

# Content Manager OnDemand

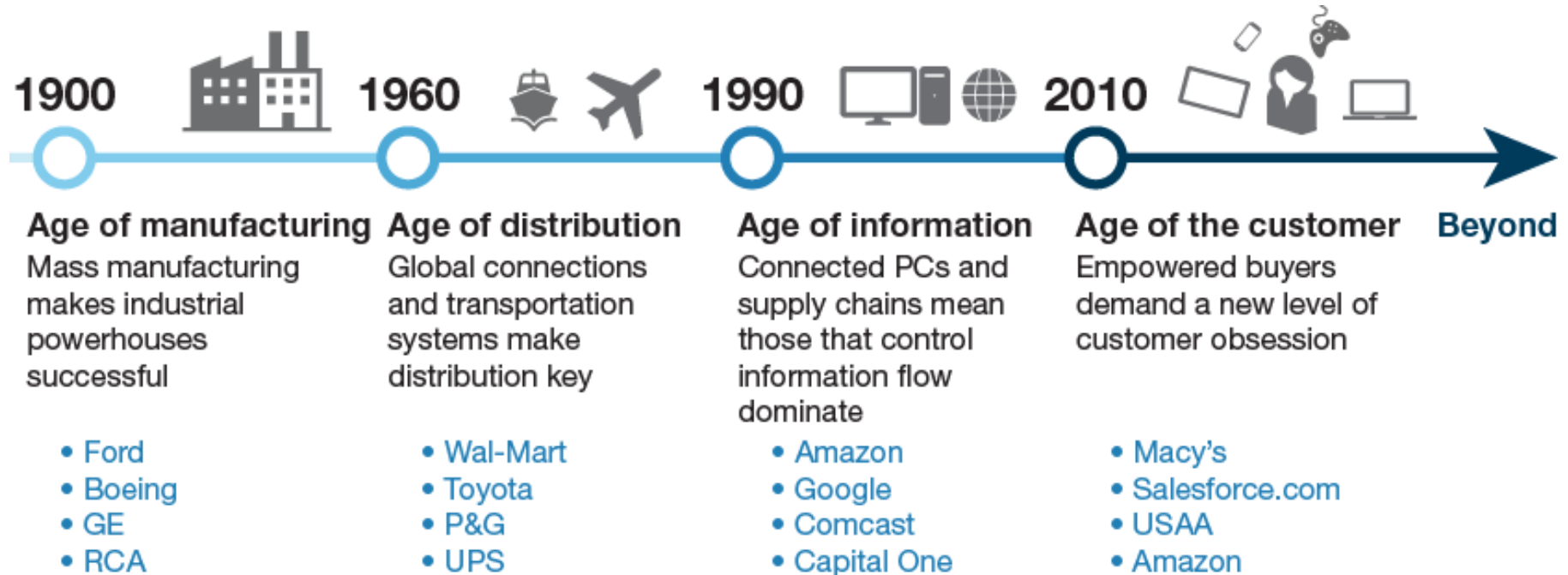
## Optimizing Customer Self Service with High Performance Statement Presentment



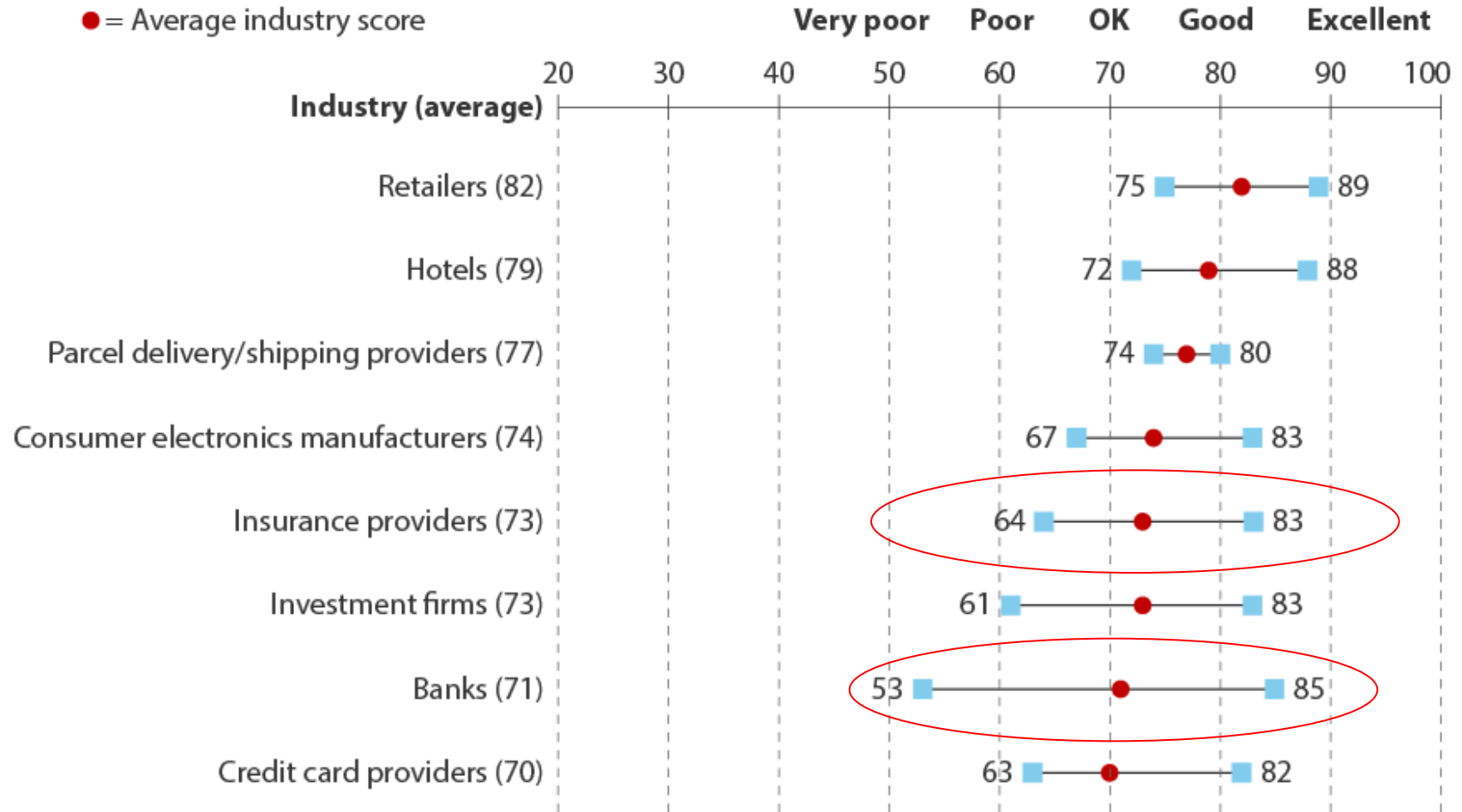
## Agenda

- Your Customers are driving E-delivery
- E-Delivery adoption is still a Struggle
- OnDemand for E-delivery AND Compliance
- Key Capabilities of OnDemand
- Use Cases
- OnDemand Advantages and Release highlights

