



**IBM**

Information



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# Intelligent Analytics and Optimization for Smarter Business



**LEAD  
THE WAY**

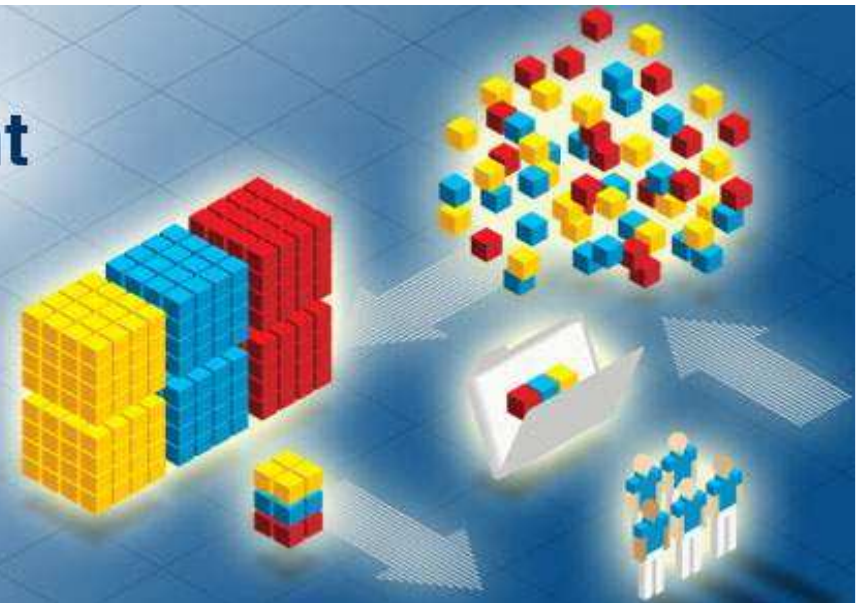


# Automate and Optimize Complex Processes Across your Enterprise

Andrew CK Lau  
Senior I/T Specialist, IBM China / Hong Kong  
April 29, 2010

## Advanced Case Management

Optimize case outcomes  
with information, process and people



<http://www.ibm.com/software/data/advanced-case-management/>

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## The World is Changing and Becoming More ...



**INSTRUMENTED**



**INTERCONNECTED**



**INTELLIGENT**

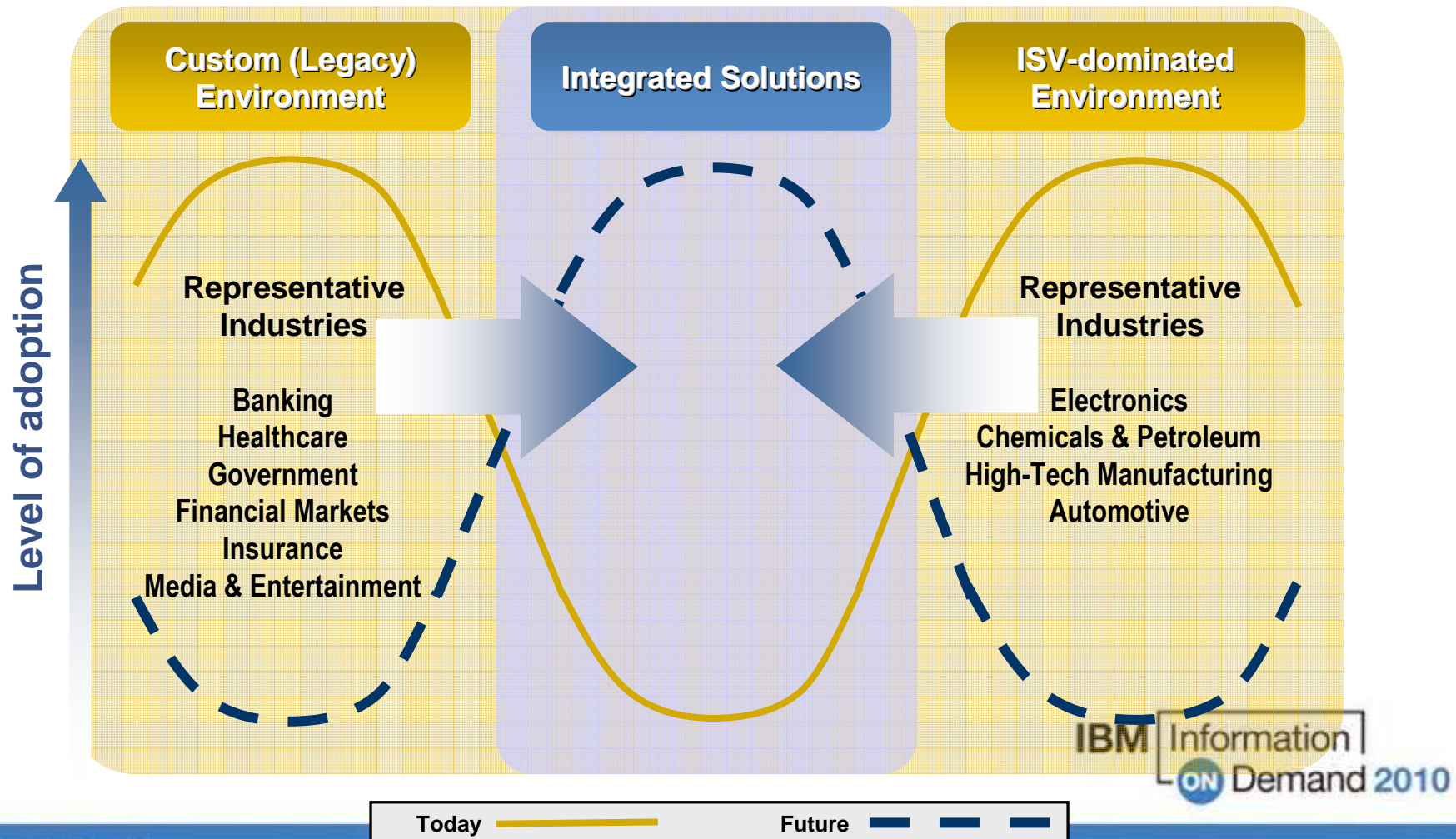
The explosion of new information, when integrated, analyzed, and acted upon using new types of intelligence, enables solutions that

