Neil Parrott – Worldwide Offering Lead

Content Manager OnDemand

Optimizing Customer Self Service with High Performance Statement Presentment

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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

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We Have Entered The Age Of The Customer

Age of manufacturing
Mass manufacturing makes industrial powerhouses successful

- Ford
- Boeing
- GE
- RCA

Age of distribution
Global connections and transportation systems make distribution key

- Wal-Mart
- Toyota
- P&G
- UPS

Age of information
Connected PCs and supply chains mean those that control information flow dominate

- Amazon
- Google
- Comcast
- Capital One

Age of the customer
Empowered buyers demand a new level of customer obsession

- Macy's
- Salesforce.com
- USAA
- Amazon

Beyond

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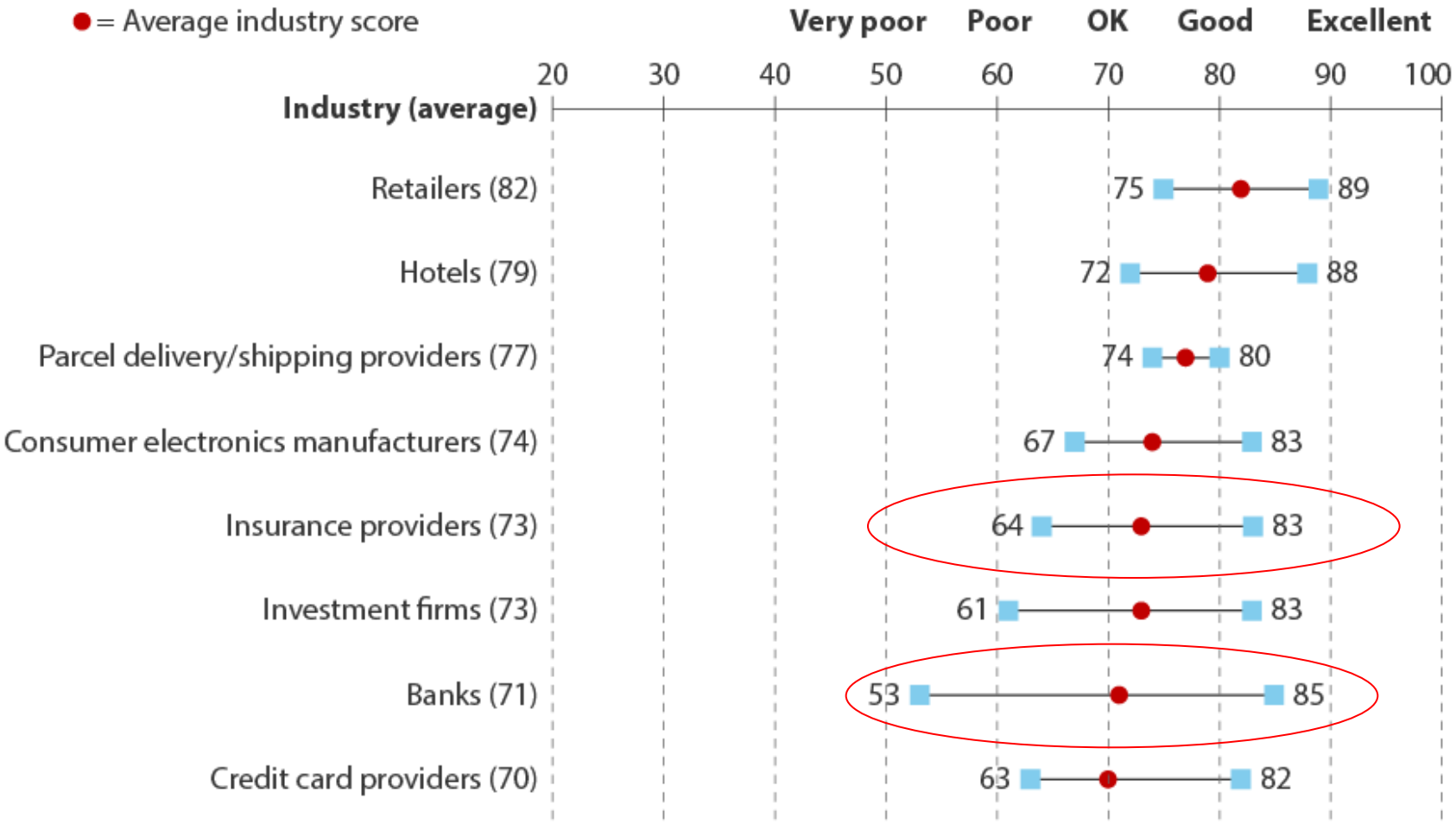
Most Enterprises Middle Of The Pack For Customer Experience