# We Have Entered The Age Of The Customer



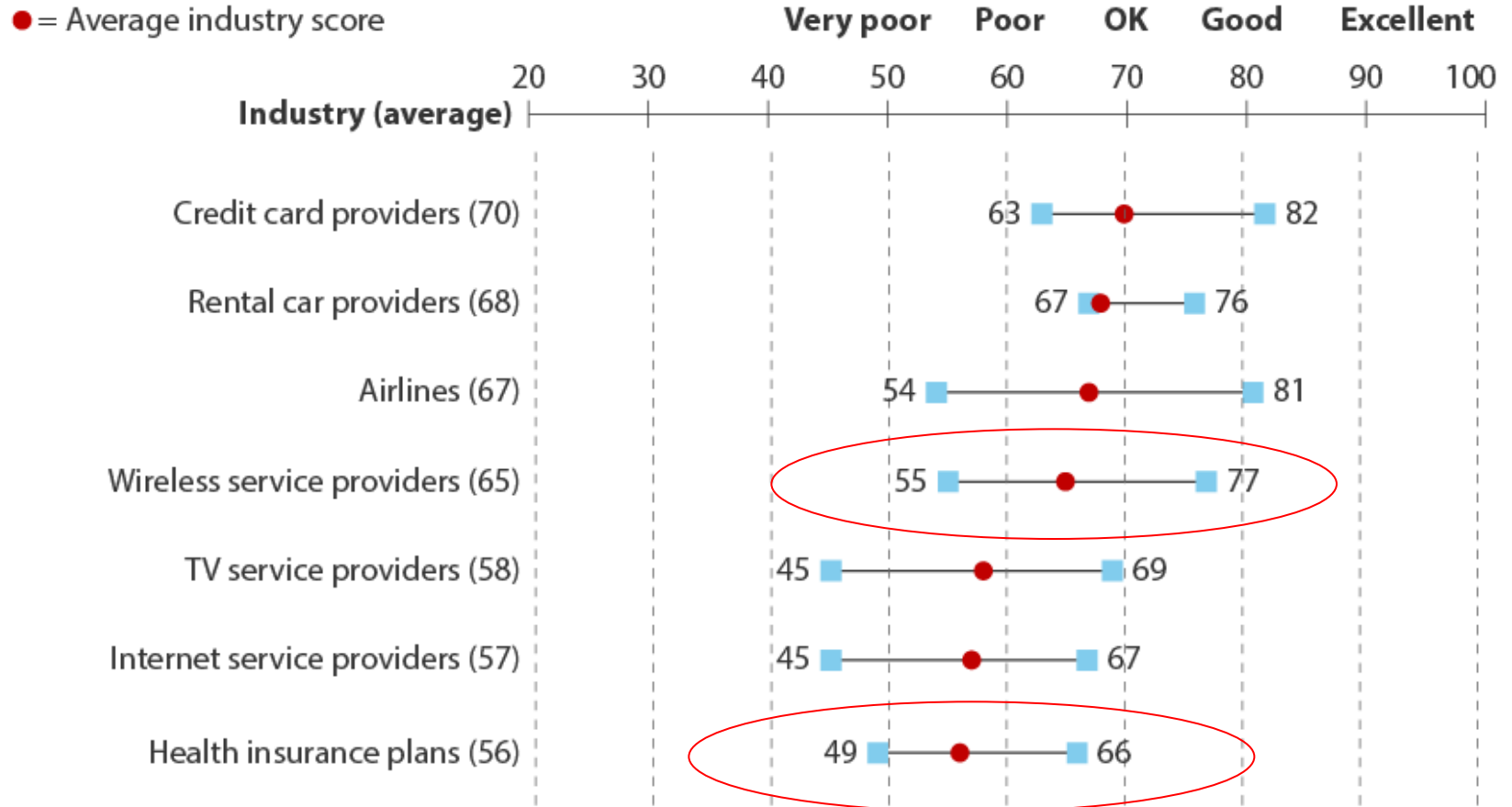
# Most Enterprises Middle Of The Pack For Customer Experience



Base: US online consumers who have interacted with brands in these industries



# Most Enterprises Middle Of The Pack For Customer Experience



Base: US online consumers who have interacted with brands in these industries

Source: North American Technographics® Customer Experience Online Survey, Q4 2012 (US)



The difference can be worth millions, even billions

**Missed opportunity (\$ millions)**

**Wireless  
carrier**

**\$1,711**

**Hotel**

**\$1,273**

**Airline**

**\$866**

**Insurance**

**\$606**

Source: November 19, 2010, "The Business Impact Of Customer Experience, 2010" Forrester report

