

# Impact2012

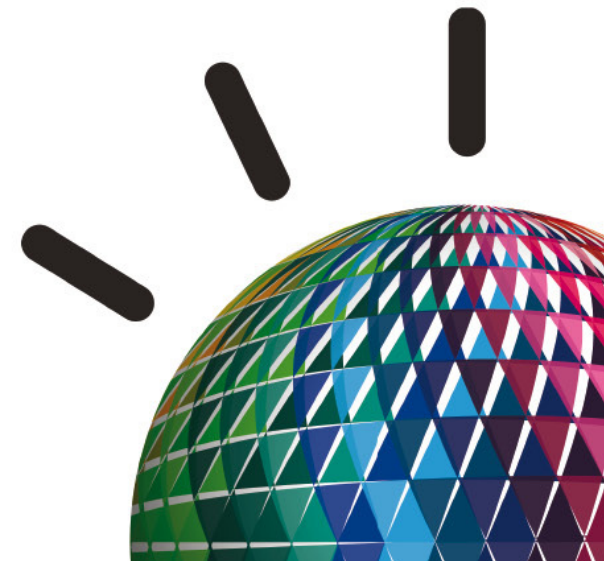
L'arte di rendere il business  
più flessibile, agile e dinamico che mai.

Roma, 7 giugno 2012



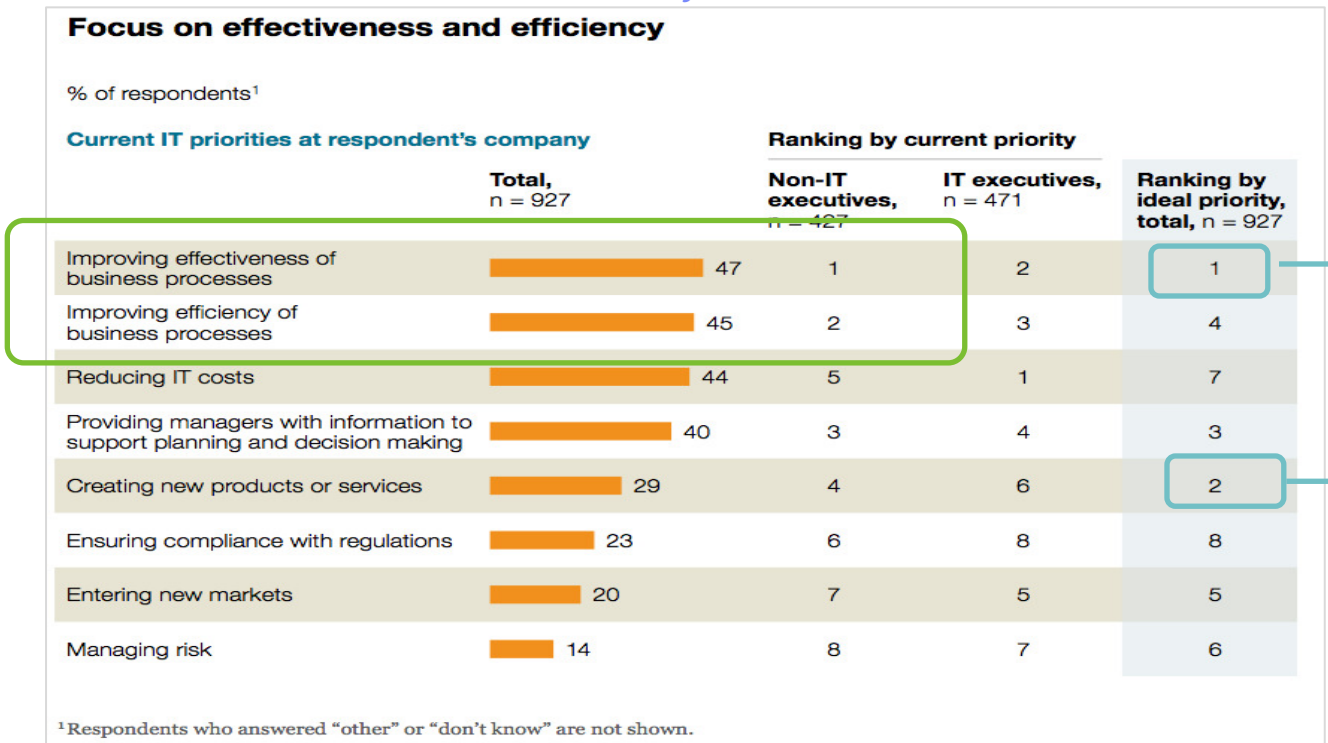
**Robert Golladay**  
BPM Leader, IBM Europe

