

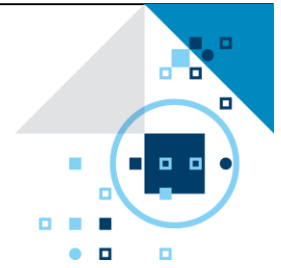
# Drive Better Business Outcomes with Case Management

**Michael Green**  
**Product Manager**  
**IBM Case Manager Solutions**

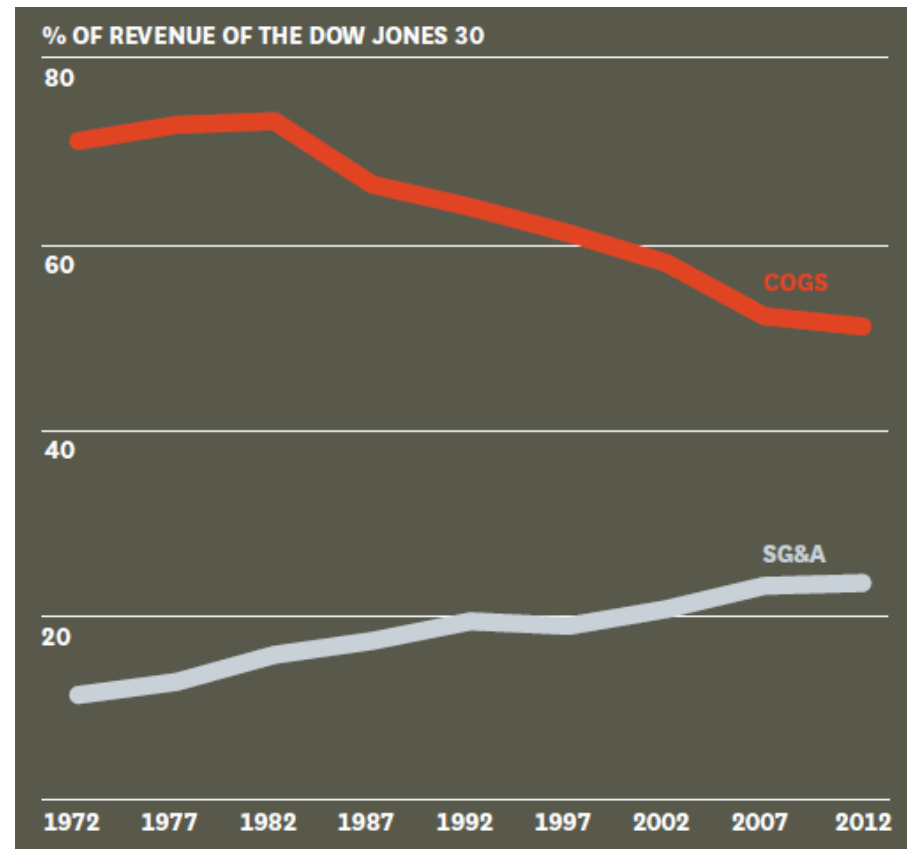
# Rising Share of Knowledge Work

## Increased focus on outcomes instead of just output

Knowledge workers make up more than 40 percent of the US work force.



- Magnitude can be found in comparing cost of goods sold (COGS) and selling, general, and administrative expenses (SG&A)
- A proxy for blue-collar and white-collar workers respectively
- Knowledge work actually comes primarily in the form of projects, not routine daily tasks
- A need for nimble experts who can flow to projects where their capabilities are needed
- Pushes the boundaries of knowledge codification



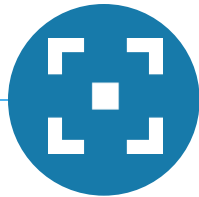
Source: Rethinking the Decision Factory

<http://hbr.org/2013/10/rethinking-the-decision-factory/ar/1>

# Knowledge workers require different capabilities to drive better outcomes...

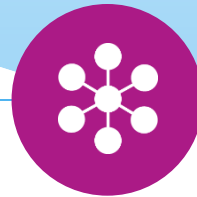


Managing customer-related issues that require knowledge-based decisions or fall outside the scope of normal business activities—  
or **in today's environment, is it more?**



