IBM CEEMEA – Software Group

**How To Take A Big Bite
Out of the Cost Of Paper and
Compliance
A Case Study**

Frederik Soendergaard-Jensen – ECM Sales Executive
26th of May, 2009

What is Enterprise Content Management?

Secure Access

Personalized Delivery

Media

Reports

Storage

Documents

Web Content

Transactions

Integration

E-mail

Search

Workflow

Records Management

Collaboration

ECM provides the ability to capture, integrate, manage and deliver all forms of digital content across an entire company to create real business value.
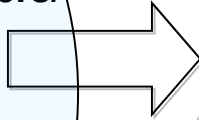
Content flow in organizations
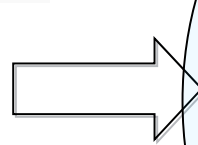
Process content according to business process
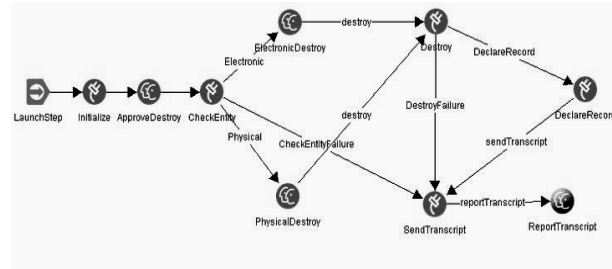
Capture content

- Invoices
- Customer letters/
- Citizen letters
- Applications
- Emails
- Fax
- eForms
- …..

Collaborate and collect content

- Reports
- Email
- Meeting minutes
- Instructions
- Power point presentations
- …..

Distribute content

- Statements
- Invoices
- Customer letters
- Fax
- email
- …..

email

Customer self service (Web)

Fax

Your organization may not work faster than the paper can flow

Common business problems
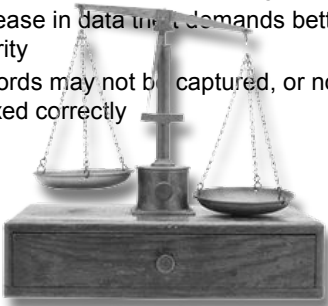
ECM Simplifies the Information Lifecycle

Frequency of Access and Use

Born Digital
Over 90% of information is born digital … and the rest should become digital

85%
of enterprise information is unstructured

Expiration
Roughly 95% has a retention policy … very little should be kept forever