**Antonio Lopriore**  
BPM Tiger Team, IBM Europe





### McKinsey Global Technology Survey: Process is Still King *Process effectiveness and efficiency ranked #1 and 2 overall*



Even in strategic intent, respondents ranked process above creating new products and services

McKinsey 2011 Technology Survey of 927 IT and non-IT Executives, December 2011

[https://www.mckinseyquarterly.com/High\\_Tech/Strategy\\_Analysis/A\\_rising\\_role\\_for\\_IT\\_McKinsey\\_Global\\_Survey\\_results\\_2900](https://www.mckinseyquarterly.com/High_Tech/Strategy_Analysis/A_rising_role_for_IT_McKinsey_Global_Survey_results_2900)



## Why do Customers Buy BPM?

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IT



### IT Automation and Optimisation

- Time to value
- Total cost of ownership
- Prebuilt assets
- Reuse
- IT standards



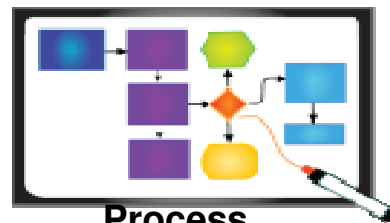
**System  
Agility**

LoB



### Process Automation and Optimisation

- Automate a manual process
- Visibility and ROI
- Quicker, better, cheaper
- Compliance
- Target operating model



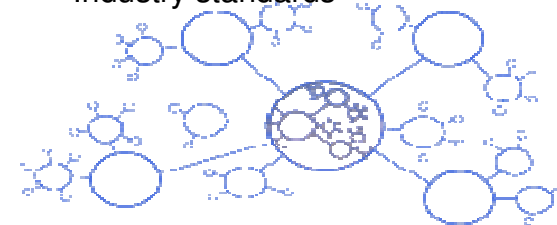
**Process  
Agility**

C-Level



### Enterprise Performance Optimisation

- Innovation
- Go to market
- Customer centricity
- Product flexibility
- Industry standards



