

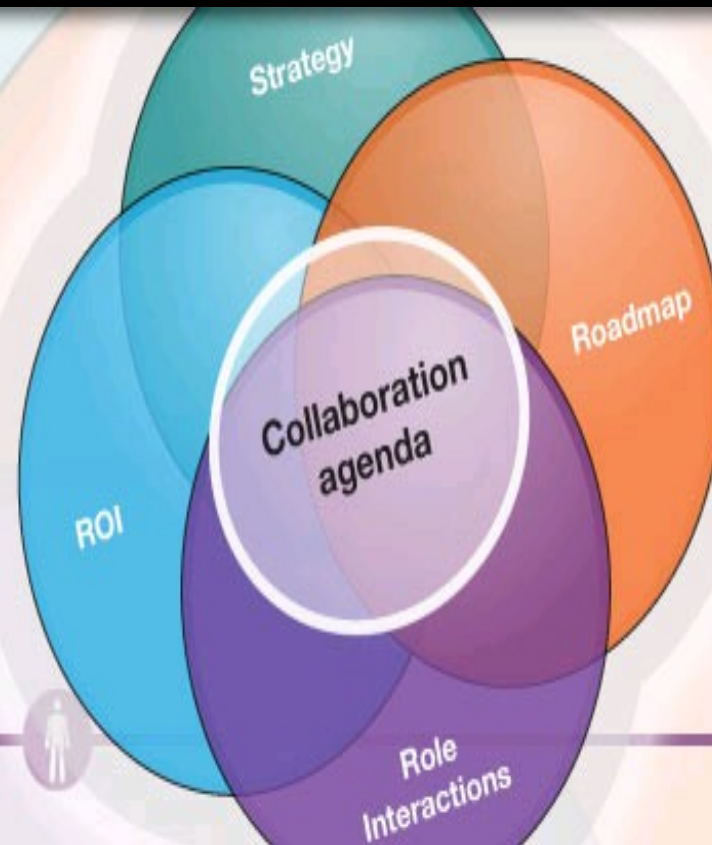


# Collaboration Agenda Manila, Philippines

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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**



