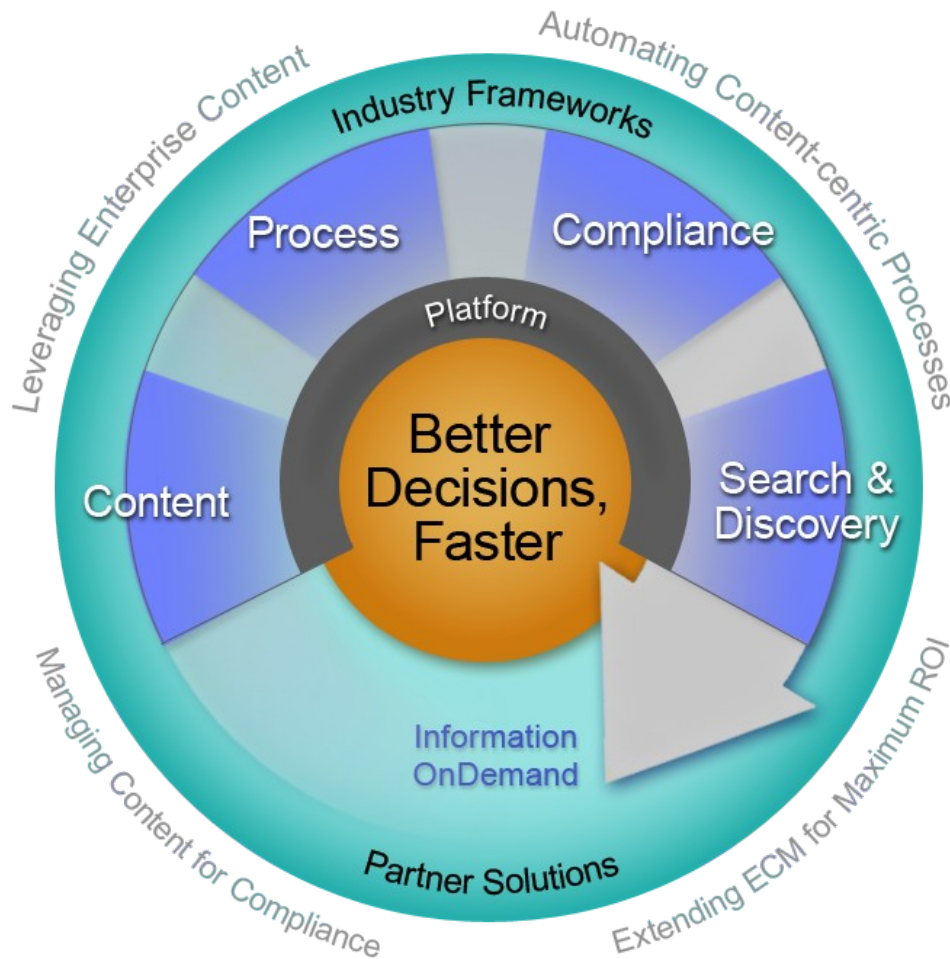# Connecting the ECM Community

Ken Bisconti
Vice President, ECM Products and Strategy

IBM ECM: *Get More Value Out of Your Content*

IBM ECM helps companies make better decisions faster by:

- **Managing content**
- **Optimizing associated business processes**
- **Enabling compliance**

through an integrated information infrastructure

Organizations Achieving Significant Results *Using IBM ECM...*

Customer Successes

citigroup	Cut processing time from weeks to 2 days
WOORI BANK	Increased revenue by $115M
AXA	Saved $5M over 5 years
IBM	Consolidating 915 websites yields $45M ROI

CAMPMOR	64% increase in online revenues
amec paragon	Document transmittal cost savings of 35-40%
enresa	Eliminated all paper documents for large cost savings and facilitate compliance

First	Improved application performance and search to address regulatory concerns
UVW	Europe – Social Security Agency cuts costs 25%
conEdison	Expects $500,000 ROI with its Mobile Office Wireless Solution
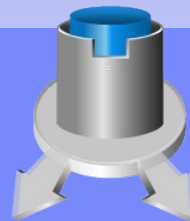
IBM ECM

Companies are Using IBM ECM to Increase Profit Margins, Improve Customer Retention and Grow Market Share

23 of the top 25 Banks

25 of the top 25 Insurers

250+ In Communications

1300+ Governments

1200+ Manufacturers

AVIS

AXA

citigroup

Duke Energy

belgacom

BARCLAYS

conEdison

WOORI BANK

ZURICH

ROTH BROS. INC.

OHRA Direct resultaat.

MetLife

Westpac

Skandia försäkring och bank

GRUPO SIRO

Safmarine

STATOIL

DTCC

bp

PRUDENTIAL

PHILIPS

IBERDROLA

Sikorsky

Service Public Fédéral FINANCES

Enel

FIDUCIA Ihr IT-Partner

CERNER All Together.