... help build a Smarter Planet

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## Client Buying Behaviors are Shifting

Clients increasingly want integrated, high-value solutions to solve industry-specific business challenges



## Case Management is a Great Example

*Although 'case' may be expressed differently in various industries ...*



*... a common pattern of challenges exists across all industries*

## Current Business Challenges...

***Knowledge workers in all industries  
must do more with less...***

***...yet business needs to improve service  
and manage risk while optimizing costs***

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## Current Business Challenges

***The volume and variety of information can be overwhelming...and it is arriving faster every day***

***Flexibility is essential to responding effectively to opportunities or threats***

***Automation has handled the exceptions are now the norm, many automated processes are outsourced***

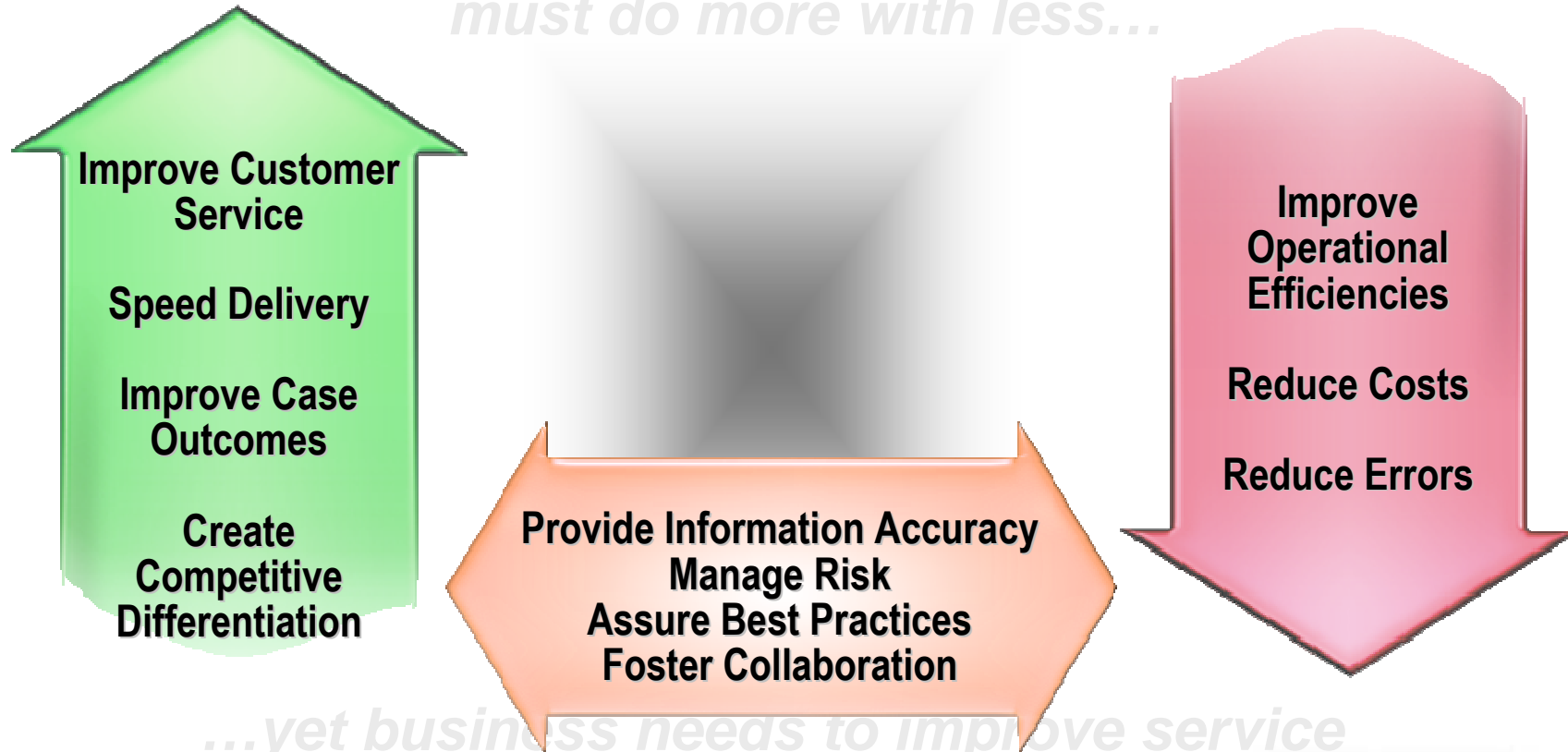
***Access to expertise is imperative to quality decision making***

***Regulatory or legal risks impose need to consistently adhere to critical policies and rules***



## Case Management Can Drive Significant Business Benefits

*Knowledge workers in all industries must do more with less...*



*...yet business needs to improve service and manage risk while optimizing costs*







## What is Case Management? What Advanced Capabilities are Needed?

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



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### A solution pattern where...

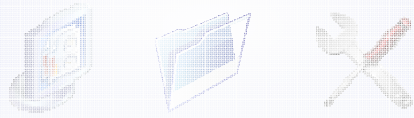


- There are **collaborative**, ad-hoc processes
- Activities are **event-driven**
- Work is **knowledge** intensive
- **Content** is essential for decision making
- **Outcomes** are goal-oriented
- The judgment of people impact how the **goal** is achieved
- **Process** is often not predetermined

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### For challenges such as...

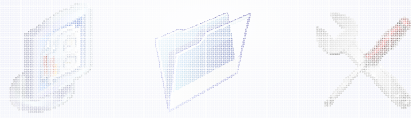


- Complex exception handling
- Complaint or dispute management
- Contract management
- Lending applications
- Benefits enrollment
- Rate case management
- ...that are both horizontal and vertical in nature

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- Complex exception handling
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## That requires unique capabilities from...