∞

Time
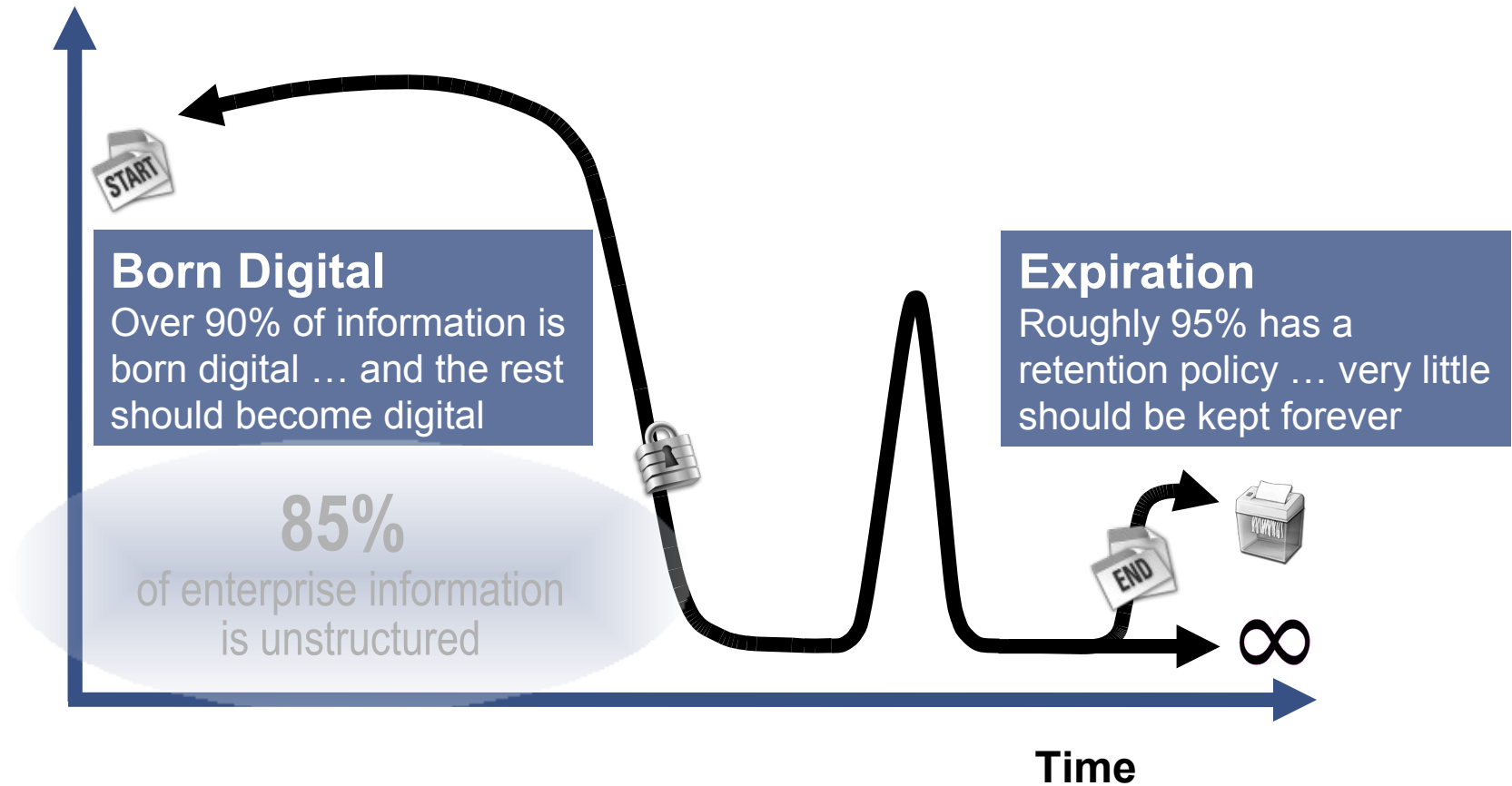
Key Business Challenges

Business Processes	Transition	Records Lifecycle	
•Natural or man made disasters •Increased litigation and related discovery issues •Volume of Records increasing •Competitive environment demands higher levels of customer satisfaction •Increase in data theft demands better security •Fines and Penalties incurred for non-compliance	•Natural or man made disasters •Volume of Records increasing •Increase in data theft demands better security •Records may not be captured, or not indexed correctly	•Natural or man made disasters •Increased litigation and related discovery issues •Volume of Records increasing •Increase in data theft demands better security •Fines and Penalties incurred for non-compliance •Records not destroyed, too soon, too late, or not at all •Difficult to locate records for users retrieval, discovery	**Risks**
•Labor costs for processing paper increasing •Business Processes require Re-engineering •Costs of storing paper rising •Cost of legal and audit discovery rising •Volume of Records increasing •Shareholders require cost cutting •Need to reduce costs and improve efficiencies	•Labor costs for processing paper increasing •Costs of storing paper •Volume of Records •Transportation and fees rising	•Labor costs for processing paper increasing •Costs of storing paper rising •Cost of legal and audit discovery rising •Volume of Records increasing •Records past retention period	**Costs**
•New reporting and auditing requirements •Increased litigation and related discovery issues •Volume of Records increasing •Difficult linking paper to transaction •Difficult to analyze and improve user productivity •Inability to truly understand business and processes	•Volume of Records increasing •Weak audit trail and chain-of-custody	•New reporting and auditing requirements •Increased litigation and related discovery issues •Volume of Records increasing •Poor visibility into box contents •Weak Audit trail and reporting •Weak chain-of-custody	**Visibility**

IBM Offerings & Customer Benefits

IBM Offering

IBM FileNet P8 BPM
IBM CM8
IBM Content Manager OnDemand

Business Benefit

No Paper Weight

Move from paper-based records to electronic records

Reduce Costs and Risks

- Of labor costs and physical records storage by automating manual processes
- address information storage, auditability and retrieval needs from regulations, eDiscovery and other legal requirements

Increase Productivity

- For employees focused on managing records as well as business users across all business applications
- Improve visibility into paper-based, manual business processes to support better business decisions

Payback period of 4 months, $11 Million saving in year one, and $36 Million over three years, or 263% ROI
Industry: Banking

Partner solutions

GoPro
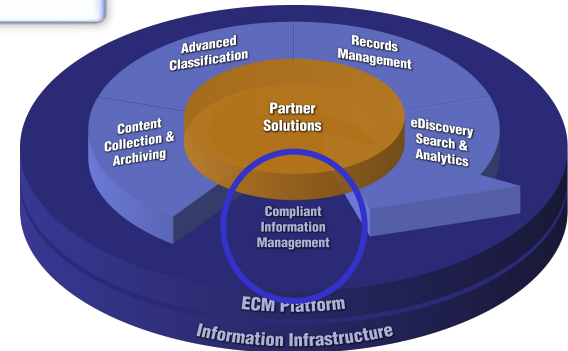
No Paper Weight Customer Case Study

JM FAMILY
ENTERPRISES, INC.

Challenge

More than 700 JM Family customer service associates annually process tens of thousands of automobile loans and leases. However, processing was complex, involving volumes of paper documents, frequent interaction with customers, and multiple information sources and systems.

Solution

- IBM FileNet® BPM to manage information and customer requests arriving from multiple sources such as phone, fax, mail or email

- Automation of the entire loan/lease process with the combination of business process, electronic forms and systems integration

- Facilitate auditing by automatically recording the status of key process steps as well as the participants involved in reviews and approvals.