# Most Customers Still Receive Paper Statements Across All Banking Products

**How consumers receive each type of statement:**

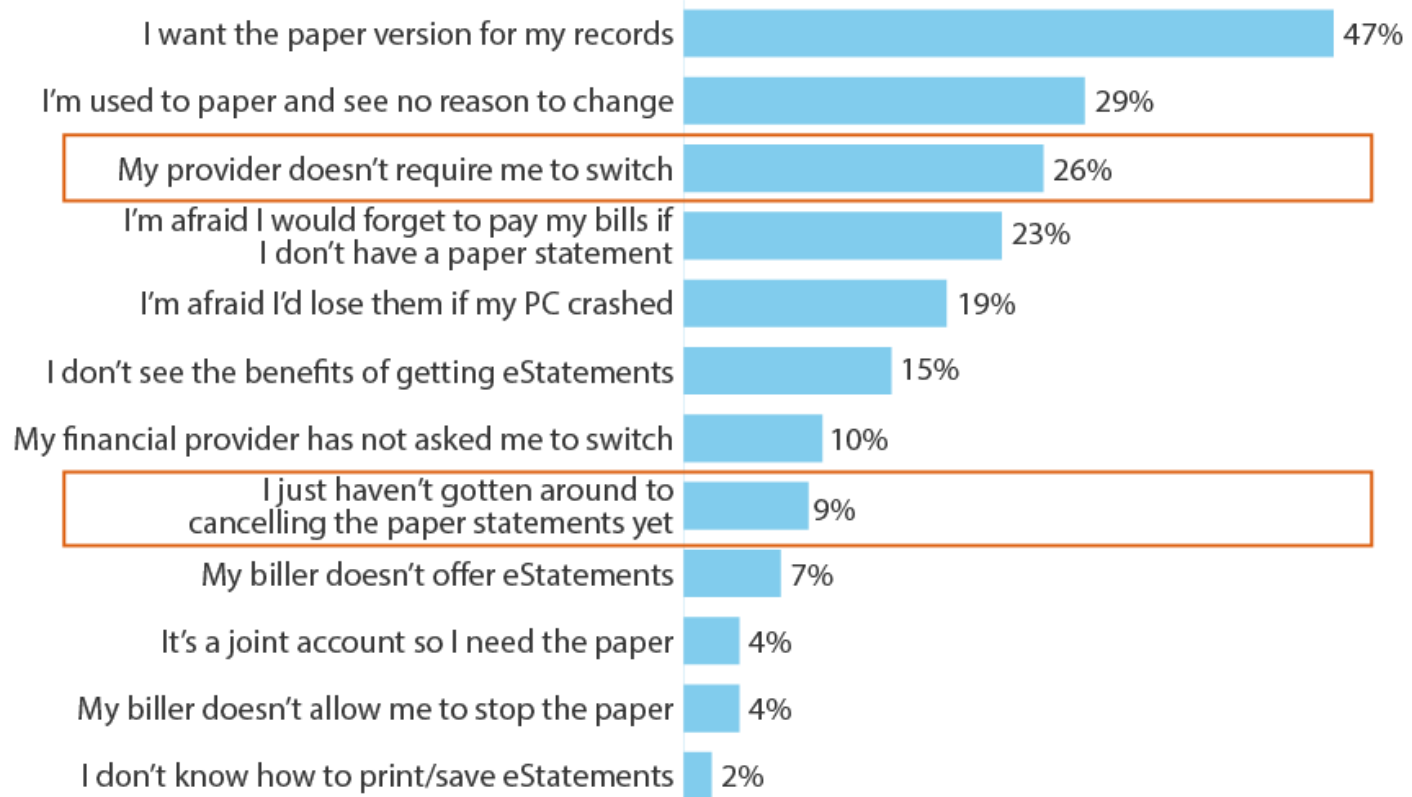
	<b>Paper only</b>	<b>Online and paper</b>	<b>+</b>	<b>Online only</b>	<b>=</b>	<b>eDelivery users</b>
Checking account	29%	25%		45%		71%
Savings account	28%	25%		46%		72%
Credit card	32%	32%		35%		68%
Home equity loan	43%	27%		29%		57%
Mortgage	47%	24%		29%		53%

Base: US online adults (18+) who receive monthly account statements for the specified product/account

Source: North American Technographics® Financial Services Online Benchmark Recontact Survey, 2013

# Why Recipients Won't Switch To Paperless

## "Why have you chosen to continue receiving paper statements?"



Base: 7,682 US online adults (18+) who receive at least one consumer finance bill or statement via paper in the mail (multiple responses accepted)

Source: North American Technographics® Financial Services Online Benchmark Recontact Survey, 2013



## Statement Presentment – Why Do It?

### **\$3 - \$6 USD**

- The cost to send a single statement, invoice, benefit summary, letter, etc.

### **\$15m**

- The amount a company with 10M customers spends per mailing cycle
- And, customers may prefer not to receive Snail Mail



# Content Manager OnDemand

## Credit card companies improve customer service and reduce costs

*Industry context: Finance*

*Value driver: improve service, reduce risk & cost*

*Solution: enterprise report management*

### **Business Challenge**

Poor customer service. High development costs.

