, capture, and records management functions for electronic content stored on PCs and network file shares
	Search, Discovery & Analytics ECM GMV Category: Simple, Infrastructure Discovery Solutions	Enables comprehensive searching, classification and analytics in support of normal business operations and discovery.

	Offering	Solution Contribution
Value Drivers (Optional)	Content Management ECM GMV Category: Content Services and Centric Apps, COLD, Collaboration and Web Content	These offerings could include web content, document, report and other content management tools to enable cost effective management of electronic records
	Forms Management ECM GMV Category: E-Forms	Forms can provide input into business processes and launch workflows and enable business worker efficiencies and accuracy.
	Federation	Federation products and connectors may be utilized provide records and retention management, legal holds, discovery and other functionality across diverse repositories, further enabling the No Paper Weight values
	Storage Products:	IBM archiving products include storage devices and management software that are typical for most ECM implementations. Additional sales of these Optional Value Drivers will be driven by efforts to sell a No Paper Weight solution. IBM System Storage offering provide cost effective, market leading products that interface with our ECM offerings and customer business applications. Storage offering can assist customers in providing a total compliance solution coupled with IBM compliance software and minimize risk.
	Storage Management	Tivoli Storage Manager manages the tiered storage process of finding the most cost effective storage option for content.
	Professional Services	Professional services by IBM and its partners can provide an ROI and risk analysis as well as assist customers in design, implementation and other value added services.

Table 3 – No Paper Weight Offering Descriptions

Professional Services

Many opportunities for professional services are available as organizations examine their risks, cost and visibility problems. These range from an ROI Analysis to configuration and implementation. Customers that wish to identify their own risk and cost reduction opportunities and ways to improve visibility will require the professional services to assist them. They may also require configuration and implementation services as they roll out a solution. These services can be provided by IBM GBS or ECM consultants or by partners. Core service opportunities include:

- 1 No Paper Weight Analysis
- 2 Business Process Analysis and Design
- 3 Configuration/Design
- 4 Implementation Services
- 5 Support

The No Paper Weight Analysis is of course the key method to advance sales opportunities, as well as the tools and marketing efforts provided by the campaign. As mentioned earlier, IBM has trained selected partners and IBM GBS Business Analysts to complete a No Paper Weight ROI and high level risk analysis. These partners and other IBM business units will engage in ongoing marketing and revenue opportunities with training eventually offered to all qualified Partners. The current partner strategy is to use the partners identified in Appendix A and GBS to provide this service as proof points prior to general release of the training.

Use of Professional Services in the Sales Cycle should again consider the length of time that such services might require. The No Paper Weight Analysis could be offered at either point 1 or 2 in Figure 6, depending on the sales situation. Other core services such as design and implementation are, of course, typical in the pilot and/or implementation stage. The other services identified in Table 4 below could be offered at various points in the sales cycle.

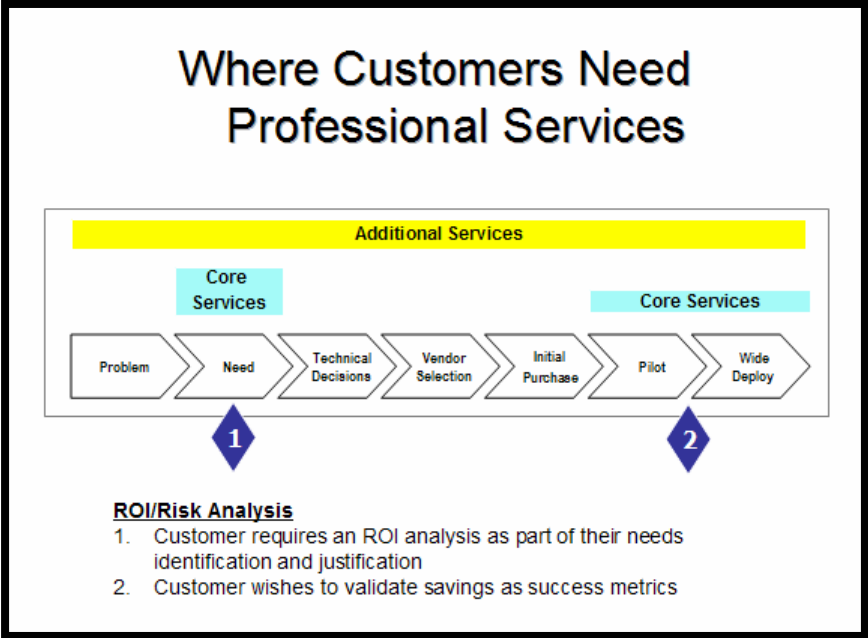


Figure 6 – Professional Services in the Sales Cycle.

