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# IBM Enterprise Content Management *Strategy and Portfolio Update*

*23 March 2011*



# Enterprise content: your organization's DNA

How will you unlock its potential?

Like DNA strands that contain genetic code, **enterprise content** holds the key to enhanced business insight, agility and performance



Enterprise content management is the set of strategies and practices that enables your organization to maximize value from content

To achieve competitive edge

# Organizations need to be smarter, faster

- **77% of CEOs** say they do not have real-time information to make key business decisions
- **1 in 3 business leaders** frequently make business decisions based on information they don't have, or don't trust
- **1 in 2 business leaders** say they don't have access to the information they need to do their jobs



*Companies that invest in business insight outperform their peers, showing 33% higher revenue growth, 12 times more profit growth, and 32% higher return on invested capital.*



To accelerate service delivery

## Knowledge workers demand agility and autonomy

- **11% of knowledge workers** claim to have well-defined and mapped case management processes
- **40%** cite difficulty adding or changing processes as their biggest case-handling problem
- **Nearly half** have access to fewer than 40% of customer records required for case processing



*Companies that invest in business agility outperform their peers, showing 10% higher revenue growth, 40% higher profit growth, and 60% higher return on invested capital.*



To enhance customer intimacy and employee collaboration

# Business is becoming more social

- **69% of executives** report gaining measurable business benefits from social technologies
- **52% of organizations** plan to increase investment in social media and collaboration tools in 2010



“Social media has shifted control of the corporate message away from the organization and towards consumers and other stakeholders, and running away and hiding is no longer the safe option.”

Burson-Marsteller  
“The Global Social Media Check-up,”  
February 2010



# Your organizational advantage is trapped in your content

**90%**

Unstructured content that is currently *not being managed* by organizations

**80%**

New data growth from unstructured content, e.g. email, documents, images, video and audio

**60%**

Managers who miss key information when making business decisions

**50%**

Organizational content that carries risk without delivering business value

# Select your value entry point

## Where to *start*?

The path to value lies along one or more specific *solution entry points*.



### **Document imaging and capture**

*Capture, manage and share content anywhere it exists*



### **Social content management**

*Connect people with social content and office documents*



### **Advanced case management**

*Optimize case and business outcomes*



### **Content analytics**

*Gain unexpected business insights*

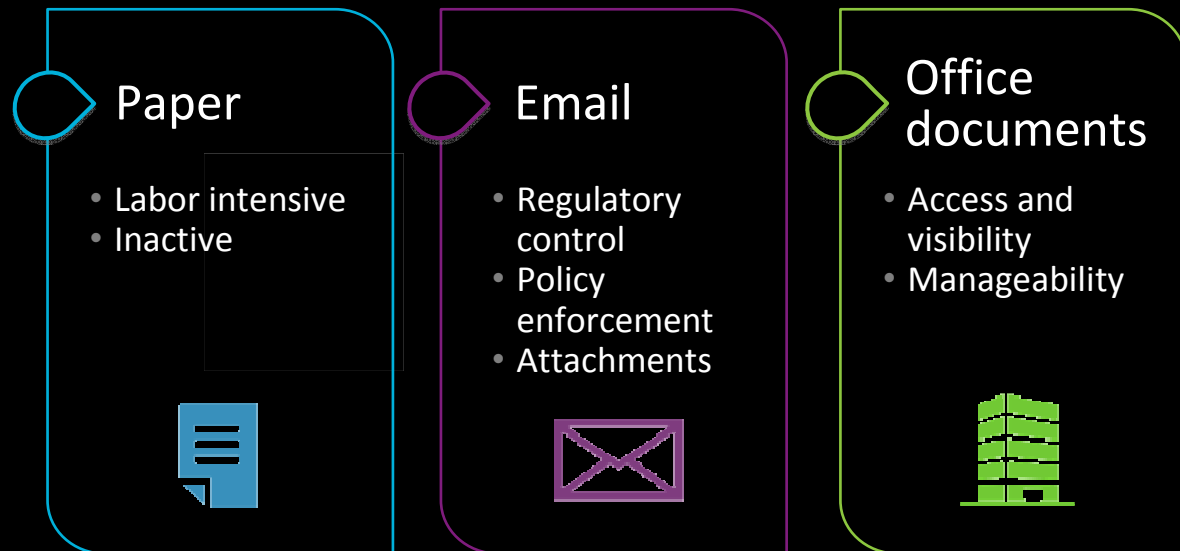


### **Information lifecycle governance**

*Reduce cost and risk by managing information through its lifecycle*

# Challenges of document automation

- Access and security
- Constrained productivity and growth
- Untimely and inconsistent service
- Paper related people costs
- Storage and management costs
- Compliance risks



