

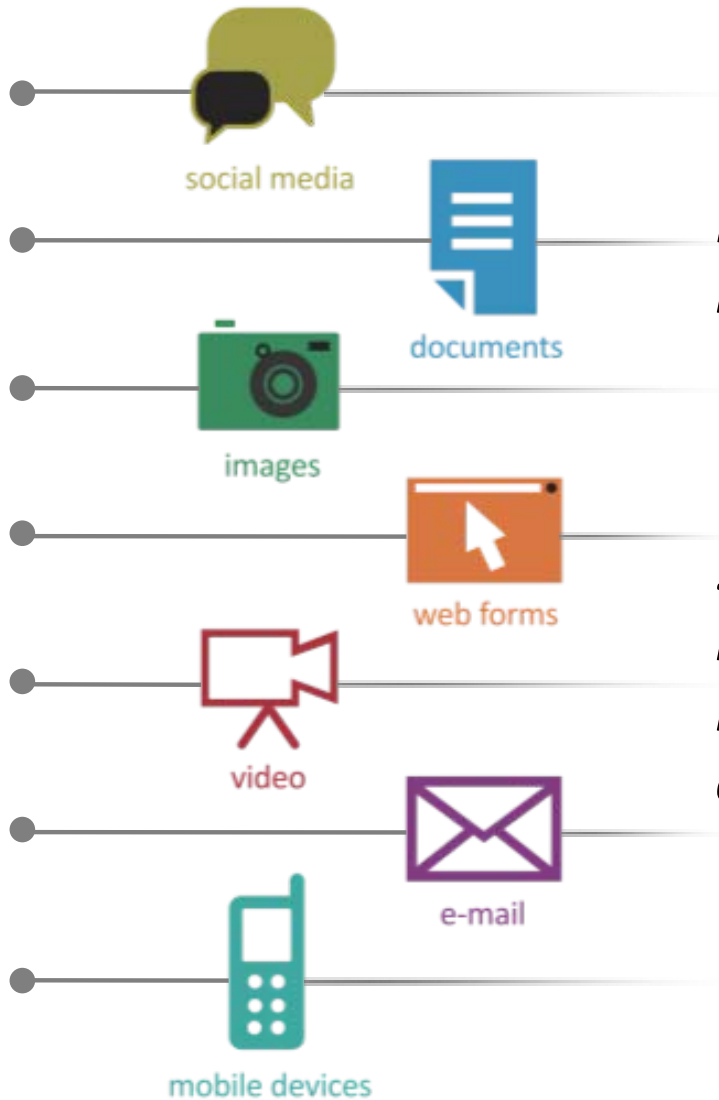
Advanced Case Management Solutions

IBM Case Manager

June 14, 2011



Current business challenges...



