



Overview

The need

With a focus on sustainable business growth, Tejon Ranch Company (Tejon) needed to carefully manage overhead costs.

The solution

Tejon extended its IBM enterprise content management platform with case management, mobility and collaboration tools to help staff members get more done in less time.

The benefit

Fewer than 200 Tejon administrative staff members can effectively coordinate the activities of hundreds of contractors and suppliers and thousands of consultants across diverse operations.

Tejon Ranch Company efficiently manages widely diverse operations

IBM Advanced Case Management software helps midsize company operate on an enterprise scale

Overdevelopment and suburbanization have overtaken much of Southern California, but 60 miles north of Los Angeles and 25 miles south of Bakersfield, all of that stops at the borders of Tejon Ranch. Measuring 422 square miles, Tejon Ranch is owned by Tejon Ranch Company (Tejon), a 150-year-old business based in Lebec, California. While committed to preserving 90 percent of the 270,000-acre ranch in its natural state, Tejon is also a growth-oriented, diversified real estate development and agribusiness company (NYSE:TRC).

Covering a lot of territory

A core Tejon staff of 146 employees coordinates the work of hundreds of contractors and suppliers on the ranch, as well as more than 5,000 consultants and other groups that manage operations from the outside. The company's major projects include an industrial complex, a commercial and industrial park, a mountain village, a resort community and a city with more than 20,000 housing units. In addition to land entitling, planning and permitting for development, the company's real estate activities include infrastructure construction and land sales. Tejon also owns water plants. It grows crops and operates feedlots, primarily for cattle. It sells rights for mining, extraction, grazing and location filming, and it provides rights of way to power and communications companies.

Until recently, Tejon managed these diverse activities using manual, paper-based and siloed processes. To grow the business without increasing overhead, Tejon needed to automate. However, the range and variety of Tejon operations complicated the search for technology solutions.

"We didn't want 20 different industry tools," says Richard Daley, director of records and information management for the company. "We wanted a one-stop shop. We also needed the solution to be mobile and support collaboration among people within and outside the company."



“We are looking at a 3-year ROI of between USD2 million and USD4 million with the IBM solution. But as for the value it has brought to the company in terms of transforming the way we do business, the worth is beyond any estimate.”

—Richard Daley, director of records and information management, Tejon Ranch Company

Laying the groundwork

When Tejon began its automation initiatives, there wasn't a single solution available. There were, however, some commonalities across the lines of business that could be centralized, such as records management.

As a first step, therefore, Daley's team implemented IBM® FileNet® Content Manager software to turn paper documents into centrally managed electronic files. The company engaged IBM Business Partner Iron Mountain Inc. to archive its paper documents, and it deployed IBM Enterprise Records software to integrate information lifecycle governance for both physical and digital records.

Today, virtually all of the company's key business documents are digitized, including master builder bids, contracts, insurance policies, leases, easement bonds, employment records and investment files. Working with IBM Business Partner SpatiaX Infosystems, Tejon also added geographical information to the FileNet repository.

Centering content and processes around cases

Digitizing documents didn't necessarily ensure rapid access. For example, a contract and its associated documents compose a case file that follows a business transaction until the company closes the deal. With siloed work processes, transactions were sometimes delayed because required content was not accessible outside a particular workgroup.

The company deployed IBM Case Foundation software to help ensure that progress on a case no longer depended on any single person.

“We wanted to make the case management function a holistic process that would connect all the departments to the content they needed to serve customers efficiently,” says Daley.

The solution links electronic documents to automated workflow, letting multiple people connect on a permanent, temporary or ad hoc basis to complete required activities. Through disciplined application of role-based access security and business rules, Tejon controls who sees what content and makes sure that work moves forward as scheduled in compliance with contractual obligations, company policies and regulatory mandates.

Solution components

Software

- IBM Case Foundation
- IBM Case Manager
- IBM Content Collector for Email
- IBM Content Navigator
- IBM® FileNet® Content Manager
- IBM Enterprise Records
- IBM Datacap Taskmaster Capture

IBM Business Partners

- Iron Mountain Inc.
 - SpatiaX Infosystems
 - Evolution Business Group
-

“Case Manager really helped us push forward into the future with mobile connectivity because the platform was built that way. It also gives us social collaboration so we don’t need to use outside resources like Foursquare or Facebook.”