Business Benefits

- **Eliminated annual printing of 168,000 pages for both cost savings and "environmental" benefits**

- **Able to efficiently comply with corporate records policy via automated declaration of documents**

- **......**

"The major business objectives in our organization are excellence in customer service and increased productivity of our associates. IBM ECM is a key enabler of these objectives."
– Keith Tempinski, Director, Enterprise Content

No Paper Weight - ROI Model Financial Summary

Amounts in USD	Year 1	Year 2	Year 3	Total
Incremental costs				
Software Costs	($1,165,815)			($1,165,815)
Software Support	($184,262)	($184,262)	($184,262)	($552,785)
Hardware Costs	($743,811)	($165,000)	($165,000)	($1,073,811)
Incremental Transactional Costs	($1,277,106)	($1,302,649)	($1,328,702)	($3,908,456)
Professional Services / Training Costs	($354,000)			($354,000)
Annual Incremental Costs	**($3,724,994)**	**($1,651,910)**	**($1,677,963)**	**($7,054,867)**
Annual Savings				
Transactional Savings	$9,140,483	$9,361,154	$9,548,377	$28,050,014
Legal Savings	$182,856	$256,581	$354,081	$793,518
Other Direct Savings	$483,605	$947,445	$1,044,945	$2,475,994
Annual Savings	**$9,806,944**	**$10,565,180**	**$10,947,403**	**$31,319,527**
Annual Net Value Derived	**$6,081,950**	**$8,913,270**	**$9,269,440**	**$24,264,660**
Cumulative Net Value Derived	**$6,081,950**	**$14,995,220**	**$24,264,660**	**$24,264,660**
Economic Value Added (EVA)	**$7,131,534**	**$8,177,613**	**$8,532,220**	**$23,841,368**
Internal Rate of Return (IRR)	163.3%	234.8%	251.5%	
3-Year ROI				
Payback Period in Months				
Net Present Value (NPV)				

Total Potential savings

	Year 1	Year 2	Year 3	Total 3 Year Savings
Paper Storage Reduction	$ 181,384	$ 105,808	$ 63,485	$ 350,677
Electronic Storage Reduction	$ 57,750	$ 37,538	$ 24,399	$ 119,687
Declaration costs with ZeroClick	$ 662,947	$1,193,304	$1,431,965	$3,288,216
Records admin savings	$ 180,000	$ 180,000	$ 180,000	$ 540,000
			67,806	
		1,784,456		

Potential 3 Year Savings

Hard Savings = $31 Million
Automation Savings = $5 Million

Total = $36 Million

Payback in 4 months = 3 Year ROI 263%
- Opportunity Lost Each Day from Delay = **$40,000**
- Annual Unnecessary CRC Expenses = **$423,000**
- Manual Procedures Consume **41%** of Workday

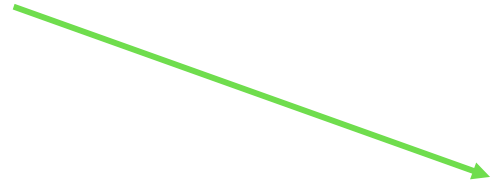**New Process Visibility and Analysis Enabled**
Major Litigation and Operational Risk Mitigated

Using No Paper Weight and eDiscovery ROI Tool - Collect facts

Costs Associated with Records Management		
Paper Storage	1. Approximately how much does your organization spend each year to store paper either in your own facilities or with a third-party Commercial Records Center? This information may be available from your records management department or vendor invoices, and might include transportation, supplies, destruction and other various fees.	**$400,000**
	2. What percentage is being stored beyond it's retention date? It is estimated that as much as 50% of most organizations records are beyond their required legal retention period.	**20%**
	3. What percentage of the paper stored originated as "born digital"? For example: Word processing, emails, screen prints, web pages etc. Many organizations report that as much as 60 - 80% of the paper used in their business processes and then stored are "born digital".	**40%**
	4. Do you have duplicate copies of all your paper records, or alternate sources for the information, that serve as a disaster discovery/back up for the paper you currently rely on as your paper copy of record that you store as inactive records?	**Yes**
Labor	5. How many employees in your organization regularly work with paper files and documents? This should include the business unit workers who use paper in their normal job duties, such as Claims Adjuster, HR Staff, Application processing employees, etc.	**1,000**
	6. Estimate what percentage of an average employee's workday is spent creating and maintaining paper files. For example: Sorting, filing, hole punching, stapling, copying, etc. Studies show it can be anywhere from 15 - 30% of their time.	**15%**
	7. What is the average yearly salary for these employees? Please include the fully burdened rate that would include insurance and other benefits, taxes, corporate overhead, etc. This can often be as much as an additional 30% in cost to the corporation in addition to actual wages.	**$60,000**
Legal	8. Estimate annual costs of legal discovery of paper records. This might include internal labor costs, outside counsel and discovery service company fees, as well as commercial records center fees beyond the normal storage costs. It might also include the costs of implementing hold or	**$600,000**
	9. Estimate the total number of fines, penalties or lost funds levied annually due to the inability to locate specific paper records. This might include legal or regulatory actions, or money lost when a	**$500,000**