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

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

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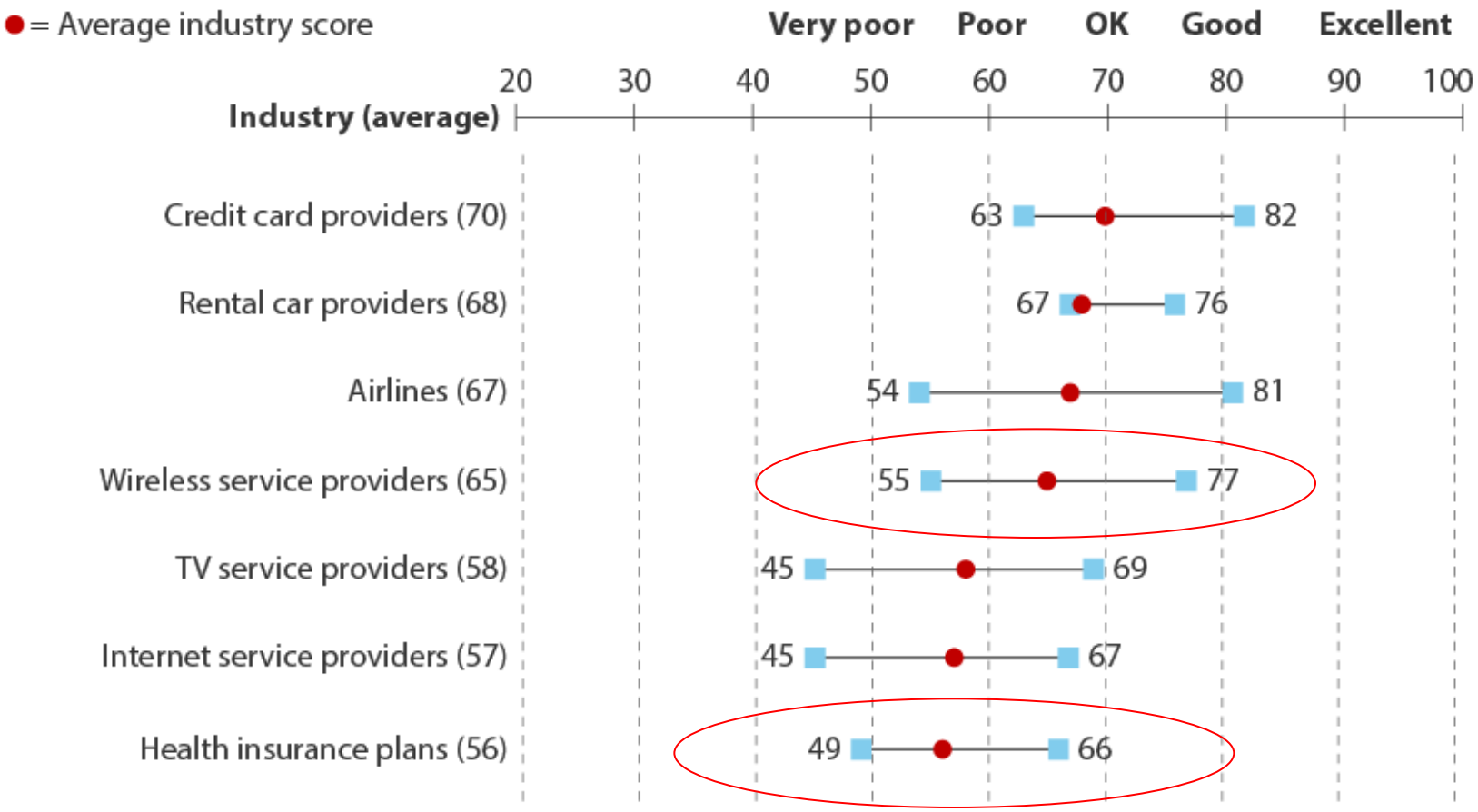
Most Enterprises Middle Of The Pack For Customer Experience



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

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

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The difference can be worth millions, even billions