## Capturing relevant Information

- Understanding
- Evaluating
- Analyzing



## Collaborating

- Internally
- Externally
- Communicating

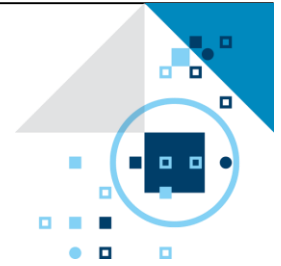


## Decision making

- Taking action
- Resolving
- Recording and reporting

All grown in complexity, urgency and customer expectation

## IBM Case Manager brings people, process and information together ... in context of a case



- Provides a **role focused UI** merging information, process control, collaboration and analytics
- Enables **dynamic**, runtime work management
- Supports **focused analytical tools** for decision support
- Manages and governs **entire case lifecycle**
- Supports industry specific **templates and solutions**
- Ready for **mobility**

# IBM's Case Management Market Leadership



- A new pattern has emerged that requires new industry solutions to optimize outcomes:



- Pre-integrated, high-value solutions to optimize businesses
- Expert Business Partners will continue to expand value
- Maximizing the economic value of information

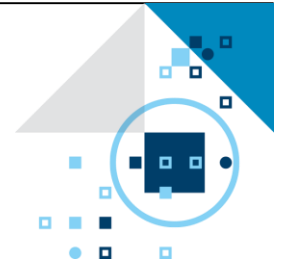
Leader in the Industry

'The largest ECM vendor in terms of market share and total content revenue, IBM has an increasing focus on high-value solutions.'

'IBM will drive leadership in analytics in the dynamic case management market.'

Sources: Gartner, Market Share Analysis: Enterprise Content Management Software, Worldwide, 2011 G00233424. Forrester, The Forrester Wave™: Dynamic Case Management, 2011

# IBM Case Manager – Key Themes



1

Provide information to help improve decisions



2

Support knowledge work



3

Industry Focused Solutions



# Case Manager Fully integrated with content management



- Each case has its own folder for storing its documents
- Integrated document viewer has markup capabilities
- Document management functionality
- Centralized content repository for case artifacts
- Support for Content Navigator plug-ins

The screenshot displays the IBM Case Manager interface. At the top, there are tabs for 'Documents', 'Tasks', and 'History'. Below these are buttons for 'Add', 'Open', and 'Actions'. The main content area shows a list of documents under the 'Home' view, including folders for 'Correspondence' and 'Supporting Documents', and a document named 'PC.jpg'. A context menu is open over the 'PC.jpg' document, listing actions such as 'Open', 'Preview', 'Download', 'Print', 'Check Out', 'Send Email', and 'Remove from Case'. On the right side, there are panels for 'Customer Information' (showing Account ID 545-456-5456 and Customer Name Bob Smith) and 'Transaction Details' (showing Transaction ID 5464567899 and Transaction Date 07/08/2013). At the bottom, a table shows a schedule for '24/08/2013' with time slots from 00:00 to 12:00.

# Access to Application and Structured Data

Work Cases Home **Review Claim**

## Review Claim | Triage

[View Instructions](#)

Comments

Investigate **Close-Insufficient Evidence**

Policy	Claim	Counts	Analysis	Identity Analysis
Claim Number:	999-99-991407	Claim Status:	Draft	
Claim Type:	AUTO	Claim Amount:	45,000	
Last Name:	Batke	First Name:	Christal	
Street Address:	15 Sanded St.			
City:	Bawlf	State:	AB	Zip Code: TOB OJO
Loss Description:	Collision turning left. Multiple vehicles involved.			
Loss Type:		Loss Cause:	Collision while turning left.	
Loss Date:	June 1, 2013	Reported Date:	June 1, 2013	
Loss Location:	15 Sanded St. null, Bawlf, AB, TOB OJO			
Police Report:	Theft: <input type="checkbox"/>	Independent Witness Count:	2	
Medical Expenses:	10,000	Total Injuries:	1	At Fault: <input type="checkbox"/>