Using No Paper Weight and eDiscovery ROI Tool – Review findings

Costs Summary	
Locating Records. A typical worker spends an average of 150 hours per year looking for lost documents, with the average employee working 260 days (2080 hours) per year on average. This does not include searches associated with legal discovery. Based on the number of employees you provided and their average annual wage, document searches are costing your organization:	**$4,326,923**
Storage. Your response to Question 1 provides a rough cost. Other items that might also be considered include the cost of office space used to store paper, supplies and more.	**$400,000**
Legal Costs. Legal costs include the amounts listed in Questions 7 and 8. Other costs not reported include IT and business unit costs incurred looking for documents.	**$1,100,000**
File Maintenance Labor. Based on the number of employees you provided and the average hourly rate, annual file maintenance is costing your organization:	**$9,000,000**
Current Annual Costs:	**$14,826,923**

Using No Paper Weight and eDiscovery ROI Tool – Step 3

Annual Savings Opportunities		
Storage Savings.	**paying to retain documents past their retention date. IBM ECM Records Management technology would reduce paper storage volumes by automating records destruction processes. Additional savings, not calculated here, would come from automated records declaration and classification that would reduce not only the paper stored, but also electronic storage costs as well.**	**$80,000**
	digital" documents in order to store them in paper format. Studies show 80-90% of internally generated documents are "born digital". Capturing these documents in their original state could saving your organization:	**$160,000**
	Total estimated Storage savings:	**$240,000**
Labor Savings	**"born digital" are being printed and used in business process prior to storing the paper. Using IBM ECM automation tools would capture the content in its original electronic format and reduce the need to print the percentage you indicated in question. In addition to the storage savings shown above, this would result in** *labor* **savings of approximately:**	**$3,600,000**
	records needed for a legal, regulatory or auditing requirements. A conservative estimate of your productivity savings is 20% in just the first year, based on your search costs identified above, and be:	**$865,385**
	Total estimated Labor savings:	**$4,465,385**
Discovery Savings	**Discovery Savings: IBM ZerocClick records management automation can help ensure that records are destroyed in compliance with their legal retention period. This would result in a reduction of discovery costs with few records subject to examination. Based on your responses to questions 2 and 7, you could reduce your annual audit and discovery expense by:**	**$120,000**
	Anticipated Annual Savings:	**$4,825,385**
	Dollars you are loosing everyday!	**$18,559**

eDiscovery savings

No Paper Weight & eDiscovery savings

No Paper Weight - ROI Model Financial Summary

Amounts in USD	Year 1	Year 2	Year 3	Total
Incremental costs				
Software Costs	($1,165,815)			($1,165,815)
Software Support	($184,262)	($184,262)	($184,262)	($552,785)
Hardware Costs	($743,811)	($165,000)	($165,000)	($1,073,811)
Incremental Transactional Costs	($1,277,106)	($1,302,649)	($1,328,702)	($3,908,456)
Professional Services / Training Costs	($354,000)			($354,000)
Annual Incremental Costs	**($3,724,994)**	**($1,651,910)**	**($1,677,963)**	**($7,054,867)**
Annual Savings				
Transactional Savings	$9,140,483	$9,361,154	$9,548,377	$28,050,014
Legal Savings	$182,856	$256,581	$354,081	$793,518
Other Direct Savings	$483,605	$947,445	$1,044,945	$2,475,994
Annual Savings	**$9,806,944**	**$10,565,180**	**$10,947,403**	**$31,319,527**
Annual Net Value Derived	**$6,081,950**	**$8,913,270**	**$9,269,440**	**$24,264,660**
Cumulative Net Value Derived	**$6,081,950**	**$14,995,220**	**$24,264,660**	**$24,264,660**
Economic Value Added (EVA)	**$7,131,534**	**$8,177,613**	**$8,532,220**	**$23,841,368**
Internal Rate of Return (IRR)	163.3%	234.8%	251.5%	
3-Year ROI				
Payback Period in Months				
Net Present Value (NPV)				

Potential 3 Year Savings

Hard Savings = $31 Million
Automation Savings = $5 Million

Total = $36 Million

Total Potential savings

	Year 1	Year 2	Year 3	Total 3 Year Savings
Paper Storage Reduction	$ 181,384	$ 105,808	$ 63,485	$ 350,677
Electronic Storage Reduction	$ 57,750	$ 37,538	$ 24,399	$ 119,687
Declaration costs with ZeroClick	$ 662,947	$1,193,304	$1,431,965	$3,288,216
Records admin savings	$ 180,000	$ 180,000	$ 180,000	$ 540,000
			$ 67,806	
		$1,784,456		