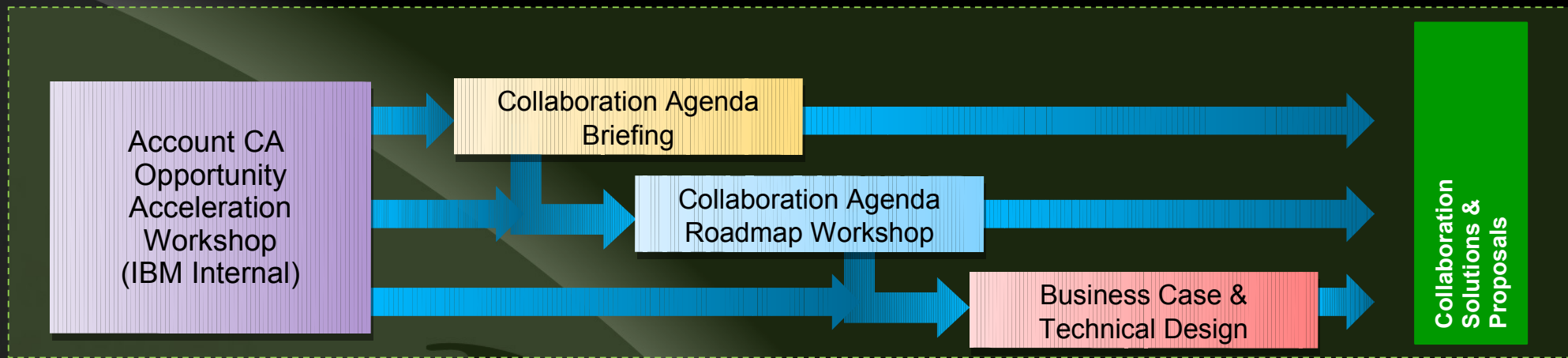
**Government**

## 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

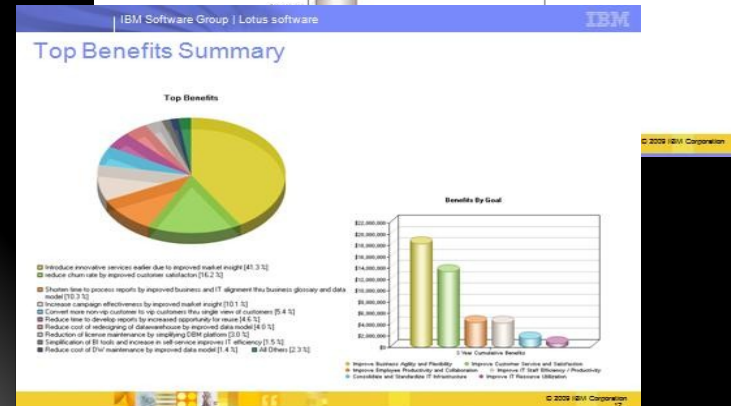
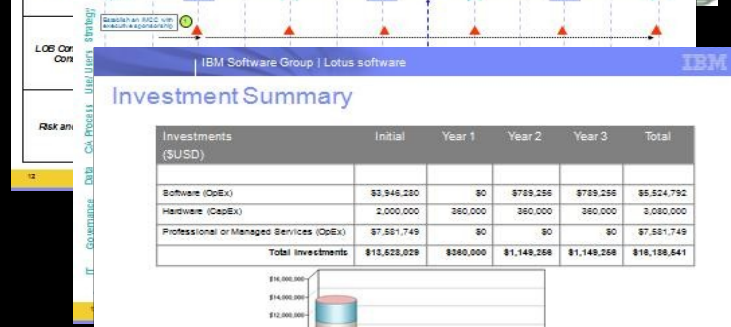
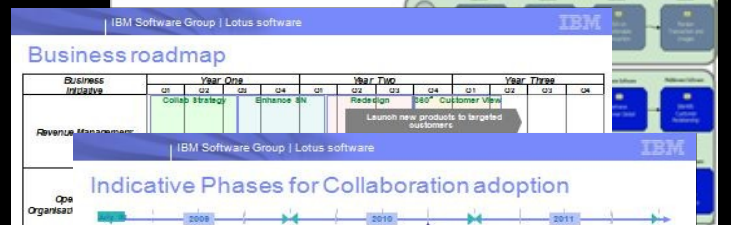
2-3 Day workshop to help build a Collaboration Roadmap using a proven five-step approach. The final report contains an overview of CA for the customer's industry, prioritized business objectives, collaboration architecture review and readiness, business to collaboration architecture alignment, phased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