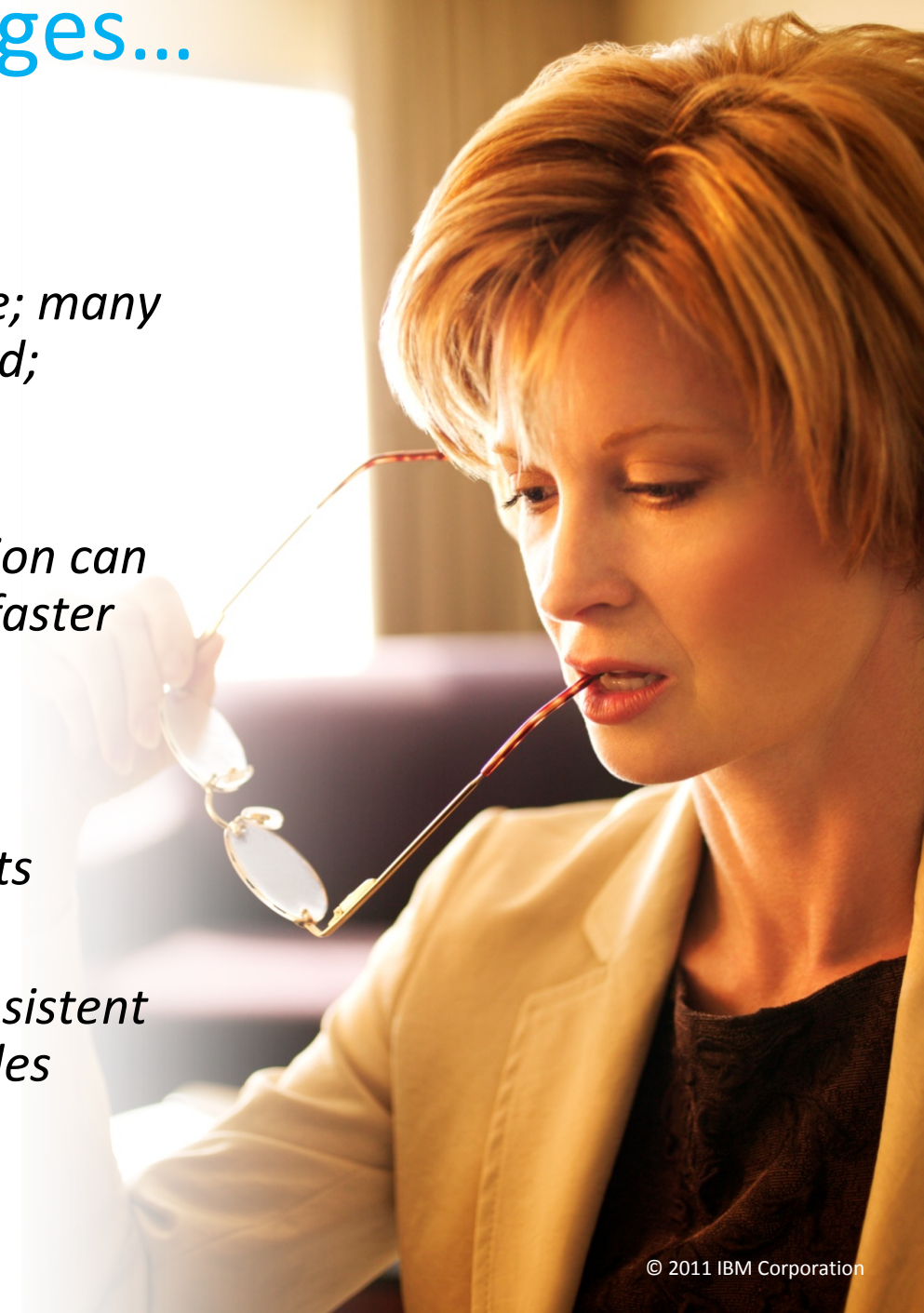
Knowledge workers in all industries must do more with less...