- Content management
- Business process management
- Collaboration tools
- Social software
- Business rules
- And analytics

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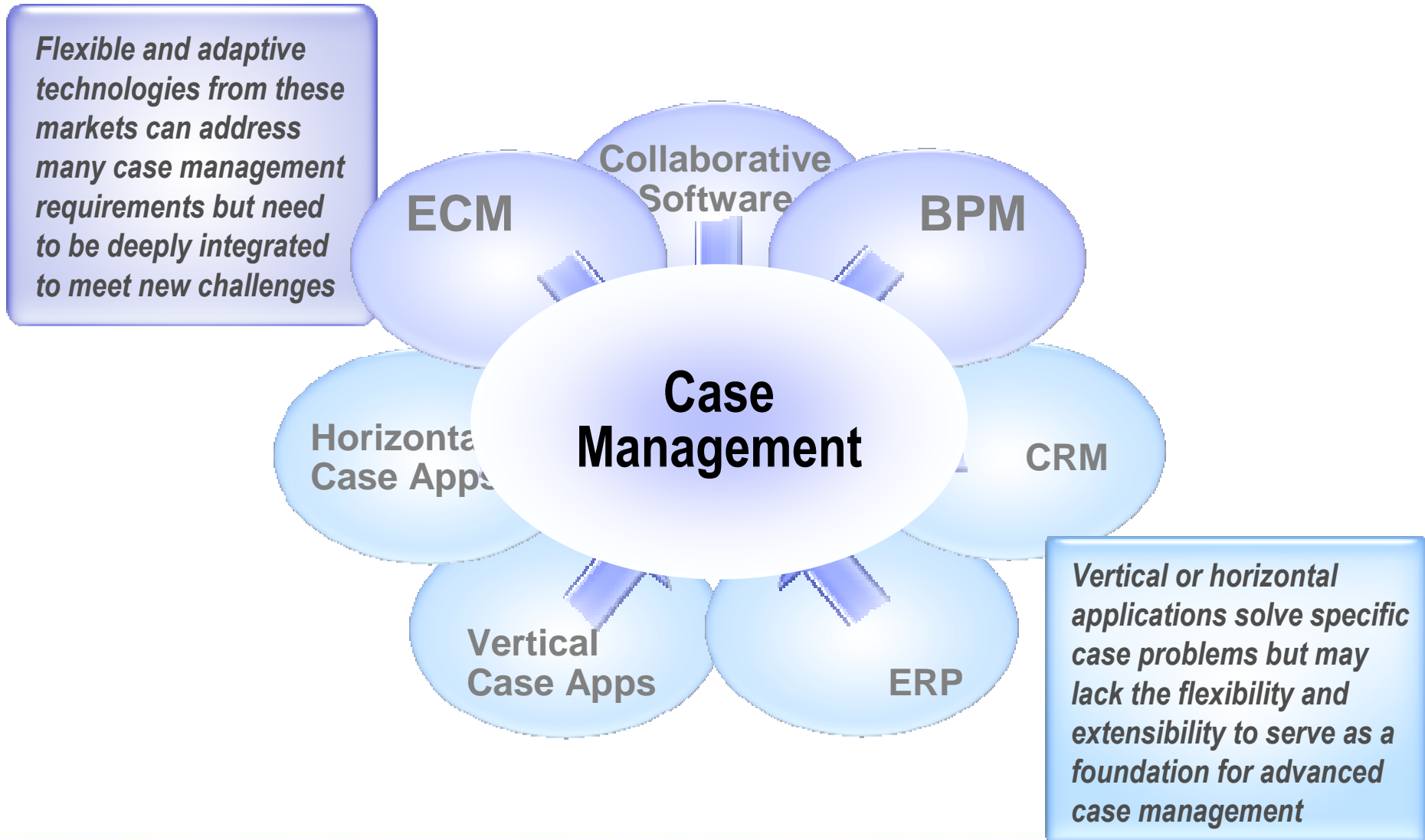
**gaps exist today for driving better case outcomes**

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## A Next-Generation of Case Management is Emerging



## Case Management: What Is New?

December 28, 2009  
**Dynamic Case Management —  
An Old Idea Catches New Fire**  
by Craig Le Clair and Connie Moore  
for Business Process & Applications Professionals

**“Next-generation case management requires  
a different mindset**

*... this new case management will be a huge departure from the workflow/imaging solutions of old and will be based on predictive analytics, business rules, and social collaboration, in addition to core BPM and ECM functionality...”*