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:

	Paper only	Online and paper +	Online only =	eDelivery users
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

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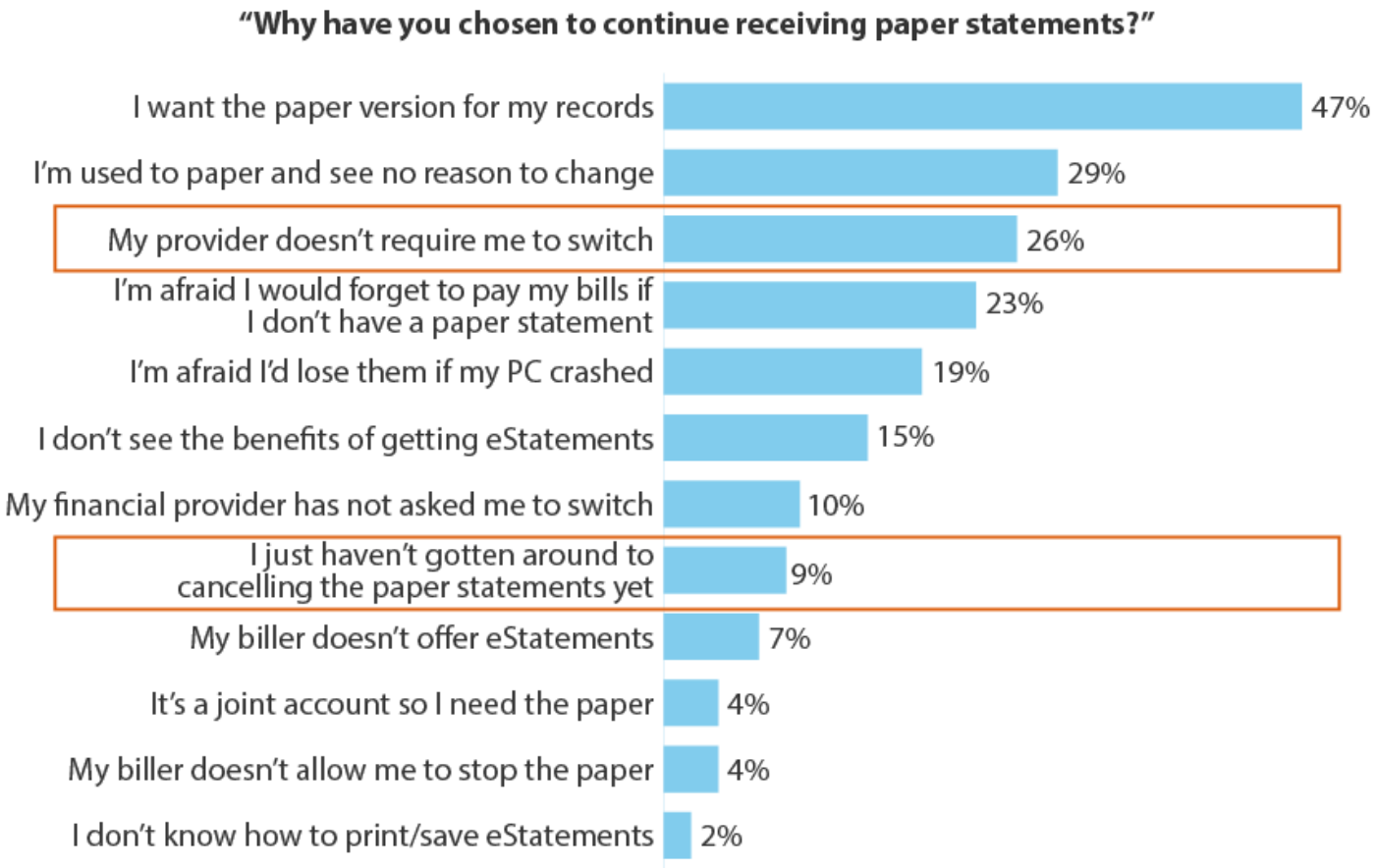
Why Recipients Won't Switch To Paperless



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

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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

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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 customers 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!