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

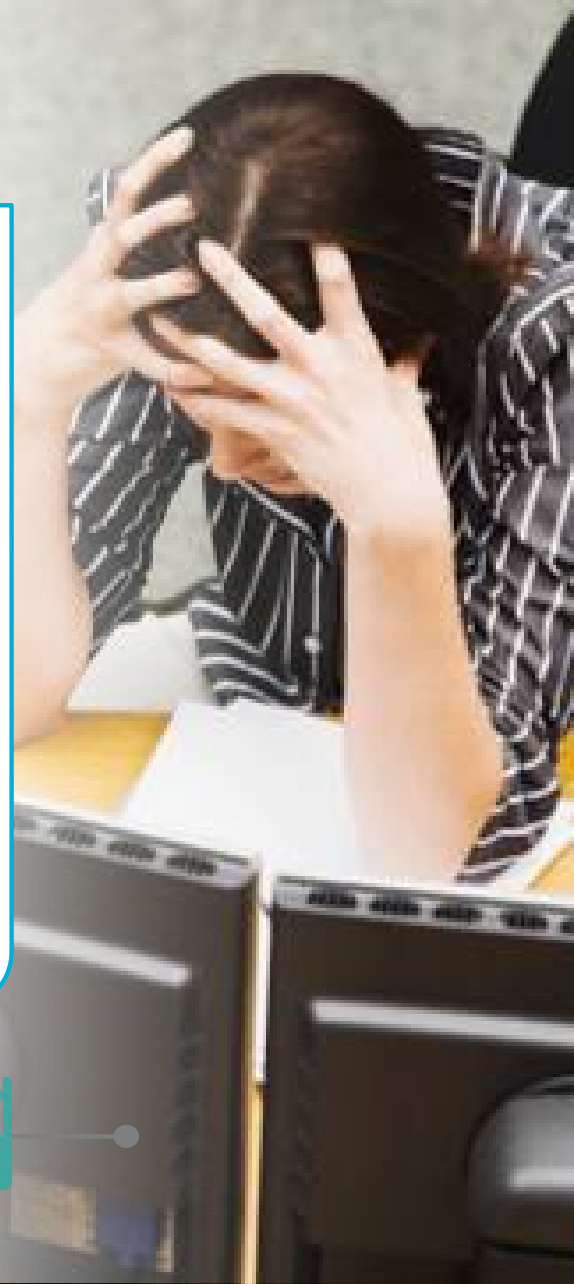
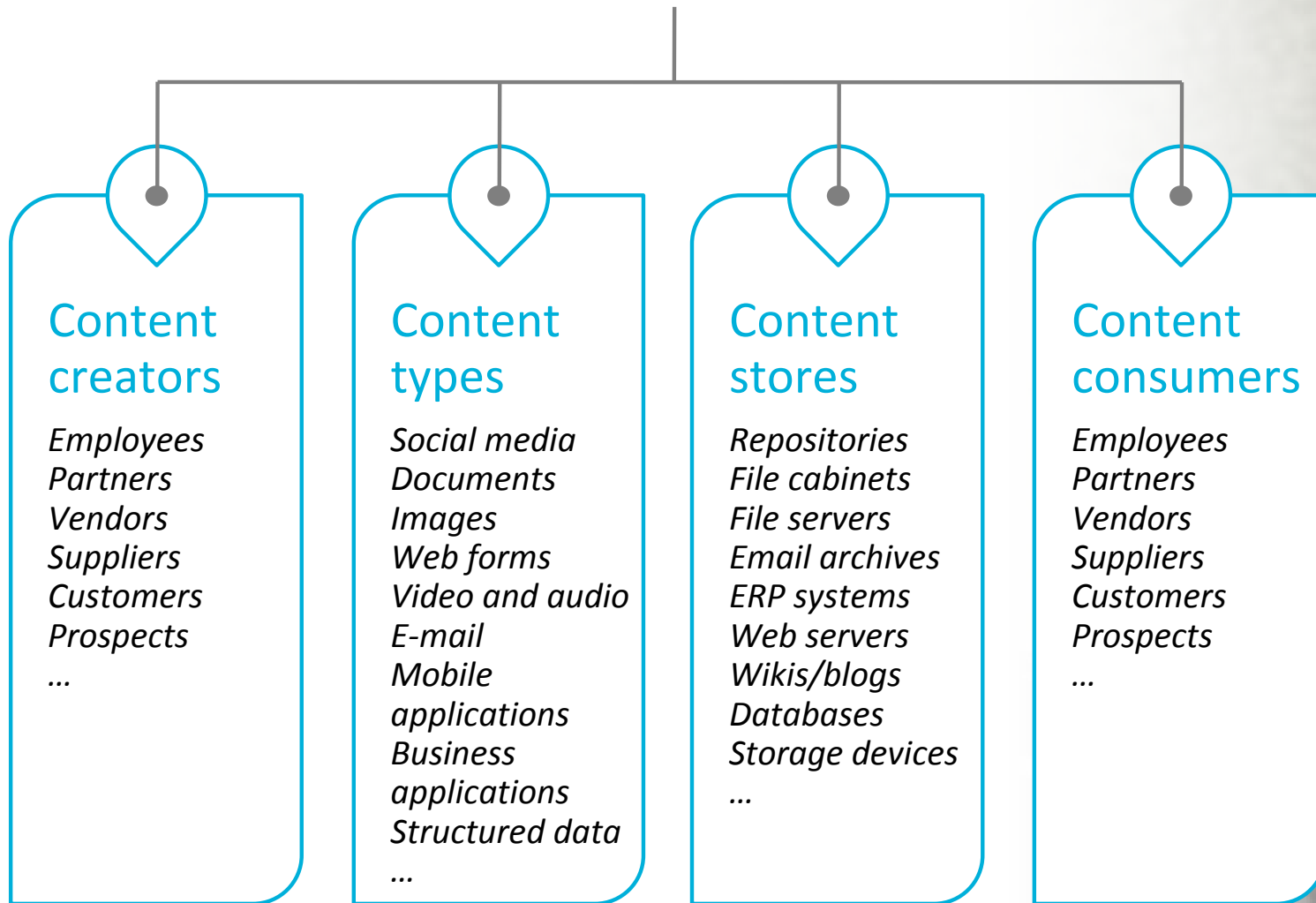


Current business challenges...