# Executing the Agenda Business Case and Technical Design

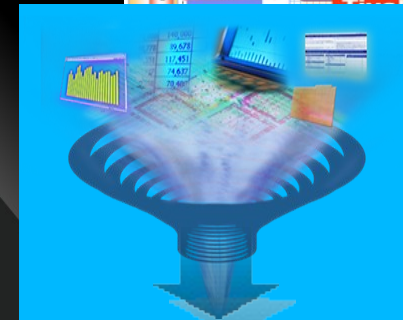
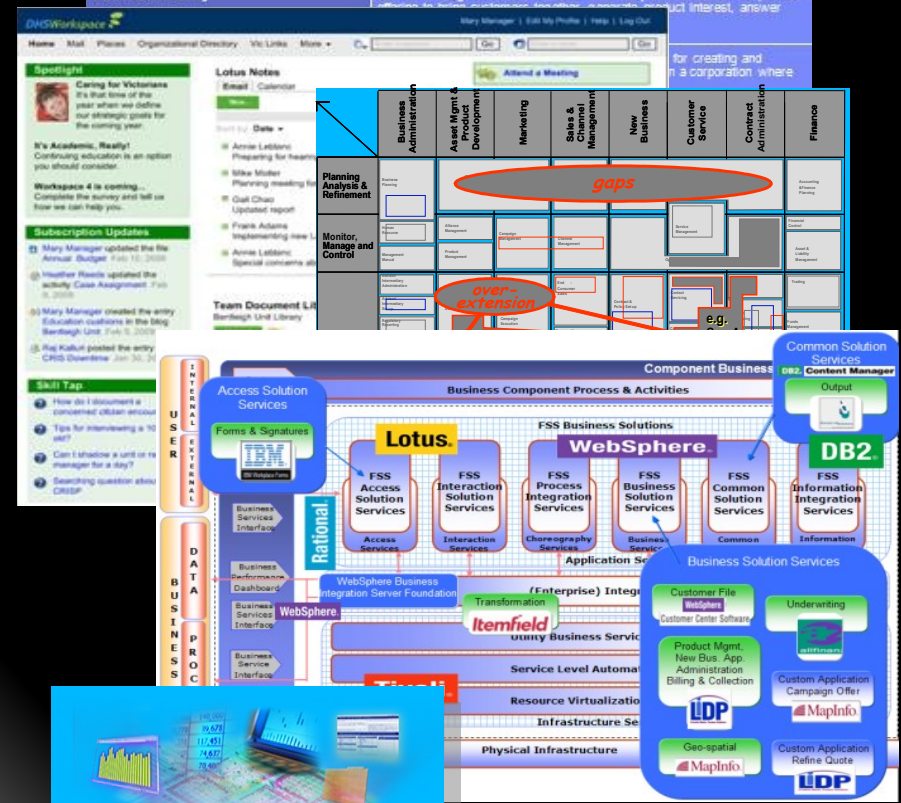
Create business case and high level plan for the first phases to deliver business value