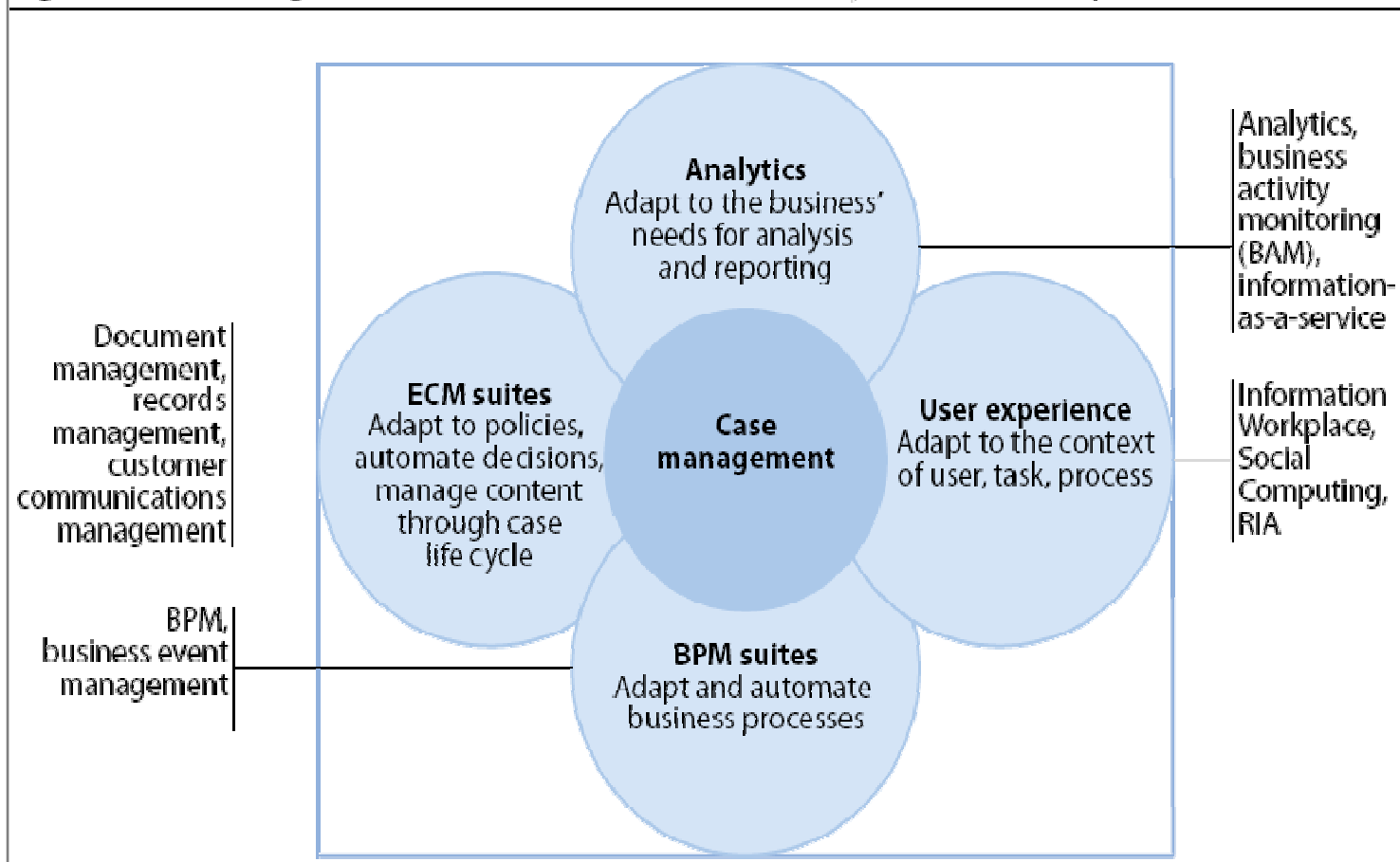
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# Case Management has Four Major Pillars



**Figure 1** Case Management Combines ECM, BPMS, And Analytics With User Experience Advances



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Source: Forrester Research, Inc.

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## Announcing IBM Advanced Case Management Strategy

*Advanced case management is IBM's strategy to leverage capabilities from **across IBM** to deliver the advanced requirements needed to **drive better case outcomes**.*

*IBM is leveraging deep experience solving case-style business problems with **ECM and BPM** and adding advanced capabilities for **rules, events, collaboration, social software** and **analytics** to deliver the most comprehensive case management product in the market.*

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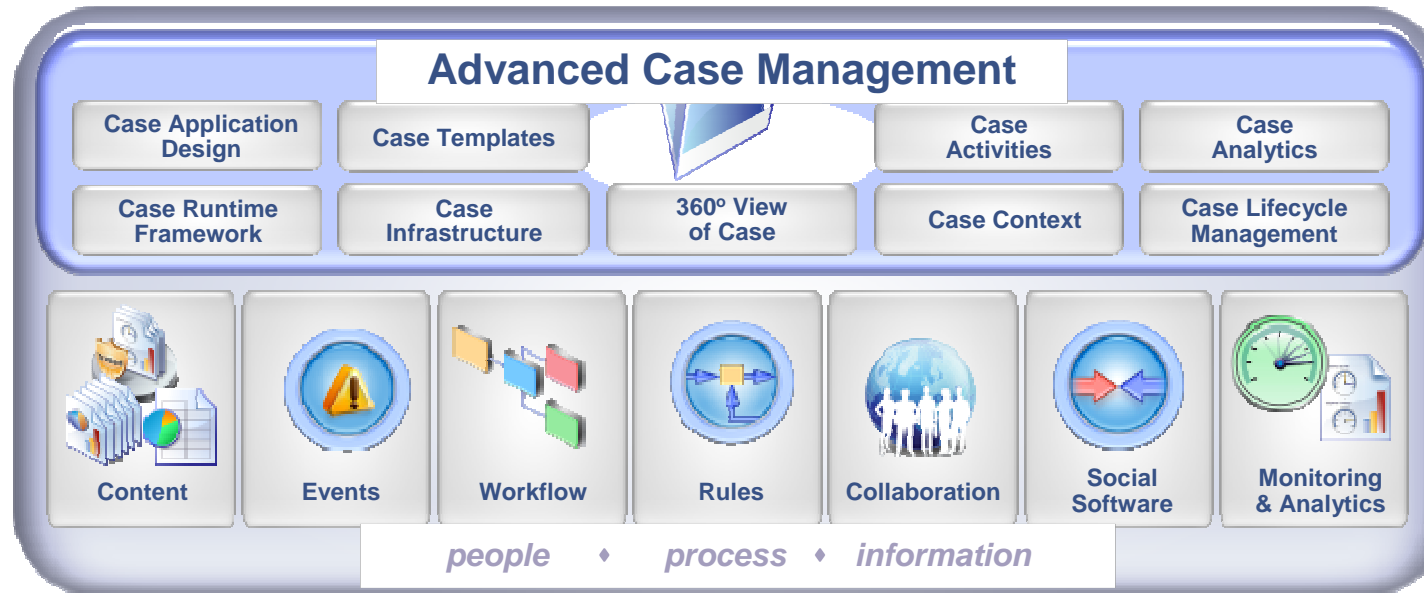
*IBM is leveraging deep experience solving case-style business problems with **ECM and BPM** and adding advanced capabilities for **rules, events, collaboration, social software** and **analytics** to deliver the most comprehensive case management product in the market.*