- *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*



The staggering complexity of enterprise content



Why **new approaches** are needed ...

“The new generation of information **workers must collaborate** and juggle an ever-increasing set of tasks.”¹

“**Older process automation approaches** based on old mass-production concepts are no longer adequate.”¹

“Business processes must increasingly tackle smart jobs — those encompassing more skilled workers who must accomplish a **greater variety of tasks** with relatively fewer resources.”²



1. Forrester, Dynamic Case Management — An Old Idea Catches New Fire,” Dec. 28. 2009;
2. Forrester, “Next Generation of Knowledge Worker Processes Will Dominate Enterprises”, Oct. 2010

Addressing knowledge worker productivity

“..business processes must increasingly tackle smart jobs — those encompassing more skilled workers who must accomplish a greater variety of tasks with relatively fewer resources”

Forrester, “Next Generation of Knowledge Worker Processes Will Dominate Enterprises”, October 2010



Advanced Case Management

Brings people, process and information together ... in context of a case



- Delivers **trusted information** to the case – both content and structured data in the context of a case
- Shortens time-to-value with better tools, **out-of-the box solutions** and templating capabilities
- Built-in infrastructure for creating and reusing **case templates**
- Leverages unique **dynamic work management** concepts and capabilities

IBM's approach to case management

Use Cases

- Complex exception handling
- Complaint or dispute management
- New customer or new account opening
- Lending applications
- Credit approval
- Contract management
- Claims processing
- Benefits enrollment
- Rate case management
- Investigations or audits

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

Patterns

- Work activities are event-driven
- Collaborative, ad-hoc processes
- Processes are often not predetermined
- Work is knowledge intensive
- Content is essential for decision making
- Outcomes are goal-oriented
- Relies on people

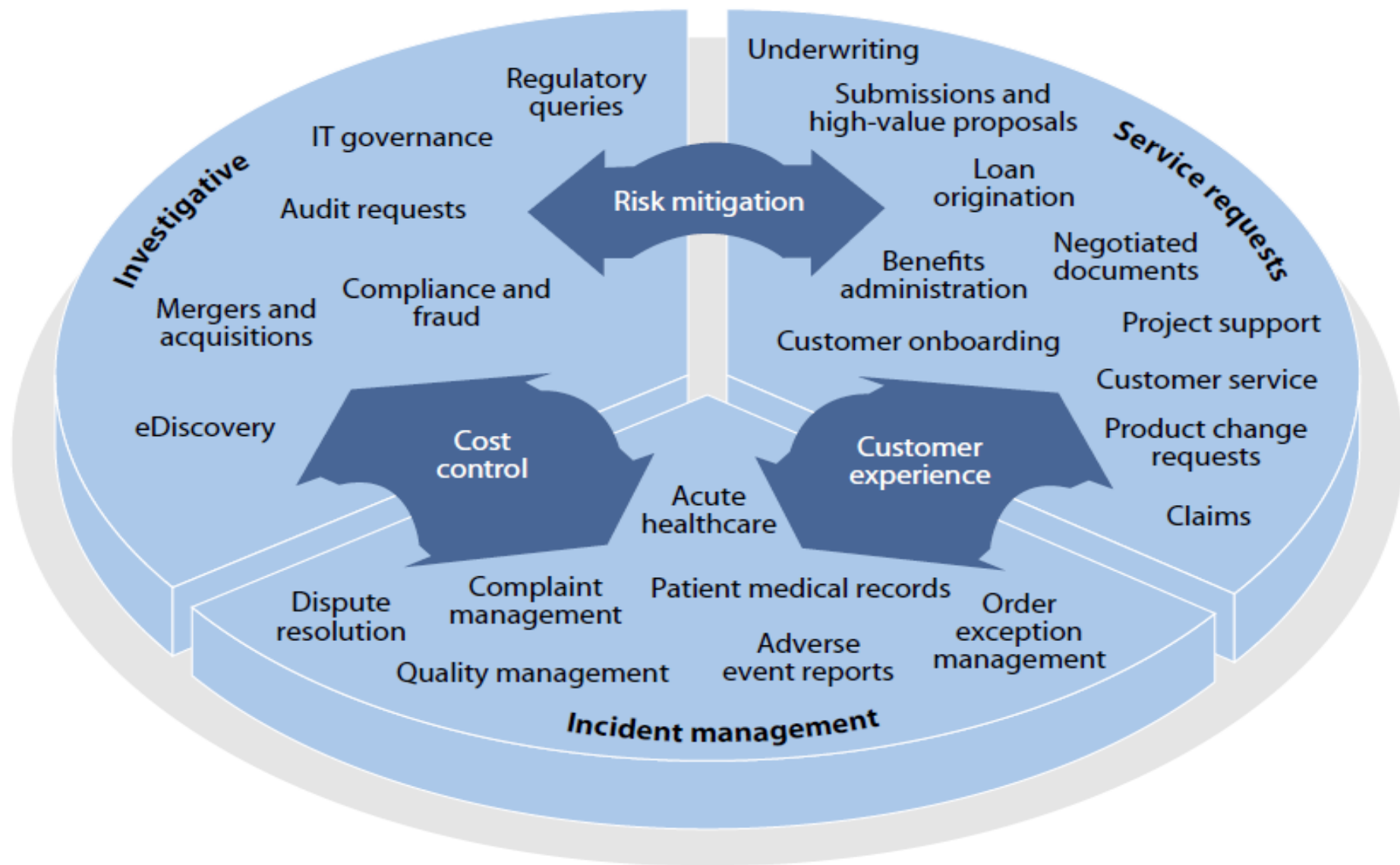
KEY: A *case* is the primary focus of the system