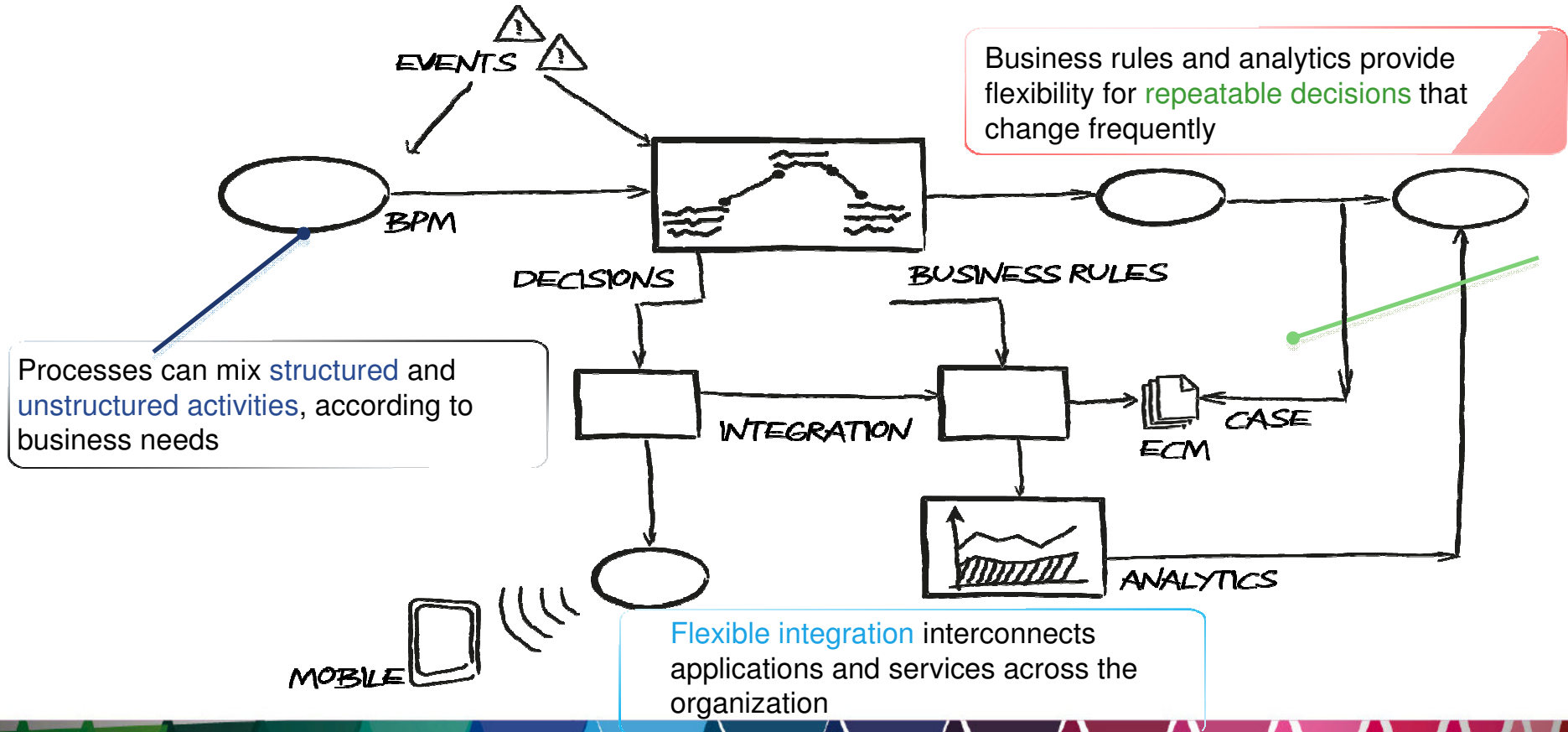
**Business  
Agility**



# Building Blocks to Achieve Process Innovation

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Empowering business and IT users to easily manage change





## Banco Espirito Santo (BES) Business Innovation via BPM

### BPM Approach at BES

- **Business processes are managed by business people**
- **Business is best suited to understand customer needs and must be empowered to make improvements**
- **Improvements can be done without involving IT / IT staff**

*BPM as the bridge between Business and IT*



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**BPM is about bringing the power of technology to business staff**

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- **Business processes are supported by several applications requiring service and data integration**
- **Processes span from repeatable, highly automated and very complex, to very simple interactions, like Excel spreadsheets sent over email**



## Banco Espirito Santo (BES)

# BES Processes in numbers

### Overview

	Existing	Growth	Characteristics
Generic	> 400	30 per quarter	
Procedural	> 15	10 per year	50 - 100 activities
Integrated		1 -2 per year	over 200 activities

	time to deploy	Cost
Generic	5 days	1 FTE
Procedural	~ 3 months	15K - 250K
Integrated	6 months and over, considering the phases	100K and over

Integrated processes are developed in Iterations and phases

### Examples of Processes

#### Integrated

- Mortgage
- Consumer Loans
- Credit Cards
- Corporate Credit
- Account Opening
- Claims
- Savings/deposits

#### Procedural (in Spain and Portugal)

- Garantias
- Descontos
- Comercio Exterior
- Polizas de Credito
- Innovation
- Leasing
- Savings/deposits



# Why IBM for Process Innovation?

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## Unparalleled Expertise and Investment

- Expert consulting and implementation services for **fast realization** of business value
- Industry expertise to **customize solutions** for your specific industry

## Largest Customer Base

- **#1** in Business Process Management (BPM) market share according to all leading analysts
- **#1** in Business Rule Management Systems (BRMS) market share according to all leading analysts



## Strongest Ecosystem and Partner Network

- **800+** Business Partners authorized and certified to support customers
- Strongest global ecosystem including major global and regional system integrators skilled to provide **comprehensive solutions**



