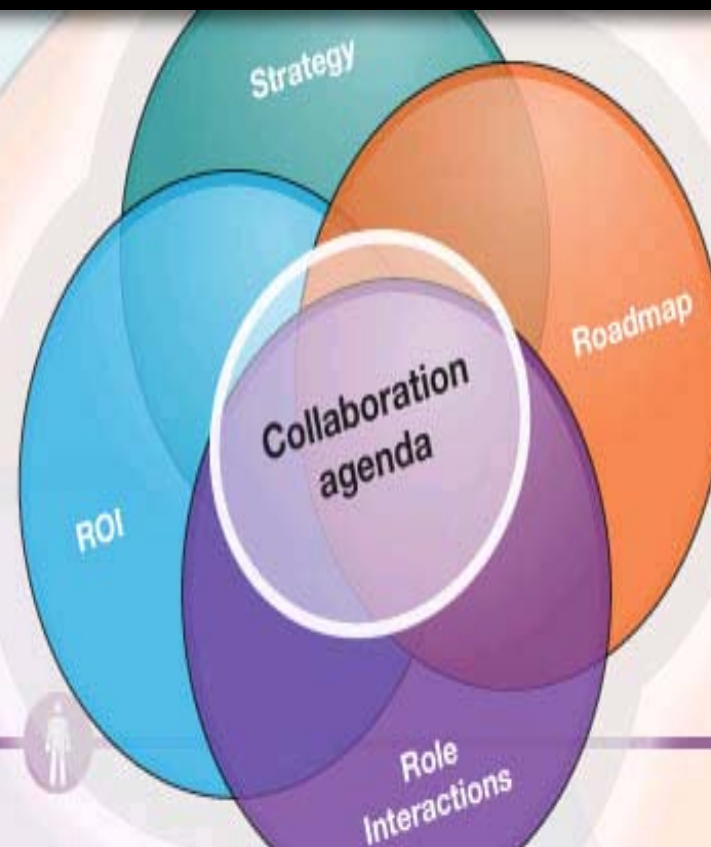


# Collaboration Agenda Manila, Philippines

Philip Blackburn  
philipbl@us.ibm.com  
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**

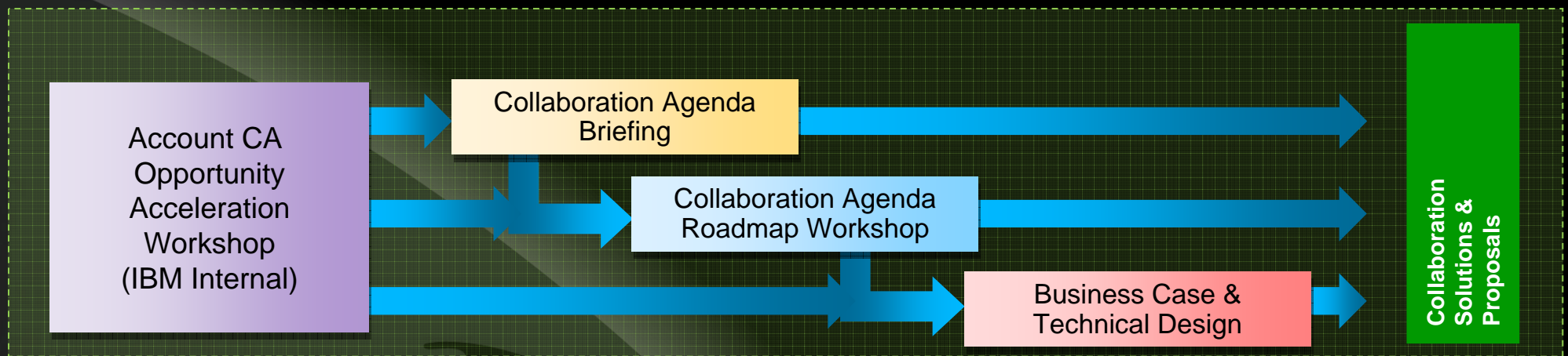


## Making easier for people to work with business process



- 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

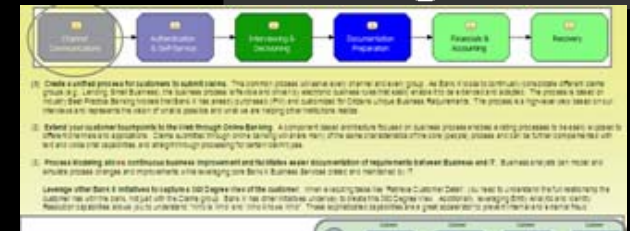
2-3 Day workshop to help build a Collaboration Roadmap using a proven five-step approach. The final report contains an overview of CA for the customer's industry, prioritized business objectives, collaboration architecture review and readiness, business to collaboration architecture alignment, phased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



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)	\$7,591,749	\$0	\$0	\$0	\$7,591,749
<b>Total Investments</b>	<b>\$13,528,029</b>	<b>\$360,000</b>	<b>\$1,149,266</b>	<b>\$1,149,266</b>	<b>\$16,186,641</b>