10
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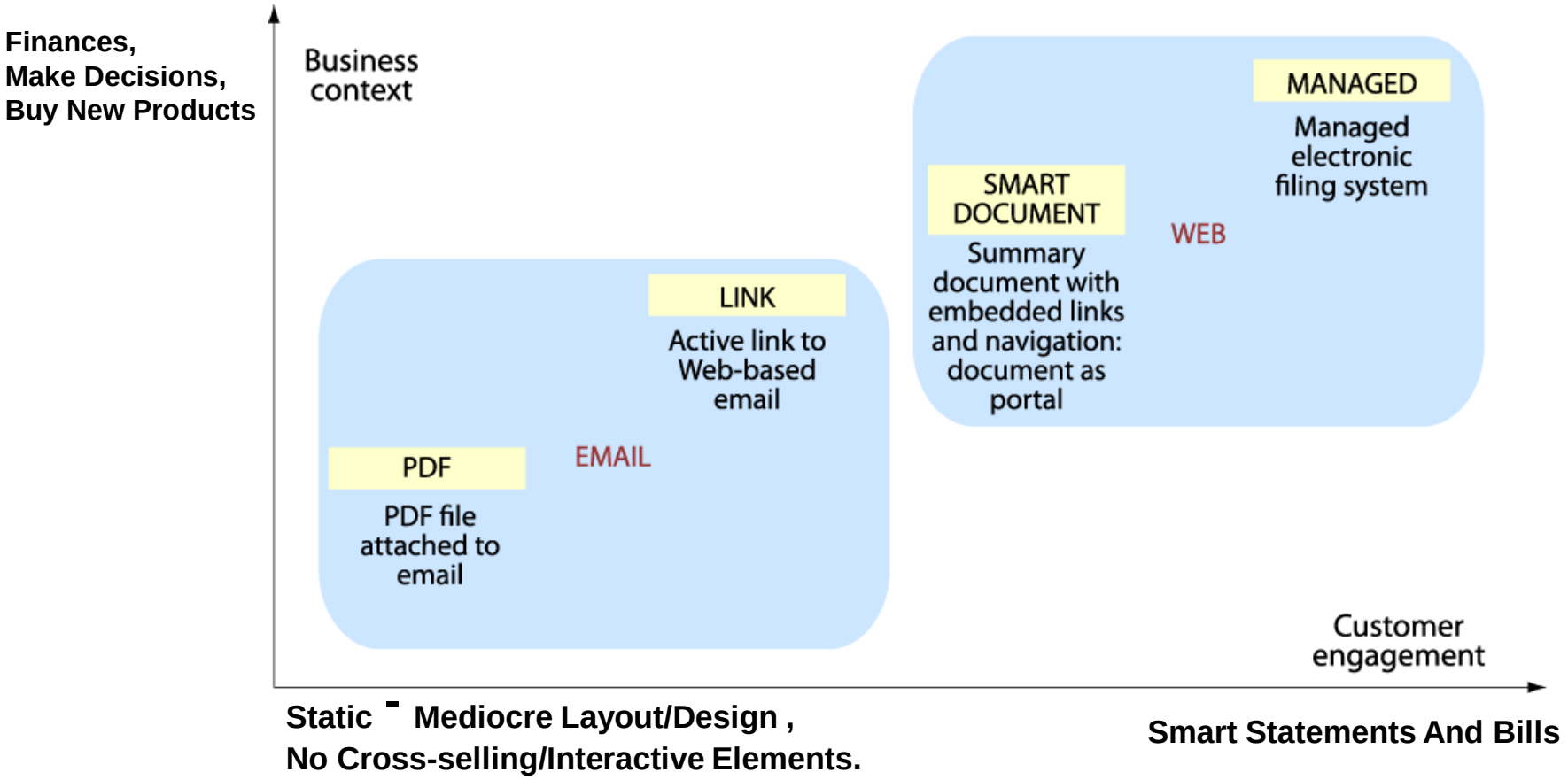
E-delivery Adoption Requires Engagement And Context