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# BPM at Scale

*requires*

**VISIBILITY**

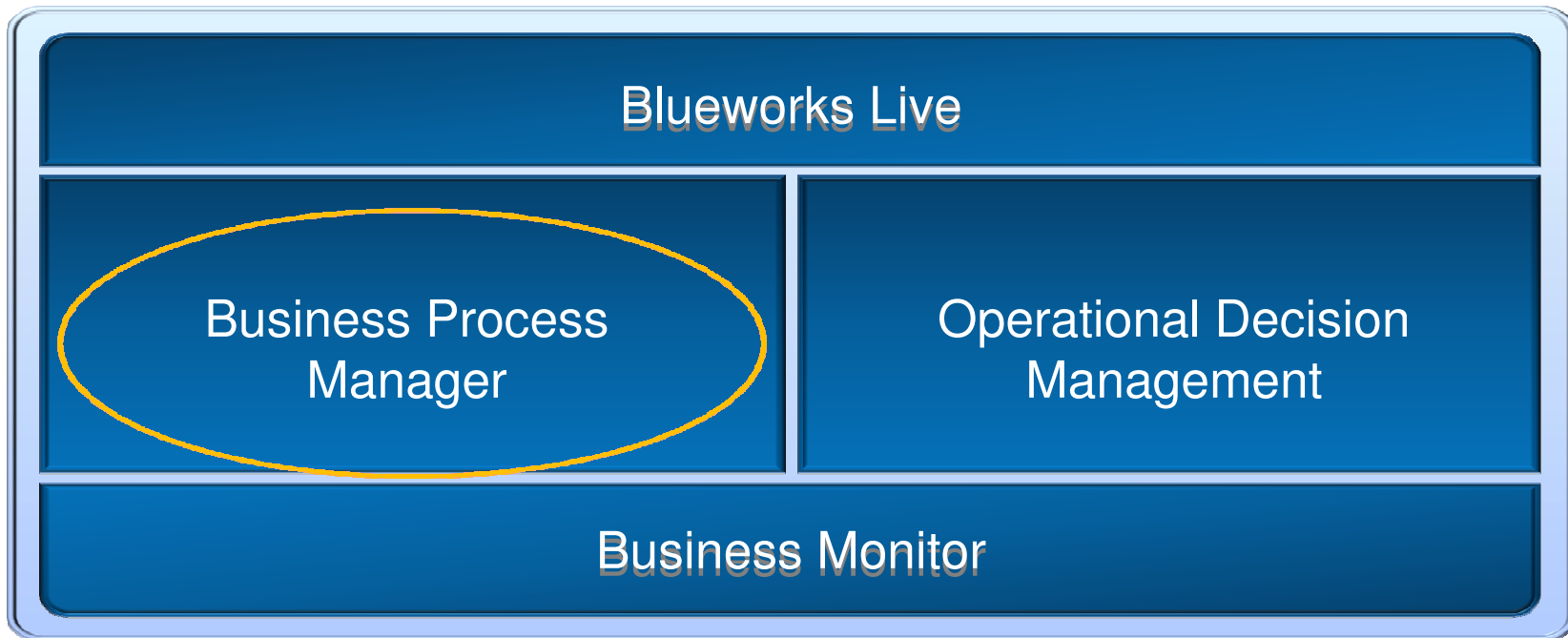
**COLLABORATION**

**GOVERNANCE**





# IBM Business Process Management Suite



Work together to deliver effective solutions for business operation improvement





# What's New in IBM BPM v8?

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## Social Collaboration



## Mobile Access



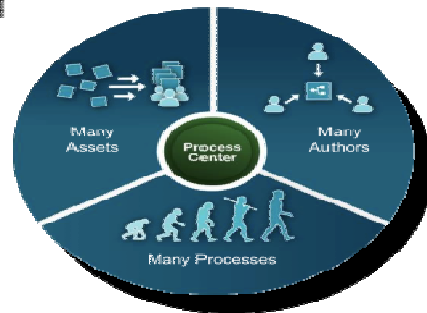
## Content Access



z/OS



## Enhanced Governance





# Completely Revamped Process Portal

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Change the way people work with tasks by making it social and accessible

**My Tasks**

Overdue (3)

- Initiate Credit Check** (Due: May 11, 2011) - Underwriter Group
- Initiate Credit Check** (Due: May 12, 2011) - Underwriter Group
- Approve Home Loan** (Due: May 12, 2011) - Underwriter group

The Jones family has applied for a \$350,000 home loan to help pay for a house in Brantly Park. The Jones are looking to sign contracts and move in by July 1, 2011.

Loan Amount: \$350,000   Credit Score: 810   Annual Household Income: \$180,000

Approve   Reject

At Risk (2)

- Answer Help Request from John Henson** (Due: May 15, 2011) - Underwriter Group
- Complete Loan Rejection Form** (Due: May 16, 2011) - Underwriter Group

Due Today (4)

Launch   Favorites   @Mentions

- Card Transaction Authorization
- Corporate Vendor Payments
- Credit Score Application
- Fees and Charges
- Home Loan Application
- Initiate Mortgage Refinancing
- Interactive Bill Pay
- Loan Process
- Manage Card Request
- Manage Contact Preferences
- Maximize Revenue Process
- Mortgage Refinancing
- New Account Opening
- Stop Payment
- Transaction Fraud Detection
- Travel Approval for Cross-Continental Sales Visits