100,000 customers accessing statements per month

6TB Space for 13 months of on-line storage

6 dedicated CSRs to help customers access their data

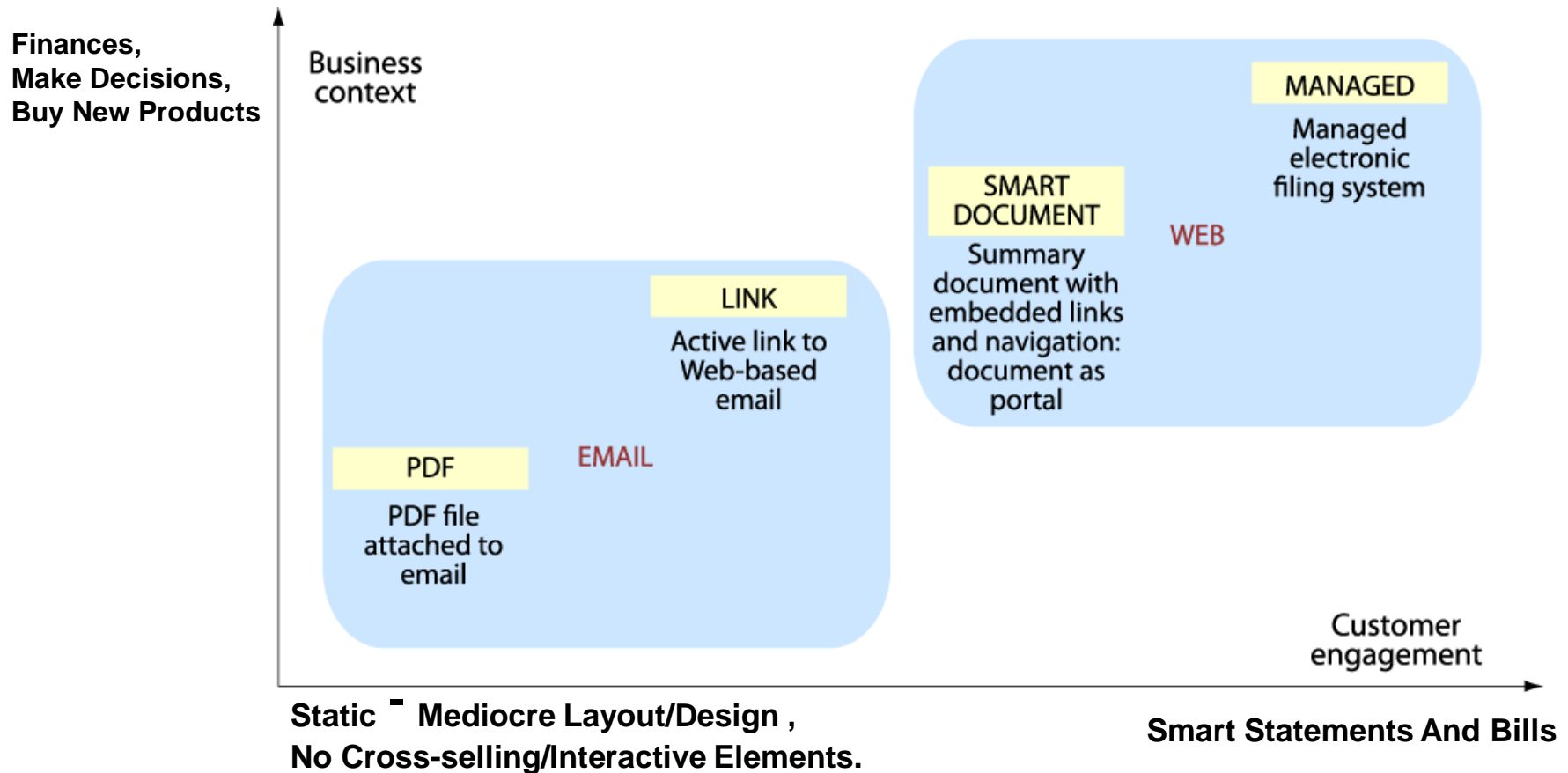
### **What's Smart?**

Replace inadequate in-house developed system with CMOD to avoid excessive development cost and risk

### **Smarter Business Outcomes**

- 75% storage reduction via CMOD compression
- \$110K annual savings in storage costs
- ROI of 63%, NPV \$643K
- Reduce CSRs by 50% and better customer service!

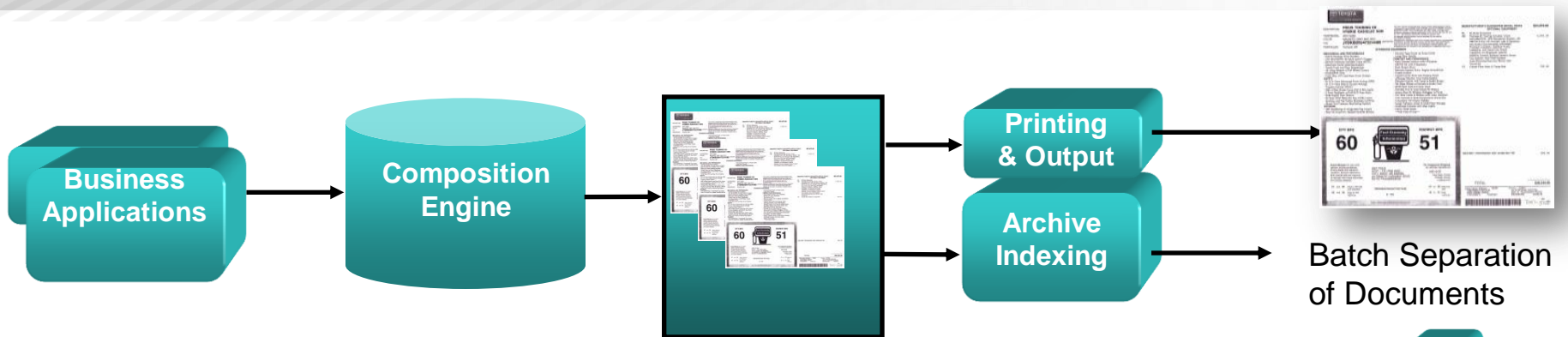
# E-delivery Adoption Requires Engagement And Context



# Smarter Customer Servicing with OnDemand

## Benefits

- *Competitive advantage through superior customer service*
- *An average saving of \$3 for each mailing suppressed*
- *20%-30% adoption rate for customers accessing statements on-line allows a business to sell other services to their customers through their customer portal*
- *Self-service for customers 24x7 lowers the cost to a business, because of fewer direct customer service phone calls*



### Batch Examples:

- Printstreams (AFP & Metacode)
- Documents like PDF
- Mass Data like XML



# A Legacy Of Big Numbers

## Compression

**30:1**

Creates cost savings of 50%

- Get the most out of disk devices
- Petabytes of data under management
- No penalty during access

Optimize hardware and manage IT costs

## Performance

**3500**

Items per second

Retrieval is instant

- 10 Million retrievals/day
- Multiplatforms, zSeries, iSeries, Web interface
- ECM System Monitor
- Content Navigator

Customers expect immediate access – and get it

## Scalability

**185**

Billion documents stored

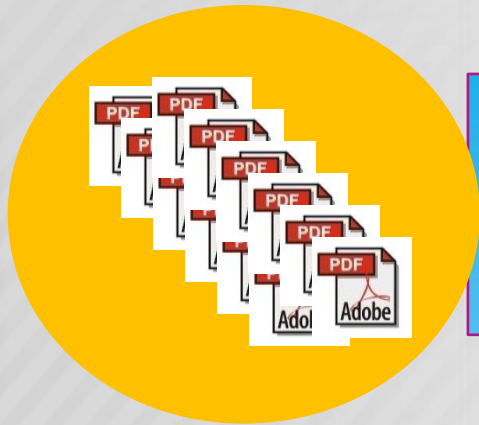
Unique architecture

- 30 petabytes in a single repository
- Scales from department to enterprise deployments

Start small and grow your application

# Industry-leading Compression for Cost Savings

## Massive Scale, Incredible Performance



Traditional ECM Systems store documents individually – with graphics embedded

100 1.3 MB PDF files requires storage of  
**1,300 MB**  
Actual results

VS.