### **IBM Strategy Highlights**

- ✓ Focus on optimizing case outcomes
- ✓ Unifying capabilities from across IBM SWG and Research specific to case management requirements
- ✓ Approachable case solution design and composable user experience to facilitate adoption
- ✓ Reusable templates and solution assets to accelerate solution delivery

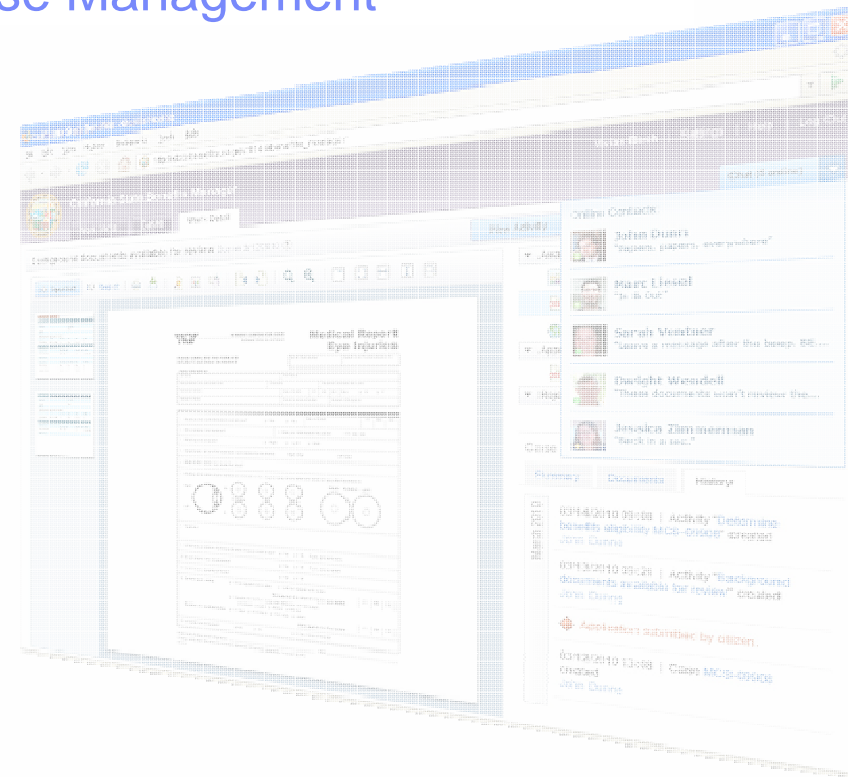
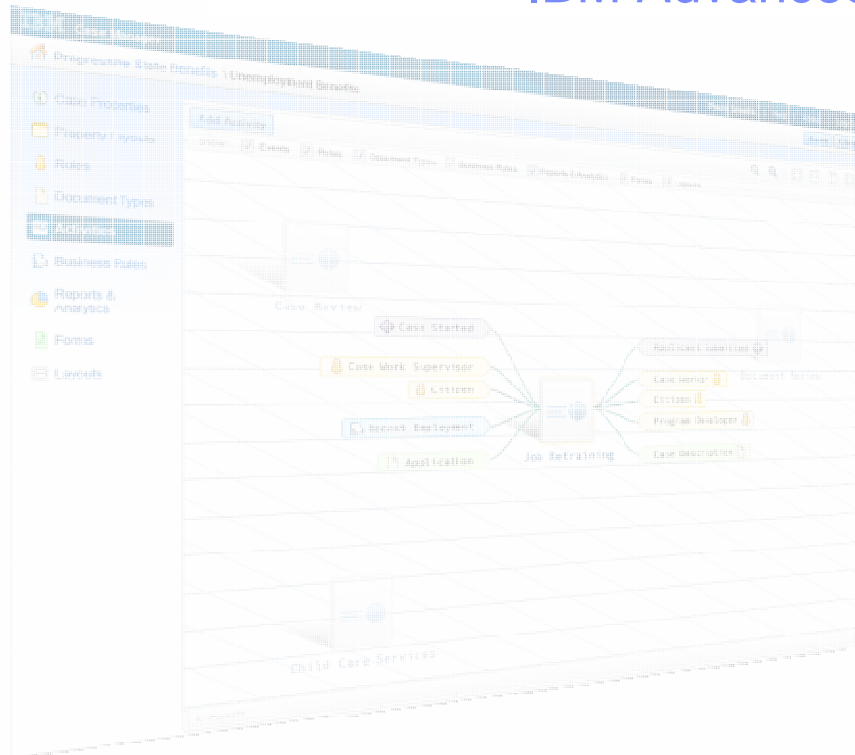


## IBM Advanced Case Management Strategy



- Unites information, process and people
- Delivers optimized case outcomes through analytics, rules, collaboration and social computing
- Supports work management of structured and unstructured activities
- Delivers trusted information to the case
- Manages and governs entire case lifecycle
- Provides extensive ecosystem of partners delivering case management solutions
- Shortens time-to-value with better tools, out-of-the box solutions and templating capabilities