Simplify user interactions by allowing "in-line" task completion

work >

# Complete Loan Rejection Form

Due: **May 15, 2011**

Name:	<input type="text"/>		Sex:	<input type="radio"/> Male <input type="radio"/> Female		
Date of birth:	<input type="text"/> / <input type="text"/> / <input type="text"/>		Reason for credit check:	<input type="text"/>		
Primary account number:	<input type="text"/>		Secondary account number:	<input type="text"/>		
Group number:	<input type="text"/>		Relationship:	<input type="radio"/> Married <input type="radio"/> Single <input type="radio"/> Divorced/Widowed		
First reason for rejection:	<input type="text"/>		Second reason for rejection:	<input type="text"/>		
Third reason for rejection:	<input type="text"/>		Credit score:	<input type="text"/>	Number of credit cards:	<input type="text"/>
Credit score source:	<input type="text"/>		Rejection date:	<input type="text"/> / <input type="text"/> / <input type="text"/>		

**Complete**

**Connect to other pre-defined & discovered Experts to get help with your task**






Details Stream **Experts**

### Recommended Experts (7)

-  **Benjamin Short**  
@Mention | Collaborate | Chat
-  **Craig Moser**  
@Mention | Collaborate
-  **David Van**  
@Mention | Collaborate | Chat
-  **Elizabeth Jensen**  
@Mention | Collaborate | Chat
-  **Cliff Vars**  
@Mention | Collaborate

[+ Show All](#)

### Experts Recommended by the Subject Matter Experts Group (19)

-  **Benjamin Short**  
@Mention | Collaborate | Chat
-  **Craig Moser**  
@Mention | Collaborate
-  **Chris Walk**  
@Mention | Collaborate
-  **Mandy Peloski**  
@Mention | Collaborate | Chat
-  **Lauren Shupp**  
@Mention | Collaborate

[+ Show All](#)





# In-Task Collaboration

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Jane and Wendy can work together in the shared Coach

Wendy is in "view" mode and can see Jane's edits real time!



Wendy



Jane

Jane can make Wendy an editor

Jane is the editor... Wendy can see her changes as she types

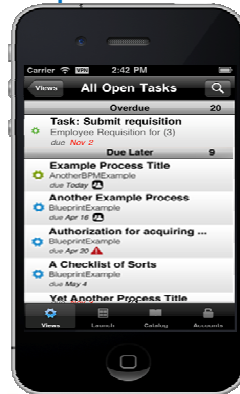
The screenshot displays two overlapping instances of the 'Do the test' task in the IBM Work environment. The top instance is in 'View Mode' and shows a collaborator 'Jane'. The bottom instance is in 'Edit Mode' and shows a collaborator 'Wendy'. A red arrow points from the bottom instance towards the footer.



## IBM BPM v8 – Mobile Access

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- **Native iOS mobile app promotes broader adoption and easy access to IBM BPM tasks**
- **Consolidates all your process work into a unified view**
- **Extensive REST APIs enable customized integration of IBM BPM content into your mobile experiences**



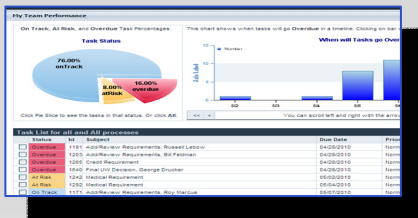
Improve productivity among business stakeholders through dynamic communication of activities – reduce ‘back channel’ emails, messages, etc.



# Situational awareness with process monitoring & analytics

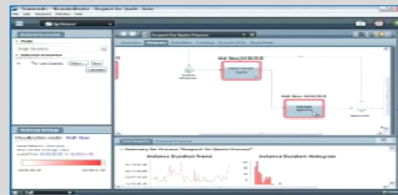
## Performance Data Warehouse Opening New Frontiers

### Real-time Scoreboards



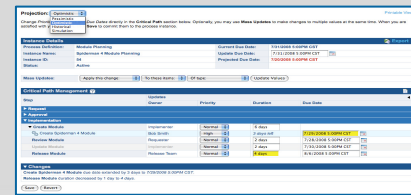
Provides visibility into work-in-progress & the ability to take corrective action when necessary

### Heat Map Overlays



Detects bottlenecks and performance thresholds and displays them visually

### Critical Path Management



Selection of projected path; visibility into details of each activity in the process

