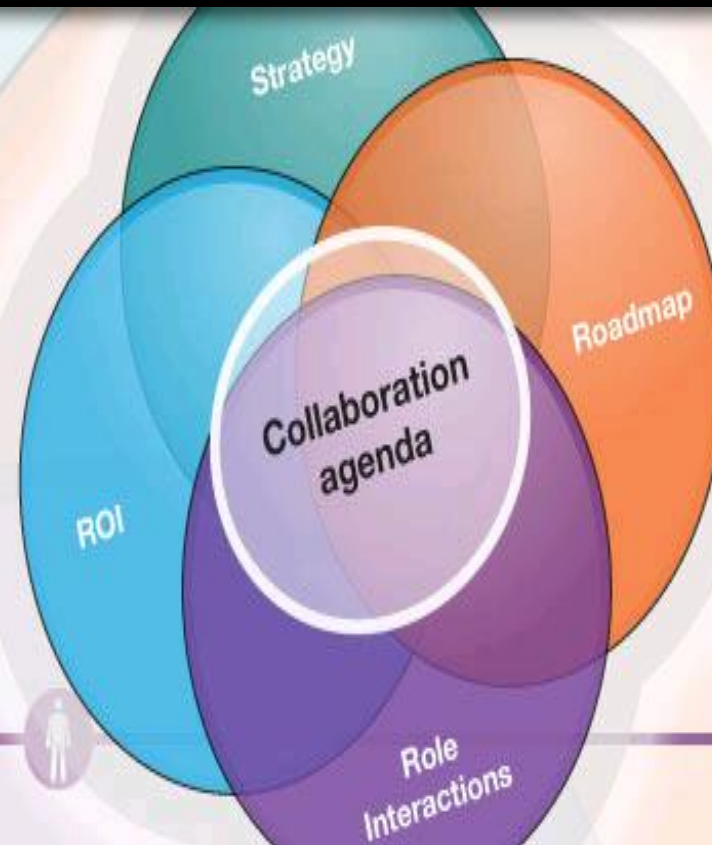


Collaboration Agenda Manila, Philippines

Philip Blackburn
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World Wide Lotus Tiger Team

Collaboration Agenda

In a world where people are interacting differently... People are central to achieving progress





**Translating technological
innovation into
industry-specific contexts**

Industry Specific Business Process Maps around collaboration capabilities

Insurance



Banking



Healthcare



Government

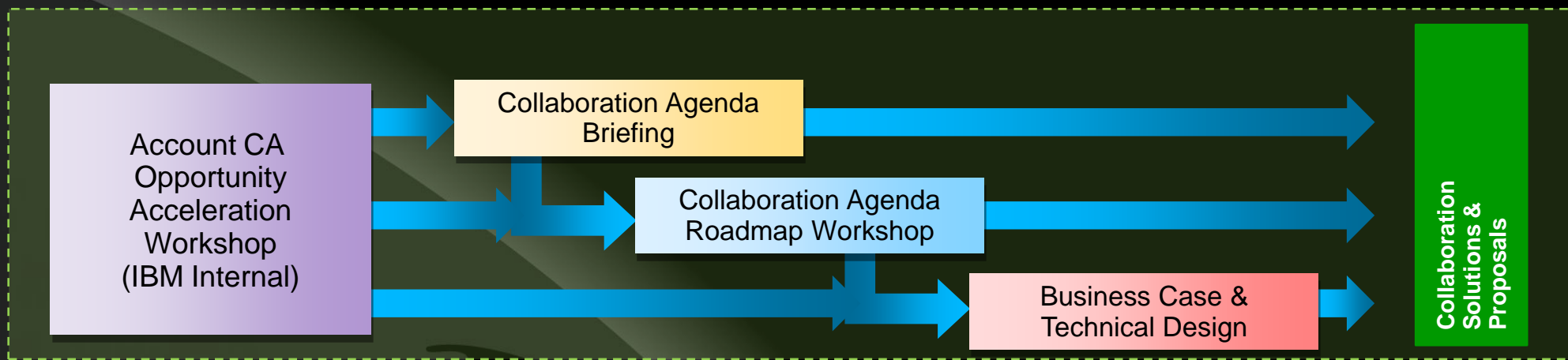


Making easier for people to work with business process



- Integrating collaboration with Business process
- Shorter process cycle times
- Allowing people to work the way they want to work
- Optimizing the talent