Integrated Solution

- Content management
- Business process management
- Collaboration tools
- Social software
- Business rules
- Analytics
- Solution development and deployment
- Templates

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

Figure 2 Three Case Management Categories



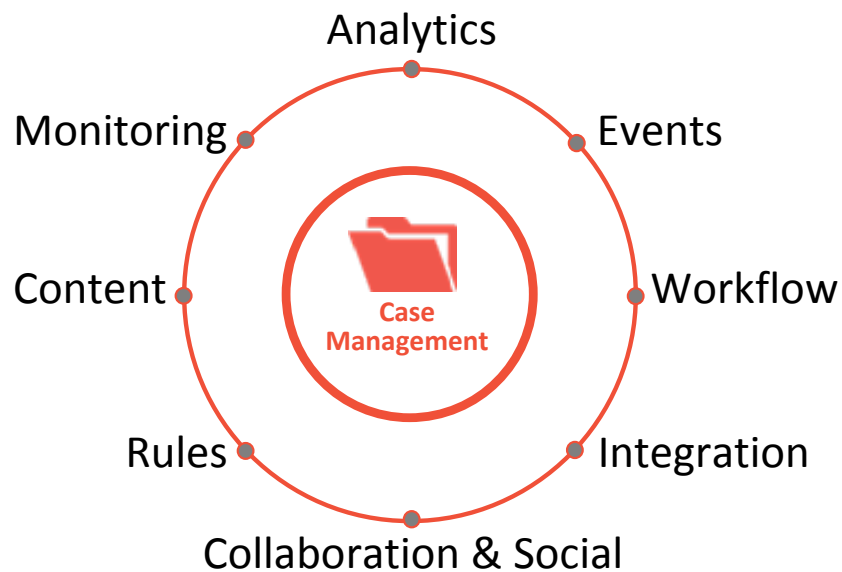
Forrester: Dynamic Case Management, Q1 2011

“IBM will drive leadership in analytics in the dynamic case management market. IBM can claim the strongest scores across the three DCM use case categories — investigative, service request, and incident management — reflecting the strength and comprehensiveness of its overall portfolio”

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IBM Case Manager

Simplifying the delivery of case-based solutions



- Delivers **optimized case outcomes**
- Supports **dynamic**, runtime work management
- Delivers **trusted information** to the case – structured or unstructured
- Manages and governs **entire case lifecycle**
- Provides the line-of-business with tools to **rapidly deliver** case-based solutions

Smart is: improving customer service

Industry context: automotive

Value driver: improve customer service

Solution onramp: advanced case management

JM Family

“The major business objectives in our organization are excellence in customer service and increased productivity of our associates. IBM ECM is a key enabler of these objectives.”