—Richard Daley

Extending case management and taking it mobile

With the foundational technology in place, Tejon moved quickly to extend capabilities to support its highly dispersed workforce. “As you can imagine, with 270,000 acres of land, everybody is spread out all over the place,” says Daley. “It doesn’t matter whether they’re at a construction site on the farm or in the boardroom, people don’t want to lose any time accessing the information and applications they need to do their work.”

Daley’s team deployed IBM Case Manager software to integrate case content and process management with mobility and social collaboration tools. It also implemented IBM Content Collector and IBM Datacap Taskmaster Capture software to add unstructured content such as emails to the company’s central content repository.

Tejon then contracted with IBM Business Partner Evolution Business Group to create a single mobile application that helps employees using virtually any type of tablet to retrieve content not only from the FileNet Content Manager platform, but also from sources external to the company.

“Now instead of going out and searching multiple databases and applications, Case Manager has it all integrated into one spot,” says Daley. “A customer emails a question. An invoice comes in. We get redlined revisions to a contract. No problem. Everything associated with the case is there at hand.”

All involved staff members are automatically alerted when content is added or changed. If they have questions, they no longer have to send out emails and wait for responses. “Basically, everything is put into a community where people can share information and ideas,” says Daley. “With less downtime, people complete tasks more efficiently.”

“Today, Tejon is doing three times as much with its systems as it did previously and yet it has added only two staff members to its IT team. IBM has enabled us to grow very sustainably.”

—Richard Daley

Transforming the way Tejon conducts business

With the recent deployment of IBM Content Navigator software, Tejon is building on its investment to optimize interactions with employees and people from outside organizations who do business on the ranch.

Using the Content Navigator offering, Daley’s team provided a front end to the IBM content and case management solution that offers a fresh custom look and greater flexibility in the way the company can present and view information. People can access a wider range of content types and applications, including widgets and embedded videos that explain how the available technology tools work.

A manager can assign work within the Case Manager offering, and an employee sees it in a widget within the Content Navigator software. Checking documents in and out is easier. People don’t see just one document. They also see recent documents and related content.

“The employee productivity savings Tejon has already realized are substantial,” says Daley. “But that’s only a fraction of the value we can achieve going forward.” Today, when contractors come to the ranch to do work, there are standardized processes in place. They use the same IBM tools as the Tejon staff. “We’re not buying 20 different software packages for 20 different groups with 200 different users. Content Navigator gives us a one-stop shop,” says Daley. “It’s almost like having an app store within the company.”

In addition, the Case Management software offers business-driven modeling and asset reusability capabilities that help groups in the lines of business participate actively in improving processes. “The IBM solutions help people accept, even initiate, changes because they now understand that everything they do is a case,” says Daley.

Everything is part of a process, with a start point and end point. Each person has a role and can look at the product in a different way with different fields. Daley continues, “That’s what made this a great experience for the ranch as a whole because we are learning from each other as we are learning the capabilities of the solution. “In stead of resisting change, people want to know what’s coming next.”

“We have one solution that we can adapt to the person using it. That’s why we have a long-standing relationship with IBM and keep innovating with them.”

—Richard Daley

Raising the bar for community development

The IBM solution is helping Tejon build smarter content for community development. For example, dozens of retail outlets currently under construction will be opening in the spring of 2014. Daly’s team plans to use the case management social business capabilities to create online communities that are focused on bringing a new store online, allowing people to collaborate on marketing strategies. “Our case management solution is going to be driving the business and social analytics that let us know how many people are accessing our Web sites and what retailers think about Tejon,” says Daly. “Every story will be a case with a workflow and collaboration tools that help us involve and share information about what we are doing and why leasing with Tejon is a sound business decision, not only from a financial standpoint, but from a foot traffic perspective as well.

For more information

To learn more about IBM Advanced Case Management solutions, please contact your IBM marketing representative or IBM Business Partner, or visit the following website: ibm.com/software/products/us/en/casemana

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Route 100
Somers, NY 10589

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