RESOURCES X 1

doc1, doc2, doc3,  
doc4, doc5...docx

IBM's unique and patented ability to dissect, compress and archive PDF files

100 1.3 MB PDF files requires storage of  
**1.6 MB**  
Actual results  
(812:1)

## Why use OnDemand and an ECM Repository?

### **OnDemand is designed for:**

- ✓ Fully Automated High Volume Ingestion
- ✓ Storing very large volumes of static 'like' content, typically transactional print output such as reports, statements, and invoices
- ✓ Long-term archival with low rates of retrieval
- ✓ Very large numbers of internal and external users
- ✓ Virtually unlimited scalability
- ✓ Unmatched levels of compression
- ✓ Fast install and deploy

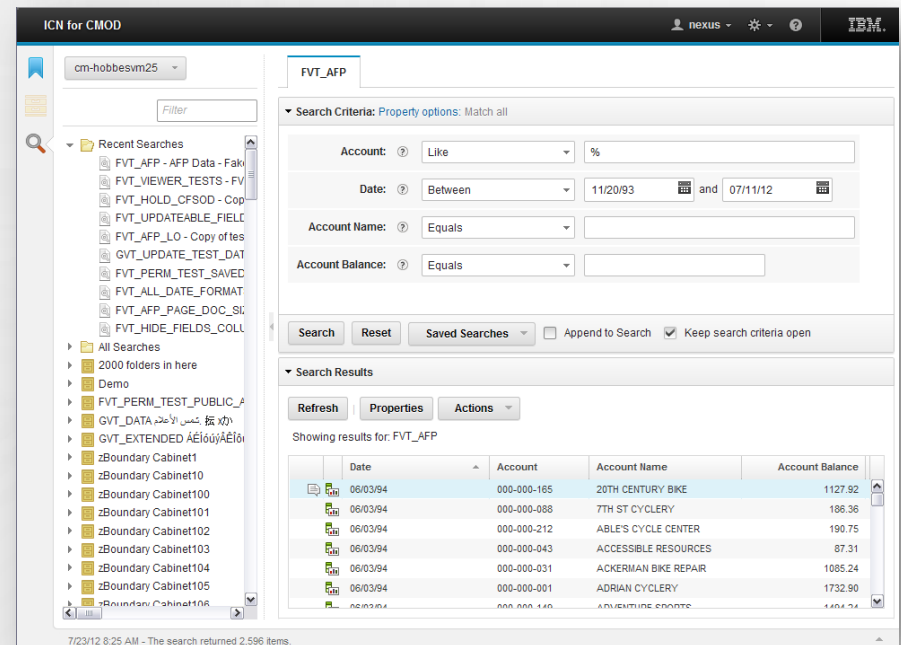
### **General Purpose ECM is designed for:**

- ✓ Updateable documents, or creation of new documents
- ✓ Repository for cases or workflow documents
- ✓ Team collaboration
- ✓ Workflow solutions, review and approval, active content

*With IBM Content Navigator, repositories are invisible*

# IBM Content Navigator Support One UI for Multiple Repositories

- New ECM client and toolkit
- Provides an out of box common client for CM8, P8 and OnDemand
- Access OnDemand content from mobile devices
- Extensible & pluggable framework
  - Supports adding new actions, panels, viewers, etc.
- Built on open standards
  - JavaScript, HTML, CSS, Java, etc.

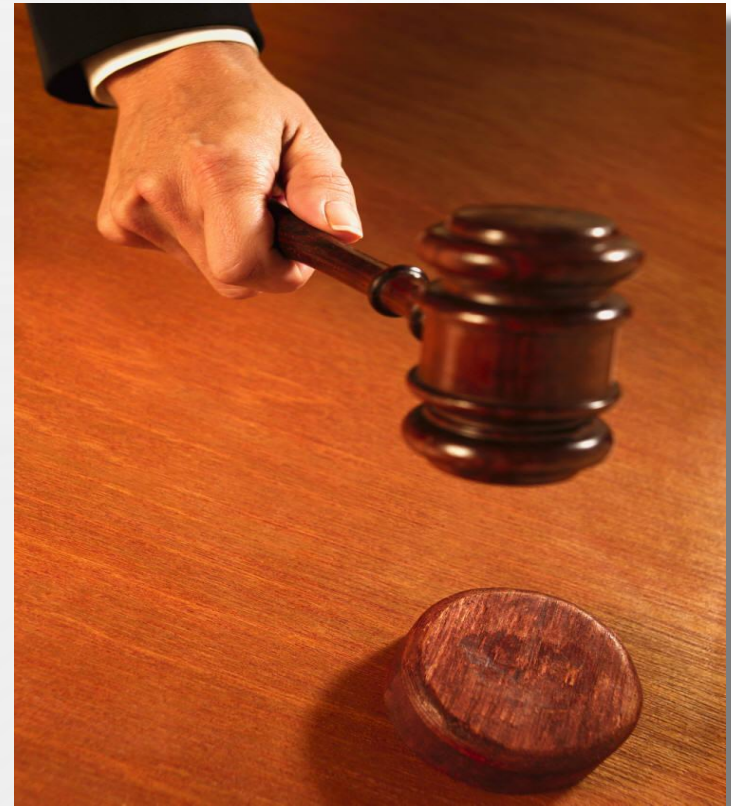




## Manage Customer Content with OnDemand

Enable regulatory compliance and satisfy legal retention requirements

- Provides a long-term archive of critical business documents
- Features that enable companies to meet regulatory and legal requirements
  - Find it with **Full Text Search**
  - Lock it down with **Enhanced Retention** and Holds
- Take advantage of **IBM ILG**
  - Classify OnDemand documents as records within a corporate file plan
  - Execute global retention schedules managed by Atlas Policy Suite



# Datawatch Report Mining Delivers Insight

## Industrial strength analytics for OnDemand

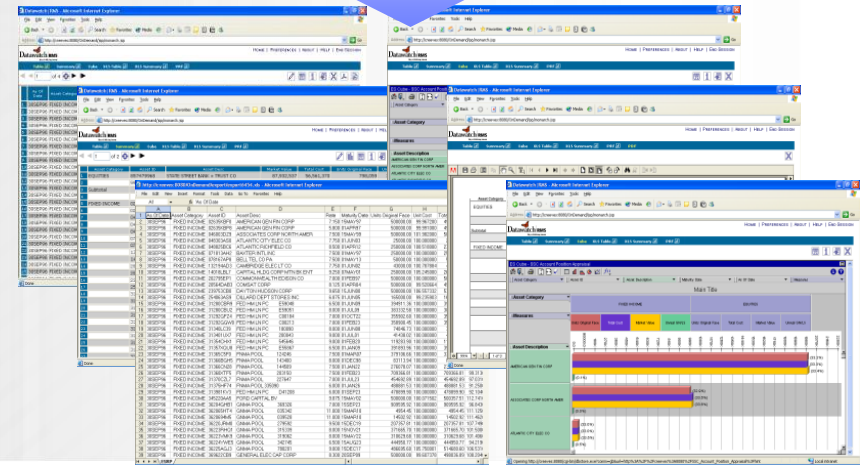
- Report Mining Server (RMS) is a web-based solution for OnDemand
- RMS transforms OnDemand content into end user data views:
  - Summarize and Analyze
  - Subtotal, Total
  - Average, Counts, Percentages
  - In browser filtering, sorting and graphing of report data
- One-click real-time access to report data in web and Excel spreadsheet format
- Enables deeper Client understanding for cross-sell / upsell opportunities
- Puts content at rest to work