Allianz

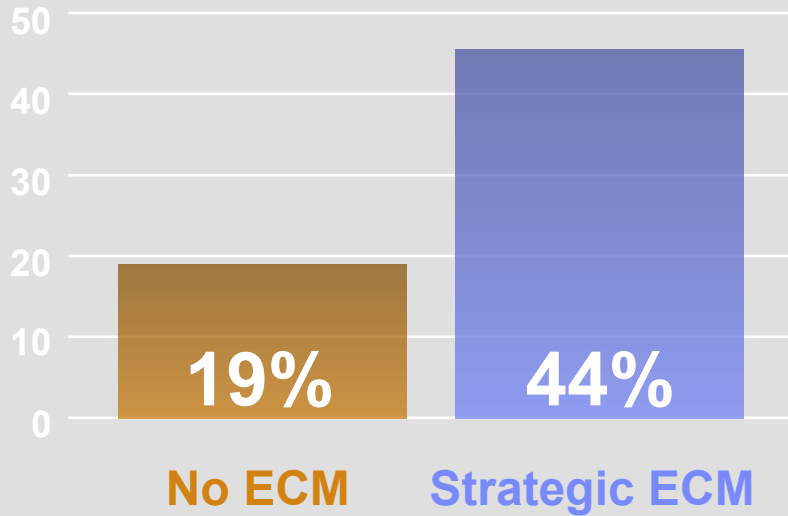## Public Sector
Strategic ECM Users

How does the EFFECTIVENESS of your organization compare to your peers?
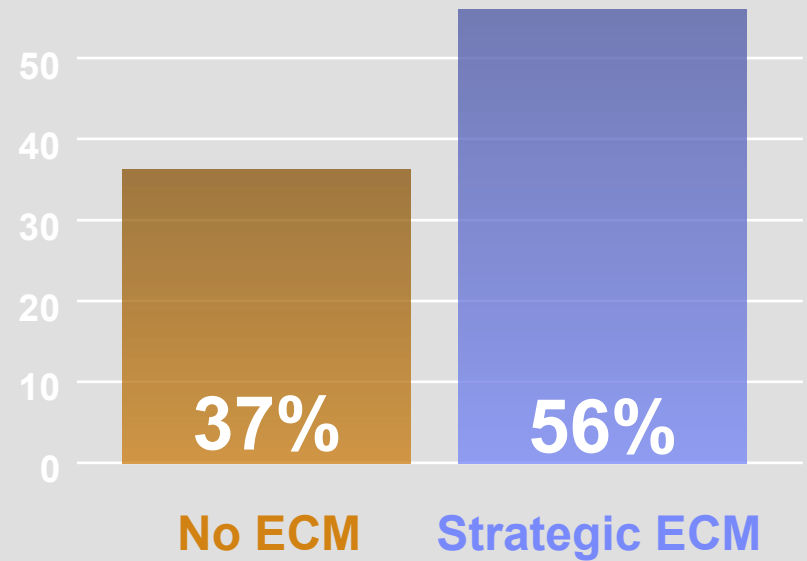(% "more effective" or "much more effective")

