IBM Analytics Forum

Transforming Industries and Professions 2015

Smarter Content, Smarter People

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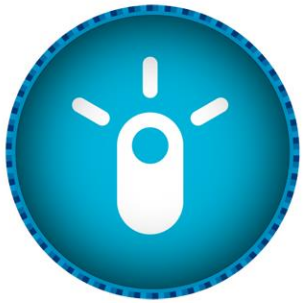
Enterprise Content management is integral to the three IBM Strategic Imperatives



- **Focus** on what matters
- Mine business content for **Hidden Truths**

- **Business Content** - Confidential and proprietary
- **Access Anywhere** Easy to maintain and support

- Provide **a 360 degree view of customers and actions** through analytics
- **Build solutions** that deliver better business outcomes

Integrates data, cloud and systems of engagement for growth and profitability

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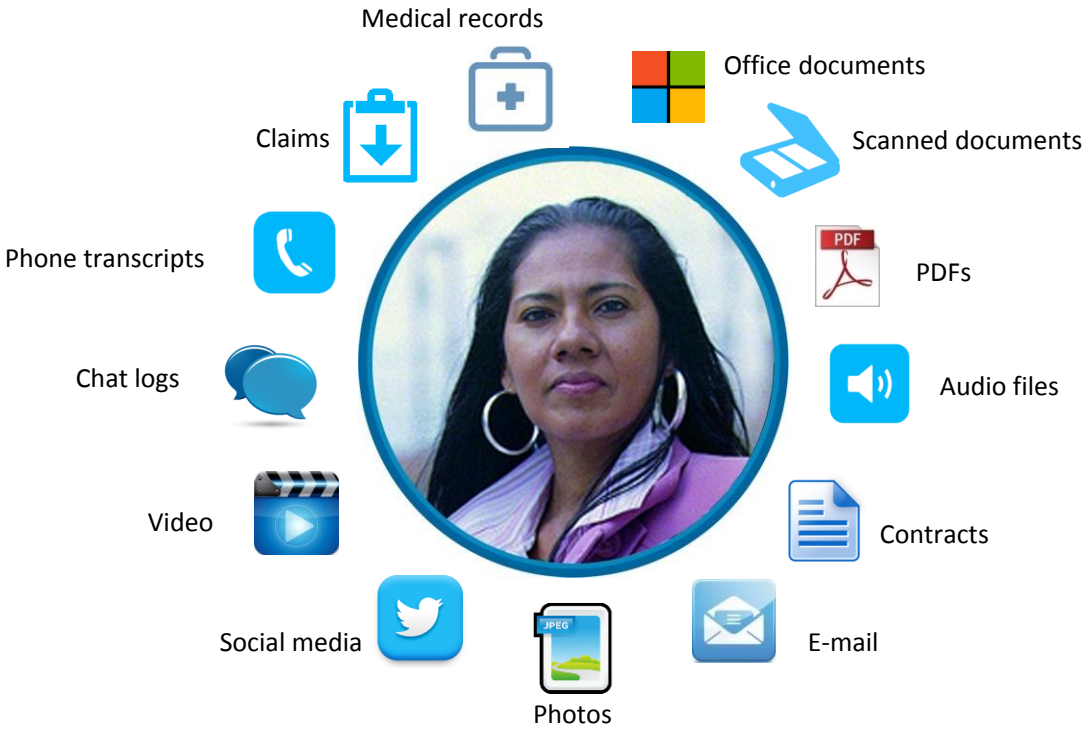
What is Business Content?