Collaboration Agenda Process Flow



Building the customer's Agenda Collaboration Roadmap Workshop

2-3 Day workshop to help build a Collaboration Roadmap using a proven five-step approach. The final report contains an overview of CA for the customer's industry, prioritized business objectives, collaboration architecture review and readiness, business to collaboration architecture alignment, phased program roadmap.

5-Step Approach

- 1) Conduct Collaboration Maturity Assessment
- 2) Document the Business Problem / Challenge
- 3) Identify Challenges and Opportunities for Improvement
- 4) Provide A Business Vision & Define Technology Requirements
- 5) Define the Business Value

Benefits

- ✓ Helps prioritize tactical projects based upon business value
- ✓ Helps client identify best approach to solve tactical projects with industry leading capabilities – resulting in more successful implementation, tangible business results, and minimized risk
- ✓ Ties current IT initiatives to business value – with long term vision and strategy for leveraging collaboration as a strategic asset



Business roadmap

Business Initiatives	Year One			Year Two			Year Three		
	Q1	Q2	Q3	Q1	Q2	Q3	Q1	Q2	Q3
Revenue Management	Green	Green	Green	Green	Green	Green	Green	Green	Green
Operational Excellence	Green	Green	Green	Green	Green	Green	Green	Green	Green
Customer Experience	Green	Green	Green	Green	Green	Green	Green	Green	Green

Indicative Phases for Collaboration adoption

Timeline from 2009 to 2011 showing phases: Discovery, Design, Build, Deploy, Operate, Optimize.

Investment Summary

Investments (\$USD)	Initial	Year 1	Year 2	Year 3	Total
Software (OpEx)	\$3,946,280	\$0	\$789,266	\$789,266	\$5,524,792
Hardware (CapEx)	2,000,000	360,000	360,000	360,000	3,080,000
Professional or Managed Services (OpEx)	\$7,581,749	\$0	\$0	\$0	\$7,581,749
Total Investments	\$13,528,029	\$360,000	\$1,149,266	\$1,149,266	\$16,186,641

Top Benefits Summary

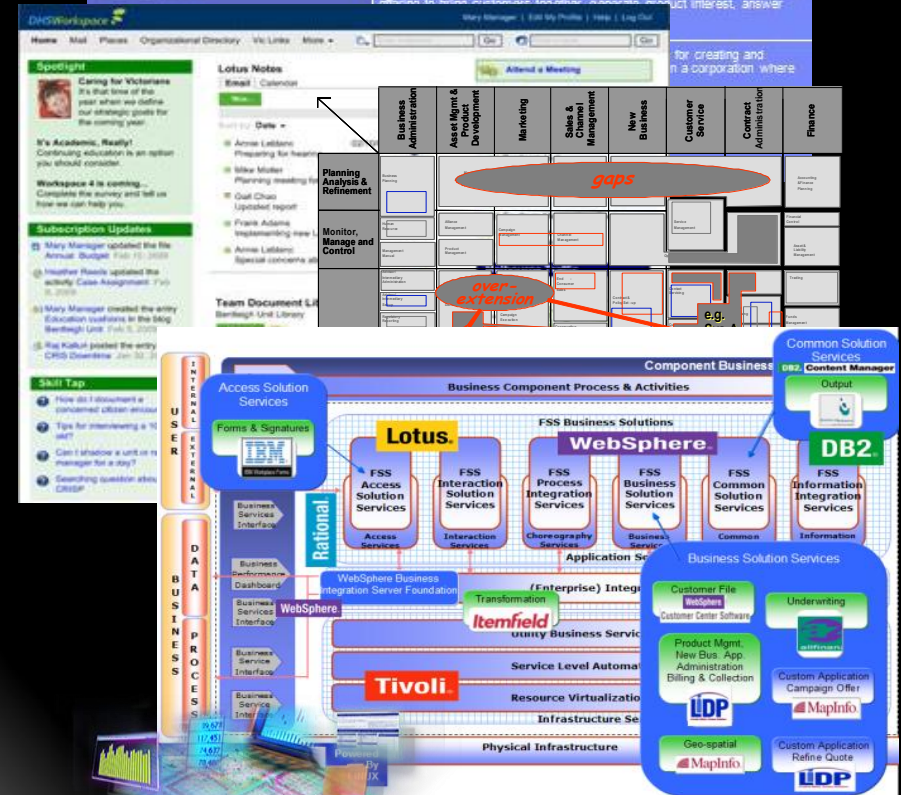
Pie chart showing distribution of benefits. Bar chart showing 'Benefits By Goal' with values ranging from \$0 to \$20,000,000.