### Facts that Triggered the Investigation

### Sametime

#### Alert Summary for claim number 999-99-991407

Policy ID: 999-99-999876 Entity ID: 9001  
 Alert Severity: K Alert ID: 2  
 SPSS Risk Score: 0.01

First Name: Christal Last Name: Batke  
 Address: 15 Sanded St. Bawlf, AB TOB OJO  
 Phone: 780-781-2074

**Alert Description:**  
 Relationship with fraudulent entity  
 Medical monetary declaration high AND automobile damage low  
 Identity association with flagged entity

Select Group **Investigation**

Carly  
Social Network An

Bill  
Customer Service

### Investigation Details and Progress

Documents Tasks History

Add View More Actions

- Case Analytics**  
Modified: P8admin | 7/8/2013 6:08 PM
- Correspondence**  
Modified: P8admin | 7/8/2013 6:08 PM
- Evidence**  
Modified: P8admin | 7/8/2013 6:08 PM
- Alert Summary for claim number 999-99-991407**  
Modified: P8admin | 7/8/2013 6:08 PM
- ISO**  
Modified: P8admin | 7/8/2013 6:08 PM
- Witness Statements**  
Modified: P8admin | 7/8/2013 6:08 PM
- Medical Claim Summary**  
Modified: P8admin | 7/8/2013 6:08 PM

+ Search

Claimant Name batke

Search [Advanced Search](#)

+ Search Results

- Investigation Case**  
Modified on: 4/23/13 8:33 PM | Modified by: John | Size: 41 KB
- Inv. Kristina Batke 5/29/2013**  
Modified on: 2/23/11 1:32 PM | Modified by: Carly | Size: 5.3 KB
- Inv1308072013**  
Modified on: 2/16/13 10:20 AM | Modified by: John | Size: 4.7 KB
- Inv1306101146**  
Modified on: 11/30/12 4:13 PM | Modified by: Rich | Size: 46 KB
- Application for medical Assistance**  
Modified on: 7/4/13 9:58 AM | Modified by: Carly | Size: 8.1 KB



# Integrated Extensible Document Viewer

IBM Counter Fraud Management John - Focus Insur

Work Cases Home **Review Claim**

### Review Claim | Triage

[View Instructions](#)

**Comments**

Policy	Claim	Counts	Anal
<b>Item</b>	<b>Match</b>	<b>Value</b>	
Last name	✓	Batke	
Phone number	✓	780-700-06	
Existing record match	✓	Kristina Bat	

Meta-data	Claimant	Matched Ident
Entity ID	9001	34001
Alert Count	1	1
Watch List Ind	false	false
Alert ID	369	539

### Investigation Details and Progress

**Documents** Tasks History

Add View **More Actions**

- Case Analytics**  
Modified: P8admin | 7/8/2013 6:08 PM
- Correspondence**  
Modified: P8admin | 7/8/2013 6:08 PM
- Evidence**  
Modified: P8admin | 7/8/2013 6:08 PM
- Alert Summary for claim number 999-0**  
Modified: P8admin | 7/8/2013 6:08 PM
- ISO**  
Modified: P8admin | 7/8/2013 6:08 PM
- Witness Statements**  
Modified: P8admin | 7/8/2013 6:08 PM

7/9/2013 Page: 000

ISO REPORT RESULTS Date of Order: 7/8/2013

Policy: 999-99-999876

Focus Insurance

Requestor: Insurance Claims Supervisor Ref. #. 000-1234-56

---

RECAP:                      Subject 1 – 1 Claim(s) Reported  
                                   Vehicle 1 – 1 Claim(s) Reported  
                                   Subject PRC – 1 Claim(s) Reported

-----MESSAGES-----

ISO'S GEOGRAPHIC UNDERWRITING SYSTEM: RESULTS REPORTED.  
 VERIFICATION AND REPORTS IN THE ADDITIONAL INFORMATION SECTION.