## 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. Product interest, answer





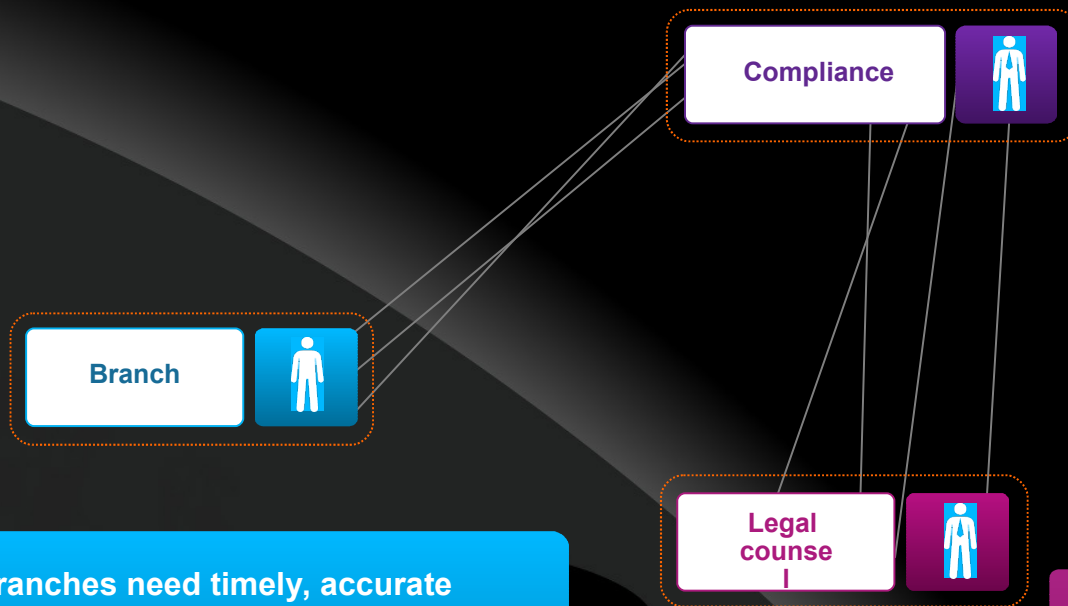


Industry: Banking  
Client: Global Bank

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

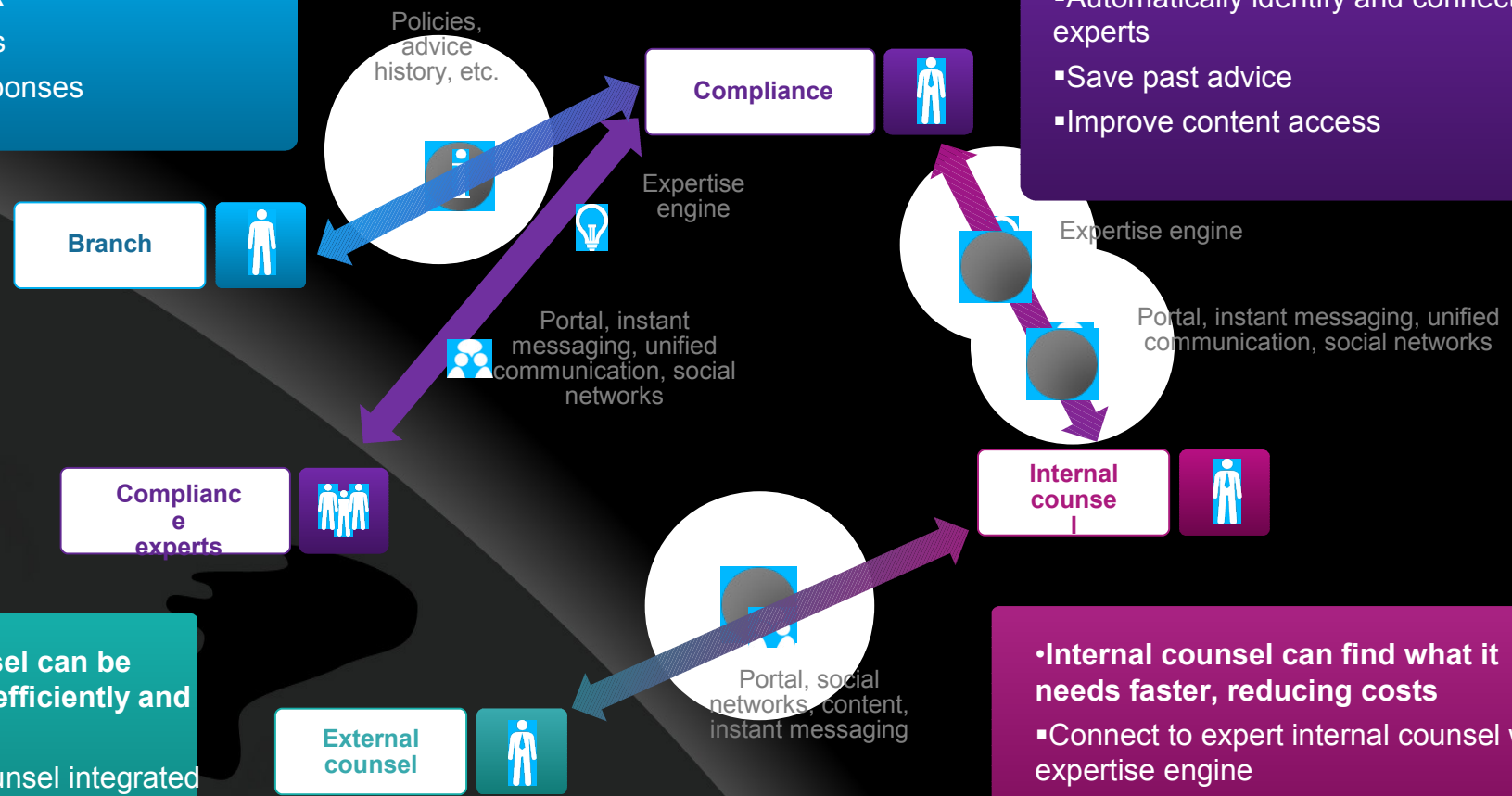


# The solution: Enhanced collaboration means faster, more cost-effective compliance

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

- 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



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

- 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  
[view all](#)

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	⚠
Pixar/Disney M&A	Brian Brinker	06/15/06	✓
Trademark and copyright license contract review for Acme	Nick Ketter	06/15/06	✓

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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

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

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## 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