2.3 times more effective

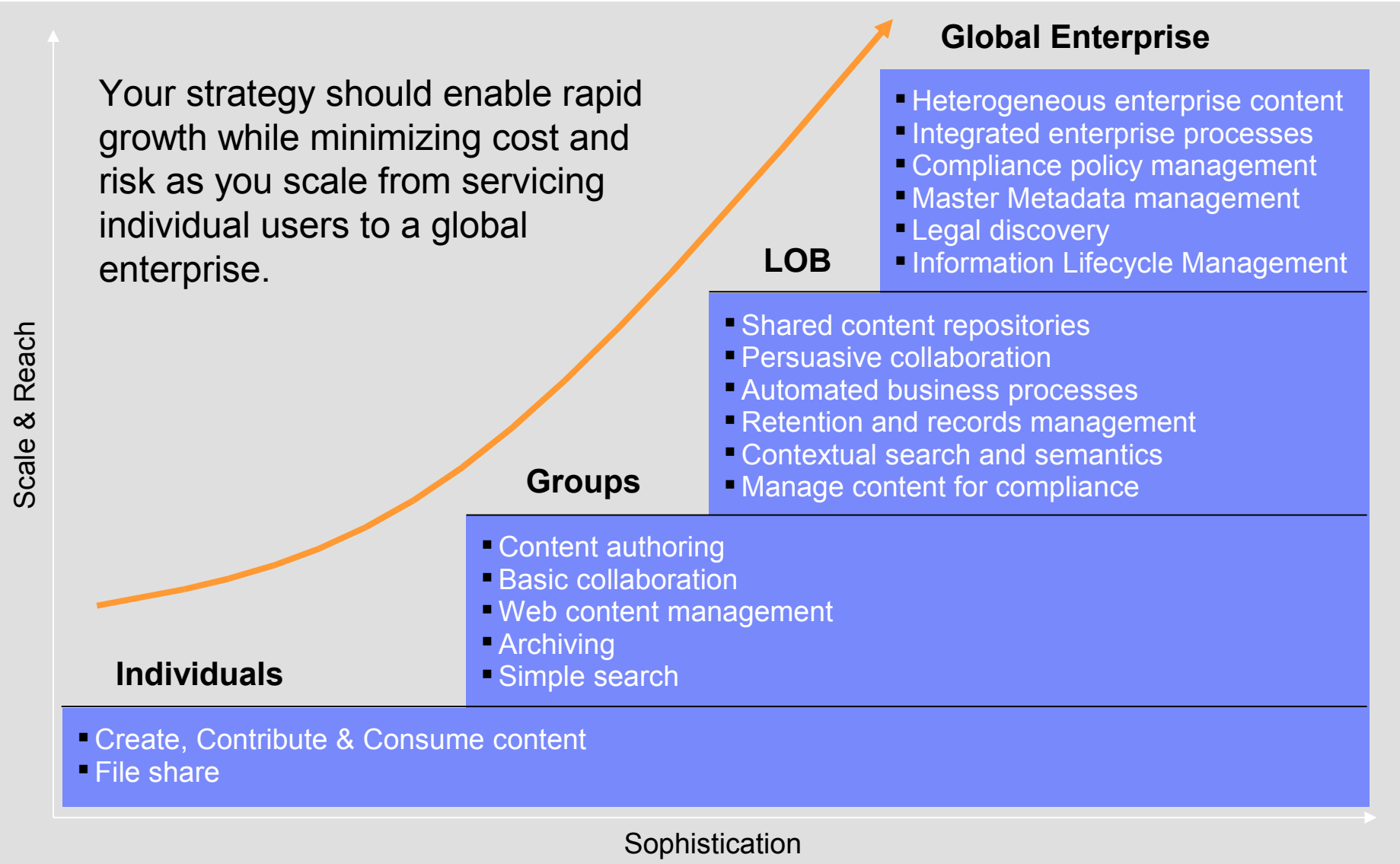|	No ECM	Strategic ECM
	19%	44%

Private Sector
Strategic ECM Users

How does the PROFITABILITY of your company compare to your peers?
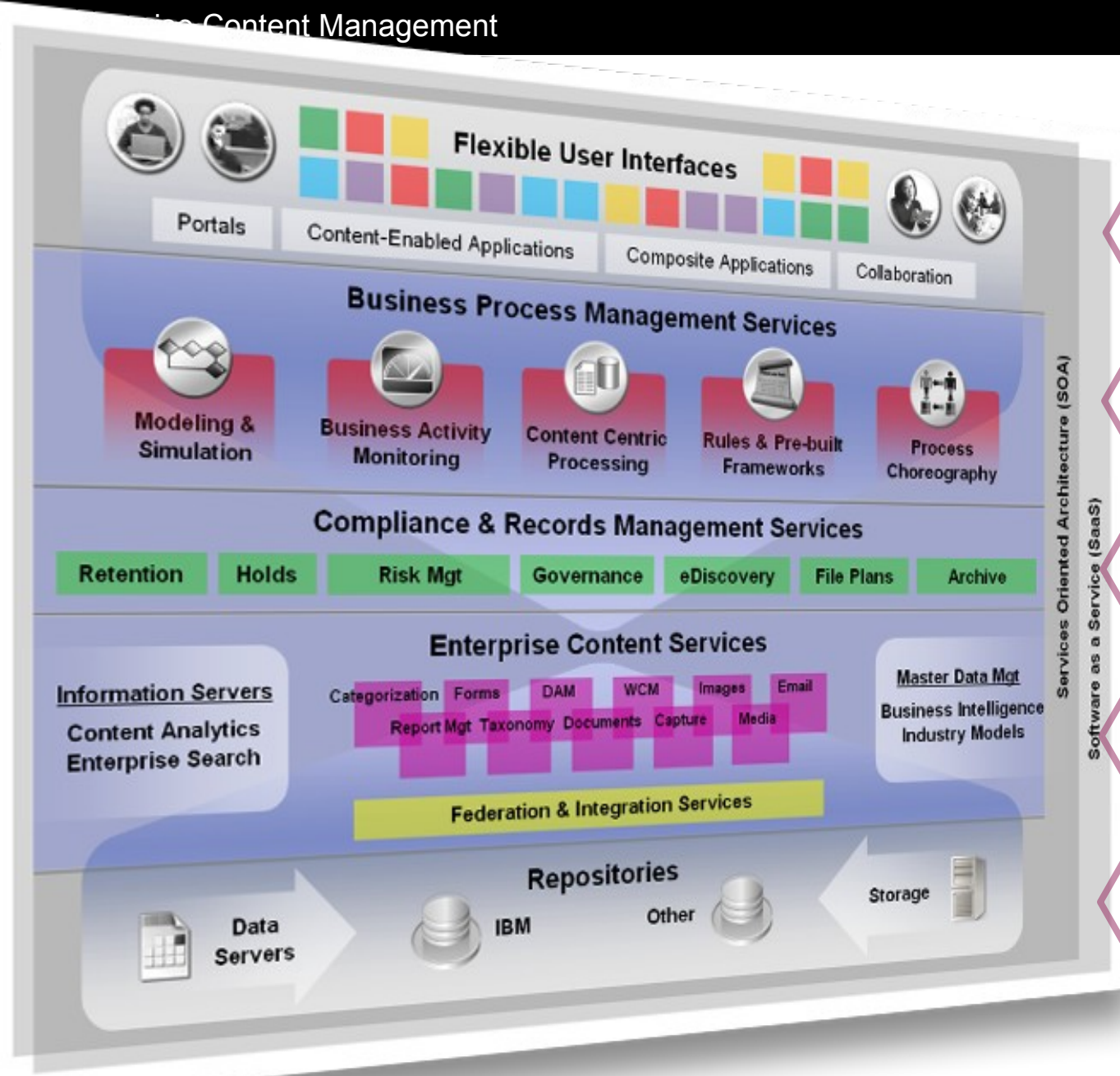(% "more profitable" or "much more profitable")

1.5 times more profitable

	No ECM	Strategic ECM
	37%	56%

Strategy for Leveraging Enterprise Content Management

Your strategy should enable rapid growth while minimizing cost and risk as you scale from servicing individual users to a global enterprise.

Scale & Reach

Global Enterprise

- Heterogeneous enterprise content
- Integrated enterprise processes
- Compliance policy management
- Master Metadata management
- Legal discovery
- Information Lifecycle Management

LOB

- Shared content repositories
- Persuasive collaboration
- Automated business processes
- Retention and records management
- Contextual search and semantics
- Manage content for compliance

Groups

- Content authoring
- Basic collaboration
- Web content management
- Archiving
- Simple search

Individuals

- Create, Contribute & Consume content
- File share

Sophistication

ECM Product Vision

Flexible User Interfaces

Portals · Content-Enabled Applications · Composite Applications · Collaboration

Business Process Management Services

Modeling & Simulation · Business Activity Monitoring · Content Centric Processing · Rules & Pre-built Frameworks · Process Choreography

Compliance & Records Management Services

Retention · Holds · Risk Mgt · Governance · eDiscovery · File Plans · Archive

Enterprise Content Services

Information Servers — Content Analytics, Enterprise Search

Categorization · Forms · DAM · WCM · Images · Email · Report Mgt · Taxonomy · Documents · Capture · Media

Master Data Mgt — Business Intelligence, Industry Models

Federation & Integration Services

Repositories

Data Servers · IBM · Other · Storage

Services Oriented Architecture (SOA)

Software as a Service (SaaS)

Pervasive Persuasive

Business Agility

Enterprise Compliance

Active Content

Content Anywhere

Scalable Enterprise Repositories

IBM Content Manager
Robust stand-alone content repository
Supports enterprise-class content applications

IBM Content Manager On Demand
Enterprise report management (COLD)
Ultra-scalable image and document storage

IBM FileNet Content Manager
Robust enterprise content platform
Integrated application and process engines

Repositories

IBM CM   **IBM CM On Demand**   **IBM FileNet**   **Other**

Viewpointe

Scalability for Volume Archiving

Challenges

- Establish highly scalable infrastructure for a dynamic image archiving solution

- Reduce costs of check archival (15-20% below in-house archive)

- Improve retention, extraction quality and speed

- Enable image exchange sooner

- Enable new revenue streams for participating banks

- Capacity of 20B checks/year (stored up to 7 years)

Solutions

- Data warehousing system

- Archives data at the primary and backup site

- Also supports archive retrieval

Business Benefits

- **Over 121B items and counting**
  - **1.2-1.3B items/month**
  - **50-80MM in 3-4 hour window each night**
  - **Expected savings of $.025 - .03 per image exchanged**
- **Enhanced customer service**
- **Lower operating costs**
- **Reduced fraud exposure**

"In Viewpointe's archive, the On Demand piece of content management is actually central to our operation. CM OnDemand is the glue that holds together the rest of the architecture."
**John G Lettko, Chief Executive Office, Viewpointe Archive Services**

Content Integration and Federation

- **Information Integrator** (IICE)
  - Adds 20+ cross-repository services
  - Can be deployed in combination with CFS to extend the P8 catalog reach
  - Development toolkit for custom connectors