*“The strongest driver for scanning and capture is improved searchability and knowledge sharing across the business, followed by productivity improvements, reduced office costs and better customer service.”*

**— Harvey Spencer Associates  
2011**



# IBM Production Imaging

Combine the power of advanced capture and scale of ECM

## Desired business outcomes

- Manage the entire lifecycle of document imaging
  - Capture and manage document workflow
- Scale from distributed locations, at a departmental level, to enterprise wide deployments
- Perform for billions of document images, and tens of thousands of users
- Cut costs and improve productivity
- Eliminate lost documents

## Solution summary

- Delivers capabilities for the entire lifecycle of document imaging and capture
- Comprises capture, document-centric process, an industry-leading ECM repository, and the ability to view, annotate, and redact document images
- Avoids costs associated with multi-product & multi-vendor alternatives

*“Imaging solutions represent a low-risk, high-value investment that can be extended through an enterprise.”*

— Forrester  
2010

## Global Logistics Company

# Smart is: improving productivity and service

*Represents the state of the art for capture today: capturing paper, fax and emails, distributed scanning from many different sites, with many rules-driven variations.*

*Industry context: transportation  
Value driver: improve productivity, service  
Solution onramp: document capture*

### Business Challenge

Shipping document processing times and failure to meet service level requirements risk penalties and fines.

### What's Smart?

- Deployed seven imaging applications.
- Process ~600,000 pages per day for ~3,000 users in U.S. Deploying globally to process ~4 million pages per day for ~10,000 users.

### Smarter Business Outcomes

- Reduced errors on data input.
- Improved compliance with NAFTA, Patriot Act, EPA and DHS.
- Reduced processing costs and FTEs.
- Improved cycle times and accuracy.

# The context of social content management

## Patterns

- Information is immediate
- Collaborative, ad-hoc processes
- Work is knowledge intensive
- Content is essential for decision making
- Outcomes are sustained
- Relies on smart people

KEY: Content awareness and action **measured in hours to minutes**

## Challenges

- Content access anywhere
- Access and security
- Workflows & business process
- Content reuse / repurposing
- Archival & records management
- Federated searching
- Content lifecycles & single sourcing

KEY: Dynamic, cross-enterprise **access, management and control**

## Solution

- Mobile social and content-centric apps (CMIS)
- Content management
- Web content management
- Mobile content access
- Messaging, file management
- Comprehensive document management
- Social collaboration
- Office collaboration

KEY: **Integrated solutions** to enable swift, collaborative outcomes

# Smart is: collaborating on content

*Industry context: travel and transportation*  
*Value driver: reduce risk, improve efficiency*  
*Solution onramp: social content management*



## Union Pacific Railroad

*The premier railroad franchise in North America. The company covers 23 states and links every major West Coast and Gulf Coast port.*

### Business Challenge

Transform an unstructured document culture to better enable team collaboration across the company and among legal, HR, accounts payable and finance departments.

### What's Smart?

A unified collaborative content environment to manage enterprise information. Knowledge workers authoring business and legal documents within an optimized workflow . Direct check-in/out, search and retrieval of content based on system defined meta-data and classification rules . A system leveraging existing investments in email, desktop and infrastructure applications.

### Smarter Business Outcomes

A single, scalable provisioned environment that uses a social and collaborative approach to content within a secure and managed enterprise system that reduces risk and improves efficiency.