Executing the Agenda Business Case and Technical Design

Create business case and high level plan for the first phases to deliver business value

- Scope
- 2-6 Weeks project focused on developing a technical solution architecture and business value case that includes:
 - ✓ Overview of prioritized business objectives
 - ✓ Business Value Assessment
 - ✓ Economic value realization scenarios, Role Patterns, ROI, TCO.
 - ✓ Financial modeling and investment payback analysis, risk assessment,
 - ✓ Review of the enterprise collaboration initiatives, leveraging the Reference Architecture and patterns to assess gaps in capability.
 - ✓ Provision of "as is" and "to be" technology mapping with an architecture roadmap and transition recommendations.
 - ✓ Collaboration products and services solutions definition
 - ✓ Implementation roadmap and resource
 - ✓ Size And Scope Project

Key Collaboration Scenarios	
Personal home page (B2E)	A place where corporate employees can start their day and get regular content updates throughout the day. Serves as an aggregation hub enabling navigation to additional content. Highly customized.
Intranet (team-based) collaboration space (B2E)	A place for small teams to collaborate. Share content. Communicate with other team members. Create a record of team knowledge over time.
Client/Dealer/Supplier Extranet (B2B)	A special team space enabling collaboration with external partners.
B2C Community	A website designed to build a social community around a brand or product. Enable customers to share their experiences, ask questions, get product interest, answer

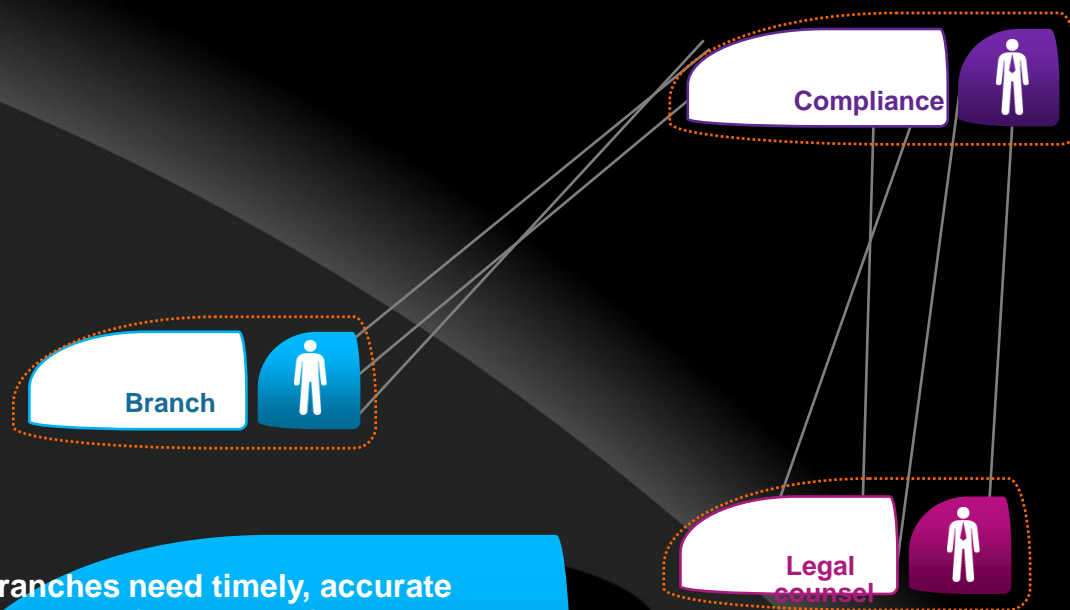


Industry: Banking
Client: Global Bank

The large global Bank is based in Europe with a large presence in the Americas and Asia. The bank provides a comprehensive line of offerings including investment banking, trading, asset management, private banking and retail investment.