Payback in 4 months = 3 Year ROI 263%
- ¿ **Opportunity Lost Each Day from Delay = $40,000**
- ¿ **Annual Unnecessary CRC Expenses = $423,000**
- ¿ **Manual Procedures Consume 41% of Workday**

New Process Visibility and Analysis Enabled
Major Litigation and Operational Risk Mitigated

Agile ECM in Action (10 Industry Charts & 16 Reference Customers)

Agile ECM for Government

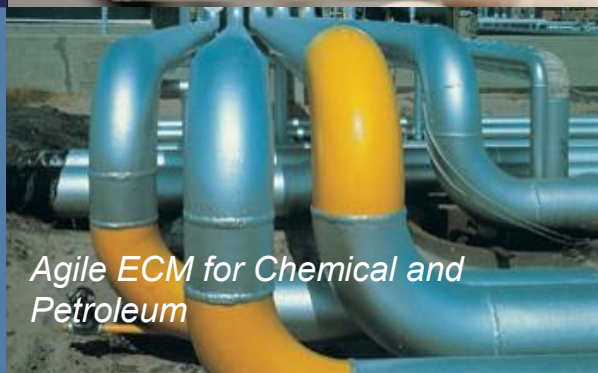Agile ECM for Manufacturing

Agile ECM for Insurance

Agile ECM for Healthcare

Agile ECM for Transportation

Agile ECM for Retail

Agile ECM for Chemical and Petroleum

Agile ECM for Telecommunications

Agile ECM for Banking and Financial Services

Agile ECM in Action

Agile ECM for Government

Agile Document Processing

A department of taxation speeds the distribution of tax-return checks by as much as 600 percent when it implements IBM FileNet Content Manager software, improving service, productivity and cutting physical storage by 50%.

– Hawaii Department of Taxation

Challenges

- **Increase operational efficiency**
- **Improve customer service and responsiveness**
- **Enhance departmental and agency collaboration and productivity**
- **Meet security and privacy requirements**

Kommunedata

CHALLENGE

- Increase efficiencies
- Create a portal to manage citizen interaction with the government
- Leverage technology to enhance public service

SOLUTION

- IBM DB2 Content Manager
- IBM DB2 Content Manager OnDemand

KMD is one of Denmark's largest providers of information technology for the public sector, serving 275 local government agencies with approximately 115,000 users.

VALUE

- Citizens can now communicate via email, letter, or fax to government agencies
- Improved customer service
- New system supports 20 - 30 applications for Citizen Relationship portal

Agile ECM in Action

Agile Processes

"The main challenge was to unify the business processes involved and implement a single IT platform to support them. There was also a need to re-engineer the processes with a view to streamlining and automating them for improved efficiency."

– Portugal Telecom

Agile ECM for Telecommunications

Challenges

- **Improve overall operational efficiency to reduce costs**
- **Respond to competitive threats and customer churn**
- **Shrinking wireline revenues**
- **Consolidation of back office functions and creation of shared services**
- **Cost-effectively comply with an increasing number of regulatory guidelines**

Agile ECM in Action
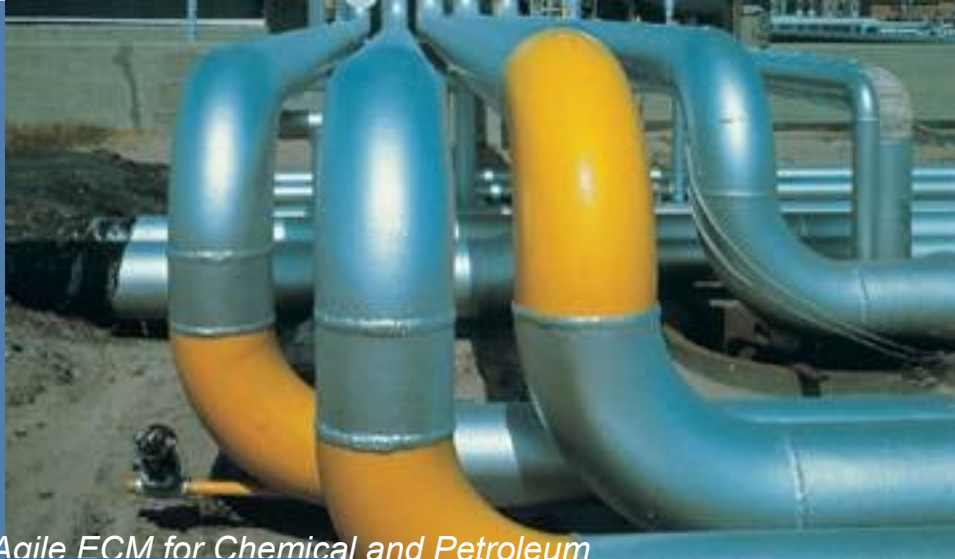
Agile ECM for Chemical and Petroleum

Challenges

Agile Compliance

A large materials company implemented a solution to support compliance efforts and strengthen governance processes while improving staff efficiency and making legal discovery faster and more accurate. Plus, it protects corporate intellectual property and enhances collaboration to drive greater innovation.