*— Keith Tempinski, Director, Enterprise Content Group,
JM Family Enterprises, Inc.*

Business Challenge

Lack of visibility into customer service interactions around automobile loans and leases

Bottlenecks due to many audits in approval steps

What’s Smart?

Customer service associates focused on exception-based processes, with greater knowledge sharing across departments

Smarter Business Outcomes

\$2.1 million annual call center labor savings. Processes cut from days to just minutes. Handle more loans with current resources. Eliminated annual printing of 168k pages for cost savings and environmental benefits.

Smart is: increasing revenue, productivity

Industry context: transportation
Value driver: increase revenue, productivity
Solution onramp: advanced case management



JB Hunt

Business Challenge

Manual billing. Deliveries made before customers could accept them resulting in delays.

What's Smart?

Complete billing process visibility. Automated carrier assignment & billing – drivers know when customers can take deliveries and charge automatically if the customer delays delivery.

Multiple forms of information including email and paper are now automatically managed.

Smarter Business Outcomes

Accurately track and bill charges to the customer, adding \$870K in revenues annually. A 6x improvement in billing staff productivity. Improved record-keeping to ensure compliance.

Increased automatically processed bills from 60% to 90%. One billing clerk now required instead of six.

Japan Business Services Provider

Smart is: **gleaning insight** about customers

“Insight into customer interaction logs is an information gold mine for us.”

*— General Manager
Japan Business*

*Industry context: computer services
Value driver: improve customer service
Solution onramp: content analytics*

Business Challenge

A Japanese business services provider operates multiple customer service centers and needed ways to analyze large volumes of information to improve agent training and deliver better customer support.

What’s Smart?

They implemented content analytics from IBM to understand and process natural language. The solution analyzes customer interactions based on consolidated logs of phone calls, email and Web, identifying keywords.

Smarter Business Outcomes

Improved agent skills and training, resulting in a 92% reduction in call transfer and 88% improvement in volume. Provides new insights about product issues, resulting in an 88% decrease in product-related calls.

How IBM case management can help customers

“We need to treat business processes as assets. If you have ownership of your processes and manage them, you get a better return.”

Rusty Williams
CIO
Good Samaritan

- ✓ *Improve customer service*
- ✓ *Improve case outcomes*
- ✓ *Create competitive differentiation*
- ✓ *Improve information accuracy*
- ✓ *Manage risk*
- ✓ *Assure best practices*
- ✓ *Foster collaboration*
- ✓ *Reduce errors*
- ✓ *Reduce costs*



Case Management

- Business / process goal achieved by collaboration between the system and participants
 - Participants must know the business goal, but don't need detailed information on how to achieve it
 - System knows when the goal is reached
- Process partially encoded into process fragments
 - “Case worker” is in control
- All elements are contained within a Case Folder
 - Documents, History, Properties, Tasks