# IBM Advanced Case Management

*Brings people, process and information together ... in context of a case*



- Delivers **trusted information** to the case – both content and structured data in the context of a case
- Shortens time-to-value with better tools, **out-of-the box solutions** and templating capabilities
- Built-in infrastructure for creating and reusing **case templates**
- Leverages unique **dynamic work management** concepts and capabilities

# Smart is: improving customer service

*Industry context: automotive*  
*Value driver: improve customer service*  
*Solution onramp: advanced case management*



## JM Family

*“The major business objectives in our organization are excellence in customer service and increased productivity of our associates. IBM ECM is a key enabler of these objectives.”*

*— Keith Tempinski, Director, Enterprise Content Group, JM Family Enterprises, Inc.*

### Business Challenge

Lack of visibility into customer service interactions around automobile loans and leases  
Bottlenecks due to many audits in approval steps

### What's Smart?

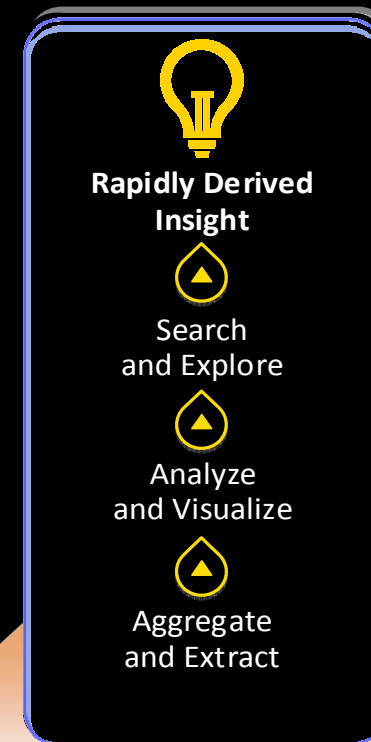
Customer service associates focused on exception-based processes, with greater knowledge sharing across departments

### Smarter Business Outcomes

\$2.1 million annual call center labor savings. Processes cut from days to just minutes. Handle more loans with current resources. Eliminated annual printing of 168k pages for cost savings and environmental benefits.

# IBM Content Analytics is a platform to derive rapid insight

- Transform raw information into **business insight quickly** without building models or deploying complex systems.
- Derive insight in **hours** or **days** ... not weeks or months.
- **Easy to use** for all knowledge workers to **search** and **explore** content.
- **Flexible** and **extensible** for deeper insights.



## Japan Business Services Provider

# Smart is: **gleaning insight** about customers

*"Insight into customer interaction logs is an information gold mine for us."*

— General Manager  
Japan Business



*Industry context: computer services*  
*Value driver: improve customer service*  
*Solution onramp: content analytics*

### **Business Challenge**

A Japanese business services provider operates multiple customer service centers and needed ways to analyze large volumes of information to improve agent training and deliver better customer support.

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

They implemented content analytics from IBM to understand and process natural language. The solution analyzes customer interactions based on consolidated logs of phone calls, email and Web, identifying keywords.

