



Highlights

- Gives information workers the control and insight to take the next best action and resolve cases effectively
 - Provides near-real-time access to content and facilitates decision-making in complex, dynamic customer service, incident management and investigation processes
 - Offers a consistent user experience across platforms with IBM® Content Navigator while enabling customization for specific roles and business groups
 - Provides a shared services platform to build, deploy, host and manage content-centric solutions across the enterprise for rapid time to value
 - Enables secure collaboration with internal and external participants through tight integration with Box
 - Helps you get up and running fast with IBM Case Manager on Cloud
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IBM Case Manager

The action platform for analytic and cognitive insights

Organizations in all industries are looking for ways to work smarter and accelerate digital transformation. Yet they are collecting larger volumes and greater varieties of content than ever before and storing it in siloed applications, making it difficult to access the right content and use it to make better business decisions. They need to unite content, people and processes to drive growth, increase profitability, enhance customer loyalty and achieve other strategic goals.

Their first challenge is to sift through the content, including large quantities of unstructured content, and identify the most valuable information. They then need to understand the context of information, find patterns and trends, and deliver new insights to knowledge workers at the right time so they can make immediate decisions. Many organizations also need ways to manage content within complex, dynamic and potentially unpredictable business processes. They must facilitate collaboration among multiple people and teams—within and beyond the organization—to work toward common goals. These organizations need case-style enterprise content management (ECM) solutions that can help knowledge workers make informed decisions and drive successful outcomes using changing content.

The right solutions offer a consistent user experience across platforms and devices while enabling customization for specific user roles, groups and workflows. Users should be able to easily focus on relevant content in context so they can perform daily tasks quickly and effectively. At the same time, they must have the flexibility to make expert decisions in real time, modify processes to meet changing demands and drive new tasks at their discretion.



A case-style ECM solution should have a design environment that helps accelerate time to value. It should allow lines of business to initiate and participate in the creation of new capabilities and contribute to the development of even more complex customizations or integrations.

Empower knowledge workers with IBM Case Manager

IBM® Case Manager helps your organization optimize case outcomes by empowering the people who work with content—the knowledge workers, taskers or caseworkers. Case Manager enables these people to make complex, real-time decisions based on constantly changing information. Advanced document search capabilities help them find content rapidly, analytics capabilities let them track trends and fact-based reporting facilitates decision-making. Knowledge workers can determine the next best steps based on insights gained from contextualized content. Field workers or knowledge workers that need to respond urgently can use IBM Case Manager Mobile to access content and take action from the palm of their hands, no matter where they are.

Case Manager provides a broad spectrum of ready-to-use capabilities, collaborative tools and process controls with a consistent user experience. It integrates with Box to enable secure content collaboration within and outside the organization. For example, an insurance fraud investigator might collaborate with a bank to see if a payment was processed correctly. Case Manager also supports rapid development and deployment of customized solutions to meet the unique needs of entire organizations or individual groups.

Accelerate time to value with a flexible framework and templates

Case Manager provides an extensible infrastructure that enables organizations to address a variety of particular requirements. Users can capture best practices in reusable templates composed of case management elements—such as data models, automated tasks, user-interface components, rule sets and other preset configurations—that help accelerate deployment and shorten time to value.

Acting as a unified content-centric platform that spans the enterprise, Case Manager facilitates shared services for all solutions where content drives outcomes. Organizations can accelerate solution delivery at a lower cost by using the template-based platform to build, deploy, host and manage enterprise-wide content-centric solutions.

Generate new insights using content analytics

Case Manager is a platform for taking action on insights. It gives organizations the option to capitalize on the power of IBM Watson® Explorer to uncover new insights in tremendous volumes of unstructured data. Using content analytics capabilities, knowledge workers can discover patterns and trends—and identify potential anomalies—across cases and related content.

An intuitive visualization component provides a graphical history of case elements, including the current state, tasks being performed, people performing the tasks, case events and actions taken. With this information, managers can take proactive measures to improve performance, such as reallocating work or adding more supporting case information.

Securely collaborate to improve case outcomes

Most processes involve stakeholders other than the caseworkers. That's why Case Manager is tightly integrated with Box: to enable secure content collaboration with people inside and outside of the organization. Caseworkers and Box users can collaborate on tasks and content without leaving their own user experience.