EVERY organization has business content – the conversations, commitments and collected knowledge of the organization and its customers

Business content is the unstructured data that drives the entire journey from commitment to engagement to proof of promises kept



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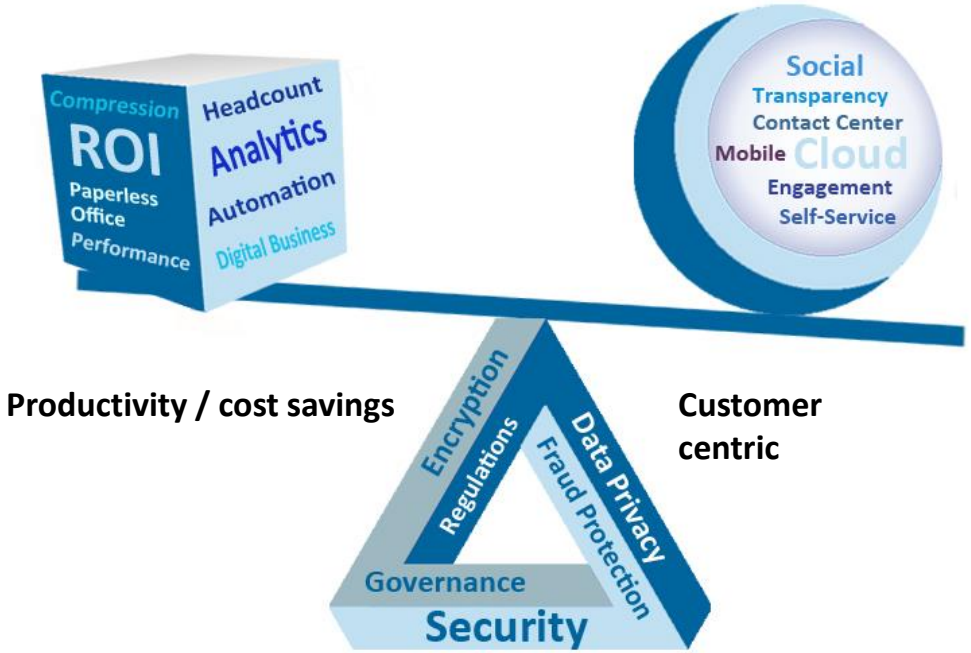
Enterprises are Balancing Three Key Imperatives

They want solutions that offer productivity / cost savings, while they pivot to become more customer centric…



Yet security and compliance remain essential

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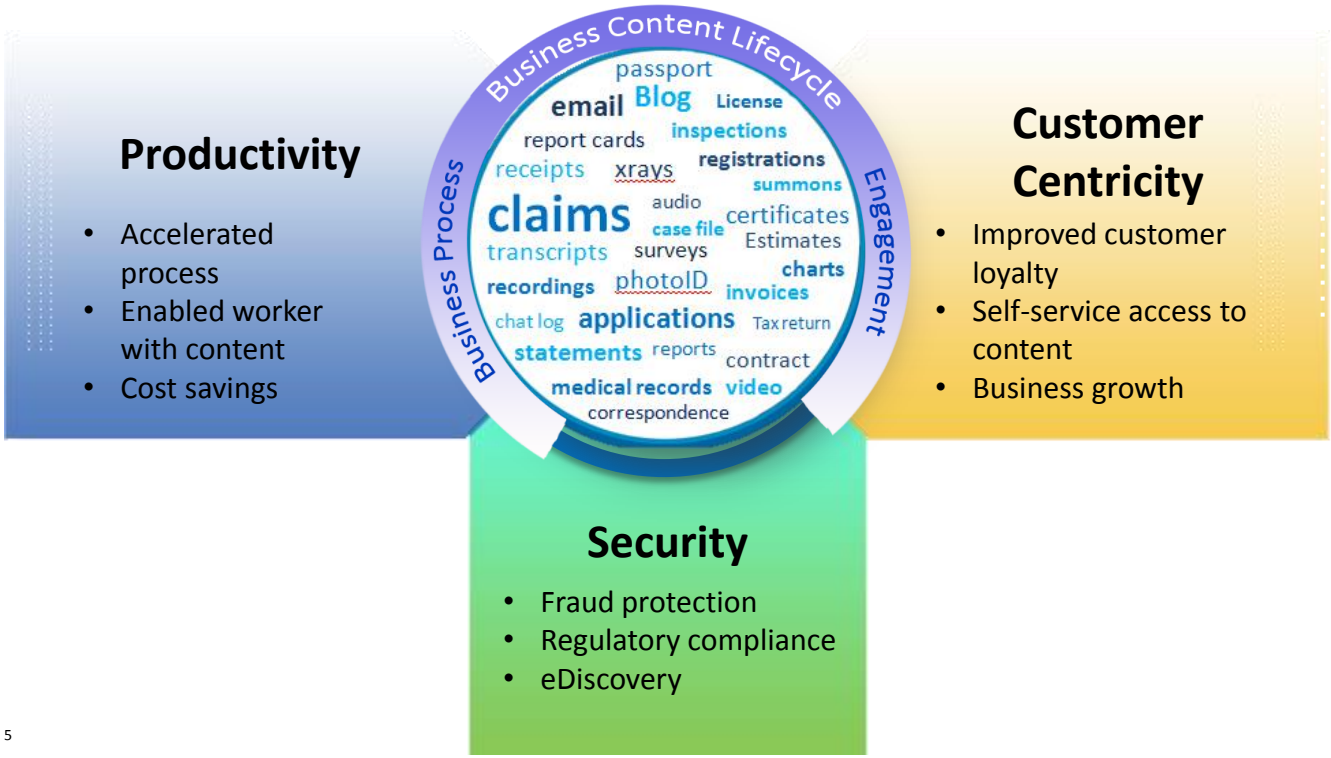
Why Business Content Matters