11/01/99 CLASSICAL MUSIC DISTRIBUTORS PAGE 01  
 10:17 MONTHLY SHIPPING REPORT  
 MSR94 FROM 10/01/99 TO 10/31/99

CUSTOMER: Betty's Music Store  
 Muscatine Plaza  
 200 Lower Muscatine  
 Cedar Falls, IA 50613

ACCOUNT NUMBER: 11887  
 CONTACT: Betty Yoder

MEDIA	QTY	DESCRIPTION	ORDER NUMBER:	SHIP DATE:	LABEL/NO.	UNT_PRC	AMOUNT
CD	4	Bartok, Sonata for Solo Violin	536017	10/06/99	MK-42625	8.99	35.96
	7	Mozart, Mass in C, K.427			420831-2	9.00	63.00
	2	Luening, Electronic Music			CD 611	10.19	20.38
TAPE	9	Scarlatti, Scabat Mater			SBT 48282	5.99	53.91
ORDER NUMBER: 536039 SHIP DATE: 10/21/99							
CD	11	Beethoven, Pathetique Sonata, Arau			420153-2	5.99	65.89
	8	Mendelssohn, War March of the Priests			SMK 47592	8.99	71.92
	10	Pizzetti, Messa di Requiem			CHAN 8964	9.59	95.90
LP	6	Misc., Modern Trombone Mas			ADA 581087	10.79	64.74
TAPE	6	Gershwin, An American in P			ACS 8034	5.99	35.94



## Industry Examples



**Telco** – replace printed statements and eliminate postage, online access and store XML of call records



**Credit cards** – eStatements on-line or in the contact center; significant cost savings by eliminating printing and postage



**Banking** – eStatements online or in the contact center, significant cost savings by eliminating printing and postage



**Insurance** – Customer communications shared online, records retention, report management and analytics



**Healthcare** – Online access to explanation of benefits and medical records; HIPAA compliant records management



**Government** – Social services communications, report management and distribution, analytics

# Integritie SMC4 –Social Media Compliance



## Grasp the power of Social Networking

- Addresses Financial Industry challenges
- FINRA & SEC regulations
- Uncontrolled social networking
- Increased corporate risk

## Meet industry needs

- Track and measure the impact of Social Media Marketing

## Meet compliance requirements

- SMC4

Captures Facebook, Twitter, IBM Connections and LinkedIn, placing social communications into CMOD

Provides FINRA & SEC compliance

Enables compliant communications with full audit trail

'World's first anti-trolling software' launched in UK

A British software company has launched a new app to help footballers, reality TV stars, pop stars, politicians and anyone in the public eye block abusive messages on their Twitter feeds.



# Content Manager OnDemand

## Enhance vehicle resale value and increase customer loyalty

Cars & Minivan Truc
Go

**\$15,900** **28/33**  
starting [1] est. mpg [1]

Car Care Included. Featuring a complimentary maintenance

## Performance. Style. Pick three.

### Mycar CMOD Demo

MSC: S-DOOR 4X2 SUV  
VIN: 2T3ZF4DV2BW053316  
RML: 2011H430A  
LR: BARCELONA RED MET./C19 (03R3/19)  
ORFPLANT: Detroit MUT/MAC RAILHEAD

GOVERNMENT SAFETY RATINGS		
Frontal crash	Driver Not Rated Passenger Not Rated	Not Rated
Side crash	Front seat Not Rated Rear seat Not Rated	Not Rated
Rollover	★★★★	

www.safercar.gov or 1-888-327-4236

**STANDARD EQUIPMENT**

**MECHANICAL & PERFORMANCE**

- 2.5L DOHC I4 V6 Engine w/ Dual VVT-i
- 175 hp @ 6000 rpm / 172 lb-ft @ 4000 rpm
- 4-Spd Electronic Controlled Auto Trans
- Front Wheel Drive w/ 4-Link Suspension
- Electronic Power Steering System
- FRONT Stabilizer Bar w/ ABS Disc Brakes
- 16" Steel Wheels, P215/70R16 Tires with Wheel Covers & Full Size Spare Tire

**SAFETY**

- Star Safety System: Enhanced Vehicle Stability Control, Traction Control, Anti-Lock Brakes, Electronic Brake Force Distribution and Brake Assist
- Smart Stop Technology
- Dr & Fr Pass Adv AirBags, Dr & Fr Pass Seat-Mounted Side AirBags, Fr & 2nd Row Roll-Over Sensing Side Curtain AirBags
- Dr and Fr Pass Active Headrests
- LATCH Lower Anchor & Tether for Children
- Child Protector Fr Door Locks, Eng Immob
- Tire Pressure Monitoring System

**EXTERIOR**

- Multi-Reflector Halogen Headlamps w/ Auto-Off Feature, Rear Spoiler, Spare Tire Cover, Power Outside Mirrors
- Black Rear Step Bumper Protector
- Variable Intermittent Windshield Wipers

**COMFORT & CONVENIENCE**

- Air Conditioning with Air Filter
- AM/FM CD w/6 Spkr, Aux Audio Jack
- TILT/Telescopic Steering Wheel
- Fabric-Trimmed 6-Way Adj. Dr Seat
- 4-Way Adj Fr Pass Seat, 6-Way Split Seating/Reclining Fold-Flat 2nd Row Sits
- Rear 2nd Row One-Touch Fold-Flat Lever
- Cargo Area Under-Floor Storage Space
- Multi-Function Center Console
- Dual Glove Box, Digital Clock
- Crutch Control, Rear Entry System
- Power Windows/Door Locks/Keyless Entry
- Optitron Instrument Panel Gauges
- 12V Auxiliary Power Outlets (2)
- \*\*Full Tank of Gas\*\*