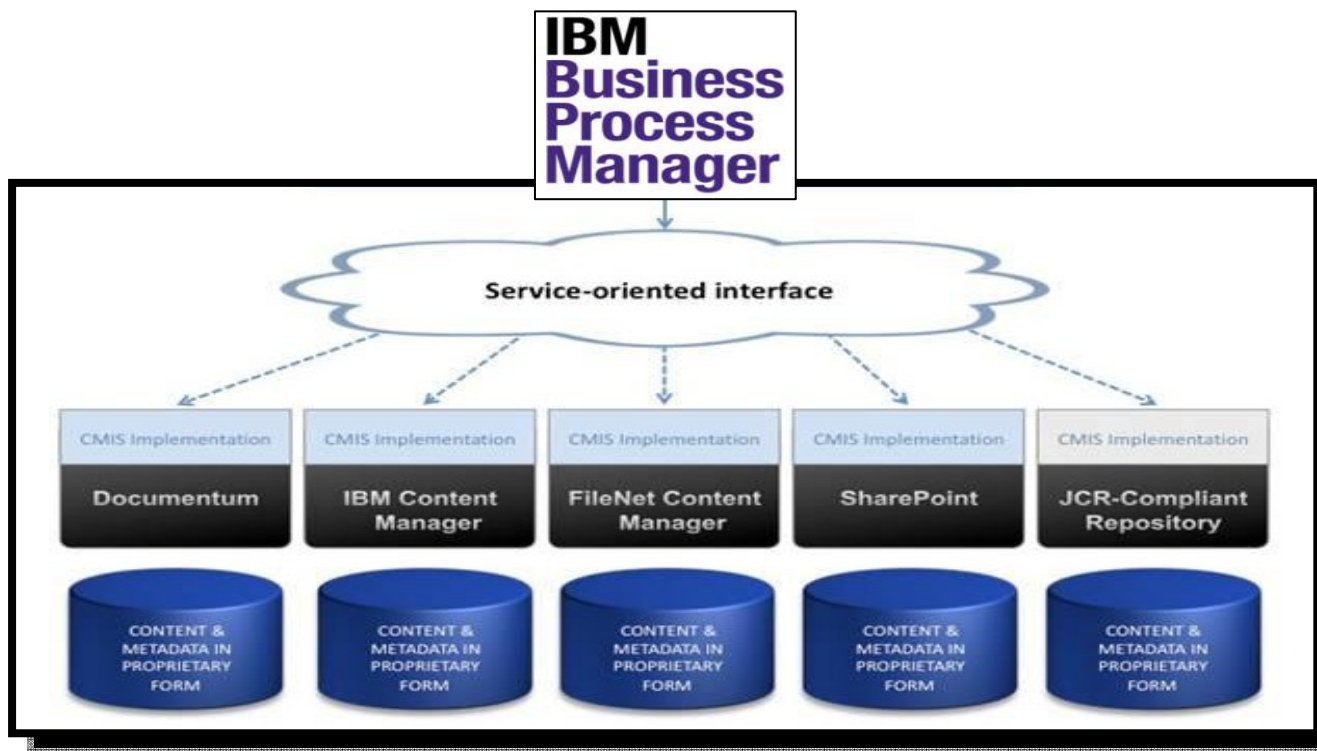
### Social Analytics



Collaborate directly on work with other participants and experts for simpler task completion