# IBM Advanced Case Management



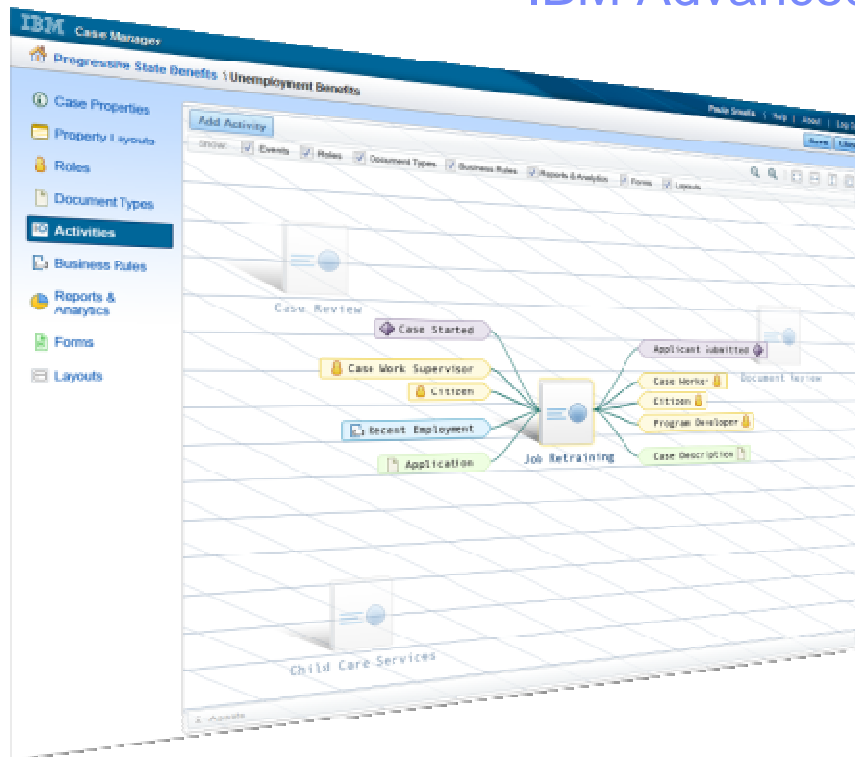
## Case Design for the Business

- Easy to use, wizard-driven
- Comprehensive across case assets
- Leverage templates for a fast start
- Significantly shortens time-to-value for case-style applications

## Case Application User Experience

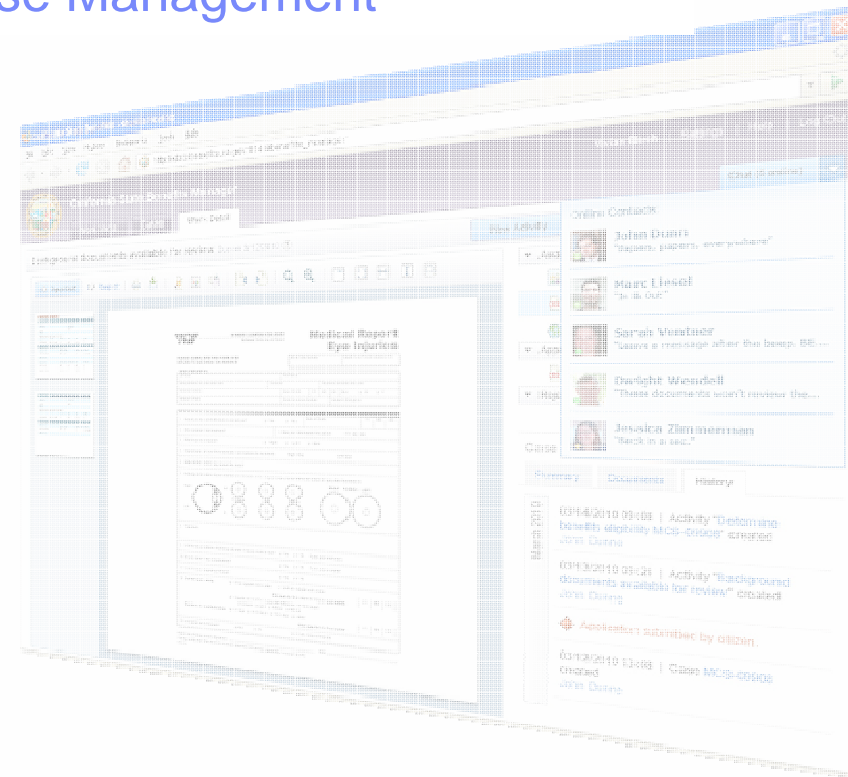
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Past 12 Months	Expenses	County	Growth Rank
Imperial	\$20,895,285.06	46%	1
Colusa	\$13,219,610.69	(12%)	3
Trinity	\$20,271,870.30	6%	2
Plumas	\$11,498,744.23	(34%)	5
Del Norte	\$11,743,190.76	565%	4

## Advanced Case Management User Experience

compelling and attractive UIs uniting business and IT  
to drive better case outcomes



# The Evolution to Advanced Case Management *driven by new challenges*

*Customers can start from any point and meet new challenges by extending into advance case management*

## Better Case Outcomes

### Process

*BPM has driven high-scale automation and better business performance through agility and continuous process improvement*

### Content

*ECM has tamed out of control content, activated content in the context of business processes and helped manage risk*

### Collaboration

*Collaboration and social software bring people together to solve problems and maximize employee potential*

### Packaged Applications

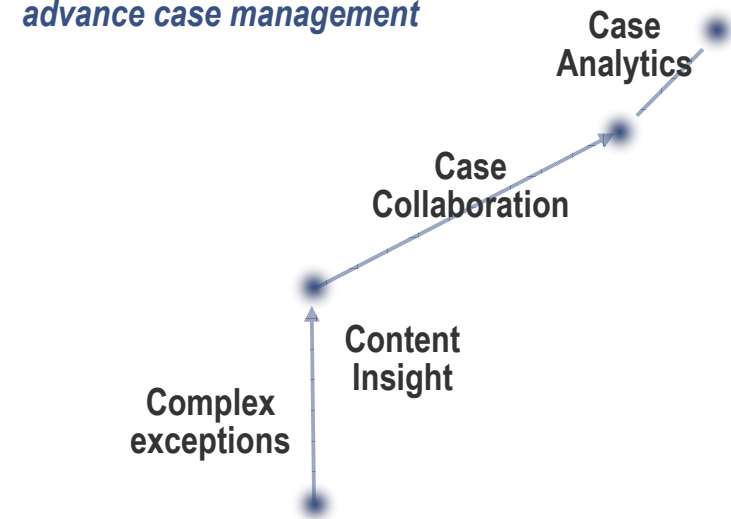
*Vertical and horizontal applications implement domain capabilities but have gaps and are inflexible*