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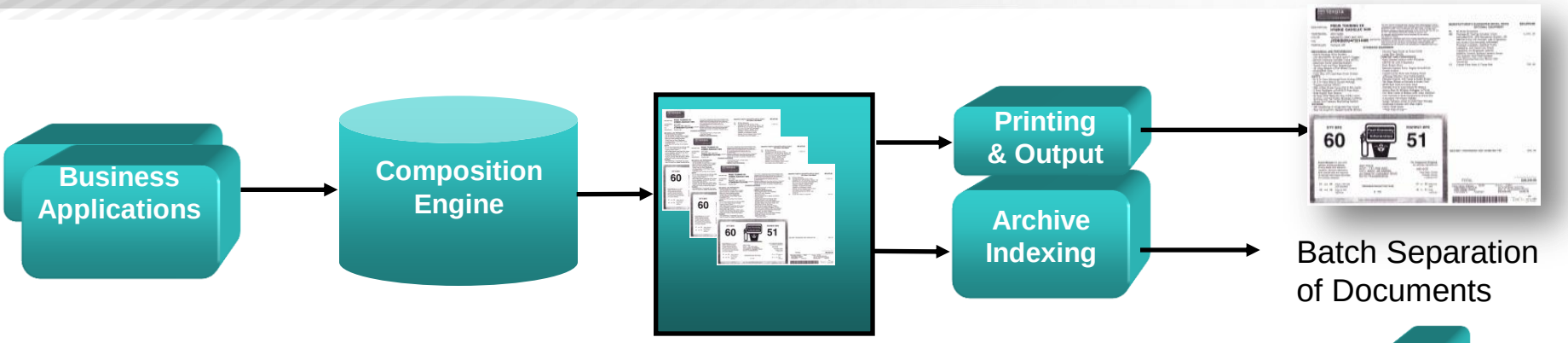
Smarter Customer Servicing with OnDemand

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*



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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

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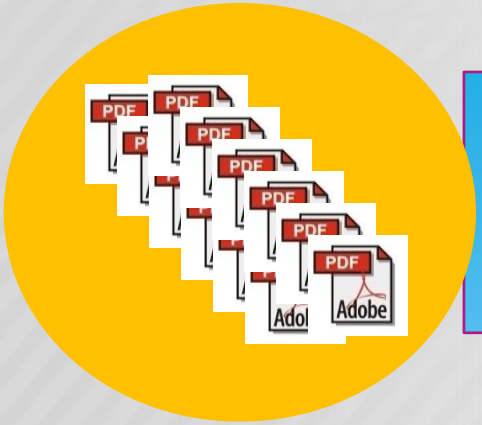
Industry-leading Compression for Cost Savings

Massive Scale, Incredible Performance



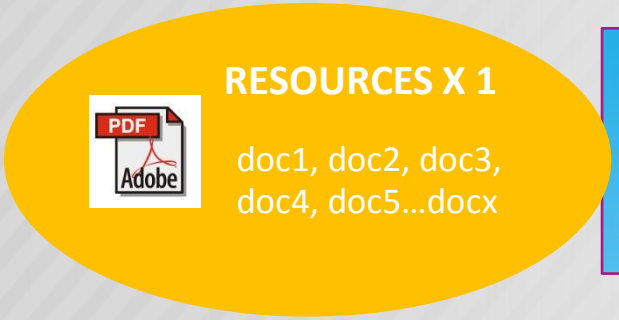
Traditional ECM Systems store documents individually – with graphics embedded

100 1.3 MB PDF files requires storage of

1,300 MB

Actual results

VS.



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)

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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

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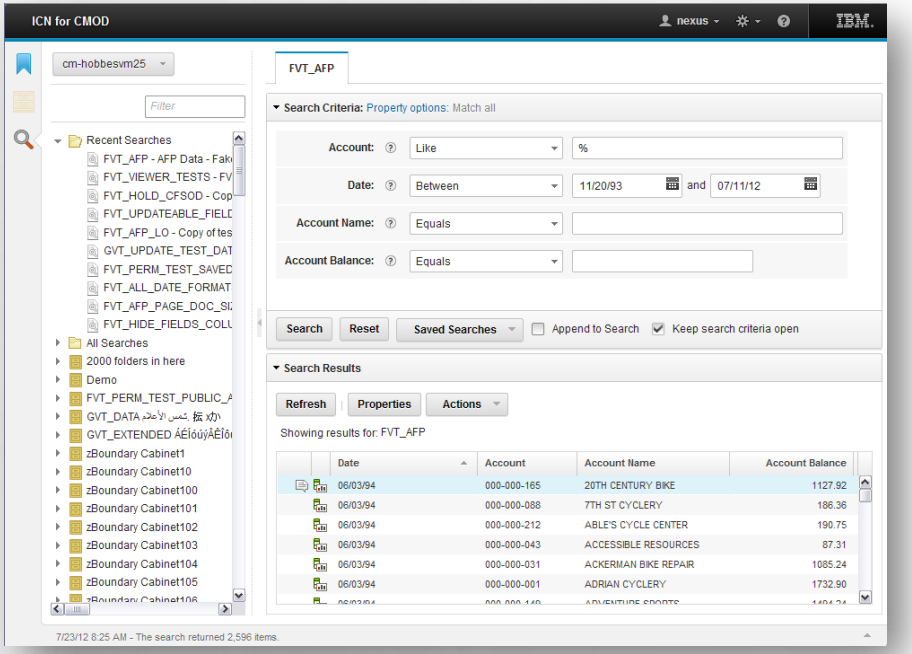
IBM Content Navigator Support