Table 4 provides, at a high level, the professional services opportunities that may be available.

No Paper Weight Service Opportunities		
	Service Opportunity	Description
Core Services	No Paper Weight Analysis	Return on Investment and High Level Risk Assessment
	Business Process Analysis and Design	Analysis and re-engineering of the business processes that shuffle paper
	Configuration/Design	Design of architecture, metadata, security, rules and other configuration elements
	Implementation Services	Provide systems installation, configuration and customization
	Support	Software and hardware services
Additional Services	Compliance and Records Program Development	Develop Strategies, file plans, classifications and taxonomies, retention schedules
	Discovery Services	Manage and discovery processes in support of litigation and audits

	Program Office	Provide overall Project Management, including change management, training,
	Risk Assessment, Disaster Recovery	True risk assessment, backup and recovery support, etc.

Table 4 – Professional Service Opportunities

I am to send to him with slides, he tweaks. Send to L. F. and him to review one last time. By Monday. Done good job. Foundation.

Primary Message

The No Paper Weight solution helps customers reduce costs, reduce risks and improve visibility by reducing the paper used and stored by key business processes. One study has shown savings of over \$11 million for a 263% ROI over three years.

Product Description

The No Paper Weight solution is a combination of IBM ECM products and other IBM and partner offerings. As the clear market leader in Enterprise Content Management (ECM), IBM's ECM solutions help organizations make better decisions, faster by managing content, optimizing business processes and enabling compliance through an integrated information infrastructure. IBM's ECM portfolio delivers a broad set of capabilities and solutions that integrate with existing information systems to help organizations drive greater value from their content to solve today's top business challenges. The world's leading organizations rely on IBM enterprise content management to manage their mission-critical business content and processes.

The IBM FileNet Compliance platform helps enterprises reduce costs and risks associated with paper based processes, meet regulatory requirements and increases worker effectiveness. It does so by capturing electronic content and digitizing the remaining paper at the front end, storing the digital records in a secure content repository. Regulatory compliance and enterprise-wide policy enforcement is enabled through ZeroClick records capture and administration, linking records to business processes, providing auditing, preservation and retention management to ensure that records are kept only for the required time. Records authenticity is maintained and policies ensure that metadata, content and business processes provide a sound foundation for legal discovery and hold management. Integrated with IBM hardware and storage, the solution provides end to end compliance support.

Audience Definition

Value propositions are specific to the reduction or elimination of paper in business processes. Addition values are also derived from an overall ECM implementation.

Line of Business/Operations - Audience			
✓	Chief Executive Officer		Marketing Systems Director/Manager
✓	Chief Operating Officer	✓	Web Master
✓	Chief Financial Officer	✓	Business Analyst
✓	VP/Director-level Industry Specific Titles (e.g. VP Client Service, Dir. Claims Processing)	✓	Manager-level Industry Specific Titles (e.g. VP Client Service, Dir. Claims Processing)
	Engineer		Other
Value Proposition			
<p>Reduce the costs and risks of using and storing paper while providing greater visibility into business processes by providing:</p> <ul style="list-style-type: none"> • faster and easier access to electronic business records with electronic search capabilities in a secure environment not available with paper records • Improve decision making with better business insight by providing the right information to the right decision maker when they need it • improved customer satisfaction and profitability by enabling better business decisions • better manage the growing volumes of content • provide back up and disaster recovery • reduce labor costs with efficiencies that enable worker to focus on the business units core functions • offer increased visibility into the business processes that create, distribute and use content • better meet increasing legal, regulatory and audit requirements to achieve, maintain and prove compliance. 			

Compliance and Legal – Audience

✓	Chief Legal Officer/General Counsel (in-house)	✓	Security Officer
✓	Risk and/or Compliance Manager/Officer	✓	Auditing
✓	Records Manager		Other (please specify)
✓	Inspector General (Government)		Other (please specify)

Value Proposition

Reduce the costs and risks of using and storing paper while providing greater visibility into business processes with an infrastructure that can:

- meet increasing legal, regulatory and audit requirements to achieve, maintain and prove compliance.
- automate and streamline all records-based activities, eliminate burdensome end-user participation,
- Enforce compliance and create business advantage while reducing the cost of compliance and risk management.
- support a single source for a complete unstructured information compliance architecture including audit and chain-of-custody control, retention rules management, records management and email management.
- support a comprehensive legal discovery solution including search, retention and hold, audit control and semantic analysis
- provide enhanced security by eliminating the ease of access and potential for duplication with paper records
- reduce records storage and discovery costs and risk by capturing only the documents required and destroying them when retention requirements have been met
- better manage the growing volumes of content
- provide back up and disaster recovery often not possible with paper records
- reduce costs of storing and retrieving paper by converting it into an electronic format or capturing born-digital content in its native format while meeting requirements of the Federal Rules of Civil Procedure and other compliance requirements.