# Executing the Agenda Business Case and Technical Design

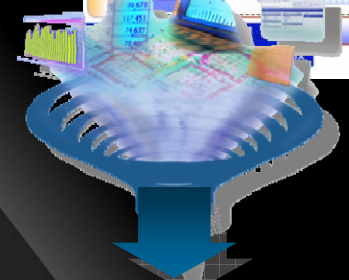
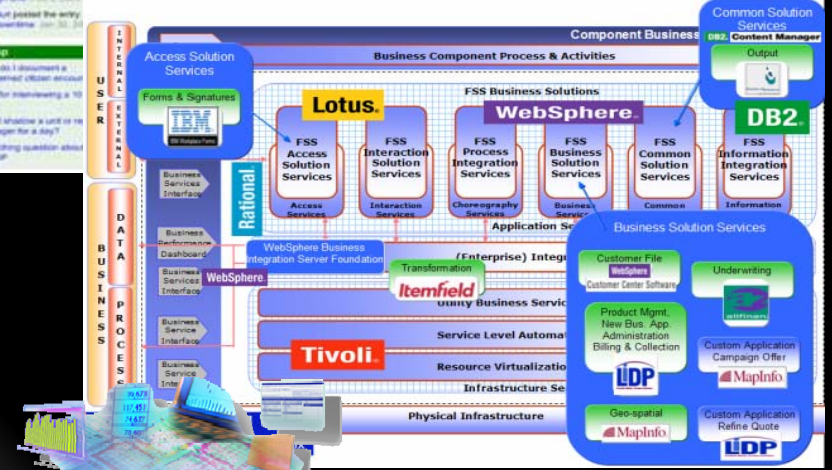
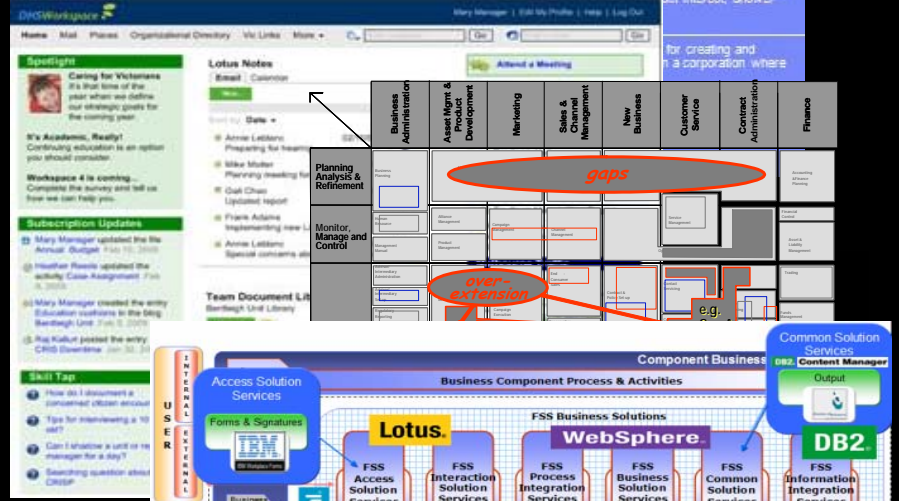
Create business case and high level plan for the first phases to deliver business value