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.



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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

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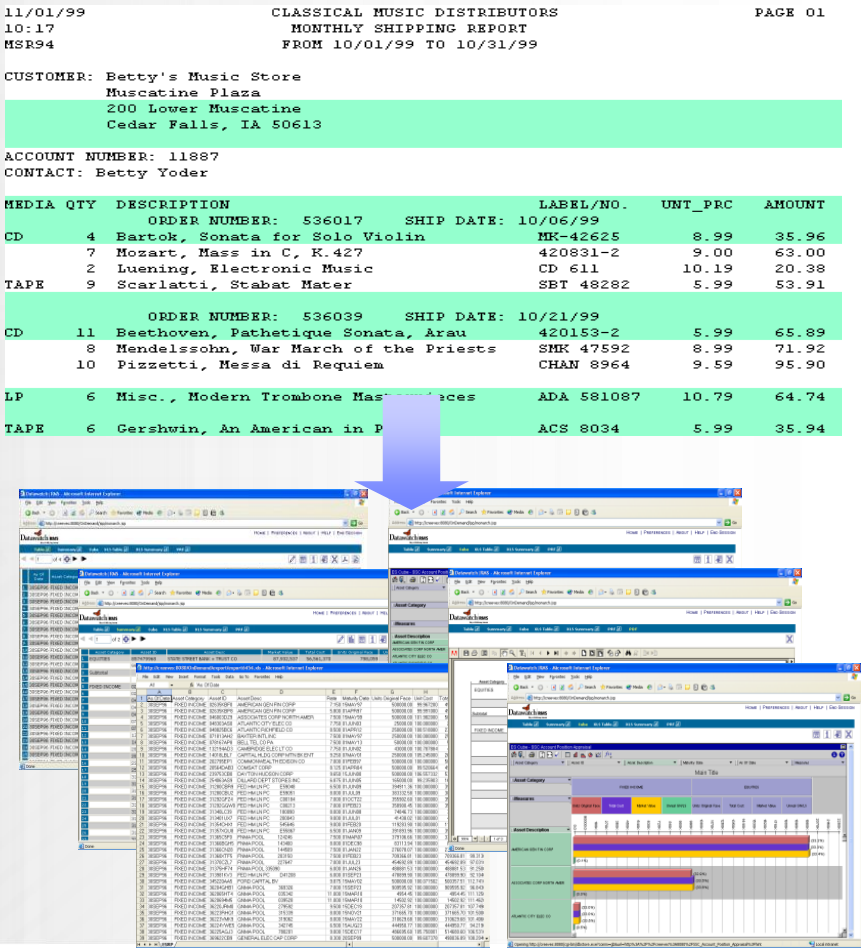
Datawatch Report Mining Delivers Insight

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



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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

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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

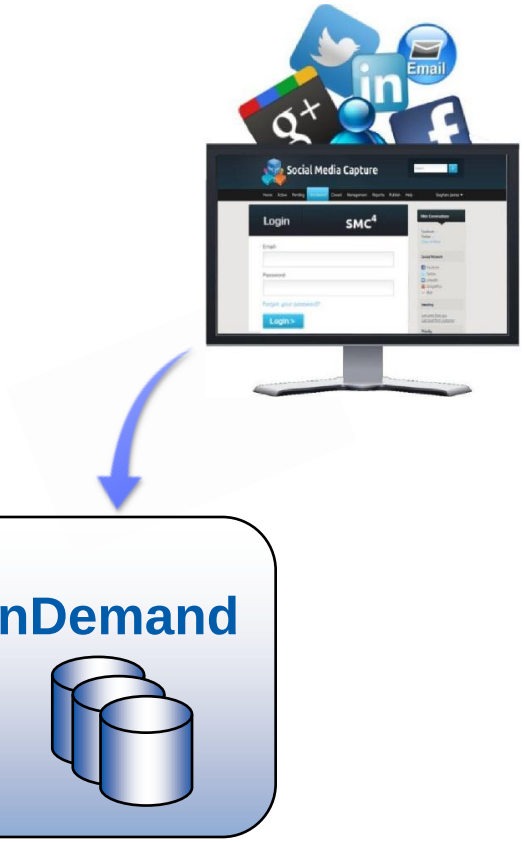
Captures Facebook, Twitter, IBM Connections and LinkedIn, placing social communications into CMOD