- **Content Federation Services** (CFS)
  - A <u>unique</u> master catalog for managing Content-centric Process & Compliance across multiple content repositories
  - Includes content acquired from Notes and Quickr
  - Utilized as part of Many to One consolidation & standardization strategy
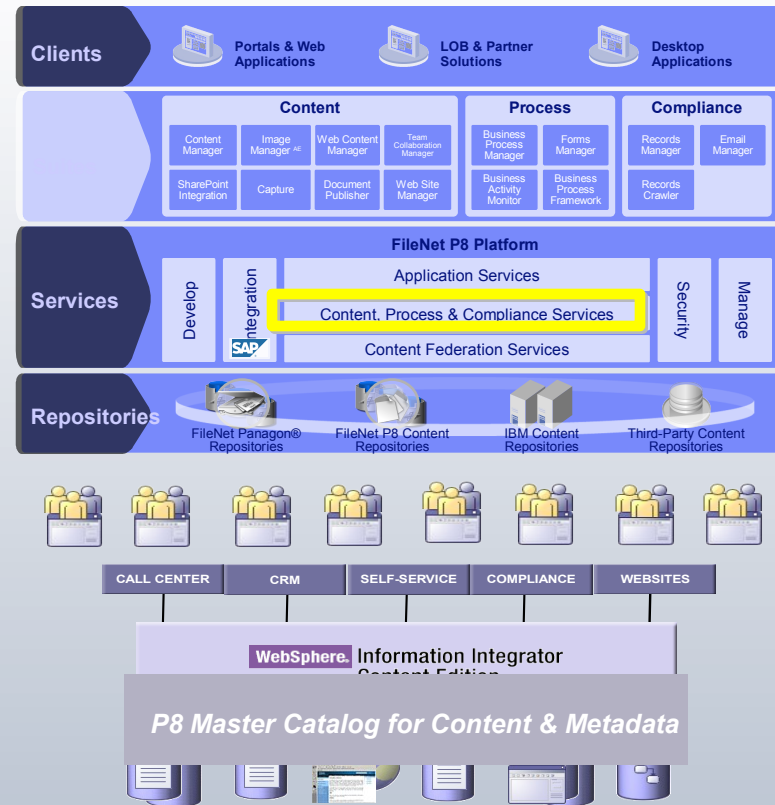
Streamlining Content Access

Challenges

- **Quickly assimilate new content repositories following mergers & acquisitions**
- **Provide single application for branch tellers to access customer documents**
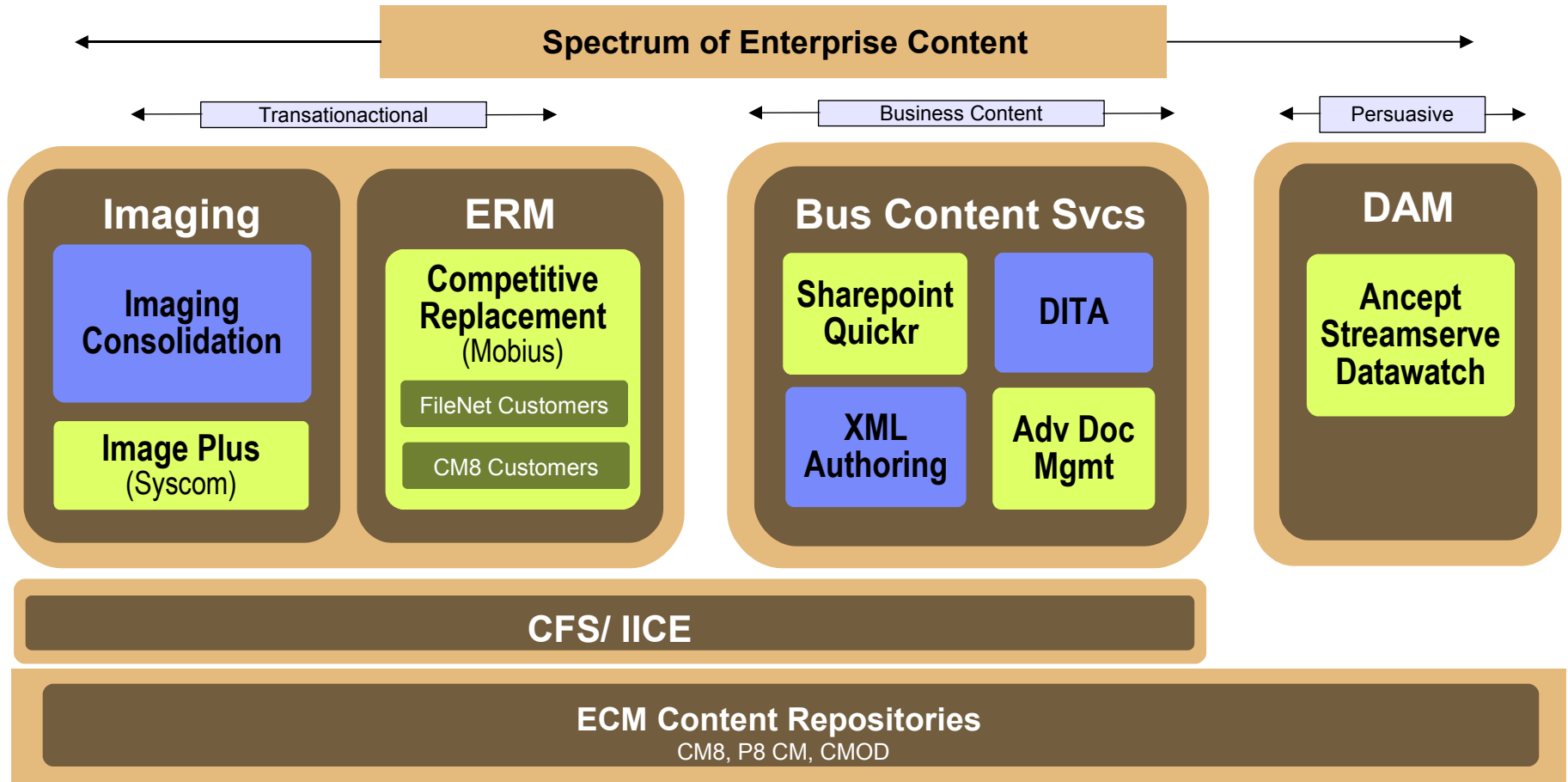- **Develop content applications that work with existing and new repositories**

Solutions

- Content from various acquired banks stored in existing FileNet, IBM and 3rd party repositories
- IBM Information Integrator Content Edition provides Common Access Services for customer service and loan processing apps
- Leverages FileNet BPM and WebSphere Process Server

Business Benefits

- Greater content accessibility resulted in 50-fold increase in number of retrievals

- $2.3 million savings within 2 years for a 64% return on initial investment

- Reduced cost of delivering applications to new departments - $1 million savings for each additional business unit implementing solution

- Immediate access to newly acquired systems

Enterprise Content Services

Spectrum of Enterprise Content

Transationactional

Business Content

Persuasive

Imaging

Imaging Consolidation

Image Plus (Syscom)

ERM

Competitive Replacement (Mobius)

FileNet Customers

CM8 Customers

Bus Content Svcs

Sharepoint Quickr

DITA

XML Authoring

Adv Doc Mgmt

DAM

Ancept Streamserve Datawatch

CFS/ IICE

ECM Content Repositories
CM8, P8 CM, CMOD

IBM Business Content Services

Overview:

> Growing content "islands"

> Office & collaboration content is out of control

> End users demand better user experiences and access from familiar business tools

Customer Benefits:

- Access & visibility to content anywhere
- Extends existing office & collaboration work space
- Single shared version of business content
- Consistent process & records management
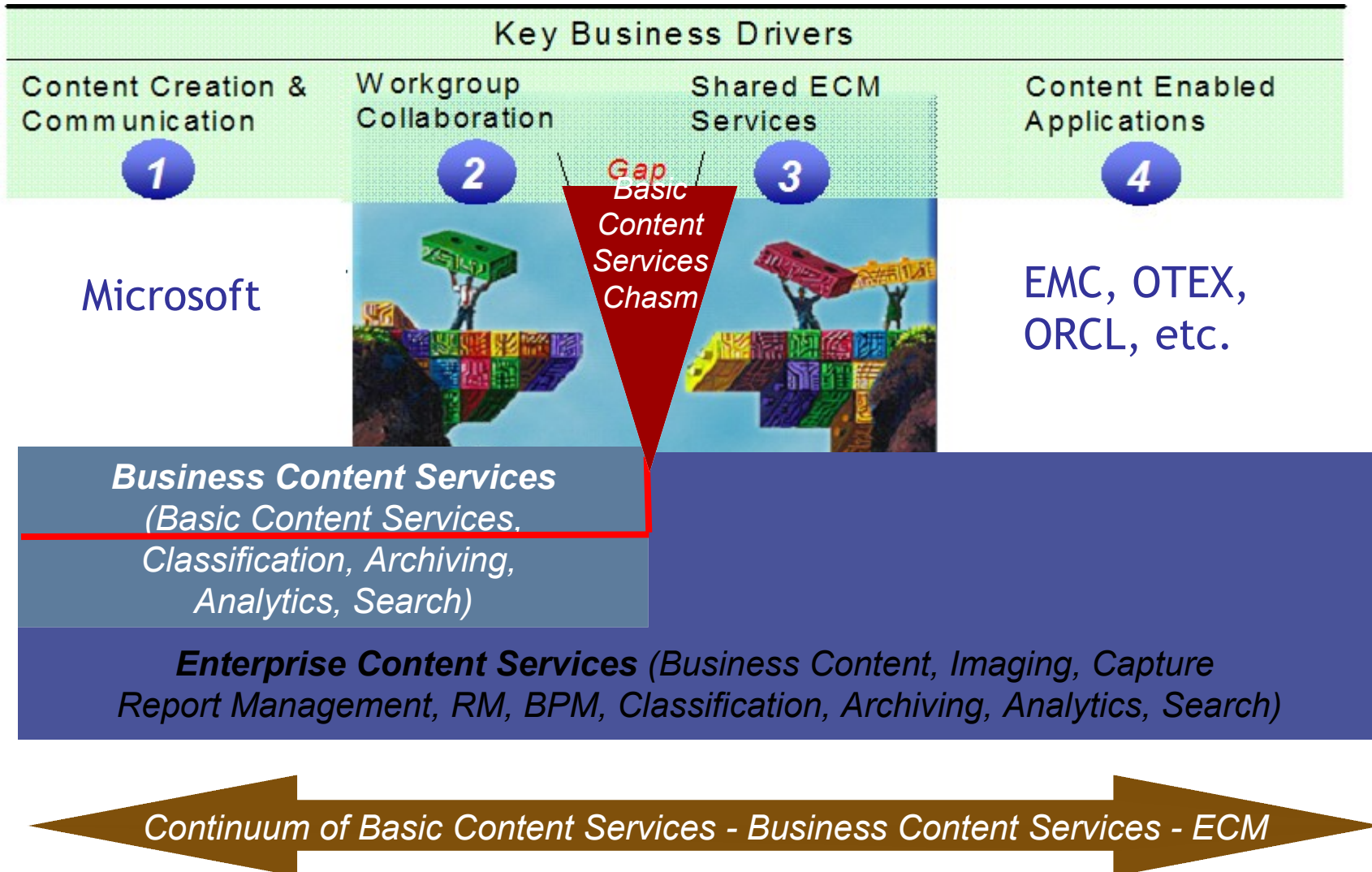
Microsoft Office **SharePoint**

Lotus Quickr

FileNet **P8**

CM8

Basic Content Services vs ECM Chasm
Addressed with ECM-based Business Content Services

Key Business Drivers

Content Creation & Communication	Workgroup Collaboration		Shared ECM Services	Content Enabled Applications
1	**2**	Gap	**3**	**4**

Basic Content Services Chasm

Microsoft

EMC, OTEX, ORCL, etc.

Business Content Services *(Basic Content Services, Classification, Archiving, Analytics, Search)*

Enterprise Content Services *(Business Content, Imaging, Capture Report Management, RM, BPM, Classification, Archiving, Analytics, Search)*

Continuum of Basic Content Services - Business Content Services - ECM

Leveraging Active Content to Optimize Processes

Over 200 Industry Solutions Leverage FileNet BPM Capabilities

Financial
Account Origination
Loan Processing
Customer Service
New Acct Opening
Derivatives/Capital Mktg.
Risk Mgmt.
Compliance…

Insurance
Claims Mgmt.
Customer Service
Compliance
Legal Case Mgmt.
Shared Services /
Enterprise Underwriting…

Government
Case Mgmt
Compliance
Gov't. Program Mgmt.
Prosecution /
Corrections Mgmt.
Customer Service…

Manufacturing
Accts Payable
Compliance
Contracts Mgmt.
Asset/Plant Lifecycle Mgmt.
Litigation Mgmt
Customer Service…

Retail
Accts Payable
Customer Service
Compliance
HR On-boarding
Contracts Mgmt.
Litigation Mgmt….

Healthcare
Case Mgmt.
Customer Service
Compliance
New Acct /
Customer On-Boarding…

Telecommunications
Customer Service
Customer Billing
Accts Payable
Compliance
HR On-boarding
Contracts Mgmt…

Energy & Utilities
Asset/Plant Lifecycle Mgmt.
Compliance
Rate Case
Aging Workforce
Contracts Mgmt.
Accts Payable…

Transportation
Bills of Lading/Manifests
Customer Service
Contracts Mgmt
Accts Payable
Claims/Legal Case Mgmt...