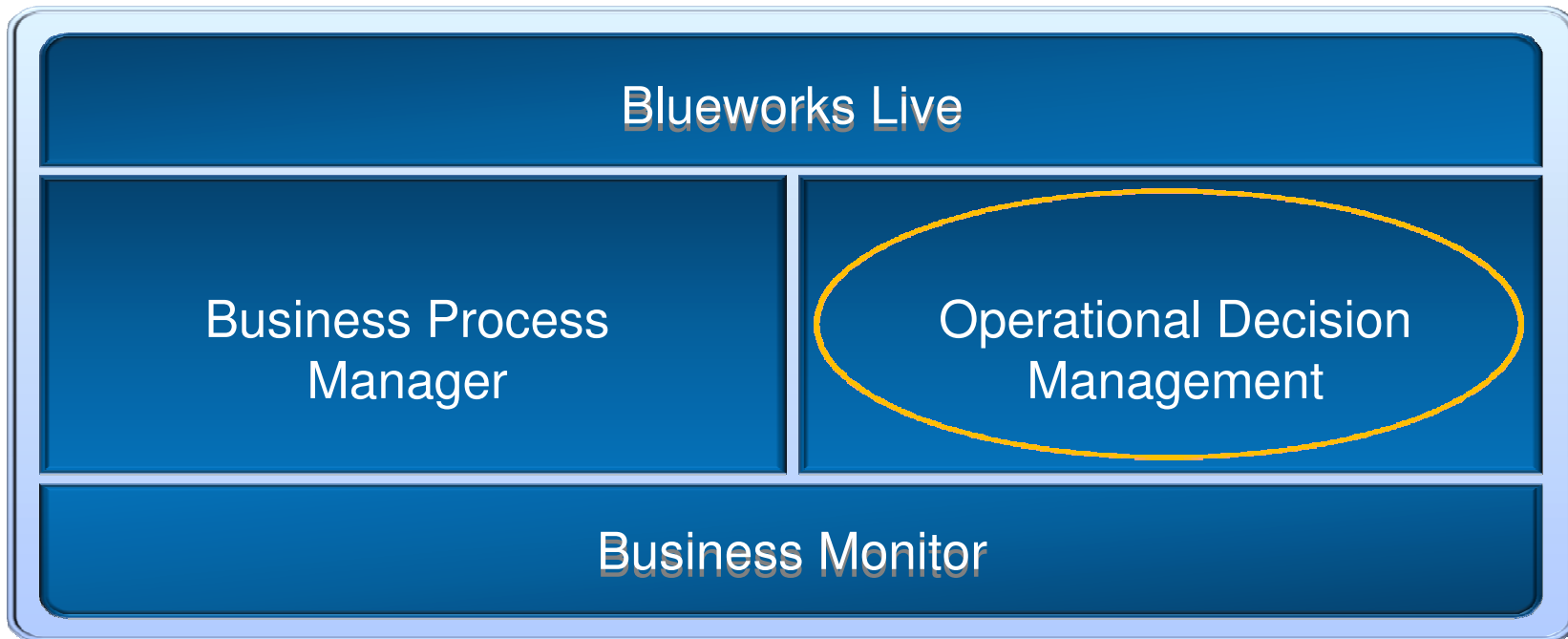
New in IBM BPM v8 – Content Management Interoperability Services (CMIS)  
*Any CMIS compliant ECM systems can be integrated with IBM BPM*



- FileNet V5
- IBM CM8
- Documentum
- SharePoint
- Alfresco
- OpenText
- Vignette
- ... and more!



# IBM Business Process Management Suite



Work together to deliver effective solutions for business operation improvement



# Visibility

Achieve clearer line-of-sight to business operations



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The screenshot shows the IBM Decision Center interface. At the top, there's a navigation bar with 'HOME', 'LIBRARY', and 'IBM ODM'. The user 'Nicolas Carre' is logged in. The main content area is titled 'Decision Center' and shows search results for 'discount'. On the left, there are filters for 'Type' (Action Rules: 8, Decision Tables: 2), 'Status' (Deployable: 7, New: 3), 'Found in' (Content: 10, Properties: 10), and 'Last edited' (Oldest to Today). The search results list several items:

- Airbag Discount**: Last edited by rtsAdmin on 3/23/12. Folder: Pricing/Coverage Pricing/Discounts/Liability/NJ. Preconditions definitions set 'one\_airbag\_discount' to \$ 3 ; Header Discount Cell Dual + Side Airbag Discount Cell one\_airbag\_discount \* 2 Cell one\_airbag\_discount \* 3
- Airbag Discount**: Last edited by rtsAdmin on 3/23/12. Folder: Pricing/Coverage Pricing/Discounts/Liability. Preconditions definitions set 'one\_airbag\_discount' to \$ 2 ; Header Discount Cell Dual + Side Airbag Discount Cell one\_airbag\_discount \* 2 Cell one\_airbag\_discount \* 3
- Anti-lock Brakes Discount**: Last edited by rtsAdmin on 3/23/12. Folder: Pricing/Coverage Pricing/Discounts/Collision. if 'the vehicle' has anti lock brakes then add a 2 % discount to 'the coverage quote', reason: "Anti-lock Brakes Discount" ;
- Anti-lock Brakes Discount for NJ**: Last edited by rtsAdmin on 3/23/12. Folder: Pricing/Coverage Pricing/Discounts/Collision/NJ. if 'the vehicle' has anti lock brakes and 'the state of residence' is "NJ" then add a 2 % discount to 'the coverage quote', reason: "Anti-lock Brakes Discount" ;
- Driver Ed Discount**: Last edited by rtsAdmin on 3/23/12. Folder: Pricing/Global Adjustments/Discounts. if the driver has completed drivers ed course and the number of accidents the driver has been involved is 0 then add a 2 % discount to 'Auto Quote Response', reason: "Good Driver Discount" ;

A callout box on the right says "Full text search across all decision assets" with an arrow pointing to the search bar.