Offer a consistent, seamless user experience

Case Manager leverages solutions from the IBM ECM portfolio for content integration and federation. By adopting the IBM Content Navigator framework for Case Manager, organizations can give users a single, consistent and easy-to-use interface across a wide range of devices. The Content Navigator framework helps simplify integration of multiple IBM ECM solutions. And through Content Navigator, caseworkers can leverage direct integration with eSignature providers to accelerate digital transformation.

Users can search for and add documents from many repositories, including IBM FileNet®, IBM Content Manager 8, IBM Content Manager OnDemand and any other repository that supports the Content Management Interoperability Services (CMIS) standard. Having customer information accessible in one central location enables knowledge workers to quickly respond to customer inquiries and resolve cases faster, based on a comprehensive view of customer content.

Improve customer service

Case Manager delivers innovative capabilities that allow your organization to gain deeper customer understanding throughout the customer service lifecycle. By facilitating rapid interaction, investigation and resolution of complex events, Case Manager lowers the barriers to meaningful, timely client engagement. These capabilities help improve customer service responsiveness while increasing customer satisfaction.

Streamline compliance and help protect against fraud

Case Manager can help you manage information lifecycle governance, including protecting customer data and complying with data retention regulations, to help reduce legal risks. For example, cases can be automatically declared records and managed with full compliance rules through integration with IBM Records Manager. Case Manager lets you monitor processes, track participation in processes and facilitate auditing to help ensure and demonstrate compliance. Plus, Case Manager can record all data, content and actions and package them as a legal record for audit and compliance purposes.

Speed deployment with agile design capabilities and reusable elements

Case Manager can help you quickly assemble and deliver dynamic, content-centric applications. An integrated case designer promotes efficient solution creation without having to use complex external tools. It also supports flexible data views including columns, sections, tabs and tables.

With Case Manager, you can reuse existing solution elements as you develop and deploy customized solutions for multiple business groups. Reusability helps you accelerate deployment and simplify ongoing management of solutions by maintaining the consistency of key components from one business group to the next.

Accelerate deployment of case solutions with IBM Case Manager on Cloud

Case Manager on Cloud is a managed service offering hosted on IBM SoftLayer® infrastructure. Because IBM hosts it in a secure and scalable cloud, the solution provides an easy way to get started. With rapid provisioning, you can begin projects quickly, without waiting in a long queue of other IT projects that may already be in process. And because it has the same capabilities as the on-premises version but without the burden of managing infrastructure, you can focus all your attention on improving case outcomes, knowing you can scale as needed to accommodate shifting caseloads.

IBM Case Manager in action: Customer examples from around the world

Blueprint Genetics delivers fast, accurate results to patients undergoing genetic testing: <http://ibm.co/2cF7WC8>

Quintillion doubles business volumes and enhances investor service while maintaining lean staffing levels: <http://ibm.co/2kOc9rb>

Spar Nord Bank optimizes banking processes to serve clients faster and better: <http://ibm.co/2loeMmq>

Swiss Export Risk Insurance connects underwriters to the content they need to make better-informed decisions: <http://ibm.co/2lorsJY>

PowerSouth Energy Cooperative keeps electricity services flowing with smart content management: <http://ibm.co/2IT5wot>

Support comprehensive case management

Case Manager leverages and integrates a portfolio of IBM technologies to deliver a broad spectrum of capabilities:

- **IBM Content Navigator** offers a unified user experience with the rest of the IBM ECM portfolio.
- **IBM Content Foundation** provides the core case infrastructure, including unified content capabilities for case management, content integration and federation with third-party repositories.
- **IBM Watson Explorer** enables users to search, discover and perform analytics on structured or unstructured case artifacts. Trend analysis, pattern detection and anomaly highlighting help facilitate smart case decisions.

For more information

For more information about IBM Case Manager software, contact your IBM representative or IBM Business Partner, or visit: ibm.com/software/advanced-case-management/case-manager

For more information about IBM Content Navigator, visit: ibm.com/software/products/us/en/content-navigator

Additionally, IBM Global Financing provides numerous payment options to help you acquire the technology you need to grow your business. We provide full lifecycle management of IT products and services, from acquisition to disposition. For more information, visit: ibm.com/financing



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