"Agile ECM" in P8 4.5

Realize time to value by accelerating the delivery of ECM and BPM solutions

Why: offering objective	What: offering feature
Enable better collaboration between business & IT users to deliver solutions	Provide "Document and Diagram Mode" for business analysts
Decrease cost & effort of developing ECM and BPM solutions	Leverage Web 2.0 Mashups & widgets for faster application layout
Minimize steps and tools required to create and update solutions	Consolidate tools & add configura-tion features in Process Designer

Provide end-to-end ECM and BPM solutions across application development stages for multiple roles

Business User   Business Analyst   IT Developer

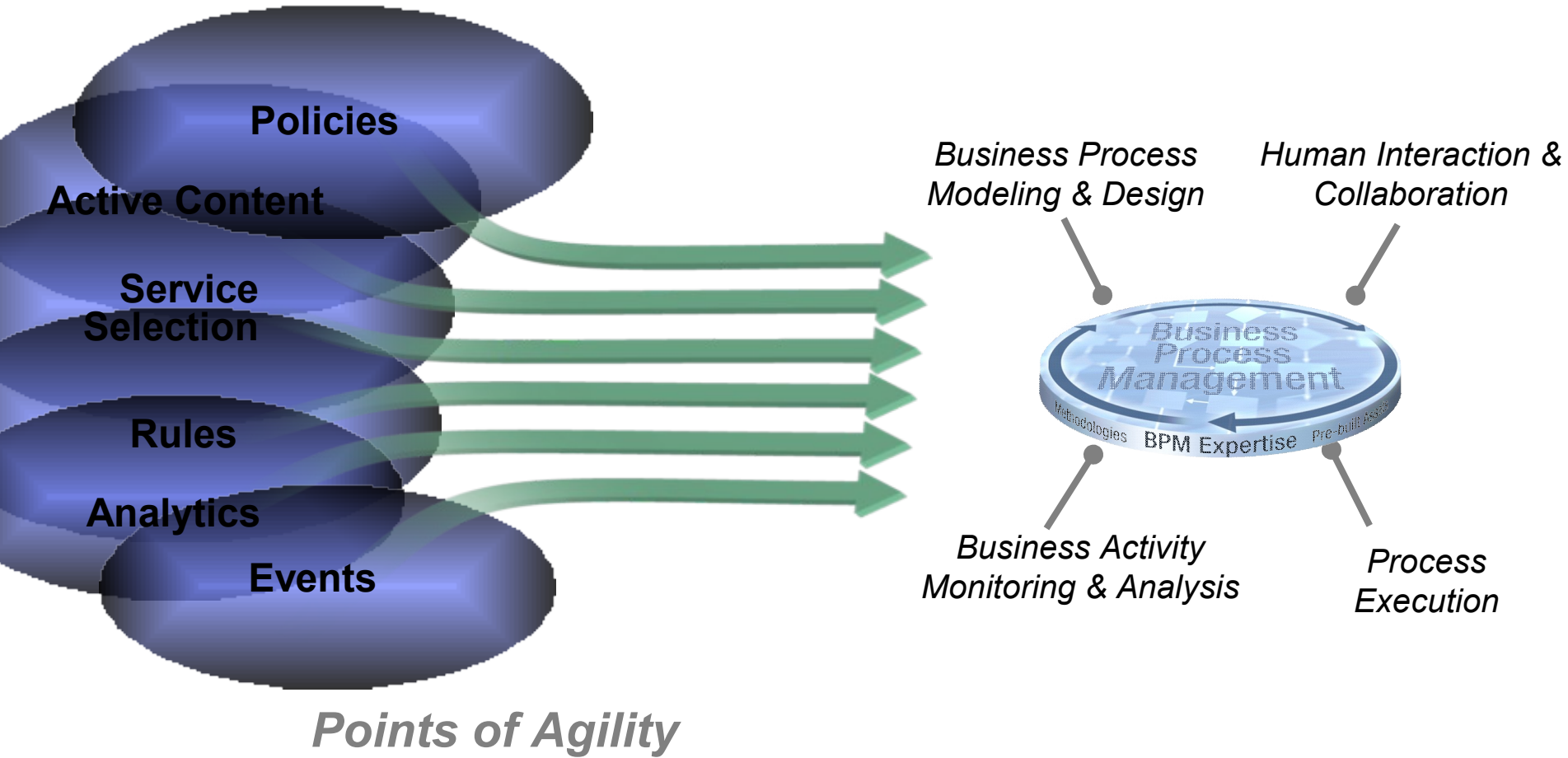| Diagram & Document	Review & Refine	Complete & Validate	Test & Deploy
Diagram	Review Needs	Configure	Test
Document Steps	Define Roles	Validate	Code
Annotate Diagram	Define In-baskets	Simulate	Deploy

IBM

IBM's BPM Suite Provides a Comprehensive Set of Capabilities For Continuous Process Optimization