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.



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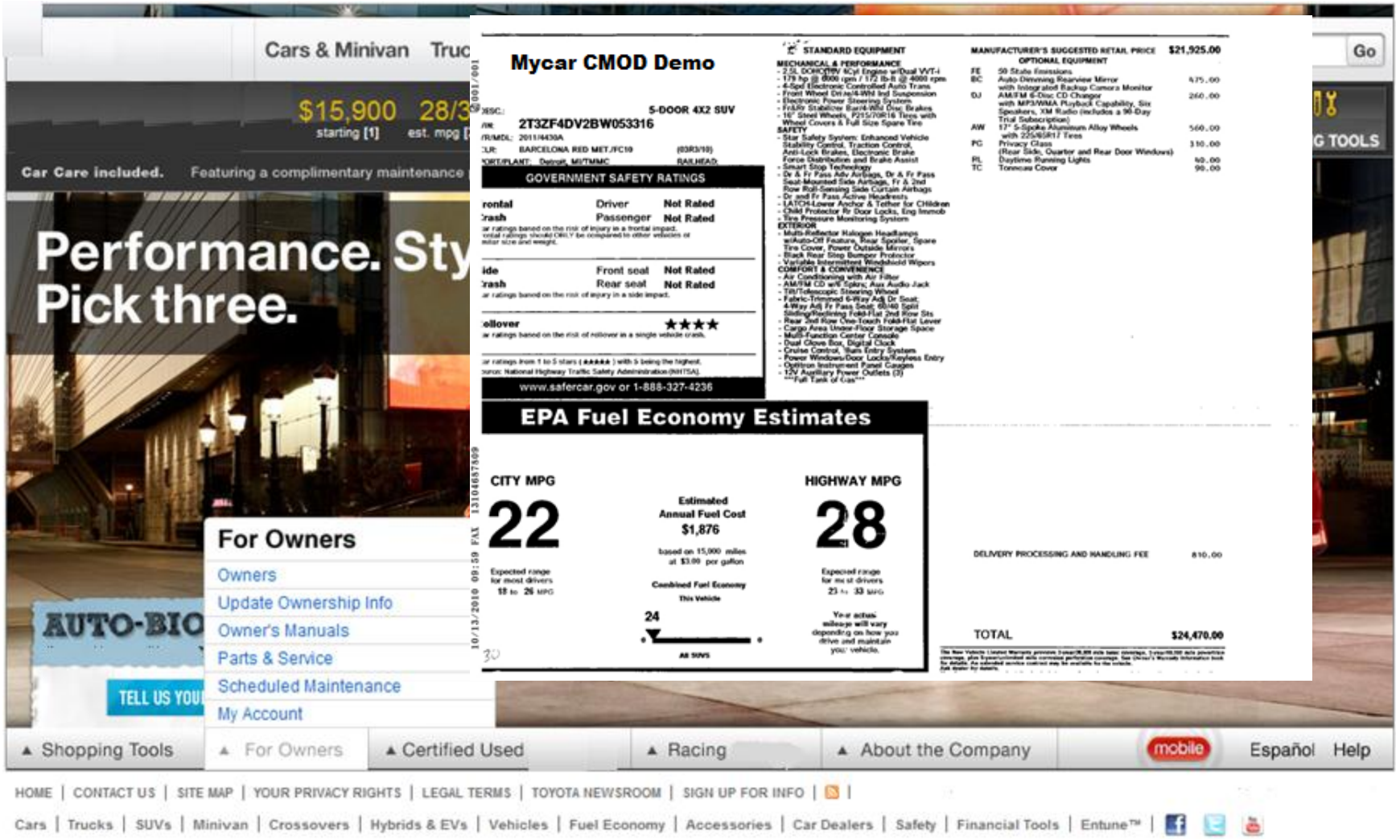
Enhance vehicle resale value and increase customer loyalty