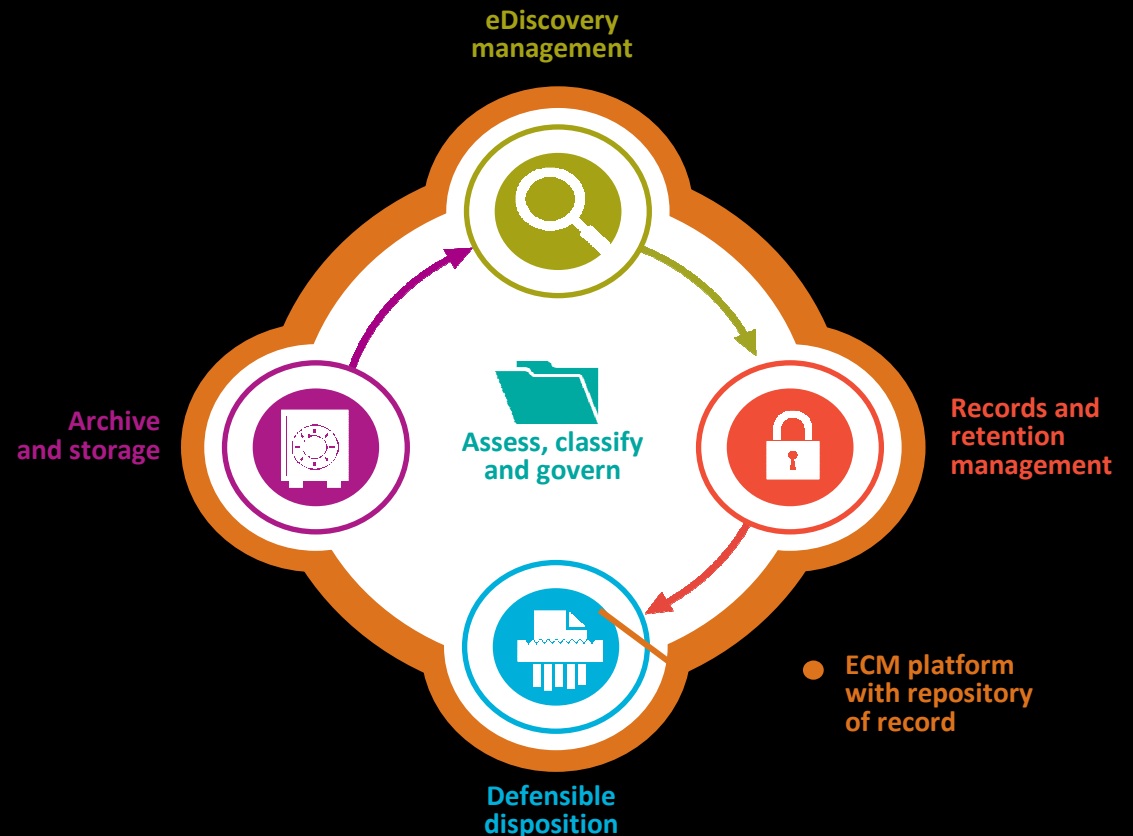
### **Smarter Business Outcomes**

Improved agent skills and training, resulting in a 92% reduction in call transfer and 88% improvement in volume. Provides new insights about product issues, resulting in an 88% decrease in product-related calls.



# IBM Information Lifecycle Governance

- IBM Information Lifecycle Governance (ILG) is a solution portfolio that enables customers to more effectively retain, classify and archive information, efficiently meet eDiscovery obligations, and defensibly dispose of information, to lower both cost and risk.
- IBM ILG includes solution sets for legal, IT and RIM buyers including:
  - Smart Archive solution for IT
  - eDiscovery Management solution for Legal
  - Records and Retention Management solution for Records and Information Managers
  - Disposal and Governance Management solution for the CIO
- IBM's comprehensive approach systematically links policy amongst stakeholders, to the information assets, for lowest cost and risk



Thomas Miller Group

# Smart is: reducing storage space by 60%

*"IBM's e-mail management offerings provided us with the stability and functionality that we needed to address and meet our e-mail archiving, retention and compliance regulatory requirements."*

*— Rashid Mahmood, Lotus Notes Systems Manager, Thomas Miller Group*



*Industry context: insurance*

*Value driver: improve process efficiency*

*Solution onramp: info. lifecycle governance*

## **Business Challenge**

Industry and government regulations and legal discovery drove the need for a more effective method of managing, retaining and producing electronic information in a timely manner.

## **What's Smart?**

IBM Smart Archive solutions provide e-mail archiving and retrieval, and manages growth for any Notes database or server platform. IBM Content Manager manages all e-mail content across multiple platforms, databases and applications

## **Smarter Business Outcomes**

- About 30,000 daily emails and attachments are indexed and archived for rapid retrieval, including 23 million emails retroactively archived and eDiscovery ready.
- Deep compression and single instance storage functionality reduced storage space by 60%.
- Users benefit from unlimited mailbox management.

# Why IBM? Your strategic vendor for ECM

- ✓ Industry **thought leader** anticipating and shaping the future in enterprise content management
- ✓ Uniquely capable of **solving clients' most complex challenges** related to content management
- ✓ Delivering **value-added solutions** through our unparalleled business partner ecosystem
- ✓ The most **complete portfolio** to address clients' content management imperatives
- ✓ **Scale-up, scale-down platform** capable of managing the most content-intensive organizations