Successful companies recognize business content is key to enabling productivity and customer centricity – and that it must be secured and protected



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IBM ECM Business Content Solutions

Smarter Content, Smarter People

Best practices to put business content to work
to realize new value

Capture **Protect** **Activate** **Analyze** **Engage**

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Critical capabilities address Business Content needs

Expertise, solutions and services provided by IBM and its Business Partners

Capture

- Reduce paper handling and shipping
- Extract valuable business data from content
- Push capture to the edge of the enterprise

Protect

- Reduce risk by eliminating what you don't need
- Guard against fraud, comply with regulations
- Govern content throughout its lifecycle

Activate

- Use content across business systems
- Eliminate silos between departments
- Increased productivity of teams

Analyze

- Reveal insight hidden in content
- Improve business decisions
- Improve performance of people and systems

Engage

- Connect people, content, analytics and process into Systems of Insight
- Streamline collaboration with hybrid cloud
- Mobile access to business content

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IBM: One Experience and Platform for Business Content

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Case Management Contributes To New Age Banking For Competitive Advantage

Financial Services

Customer Service

Pleasant first impression
with a hassle free and error free account opening experience

6 Months time to value in achieving audit compliance

Considerable reduction in cost associated with audit complications

Business Challenge: The India based large international bank wanted to stay competitive in the changing and the more demanding market landscape by doing an overhaul of their systems and processes . The existing account opening process was manual, error prone and failed to meet the audit criteria set forth by the bank regulators. The bank set itself a challenging target of 6 months to have a system in place to be audit compliant.

The Solution: IBM Case Manager and Datacap were selected with partner Tata Consultancy Services to deliver a new Current and Savings Account (CASA) account opening process. eForms was used to manage the case data and the account application-supporting documents and the whole system integrated with the required Know Your Customer(KYC) practice dictated from the Reserve Bank. The Bank saw an instant drop in errors as each case was handled uniquely by the knowledge workers.

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Advanced Case Management Overhauls A Ministry Of Health

Government

Customer Service

Secured & Broadened external collaborative user base

10%
Expected drop in Operating cost; **15%** in Productivity Gains

First time ever that the Ministry could open access to external users

Business Challenge: The Clinical Leadership Protection and Regulation Business Unit for Ministry of health, New Zealand is tasked with carrying out several key statutory functions related to health protection and general well being of the citizens. To carry out a critical and responsible function such as this, requires a framework that allows for a collaborative base while eliminating security risks. The current set up was introducing a lot of delays due to limited access, SLA and audit compliance challenges

The Solution: IBM Case Manager with partner Certus, providing an Advanced Case Management solution allowing standardized, yet flexible business processes that are tailored around the knowledge worker. The solution provides ready access to information, has removed many manual tracking and notification actions, enabled online submission of audit data and reviews by external parties as well as supports better internal collaboration between geographically disparate business units.