Policies

Active Content

Service Selection

Rules

Analytics

Events

Points of Agility

Business Process Modeling & Design

Human Interaction & Collaboration

Business Process Management

Methodologies   BPM Expertise   Pre-built Assets

Business Activity Monitoring & Analysis
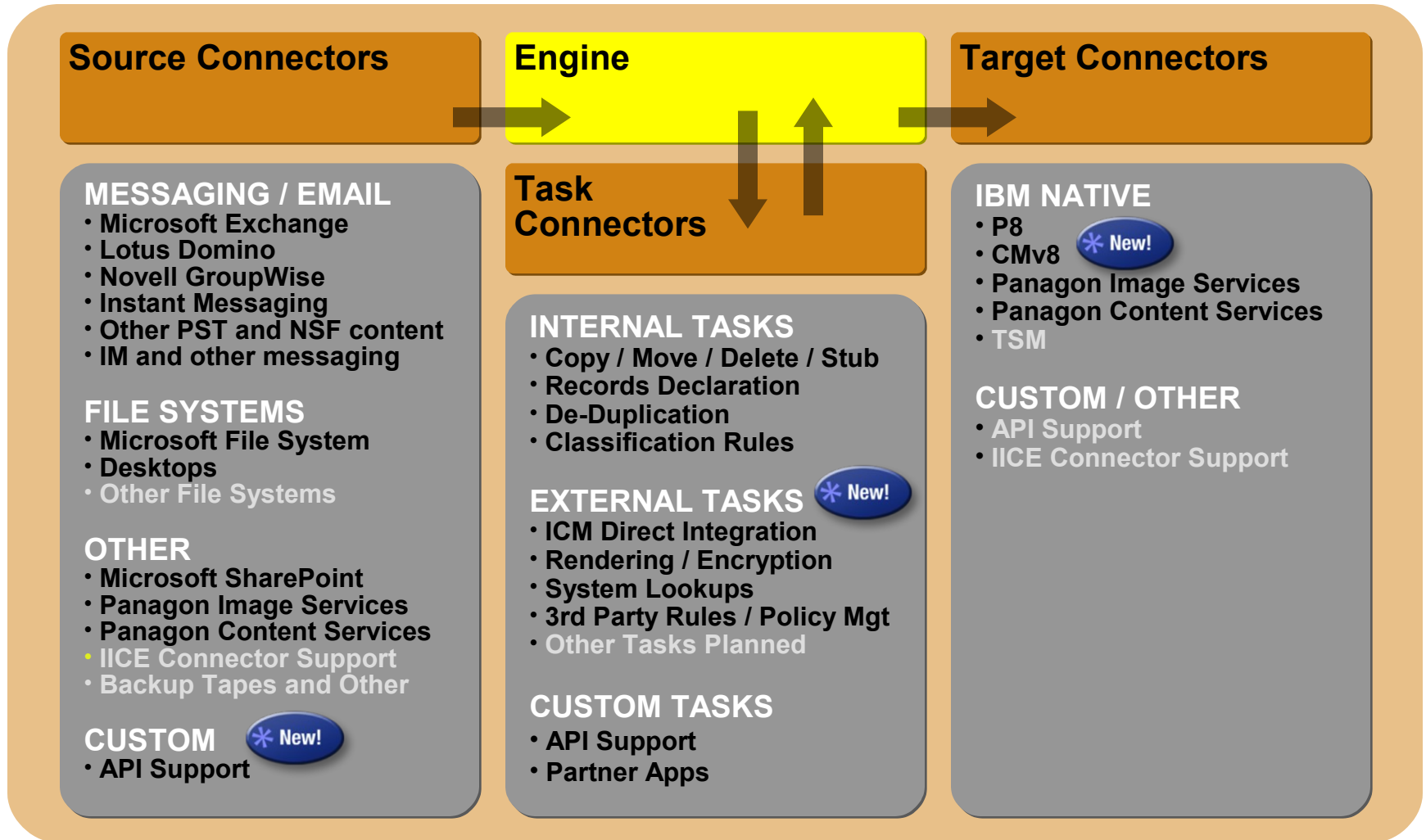
Process Execution

Enterprise Compliance Vision
Integrated Platform Addressing all Compliance Issues

September 2008
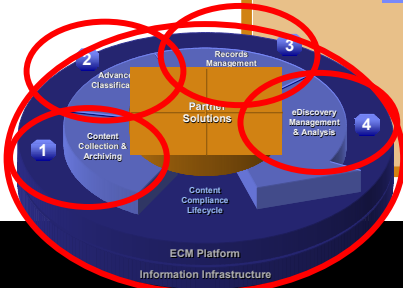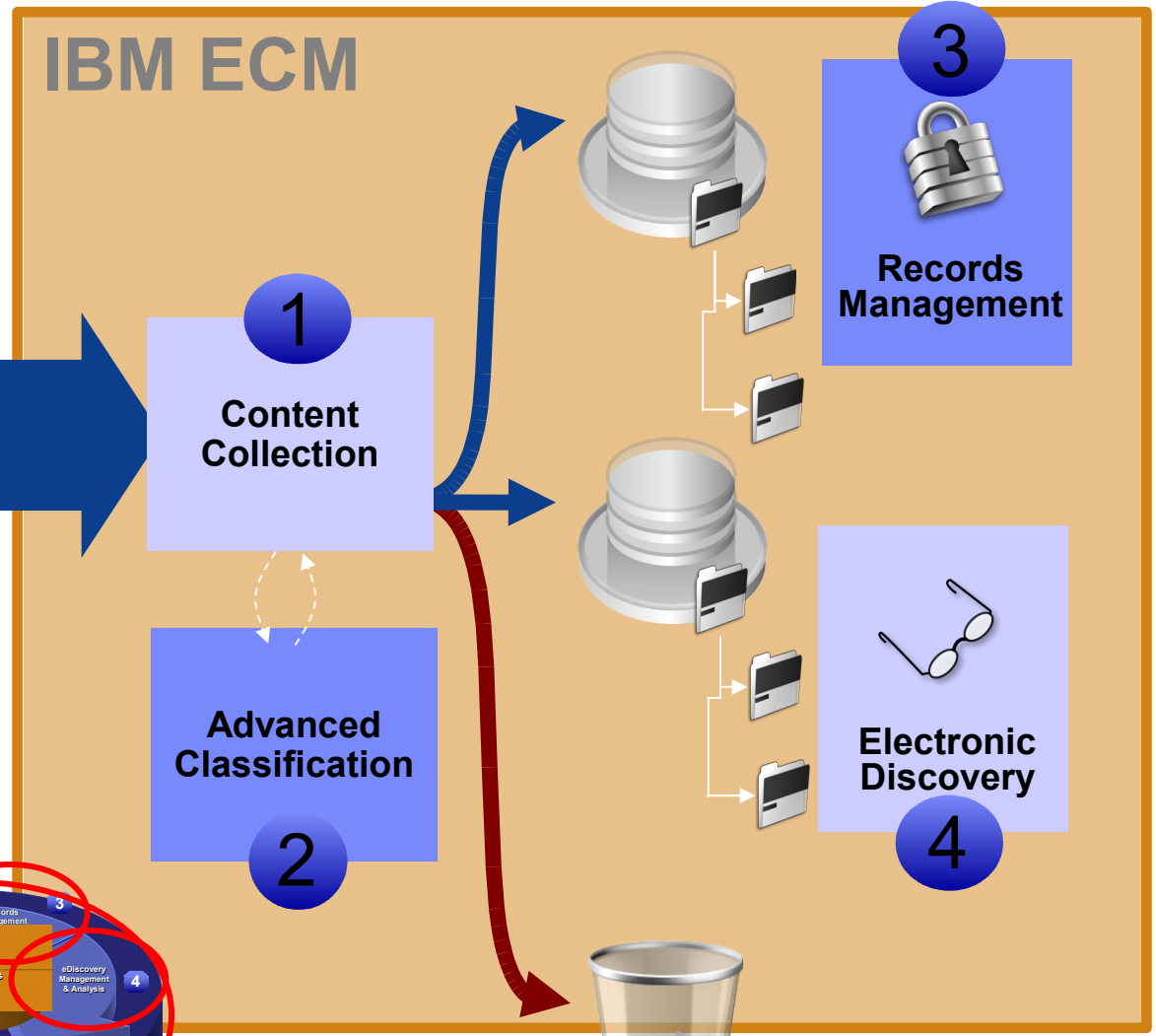
IBM Content Collection & Archiving Architecture
Modular and Extensible

Source Connectors

MESSAGING / EMAIL
- **Microsoft Exchange**
- **Lotus Domino**
- **Novell GroupWise**
- **Instant Messaging**
- **Other PST and NSF content**
- **IM and other messaging**