**MANUFACTURER'S SUGGESTED RETAIL PRICE \$21,925.00**

**OPTIONAL EQUIPMENT**

- FE 50 State Emissions \$75.00
- EC Auto-Dimming Rearview Mirror with Integrated Backup Camera Monitor \$260.00
- DJ AM/FM 6-Disc CD Changer with MP3/WMA Playback Capability, Six Speakers, XM Radio (includes a 90-Day Trial Subscription) \$560.00
- AW 17" 5-Spoke Aluminum Alloy Wheels with 225/55R17 Tires \$110.00
- PC Privacy Glass (Rear Side, Quarter and Rear Door Windows) \$60.00
- PL Daytime Running Lights \$90.00
- TC Trunk Cover

**For Owners**

- Owners
- Update Ownership Info
- Owner's Manuals
- Parts & Service
- Scheduled Maintenance
- My Account

### EPA Fuel Economy Estimates

CITY MPG	Estimated Annual Fuel Cost	HIGHWAY MPG
<b>22</b>	<b>\$1,876</b>	<b>28</b>

based on 15,000 miles at \$3.00 per gallon

**Combined Fuel Economy This Vehicle**

**24** **MPG**

Expected range for most drivers: 23 to 33 MPG

Your actual mileage will vary depending on how you drive and maintain your vehicle.

DELIVERY PROCESSING AND HANDLING FEE \$10.00

**TOTAL \$24,470.00**

Shopping Tools
For Owners
Certified Used
Racing
About the Company
mobile
Español
Help

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Cars | Trucks | SUVs | Minivan | Crossovers | Hybrids & EVs | Vehicles | Fuel Economy | Accessories | Car Dealers | Safety | Financial Tools | Entune™ | Facebook | Twitter | YouTube

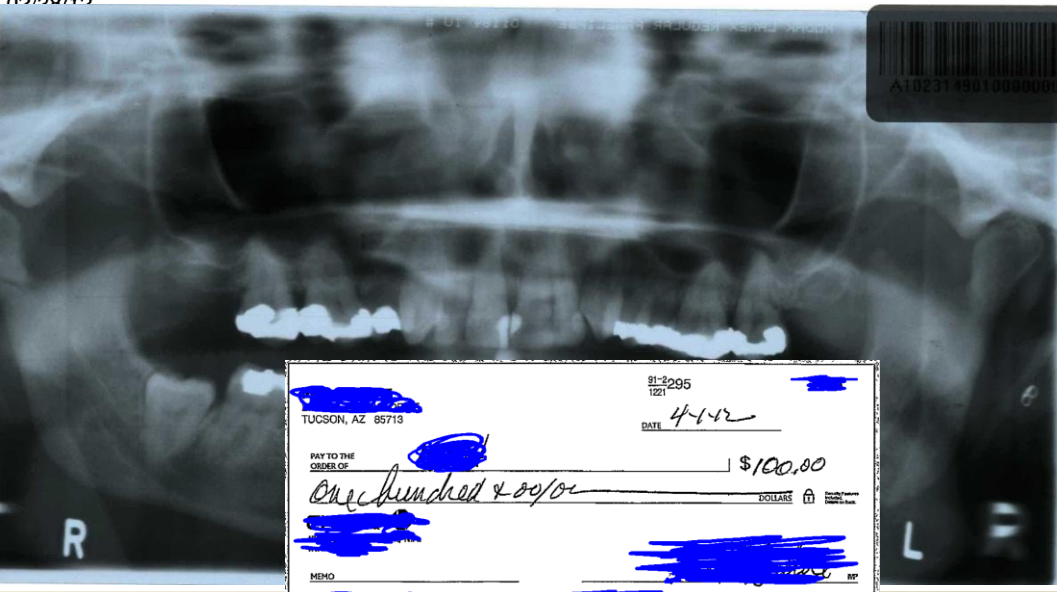
# Content Manager OnDemand

## Optimize delivery of patient communications

Analyzed BLB 02/28/12

Medications:  Reviewed NN  
 Allergies:  Reviewed NN  
 CC: TOE PROBLEM  
 HPI: Nurse Notes:  Reviewed  Patient unable to contact PCP  Referred to ED by PCP  
 Source:  Self  Family Friend  Guardian  Nursing home  Paramedic  Police  Interpreter  
 Mode of arrival:  Walk  Wheelchair  Friends  Attendant  Ambulance  Helicopter  Police  
 Location:  1.  2<sup>nd</sup>  3<sup>rd</sup>  4<sup>th</sup> toe  
 Timing: Onset: 1:30 a.m. 2:00 or Minutes Hours Days Weeks Months ago  
 Context:  
 Mechanism:  Attraction  Crush  Misc  Jam  High pressure injection  MVA  
 Nail Sporting Stubbing  
 Caused by:  Unknown  Blunt trauma  Hyperextension  Hyperflexion  Possible gout  
 Puncture Prior wound Cut:  Glass  Knife  Metal  Teeth  Wood  
 Last tetanus: TTD > 5 years Unknown  
 Associated signs and symptoms:  Pain  
 Foreign body Numbness Pain in: Foot Ankle  
 Other history: Kneel from cleaning chimney

PE: BP 116/60 P 81 R 18 T 97.1 S 0/0 P 2 W 14 I 0 Reviewed on NN  
 Constitutional:  Fever  ETOH  Ill-appearing  Distress:  None  Mild  Moderate  Severe  
 Medication:  None  Prescribed  Over-the-counter