- Thousands of legal and regulatory mandates resulting from diversified offerings across many industries and in many countries

- Lost revenue opportunities as a result of delays or inefficiencies in clearing regulatory hurdles

- Classification of critical e-mail records from non-essential e-mails and documents

- Costly and inefficient eDiscovery processes resulting from having to pore through irrelevant information

- Lack of effective re-use of critical business information among collaborative work teams

- High costs from growing volumes of content

Agile ECM in Action

Agile ECM for Banking and Financial Services

Challenges

Agile Customer Service

A financing company supporting a leading building society in Germany reduces new document distribution time from up to a day to one hour, shortens information processing times and increases security and compliance when it implements a suite of IBM FileNet software.

- **Increase efficiency, driving organic growth through innovation**

- **Improve customer service levels to obtain a complete, 360-degree view of the customer**

- **Lower costs while meeting regulatory compliance mandates and improve risk management**

- **Streamline how information is shared and accessed across every business line**

Large City Government

Challenge

- **Silo'd access to agency specific content systems, unable to share data between agencies.**

- **No single view of citizen, disparate records with different data models**

- **High employee dissatisfaction and turnover**

Solution

- **Content Federated Services provides a consistent, unified view of each citizen's records even though the content is distributed across multiple city agencies**

- **FileNet P8 as a master catalog, leveraging Content Federation Services, Content Integrator and Master Data Management to provide a coherent, normalized index of critical vital records.**

Business benefits

- <u>**Holistic view**</u> **of citizen information**
- **Improved data quality via MDM cleansing and citizen self-service reviews**
- **Improved security and decreased workload**
- **Standardized data model view without impact to existing agency applications**
- ✂ **↓ time / cost to develop new queries and integrate additional health services**
- ✂ **↑ performance and data quality due to coherent, normalized indexing**

Chart — Project Phase (P1–P4): Security, Service Access, Employee Turnover
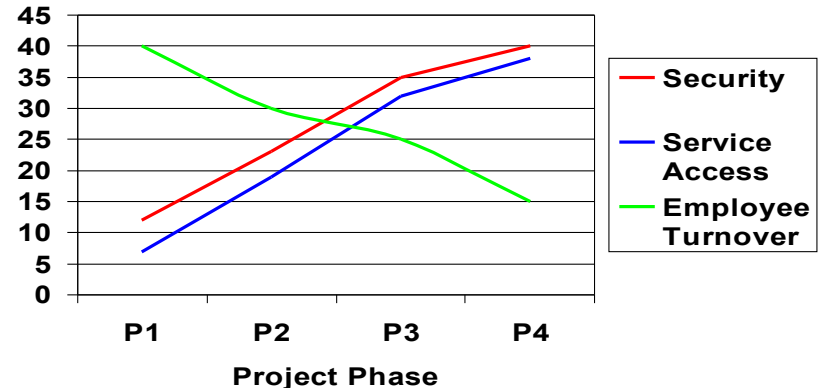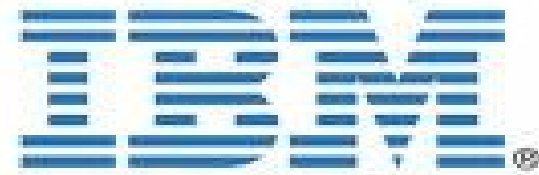
IBM Corporation

Challenge

- **Centralize services for managing all product manuals and information**

- **Reduce cost and shorten time to generate new and updated documentation**

- **Reduce cost of translation to 45+ languages**

- **Extend authoring to all subject matter experts in many roles**

- **Need for tailored documentation for specific clients**

Solution

- **IBM FileNet P8 for centralized repository services and publication management**

- **Workplace XT for publication maintenance**

- **Authoring integration with Arbortext, Clearquest/Clearcase, IBM DITA Wiki, …**

Business Benefits

- **Centralized management of all publication assets provides quality and consistency across IBM brands**

- **Enables cross product and brand documentation combinations**

- **Streamlined translation process saves money**

- **Multiple author tools enable all subject matter experts provide content using their own environment**

"Estimated productivity savings and avoidances for the project are in excess of $24M"

# Large Energy Company

Challenge

- **60-70% of computer time spent in Office applications**

- **Documents are company assets upon initial creation**

- **Billing is based on time spent on a project**

- **Requires an ECM solution that fits the user's routine**

Solution

- **200 users in Legal with influence on 1000 employees**

- **Microsoft Office 2007 Integration – FileNet Application Integration Business Content Services**

- **Provides direct access to P8 Services from within Office**

- **Content is authored directly into P8 content repositories using entry templates**