FILE SYSTEMS
- **Microsoft File System**
- **Desktops**
- Other File Systems

OTHER
- **Microsoft SharePoint**
- **Panagon Image Services**
- **Panagon Content Services**
- IICE Connector Support
- Backup Tapes and Other

CUSTOM *New!*
- **API Support**

Engine

Task Connectors

INTERNAL TASKS
- **Copy / Move / Delete / Stub**
- **Records Declaration**
- **De-Duplication**
- **Classification Rules**

EXTERNAL TASKS *New!*
- **ICM Direct Integration**
- **Rendering / Encryption**
- **System Lookups**
- **3rd Party Rules / Policy Mgt**
- Other Tasks Planned

CUSTOM TASKS
- **API Support**
- **Partner Apps**

Target Connectors

IBM NATIVE
- **P8**
- **CMv8** *New!*
- **Panagon Image Services**
- **Panagon Content Services**
- TSM

CUSTOM / OTHER
- API Support
- IICE Connector Support

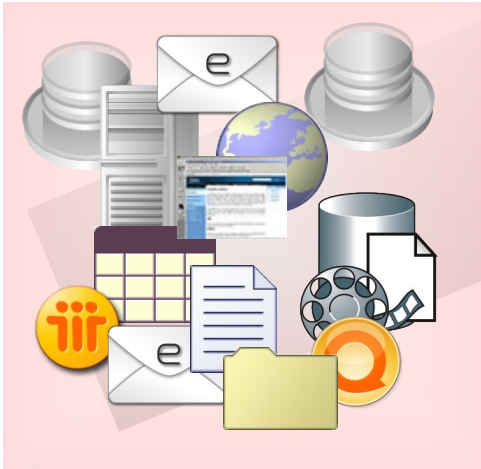# The IBM eDiscovery Best Practices Solution
eDiscovery Manager

* IBM eDiscovery Manager **– the cornerstone of eDiscovery response**

* **Tool for authorized IT users to help respond to discovery requests from legal**

* **Replaces and extends former eMail Search product; now runs on P8 and CM8**

* **Provides key functions for IT response to eDiscovery:**

  – Creating cases, user profiles, assigning users to cases

  – Managing ESI in place for multiple cases

  – Searching and culling case relevant ESI

  – Holding and locking down the result set automatically

  – Preview for relevancy

  – Built-in change audit tracking, reporting authenticity and chain of custody

  – Exporting result set in native format for detailed attorney review

* **Built on and integrated with ECM platform to leverage proactive ESI management**

September 2008   © 2008 IBM Corporation
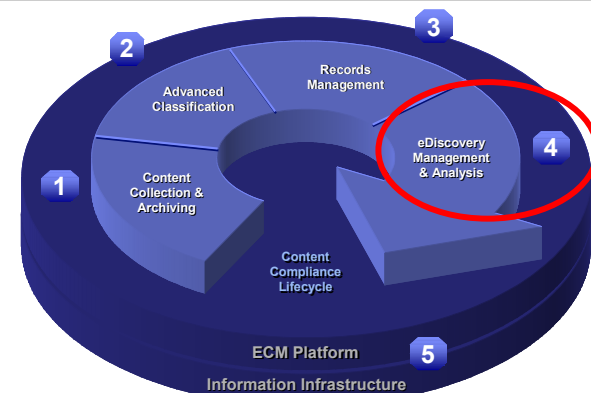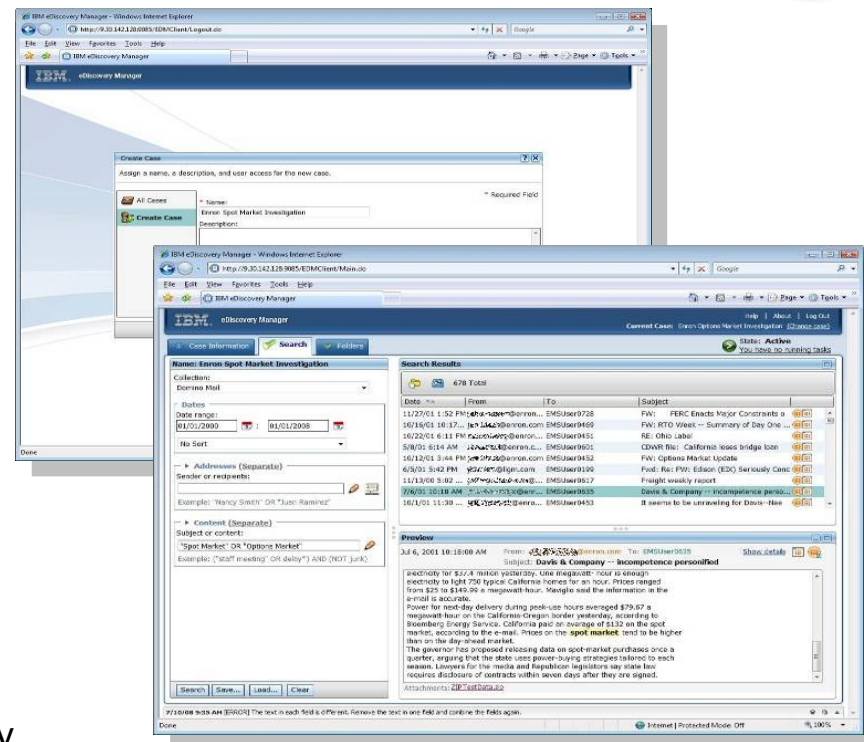
ECM Discovery Portfolio
Driving visibility and business optimization from enterprise content

Content Classification
IBM Classification Module

New!

New Visibility & Insight

Content Access
OmniFind Search

Analyzed Content
visibility & business insight

Automate Daily Decisions

Organized Content
in IBM ECM repositories

Content Analytics
IBM Content Analyzer

New!

Disorganized or Lost Content

CLOUDMARK

Improving service while reducing costs with IBM Classification Module

Challenge

- **Reduce support center workload and costs while improving customer service**

Solutions

- IBM Classification Module helping to classify and auto-respond to customer e-mails and support requests

Business Benefits

- 100% payback in less than three months
- 400% annualized return on investment
- 15% increase in customer retention
- 50% reduction in number of e-mails received
- 96% faster solution deployment than with competitors' products
- Annual savings of hundreds of thousands of dollars

"Without the IBM Classification Module, we would have had to double our team to handle our growing customer base, which would have cost hundreds of thousands of dollars each year."

Kris Politopoulos,

Manager, Cloudmark Customer Support

Connecting the ECM Community

Ken Bisconti
Vice President, ECM Products and Strategy
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