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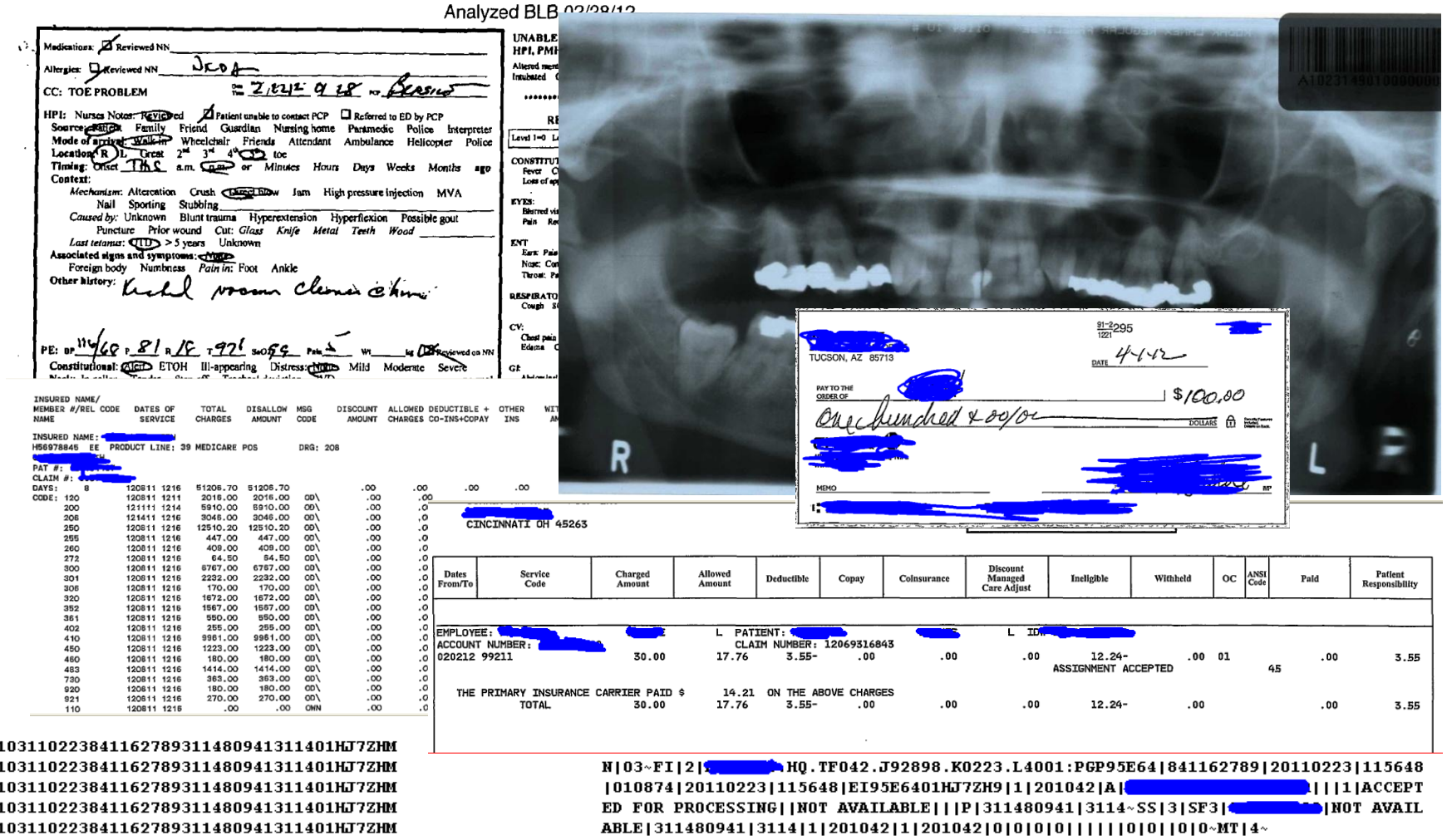
Optimize delivery of patient communications

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Content Manager OnDemand Advantages

- Scalability, performance & cost benefits
  - Unmatched compression
- Content Navigator
  - Web & Mobile Device Access
- Secure on-line e-Presentment
- 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

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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

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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

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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

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