-----SEARCH REQUEST-----

Subject #1  
 Name: Chriztal Batke  
 Address: 15 Sanded St. Bawlf, AB TOB OJO  
 D.O.B: 6/9/81  
 D/L: 012 345 678

-----VEHICLES-----

2009 Toyota Camry JT2ST88POL2345678

-----REPORTED CLAIM HISTORY-----

Reported loss history with identification information that is underlined may not apply to this risk and should be verified prior to use. This report is not a recommendation. Subscriber should independently determine what action, if any, to take.

**Sufficient Evidence**

Group **Investigation**

Carly  
Social Network An

Bill  
Customer Service

# Content Search and Collaboration

IBM Case Manager
Intgpeadmin

**Cases** | Work

**Add Case** ▾

**Search:**

Case Owner ▾

[Advanced Search](#)

**Perman.Dave-23.08.13**  
 Account ID: 123-123-123 | Date Case Opened: 23/08/2013 17:21 | Customer Name: Dave Perman |  
 Dispute Case State: **Closed By Customer** | Finality Date: | Case Owner:

**Smith.Bob-230813**  
 Account ID: 545-456-5456 | Date Case Opened: 23/08/2013 18:20 | Customer Name: Bob Smith |  
 Dispute Case State: **Review** | Finality Date: | Case Owner:

**Jones.Ed-18.08.13**  
 Account ID: 5453345444 | Date Case Opened: 28/08/2013 12:03 | Customer Name: Ed Jones | Dispute Case State: **Open**  
 | Finality Date: | Case Owner:

**Anderson.Sue-13.08.13**  
 Account ID: 544545666 | Date Case Opened: 28/08/2013 12:04 | Customer Name: Sue Anderson |  
 Dispute Case State: **Open** | Finality Date: | Case Owner:

Superbank Front Office | Customer Service Representative ▾

**Smith.Bob-230813**

**Summary** | History

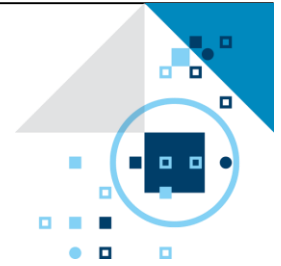
Show Summary for: All

**Yesterday**

PC.jpg Document filed in Home	12:15 Intgpeadmin
Review Dispute Item Task started	12:03 Intgpeadmin
Review Dispute Item Task ready	12:03 Intgpeadmin
Review Dispute Item Task created	12:03 Intgpeadmin
Close Case Task created	12:03 Intgpeadmin
Process Reassignment Task created	12:03 Intgpeadmin
Process Chargeback Task created	12:03 Intgpeadmin
Generate Status Letter Task created	12:03 Intgpeadmin
Generate Provisional Credit Letter Task created	12:03 Intgpeadmin
Generate Fraud Letter Task created	12:03 Intgpeadmin

28/08/2013 12:08 - The search returned 4 items.