The challenge: expanding regulatory and compliance issues and increasing complexity

State of collaboration prior to solution implementation



- **Branches need timely, accurate responses for transactions**
 - Compliance approval is required to make a transaction
 - The value of the transaction can decrease over time

- **Compliance experts are limited by**
 - The need to support many bankers in many locations
 - The need to provide approvals for many products and market segments
 - Varying levels of experience
 - How many experts they know
 - A lack of “helpful” data sources for more elaborate transactions
 - Difficulties with easily retaining advice

- **Legal counsel needs input from many sources**
 - Legal department engaged to make rulings on many new areas of compliance
 - Internal counsel can be heavily reliant on external counsel
 - Much of the external advice is not saved

The solution: Enhanced collaboration means faster, more cost-effective compliance

State of collaboration after solution implementation

- Branches have tools that help them increase trade volumes and revenue and decrease risk
 - Quicker approvals
 - More reliable responses



Policies, advice, etc.



- The compliance team can collaborate more easily, helping to reduce costs and risks
 - Automatically identify and connect to experts
 - Save past advice
 - Improve content access



Expertise engine

Expertise engine



Portal, instant messaging, unified communication, social networks



Portal, instant messaging, unified communication, social networks



- External counsel can be engaged more efficiently and easily
 - Have select counsel integrated into firm collaborative platform



Portal, social networks, content, instant messaging

- Internal counsel can find what it needs faster, reducing costs
 - Connect to expert internal counsel with expertise engine
 - Retain historic advice
 - Age advice for currency

Solution components

Integrate into current compliance applications
Identify experts automatically in context to need

Embed core capabilities

Legal & Compliance
Roberta Stephenson

Workspaces Career & Life Corporate Communications

Alerts
New Alerts: 2
Notice: Updated Export Finance Contract
Ready for Review: Pledge Agreement

Task List
Open Calendar
Today's Tasks
13:00 Regulatory reporting and tracking meeting with IB London
16:00 Meeting with Peggy from Global AM
Draft credit agreement

Instant Messaging
Options Help
I am Active
Project Team One
Mike Martin
Dennis Curry
Tal Herman
Project Team Two
Valarie Myers
Colin Freeman

Your Workspaces
Current Workspaces Archived Workspaces NEW Create Workspace

Workspace	Initiated By	Deadline	Status
Client Complaint: Mark Mueller	James Marshall	04/30/06	Warning
Pixar/Disney M&A	Brian Brinker	06/15/06	Success
Trademark and copyright license contract review for Acme	Nick Ketter	06/15/06	Success

Document Baskets
Create New Basket

Your Basket

Create New Workspace - Mozilla Firefox

Create Workspace: Add Team Members

Instructions
Based on your document selection, the following teams and individuals are recommended for participation.

Expertise Locator

Recommended Add

- Daniel Carney - Managing Director
- Fred Barton - Associate
- Stella Ritterson - Administrative Support 3
- Christina Meyers - Director
- Celina Marceau - Managing Director

You can click the Add tab to add teams or individuals not recommended by the system.

Previous Finish

Collaboration Agenda Summary



The Collaboration Agenda is an approach to help clients realize measurable business value from improving the way people interact

Targets **line of business** in an industry context

Results in **tangible ROI**

Incorporating the full Lotus collaboration portfolio, based on tested tools and methods

Applying a **structured and repeatable** client engagement model

Leveraging deep **client and industry expertise** across IBM and partners

§ **Initial Focus:**

- Healthcare, Government, Insurance and Banking