Business Benefits

- **Allows users to remain in their day to day Office based applications** **while interacting with P8 services**

- **Minimal impact to daily business routines due to an intuitive integration that is consistent across the Office product suite**

- **Easy access to P8 CM documents through browse, search, favorites and recently used lists**
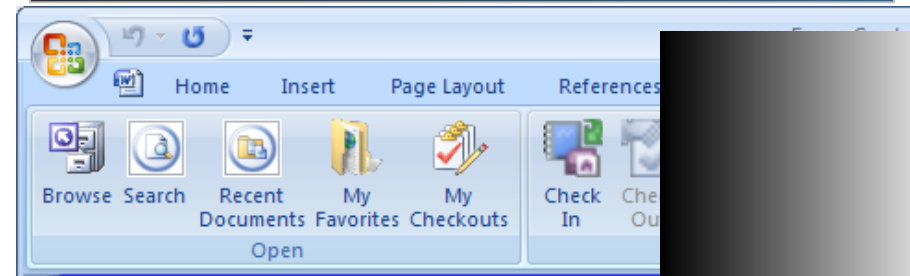
Large Government Organization

Challenge

- **Hundreds of SharePoint sites exacerbated shared drive chaos**

- **SharePoint used for collaboration, but its LAN-based storage management does not scale sufficiently or support Air Force retention and records management policies**
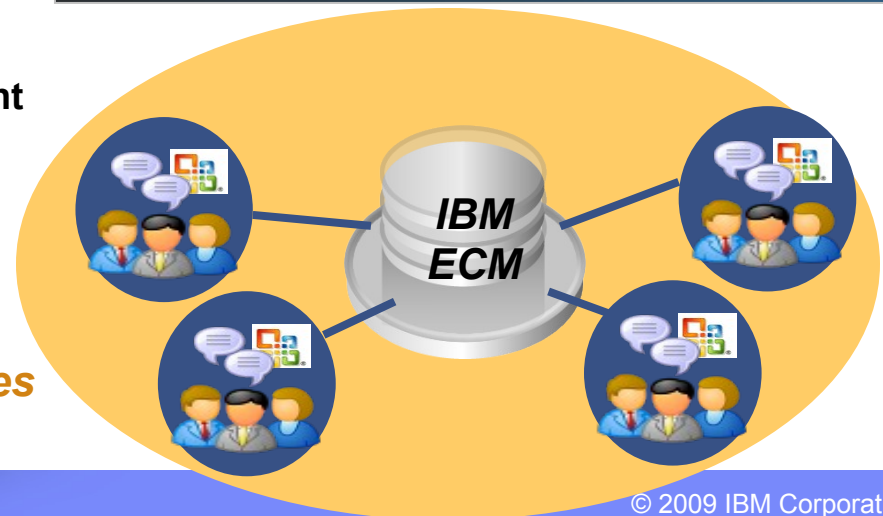
Solution

- **Sweep SharePoint content into FileNet P8 with FileNet Connector for SharePoint Document Libraries**

- **Allow end users to continue to use SharePoint UI and directly access P8 Content**

- **Typical documents being managed are contracts**

Hundreds of silo'd SharePoint sites used as network drives

Business Benefits

- **Enterprise multi-repository content search**

- **Better performance for end users**

- **Manageable enterprise security**

- **Automatic records declaration and retention control**

- **Bulk of content moved out of SharePoint**

- **Minimal retraining**

- **Simplified backup and archival**

Large Financial Institution

Challenge

- **Access and work with content stored in a disparate mix of content repositories following mergers**

- **8 Lines of Business**

- **22 Lines of Business Applications**

- **5 Repositories**

Solution

- **IBM Content Integrator solution provides consistent, unified access to distributed content assets across Retail, Commercial and Brokerage; handles M&A**

- **Access to multiple repositories: FileNet Image Manager, IBM ImagePlus, IBM Content Manager, and Mobius**

Business Benefits

- **Saved $2.3M in first 2 years**
- **50-fold increase in numbers of requests for content, indicating that customers are being served better**
- **$1 million savings for each additional business unit implementing solution**
- **Reduced time / costs to develop new apps**
- **Increased ROI on departmental ECM investments by enabling enterprise access**
- **Provides an integration strategy to support additional growth via M&A**

"… business executives are making decisions based on what they need to do, not based on whether or not we can hook up a new system."