# IBM Case Manager – Key Themes



1

Provide information to help improve decisions



2

Support knowledge work

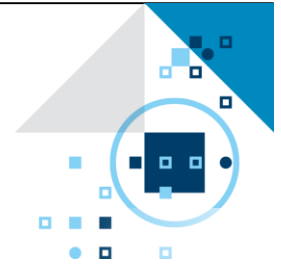


3

Industry Focused Solutions



# Caseworker user friendly experience



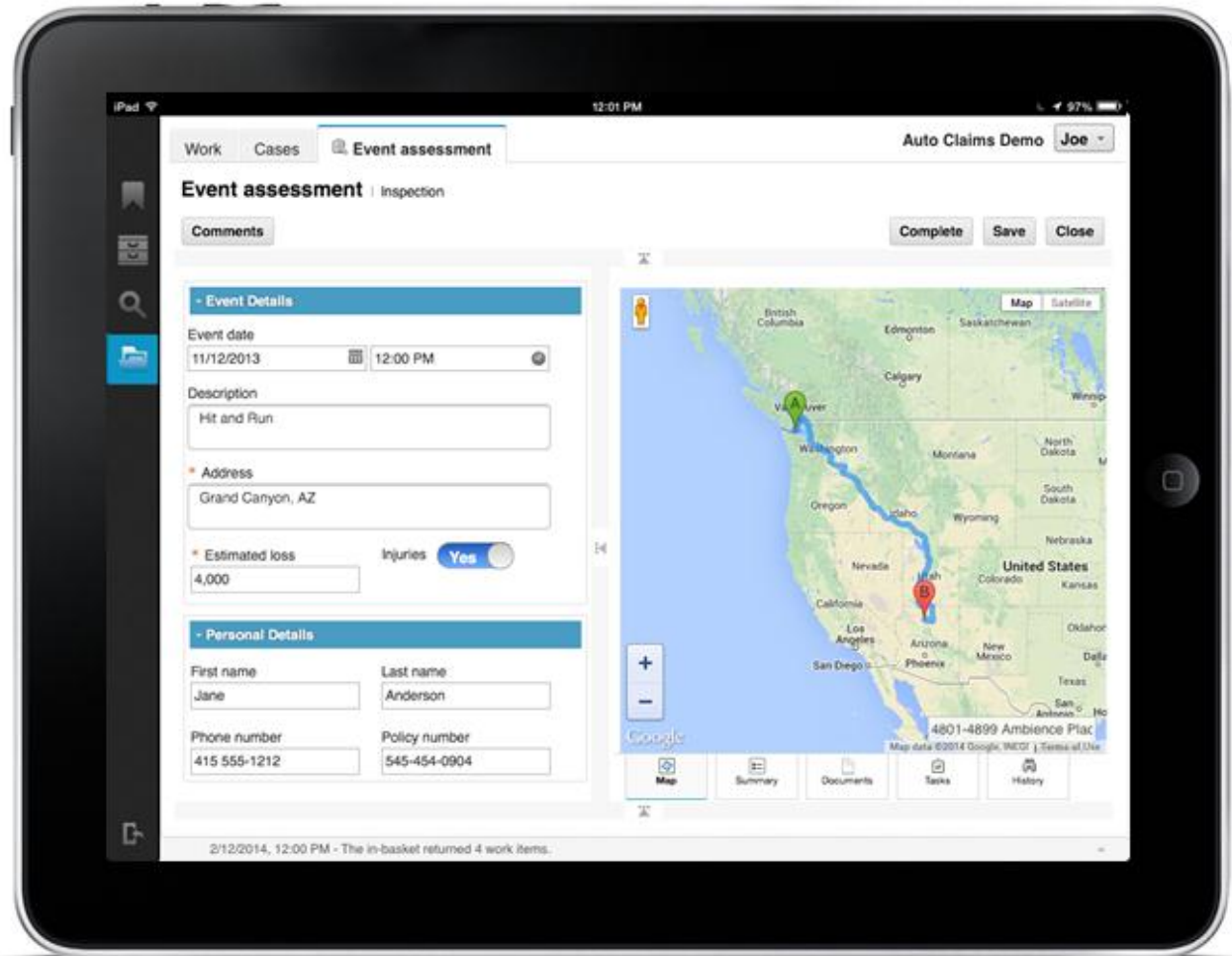
- Is role-based and personalized
- Is flexible and extensible
- Provides deep context for casework
- Brings people, process and information together to drive case progression and better outcomes

The screenshot displays the IBM Case Manager interface for a case titled "Smith.Bob-230813". The interface includes a navigation bar with "Cases" and "Work" tabs, and a user profile for "Intgpeadmin". The main content area is divided into several sections:

- Case Header:** Shows the case ID "Smith.Bob-230813", the last modified date "28/08/2013 09:04", and the user "Intgpeadmin".
- Actions:** A row of buttons for "Add Comment to Case", "Add Task", "Add Custom Task", and "Split Case", along with "Save" and "Close" buttons.
- Documents:** A list of documents including "Correspondence", "Supporting Documents", and "PC.jpg", each with a "Modified" date and user.
- Customer Information:** A form with fields for "Account ID" (545-456-5456), "Contact Phone Number" (454 545-5434), "Customer Name" (Bob Smith), and "Customer Status" (Silver).
- Dispute Details:** A form with fields for "Dispute Type" (Quality of goods), "Disputed Amount" (458.00), "Dispute Description" (Broken PC), and "Merchant Name" (UsedStuff.com).
- Timeline:** A horizontal timeline at the bottom showing the case's history from "23 Aug 2013 18:00:00" to "28 Aug 2013 18:00:00".

## Meeting the Needs of Mobile Workers

- Part of the native Content Navigator iPad app
- Displays solution pages the way they were designed with mobile tweaks where appropriate
- No updates to app are required when case solutions are modified



# Ad Hoc, Flexible Tasks



Caseworkers can view and start new tasks for a case, changing how that case is handled on the fly.

Documents | **Tasks** | History

**Add Task**

**Required (2)**

- Close Case**  
Waiting...
- Review Dispute Item**  
Started on 29/08/2013 15:18

**Optional (11)**

- Team Review**  
Ready | [Start](#) | [Disable](#)
- Add Document**  
Waiting...
- Arbitration**  
Waiting...
- Evaluate for Fraud**  
Waiting...
- Generate Fraud Letter**  
Waiting...
- Generate Provisional Credit Letter**  
Waiting...
- Generate Status Letter**  
Waiting...
- Process Chargeback**  
Waiting...
- Process Representation**  
Waiting...

**IBM Case Manager**

Cases | Work | Information | **Case Anderson.Sue-13.08.13**

**Anderson.Sue-13.08.13** | Modified: 28/08/2013 12:04 | Manage Dispute Item

**Add Comment to Case** | **Add Task** | **Add Custom Task** | **Split Case**

Documents | **Tasks** | History

**Add** | **Open** | **Actions**

Home

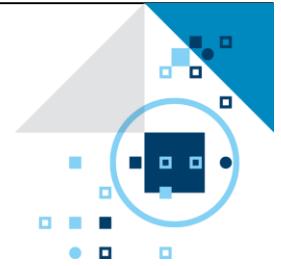
**Add Task**

Select a task type:

Enter a task name:

**OK** **Cancel**

# IBM Case Manager – Key Themes



1

Provide information to help improve decisions



2

Support knowledge work



3

Industry Focused Solutions



# Business Partner Solutions: Powered by IBM Case Manager

Over **35** Partner solutions available including with  
over **30** more solutions in the works

Adjacent	Claim-to-Payment for Government
Capgemini	Collaborate Customer Interactions Mngt
enChoice/Lighthouse	Event Tracking and Administration
HCL	Customer MbarkWealth Mngt
IMC	Contracts Mgmt
IPD	ACM for Insurance
IPD	Ultra for Disability Claims
IPD	Ultra for Pre and Post Authorizations
IPD	Ultra Intelligent Underwriter Workbench
Insight to Value (I2V)	Pension Administration
Magiclamp	Power Up for Line Item Detail Processing
Perficient/TriTek	Incident Insight
Pyramid	Wealth Mgmt
Pyramid	Loan eXpeditor (PLX)
Pyramid	Insurance eXpeditor (PIX)
Quark	Finance Reporting
RGB	Mobile Claims Adjuster
RGB	Mobile Credit Application
SMS	SLA Pulse
Syscom	SchoolSmart



*“Strategically, IBM’s strong **partnership ecosystem** will help drive the horizontal platform deep into industry solutions across all DCM use case segments. - Forrester”*