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BII Maybank launch the first paperless account setup process in Indonesia

60%
accuracy reduction in account opening process time

70%
Increased rate of customer-data input improves operational efficiency and scalability

80%
Reduction in the number of paper forms makes operations more environmentally friendly

Business Challenge: As part of the its mission to humanize financial services and enhance competitiveness, BII Maybank wanted to improve customer satisfaction and overall service quality. Under the existing account opening process, customer service representatives manually authenticated personal information provided on customers' application forms. The bank sought a paperless solution that would help improve efficiency, increase data security and optimize use of data storage.

The Solution: BII Maybank implemented IBM Datacap across branch offices in Indonesia and integrated the software with the bank's central authentication, branch delivery and global Customer Information File (CIF) systems. The solution provides a centralized platform for gathering data electronically and automating account setup, loan origination and other bank processes.

"We accelerate data input with high accuracy as well as lower costs. This paperless account opening system is the first such technology-based service in Indonesia, signaling to the marketplace the care we take in making banking more convenient." — Mr. Ghazali bin Mohd Rasad, Operation & IT Director, BII Maybank

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Using Capture and Case Management to Raise Service Levels in a BPO Outsourcing Business

Financial Services

Customer Service

Single Source of truth vastly improves informed decisions critical to client servicing

Larger portfolio of services added to challenge competition

More robust business continuity due to improvement in system reliability

Business Challenge: This BPO company in LA works in an environment with zero tolerance to errors and need to establish trust as they serve as extended services team to their customers businesses. An integrated process with single source of truth, yet easy to use and scalable ,became a business imperative for the client in such demanding environment. They wanted to streamline their evaluation and qualification process for credit approvals, while maintaining cost advantage.

The Solution: IBM Case Manager based was used to create a configurable case-based Factory Credit application, streamlining the evaluation and qualification of the credit approval process. The solution integrates with Datacap for efficient document ingestion. Cognos is used for work distribution and monitoring key performance indicators. The whole system works together to improve service levels and is architected to easily service multiple clients simultaneously.

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Mexican Insurance Leader Strengthens Customer Engagement With IBM Case Manager

Insurance

Customer Service

Productivity and efficiency gains due to centralization and automation

Competitive Mileage due to improved service engagement

360 degree operational visibility ensures service level expectations are met

Business Challenge: Being a market leader in Enterprise risk coverage, by offering a wide range of insurance products, solutions and advisory services, Zurich Mexico was exposed to the threat of competitive disadvantage if they did not improve upon their case creation responsiveness and knowledge worker productivity. They needed to establish an ecosystem that enabled them to walk the talk in a business where credibility rates the most

The Solution: IBM and Business Partner DCG deployed an IBM Case Manager based end to end process automation system for underwriting, issuance and collection. The new process has dramatically reduced manual intervention to enable knowledge workers to meet service level expectations. Cognos was used to bring in operational visibility for better deliverance allowing Zurich to stay competitive in the marketplace

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IBM Business Content Solutions

Where do you want to start?

IBM Unified Interface

Capture

- Centralized, distributed and mobile capture
- Assessment
- Imaging viewer
- Video viewer

Protect

- Defensible disposal
- Legacy data cleanup
- Value-based archiving
- eDiscovery
- Records retention

Activate

- Document imaging
- Workflow
- Customer communications
- Connectors to SharePoint, SAP, etc.

Analyze

- Content analytics
- Performance, predictive and investigative analytics
- Cognitive computing

Engage

- Advanced case management
- Cloud, mobile case, capture and content solutions
- Sync and share

Content Platform

IBM and 3rd Party

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