IBM Advanced Case Management - Case Builder

Case Manager

Manage Solutions

CEAdmin | Help | About | Refresh Solutions

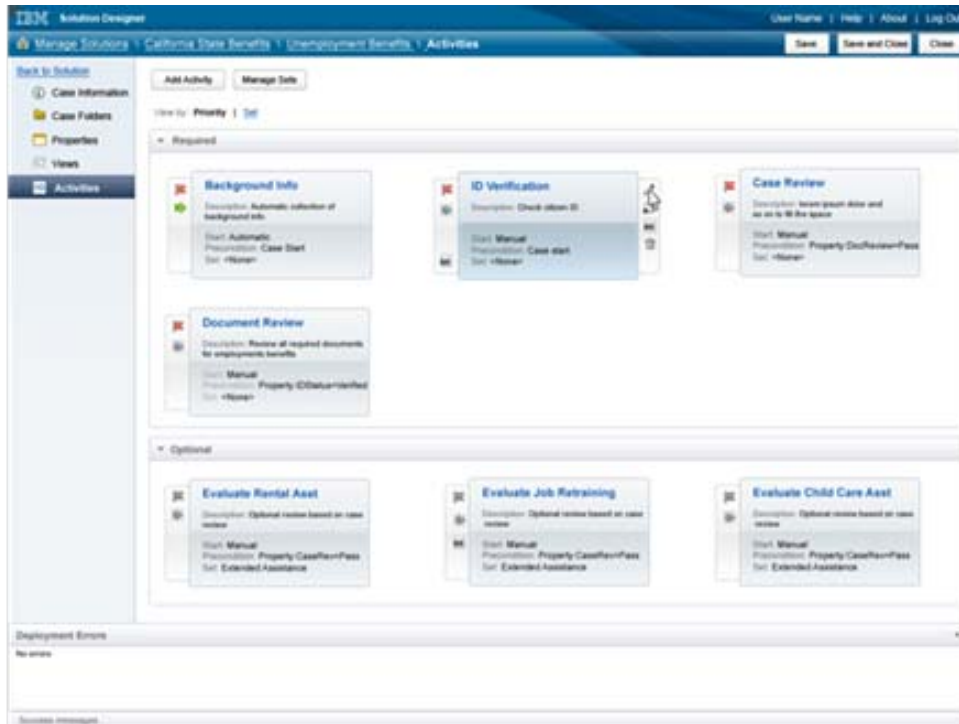
Creating Solution

Select a template

From a blank template Use the wizard to define the solution

Solution Name	Last Modified	Status	Actions
ABC an old Michael Jackson Song	23 July 2010	Not deployed	Edit Open wizard Deploy Test Remove
Beryl's Test Solution	22 July 2010	Not deployed	Edit Open wizard Deploy Test Remove
Corn 3 from template	22 July 2010	Not deployed	Edit Open wizard Deploy Test Remove
Downward Spiral	22 July 2010	Not deployed	Edit Open wizard Deploy Test Remove
Fit 'n Finish	19 July 2010	Not deployed	Edit Open wizard Deploy Test Remove

Rapid application **case design** for the business

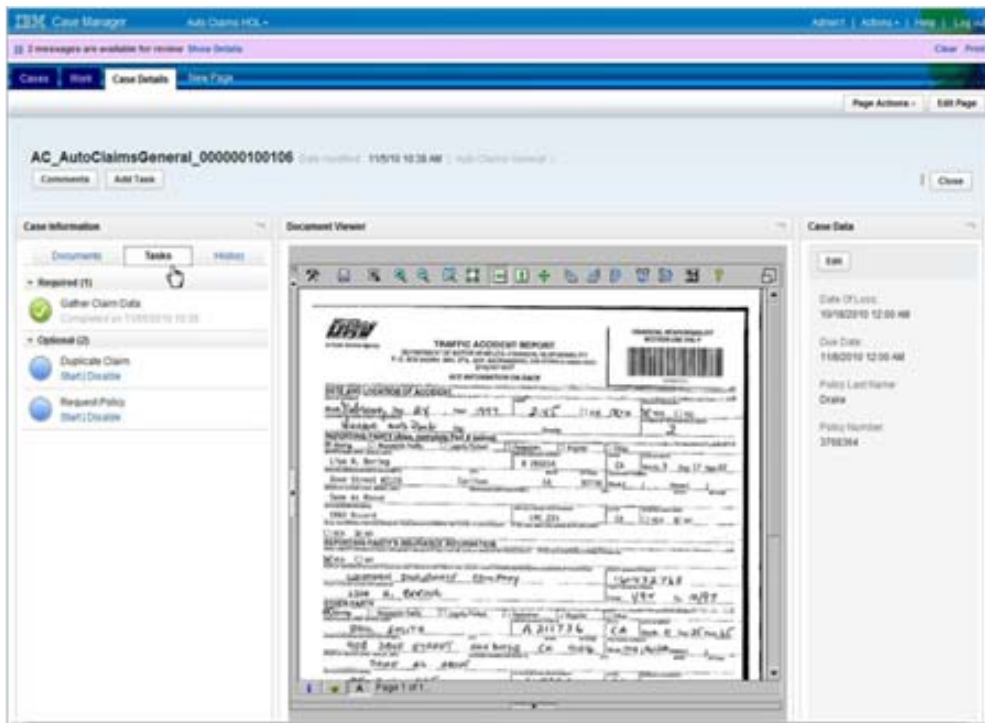


- Easy to use, “Interview Mode” (wizard-driven)
Case designer allows a business user to very quickly build a solution
- Comprehensive across case assets
Case designer can provide 360° view of case
- Leverage templates for a fast start
Represent industry best practices
- Significantly shortens time-to-value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

IBM Case Manager Demonstration

Backup slides