# Collaboration Foster cross-functional and cross-divisional outcomes



The screenshot shows the IBM Decision Center interface. At the top, there is a navigation bar with 'HOME', 'LIBRARY', and 'IBM ODM'. Below this, there are tabs for 'What's New', 'Stream', and 'Decision Center'. The main content area is a stream of activity. A blue arrow points from the 'Decision Center' tab to a specific comment in the stream. The comment is from Nicolas Carre, asking Laure to look at New Jersey pricing policy. Below it, a comment from the user states they will add a discount rule. To the right of the stream is a sidebar with a list of rules, each with a star icon. The rules listed are: Airbag Discount, All Experienced Drivers Discount, Anti-lock Brakes Discount, Anti-lock Brakes Discount for NJ, Collision Price Table, Comprehensive Price Table, and Driver Ed Discount. Below the list is a section titled 'Rules Recently Worked On' which currently shows 'You have not worked on any rules yet.'

**Decision Center enables collaboration on assets of interest and change notifications**



The screenshot shows the IBM Decision Center interface. At the top, there are navigation tabs for 'HOME', 'LIBRARY', and 'IBM ODM'. Below this, the breadcrumb path is 'Pricing > main > Good Driver Discount'. A 'Decision Center' button is visible. On the right side of the interface, there are buttons for 'New Rule' and 'Edit Rule'. The main content area is titled 'Timeline' and shows a vertical timeline for the year 2012. The timeline includes three version entries:

- Version 1.2** (highlighted with a blue box and a blue dot): Created by Nicolas Carre - Mar 22, 2012. Added a condition on the number of traffic tickets received.
- Version 1.0**: Created by Laure Boyer - Mar 22, 2012.
- Version 1.1**: Created by Laure Boyer - Mar 22, 2012. New discount rule for good drivers in New Jersey.

A callout box on the right side of the screenshot contains the text: "Timeline enables a quick view of version history".





*Advanced passenger processing enhance security and improve responsiveness*

Challenges

- Threats to border security are growing while passenger traffic increases, driving need for early detection of risks
- Passenger risk assessment involves data and processes across Carriers, Port Authorities, Immigration, Police, Customs

Benefits

- Enables the agency to identify threats sooner so they can focus attention on high-risk situations
- A near-real-time risk assessment provides enhanced security and speeds up processing

Solution for Process Innovation

- IBM Global Business Services designed and deployed solution that enables data sharing and process automation between various agencies
- System handles over 120 million passenger cross-border movements per annum.

Software Offerings:

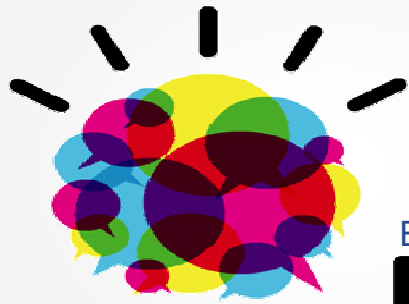
- IBM Operational Decision Management
- IBM Business Process Manager

*“IBM has enabled us to identify threats earlier so that we can more effectively deploy resources at the border, and in some cases prevent travel altogether.”*

*~ Ian Neill, Deputy Director, eBorders*



# Mobile and Cloud Accelerate Process Innovation



BPM for Mobile



**Mobile:** Deliver process innovation to where your users are



**Cloud:** Decrease your time to achieve process innovation



New Mobile and Cloud features to achieve process innovation



# Why IBM for Process Innovation?

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## Unparalleled Expertise and Investment

- Expert consulting and implementation services for **fast realization** of business value
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## Largest Customer Base

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## Strongest Ecosystem and Partner Network

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- Strongest global ecosystem including major global and regional system integrators skilled to provide **comprehensive solutions**



## Next Steps

**See Process Innovation  
in Action**

Ask your sales representative to see the solution live

**Learn what's possible  
with a Discovery  
Workshop**

On-site workshop with business and IT stakeholders to evaluate the applicability of BPM and Business Rules for your project

**Implement a real  
project in 10 weeks  
with a Quick Win Pilot**

Demonstrate immediate value to your LOB end-users with your first 'Quick Win' in 10 weeks



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धन्यवाद  
Hindi

多謝  
Traditional Chinese

Grazie  
Italian

ขอบคุณ  
Thai

Gracias  
Spanish



Спасибо  
Russian

Mer  
ci  
شكراً  
Arabic

Obrigado  
Brazilian Portuguese

Danke  
German

多谢  
Simplified Chinese

நன்றி  
Tamil

ありがとうございました  
Japanese

감사합니다  
Korean