## 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.



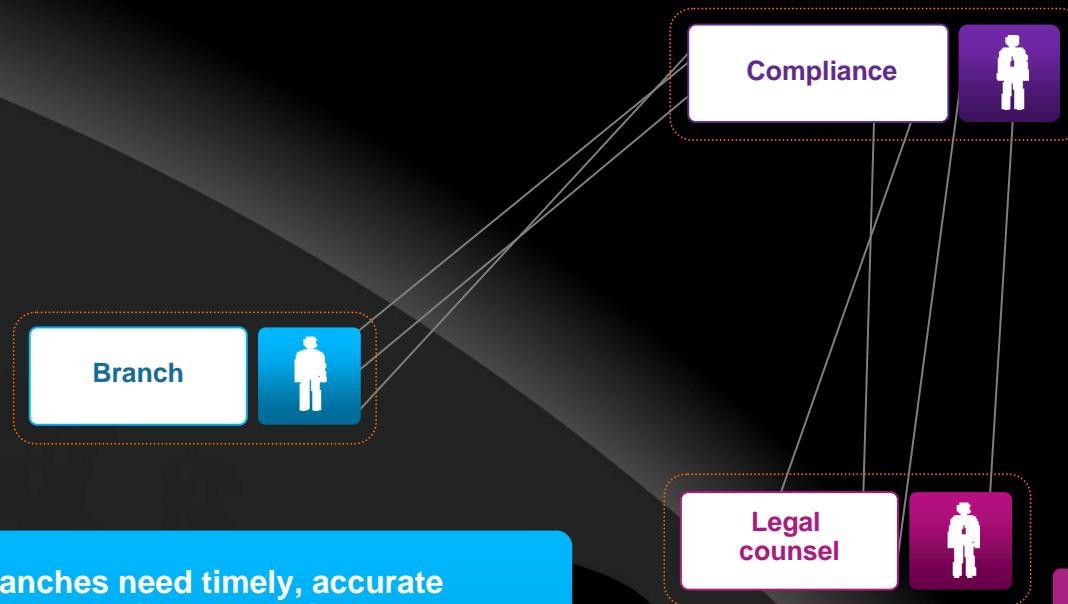


Industry: Banking  
Client: Global Bank

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

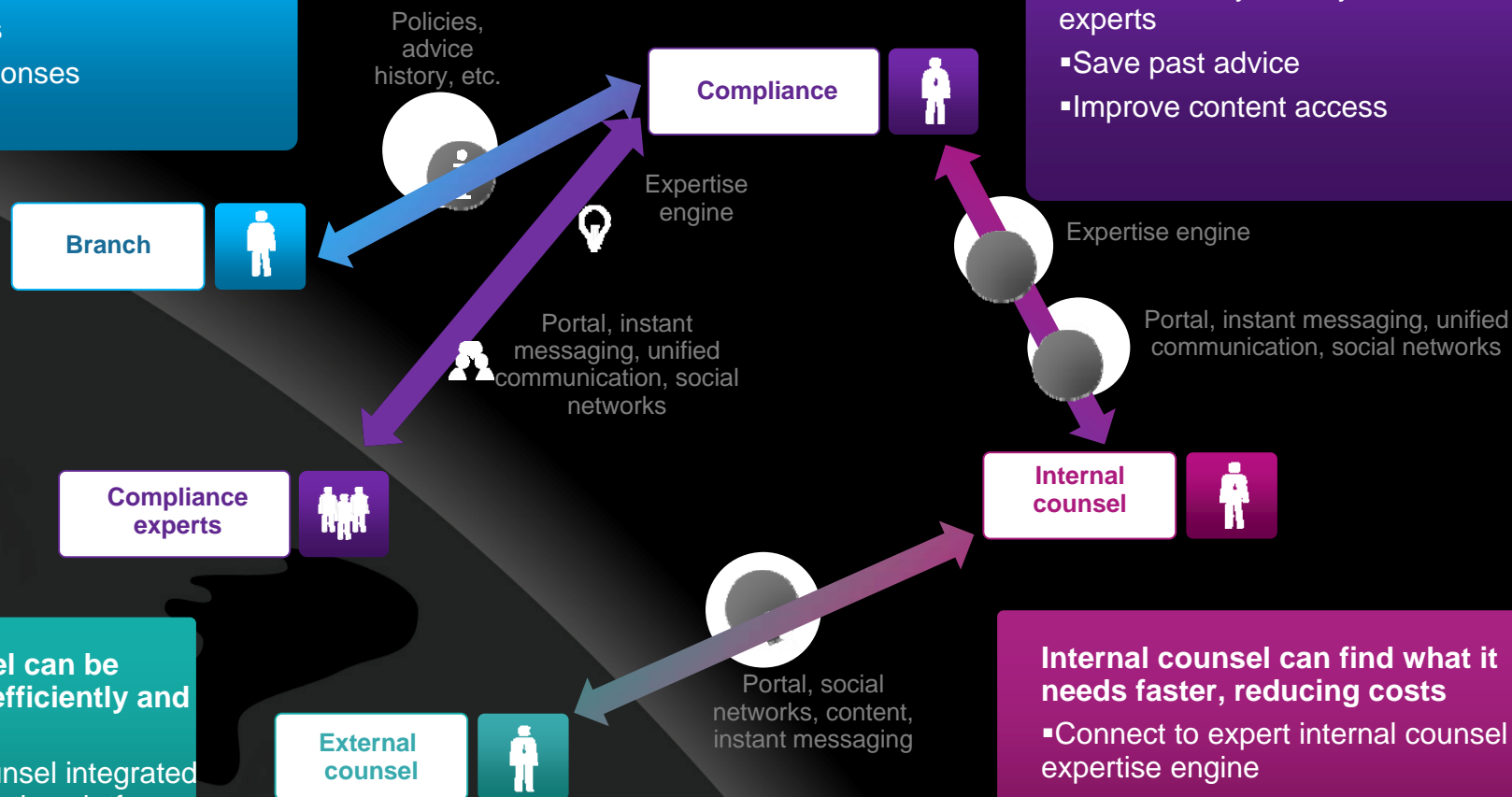
State of collaboration after solution implementation

**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

The screenshot shows a web application interface for 'Legal & Compliance' with the user 'Roberta Stephenson'. The interface includes sections for Alerts, Task List, Instant Messaging, and Your Workspaces. A 'Create New Workspace' dialog box is overlaid on the main interface, showing an 'Expertise Locator' with a list of recommended team members.

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

**Create Workspace: Add Team Members**

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

**Expertise Locator**

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

Buttons: 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