IT – Audience			
✓	CIO/CTO/SVP-level IT	✓	Email/Messaging Director/Manager
✓	VP/Director-level IT (all)		Systems Analyst/Engineer
	System Architect		IT Manager
	Developer		Other (please specify)
Value Proposition			
<p>Reduce the costs and risks of using and storing paper while providing greater visibility into business processes with an infrastructure that can:</p> <ul style="list-style-type: none"> • reduce the total cost of ownership by leveraging their ECM investment for existing customers, • lower costs of electronic storage by capturing only the documents required and destroying it when retention requirements have been met • provide enhanced security by eliminating the ease of access and potential for duplication with paper records • provide an infrastructure to manage all content within an organization, federate disparate and isolated content repositories and manage unstructured information • meet the requirements of the Federal Rules of Civil Procedure and other compliance requirements. 			

Table 5 – Audience Définitions

Appendix A – No Paper Weight Qualified Providers of Professional Services

Ten IBM Partners and IBM GBS have been trained so far in the methodologies and use of this tool. A list of these companies and the names of the trained business analysts may be found below. These partners or IBM GBS can be contacted through the IBM CDMs identified in Table A1 Below.

Partner	URL	CDM
Access Sciences	www.accesssciences.com	Burt Hughes
BearingPoint	www.bearingpoint.com	Chris Martyn
CGI	www.cgi.com	Matt Warnick
Crowe Chizek	www.crowechizek.com	Jim Denton
ICI Solutions	www.icisolutions.com	David Sandoval
IMC	www.imc.com	Nia Eaton
IMERGE	www.imergeconsult.com	David Mackay
Integro	www.integro.com	Bill Evans
Lighthouse	www.lighthousecs.com	Dan Gleason
Silicon Plains	www.sptech.com	Jim Denton

Table A1 – Partners qualified to provide No Paper Weight Analysis

IBM **Global Business Services** may be contacted through Mike Zimmer at:
mzimmer@us.ibm.com

The Business Analysts that have been trained and qualified to provide a No Paper Weight ROI and high-level risk analysis are shown in Table A2 below.

Company	Attendee	Title	Email address
Access Sciences	Jesse Wilkins	Principal Consultant	JWilkins@accesssciences.com
Access Sciences	Doug Schultz	Principal Consultant	DSchultz004@houston.rr.com
BearingPoint	Viren Gandhi	Manager	viren.gandhi@bearingpoint.com
BearingPoint	Sharad Kalyani	Manager	sharad.kalyani@bearingpoint.com
ICI Solutions	James Jones	Project Director	jjones@icisolutions.com
IMC	B. John Masters	Subject Matter Expert	jmasters@imc.com
IMERGE	Don Post	Managing Partner	dpost@imergeconsult.com
IMERGE	Marcialynn Harrington	Principle Consultant	marcialynn@imergeconsult.com
Silicon Plains	Sara Flanagan	Sr. Process Consultant	saraf@sptech.com
Lighthouse	Ron Passanante	Consultant	rpassanante@lighthousecs.com
Lighthouse	Bill Franklin	Consultant	bfranklin@lighthousecs.com
Crowe Chizek	John Gessler	Sr. Manager	jgessler@crowechizek.com
Crowe Chizek	William Smith	Staff Consultant	wsmith@crowechizek.com
Integro	Chris Gaines	Certified Records Management Consultant	cgaines@integro.com
CGI	Mustafa Kahn	Consultant	mustafa.khan@cgi.com
CGI	Raymond Vermillion	Executive Consultant	ray.vermillion@cgi.com
IBM GBS	Russell Fearing	Associate Partner, Financial Services	rfearing@us.ibm.com
IBM GBS	Todd Young	Consultant, Content Management	rtyoung@us.ibm.com

Table 2A – Business Analysts Training No Paper Weight tools and methodologies