INSURED NAME / MEMBER #/REL CODE	DATES OF SERVICE	TOTAL CHARGES	DISALLOW AMOUNT	MSG CODE	DISCOUNT AMOUNT	ALLOWED CHARGES	DEDUCTIBLE	COINSURANCE	OTHER CHARGES	NET AMOUNT
INSURED NAME: [REDACTED] PRODUCT LINE: 39 MEDICARE POS DRG: 208										
PAT #:										
CLAIM #:										
DAYS: 8	120811 1216	51208.70	51208.70		.00	.00	.00	.00	.00	.00
120	121111 1214	2016.00	2016.00	00\	.00	.00	.00	.00	.00	.00
200	121111 1214	5910.00	5910.00	00\	.00	.00	.00	.00	.00	.00
208	121411 1216	3048.00	3048.00	00\	.00	.00	.00	.00	.00	.00
250	120811 1216	129.00	129.00	00\	.00	.00	.00	.00	.00	.00
295	120811 1216	447.00	447.00	00\	.00	.00	.00	.00	.00	.00
260	120811 1216	409.00	409.00	00\	.00	.00	.00	.00	.00	.00
272	120811 1216	64.50	64.50	00\	.00	.00	.00	.00	.00	.00
300	120811 1216	6767.00	6767.00	00\	.00	.00	.00	.00	.00	.00
301	120811 1216	2232.00	2232.00	00\	.00	.00	.00	.00	.00	.00
308	120811 1216	170.00	170.00	00\	.00	.00	.00	.00	.00	.00
320	120811 1216	1672.00	1672.00	00\	.00	.00	.00	.00	.00	.00
352	120811 1216	1867.00	1867.00	00\	.00	.00	.00	.00	.00	.00
361	120811 1216	550.00	550.00	00\	.00	.00	.00	.00	.00	.00
402	120811 1216	255.00	255.00	00\	.00	.00	.00	.00	.00	.00
410	120811 1216	9961.00	9961.00	00\	.00	.00	.00	.00	.00	.00
450	120811 1216	1223.00	1223.00	00\	.00	.00	.00	.00	.00	.00
480	120811 1216	180.00	180.00	00\	.00	.00	.00	.00	.00	.00
483	120811 1216	1414.00	1414.00	00\	.00	.00	.00	.00	.00	.00
730	120811 1216	363.00	363.00	00\	.00	.00	.00	.00	.00	.00
920	120811 1216	180.00	180.00	00\	.00	.00	.00	.00	.00	.00
921	120811 1216	270.00	270.00	00\	.00	.00	.00	.00	.00	.00
110	120811 1216	.00	.00	00\	.00	.00	.00	.00	.00	.00

91-2095  
1221  
TUCSON, AZ 85713  
DATE 4-1-12  
PAY TO THE ORDER OF [REDACTED] \$100.00  
one hundred & 00/100  
MEMO [REDACTED]

Dates From/To	Service Code	Charged Amount	Allowed Amount	Deductible	Copay	Coinsurance	Discount Managed Care Adjust	Ineligible	Withheld	OC	ANSI Code	Paid	Patient Responsibility
EMPLOYEE: [REDACTED]													
ACCOUNT NUMBER: 020212 99211		30.00	17.76	3.55	.00	.00	.00	12.24	.00	01	45	.00	3.55
								ASSIGNMENT ACCEPTED					
THE PRIMARY INSURANCE CARRIER PAID \$		14.21	ON THE ABOVE CHARGES										
TOTAL		30.00	17.76	3.55	.00	.00	.00	12.24	.00			.00	3.55

R103110223841162789311480941311401HJ7ZHM  
 R103110223841162789311480941311401HJ7ZHM  
 R103110223841162789311480941311401HJ7ZHM  
 R103110223841162789311480941311401HJ7ZHM  
 R103110223841162789311480941311401HJ7ZHM

N|03~FI|2|[REDACTED] HQ. TF042.J92898.K0223.L4001:PGP95E64|841162789|20110223|115648  
 |010874|20110223|115648|E195E6401HJ7ZH9|1|201042|A|[REDACTED]|||1|ACCEPT  
 ED FOR PROCESSING|NOT AVAILABLE||P|311480941|3114~SS|3|SF3|[REDACTED]|NOT AVAIL  
 ABLE|311480941|3114|1|201042|1|201042|0|0|0|0|0|0|0|0|0|0|0~MT|4~

## Content Manager OnDemand Advantages

- Scalability, performance & cost benefits
  - Unmatched compression
- Content Navigator
  - Web & Mobile Device Access
- Secure on-line e-Presentation
- Fast deployment and ROI
  - Install and deploy in 1 week
  - Payback in one year
- Active roadmap – new releases in 2014
- Complete Governance strategy
- Analytics with Datawatch
- Active User Group - <http://odusergroup.org>



# Content Manager OnDemand 8.5 highlights

## Capability

- Content Navigator support
- Enhanced reporting and analysis

## Security

- Support for Secure Socket Layer (SSL) data transmission
- Support for SSL communication with Lightweight Directory Access Protocol (LDAP)
- Enhanced password support (FIPS 140-2)

## Performance

- AFP and PDF Indexing enhancements

## Usability

- Expanded support for Multiple Concurrent Languages including multiple language folder field names and Unicode enhancements

## Utility

- Support for multiple Tivoli® Storage Manager (TSM) servers
- Support for DECFLOAT datatype in DB2®
- Install Anywhere - Replaces Integrated Systems Management Processor (ISMP) for servers
- Support for HP Itanium® for IBM DB2 and Oracle



# Content Manager OnDemand 9.0 highlights

## Capability

- Full Text Search
- Content Navigator Support
- ECM Dashboard and FSM integration
- Export to .csv formats
- CMIS Read-Only support.
- OS/390 Indexer for AIX

## Security

- User proxy
- Last login
- Password limits/restrictions
- OnDemand Stash file

## Performance

- Report Distribution improvements

## Usability

- Database timestamp support
- Support for 128 metadata fields
- Adding field(s) to existing folder definition
- Graphical annotation support with ODWEK line data applet
- Enhanced metadata update
- Enhanced upgrade process, which allows for easier backout

## Utility

- Arsafpd utility
- PDF Floating Triggers
- zOS Installation Wizard
- Java ODWEK API enhancements

## Online Resources: Where to find documentation

### Information center

- <http://pic.dhe.ibm.com/infocenter/cmod/v9r0m0/index.jsp>

### Publication library (All PDF version of the documentation):

- MP <http://www.ibm.com/support/docview.wss?rs=129&uid=swg2722033>
- z/OS <http://www.ibm.com/support/docview.wss?rs=129&uid=swg27022034>

### Information roadmap:

- <http://www.ibm.com/support/docview.wss?rs=152&uid=swg27009157>

### Product system requirements:

- MP <http://www.ibm.com/support/docview.wss?rs=129&uid=swg27021456>
- z/OS <http://www.ibm.com/support/docview.wss?rs=129&uid=swg27021524>

### Products overview:

- <http://www.ibm.com/software/data/ondemand/>

### Download IBM Content Navigator Version 2.0

- <http://www-01.ibm.com/support/docview.wss?uid=swg24032612>

### IBM Content Navigator Version 2.0 publication library

- <http://www-01.ibm.com/support/docview.wss?uid=swg27025015>

## Please note

IBM's statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM's sole discretion.

Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.

The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.

Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