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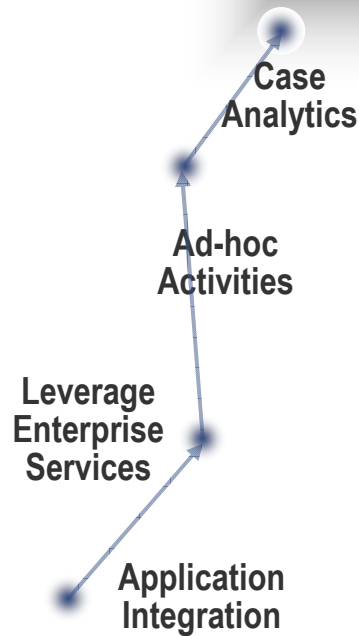
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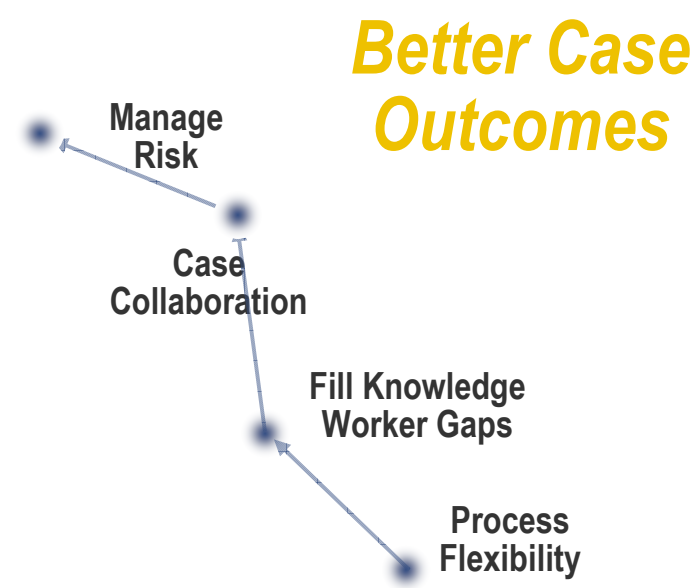
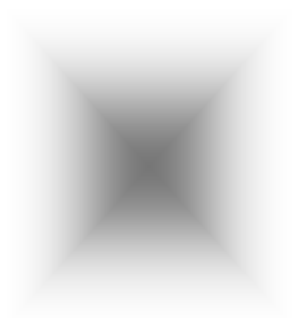
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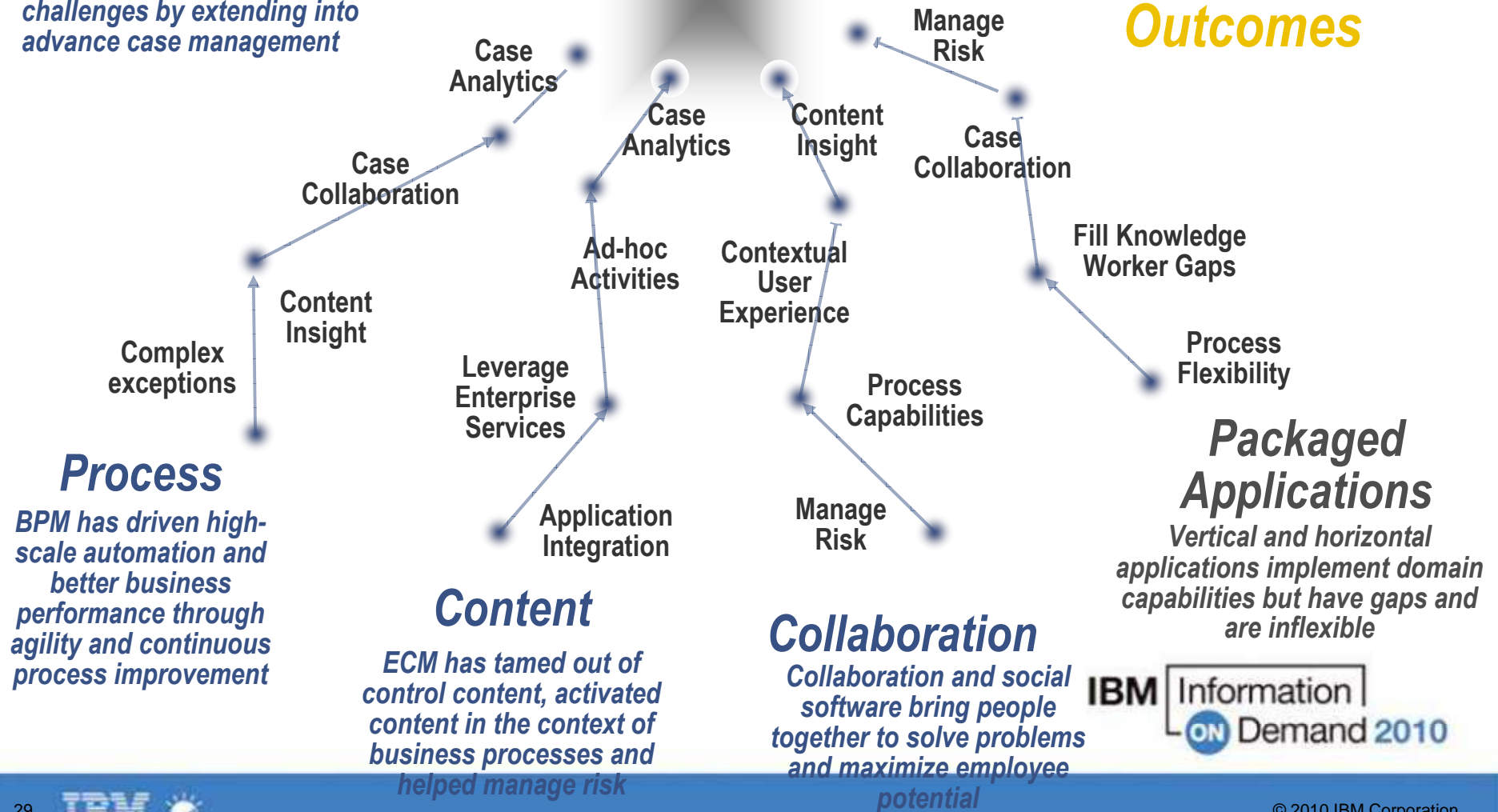
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**Better Case Outcomes**



**ibm.com** ([ibm.com/software/acm](http://ibm.com/software/acm))

**forrester offer**

**What is advanced case management?**  
The advanced case management strategy from IBM unifies information, processes and people to provide a 360-degree view of the case. In addition to content and process management, it relies on advanced analytics, business rules, collaboration and social software to help drive more successful, optimized case outcomes. Moreover, advanced case management solutions help capture industry best practices in frameworks and templates to empower business users and accelerate return on investment.

**Why advanced case management by IBM?**  
Organizations face case management challenges that require more insight, responsiveness and collaboration. Advanced case management by IBM extends case management by integrating capabilities designed to help you close cases efficiently with better results – in essence, to work smarter. Using enhanced yet proven capabilities, advanced case management helps companies optimize outcomes by extracting more value out of their information – whether that's a customer request, loan application or complex industry or regulatory procedure. By automating the right processes, applying the right analysis and involving the right people, you can create the best case outcome.

The advanced case management strategy and solutions from IBM are designed to deliver key case management improvements: insight, responsiveness, flexibility, better customer service and regulatory compliance.

**Start in your industry**  
IBM has a long track record of delivering solutions. The IBM advanced case management solutions respond to industries in need of a way to handle their growing, increasing and shrinking resources. Using industry best practices, IBM is equipped to address almost any case management scenario.

With thousands of customers leveraging case management to solve case management challenges, hundreds of partners delivering deep experience and success in case management.

**Learn more about advanced case management**

- Watch the flash and case management challenges across industries
- View the video
- Read the article
- A smarter way to manage information in a more complex world. Use advanced case management solutions
- Download the executive brief
- Forrester Report: Dynamic Case Management – An Old Idea Catches New Fire

**executive brief**

IBM Software  
Advanced Case Management

April 2010

**A smarter way to manage information in a more complex world.**

Using advanced case management solutions from IBM

**Contents**

- 1 Acknowledging case management as part of your organization
- 2 Adopting a new approach to meet changing business needs
- 2 Closing cases faster with better results
- 4 Applying advanced case management for optimized outcomes

**Executive summary**

How much would productivity increase and costs decrease if you could automate routine claims and focus on efficiently handling exceptions?

What if you could improve customer service, cross-selling and up-selling with a single view of all of a customer's transactions—from across different locations and departments?

How much time and money would you save if you were able to audit only those parties that actually needed to be audited?

Advanced case management can make all of the above scenarios—and many more—a reality. It's a new and better way of handling cases, whether your cases are contracts, lawsuits, incidents, social cases or applications.

In this executive brief, you'll read about case management and how its traditional approach is no longer meeting the needs of organizations faced with today's challenges. It will also explain the concept of advanced case management and address the IBM strategy for using it to optimize case outcomes.

**Acknowledging case management as part of your organization**

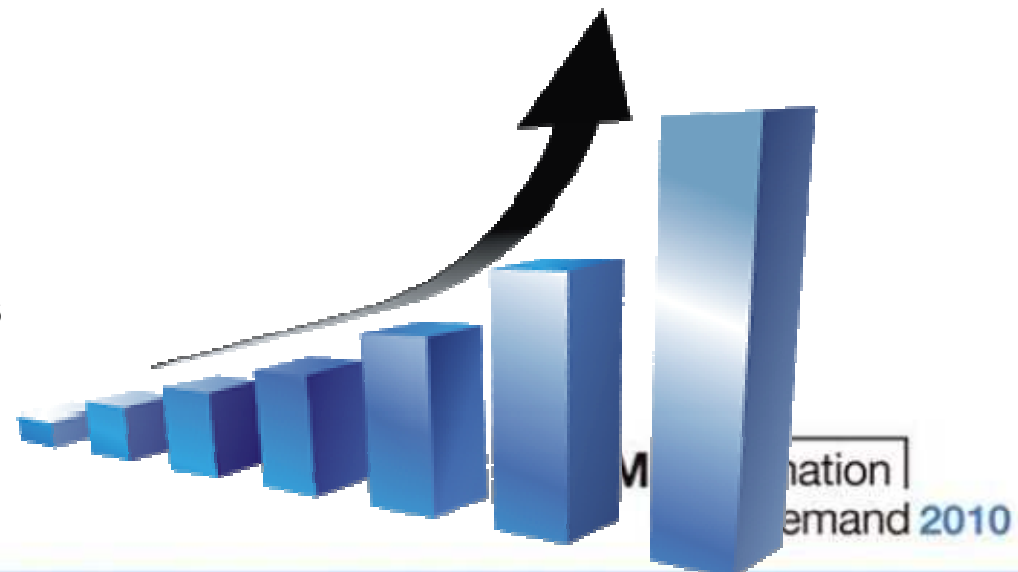
Whether you're processing claims, loans, contracts, audits or benefits or you're managing complex projects, some forms of case management are present in processes across nearly every organization. However, different organizations refer to these processes in different ways: claims management, member enrollment, contract management, customer dispute resolution, loan origination and review, patient or customer onboarding, social service administration, project management, fraud investigation and more.



**flash demo**

## In Summary: Our ACM Vision is Ready Now

- **Comprehensive package of capabilities including eForms, BAM and BPF in one offering – forms the foundation for case management**
- **Business Partner Framework (BPF) & Partner Solutions for case management solutions**
- **iWidgets and composite application frameworks driving the future**
- **FileNet BPM is the foundation platform for advanced case management – customer investments are preserved and leveraged forward**
- **Integrated to IBM's BPM Suite**





**Let's build a smarter planet**