Senior Vice-President

Large Financial Institution in Asia Pacific

Challenge

- **Manual processes limiting customer service responsiveness**
- **Manual paper handling and storage**
- **Slow processing times for customer requests**
- **Wasted time by staff clerks waiting for information**

Solution

- **Enterprise wide business process management system, using FileNet BPM Suite**
- **Common account servicing platform**
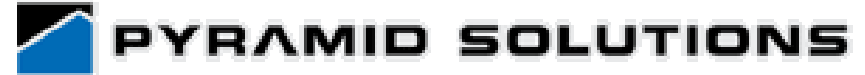- **Enterprise wide content management system for storing credit card documents**

Business Benefits

- **Reduced wait time for customers**
- **Improved customer service**
- **Increased visibility into processes**
- **Decreased wait time by staff clerks for information**
- **Embedded quality management processes**

Savings In Processing Time (hours)

# Mortgage Lender

PYRAMID SOLUTIONS
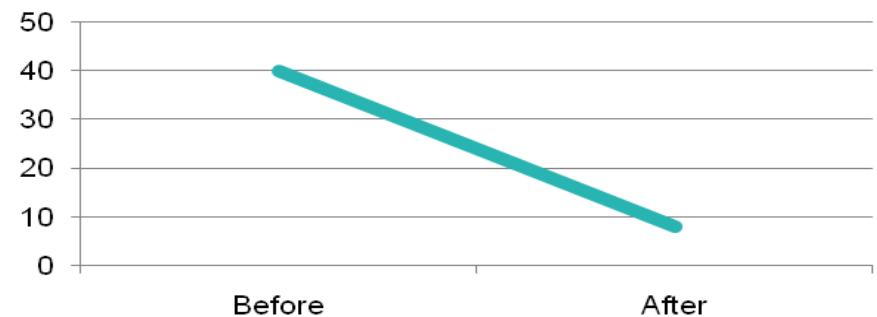
Challenge

- **Business Partner created an ECM solution for a national mortgage lender**

- **Maintain mortgage revenue in environment of increasing delinquencies and defaults**

Solution

- **Agile ECM P8 4.5 platform to quickly configure the Loan Modification processes for the client**

- **ECM Widgets and custom Pyramid Widgets enable rapid initial deployment**

Business Benefits

- **Increases the success rate of Loan Modifications**

- **Supports an Agile business model that is able to adapt quickly to change**

- **New hires get up to speed quickly through intuitive user interface**

- **Business Partner delivered better results faster and more profitably**

Time in days — Application Development

Legend: Custom Web UI, ECM Widgets
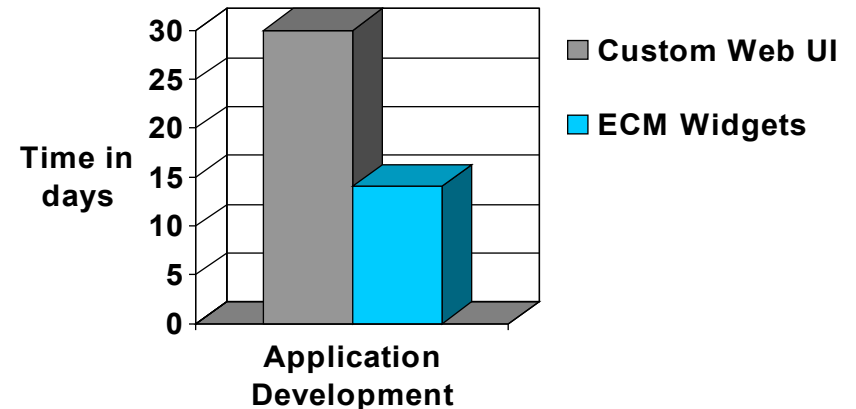
Large Healthcare Plan Provider

Challenge

- **Changing industry and government regulations**
- **Costs and risk of legal discovery requests**
- **High storage costs associated with e-mail and file shares**

Solution

Using IBM Content Collector

- **Automatically ingest and de-duplicate e-mails**
- **Monitor and ingest Microsoft file shares**

Using IBM eDiscovery Manager and Analyzer

- **Quickly respond to legal discovery requests**

Business Benefits

- **Management of over 200 Million emails**
- **Consistent rules and policies ensure regulatory compliance**
- **12 million e-mails retroactively archived in hours**
- **Able to ingest and index over 400,000 daily e-mails for rapid search and retrieval**

"**I am so excited about this product. It's smokin' !**"

IBM's approach is simple and straight forward. We now have a solution model that meets our immediate business needs for archiving, retention and compliance and provides a low cost, low risk method to expand and integrate key capabilities to meet our future plans."

ECM and Collaboration Lead Architect

Very Large Government Organization

Challenge

- **Need to comply with National Archives and Records Administration regulations**

- **Difficulties managing large volumes of e-mail**

- **Undesirable and not practical to train > 1 million non-technical users on records management policies**

Solution

- **Ingest e-mails into FileNet P8 using IBM Content Collector**

- **Deploy IBM Classification Module for automatic and intelligent email classification**

- **Manage retention and disposition using IBM FileNet Records Manager**

Business Benefits

- **Projected 900TB annual disk savings, resulting in a $1.8M annual cost reduction**

- **High degrees of automation save money**
  - **84.5% automation after Phase 1**
  - **99.01% automation after Phase 2**

- **Accurately and quickly enforces records management policies**

- **No end-user training required**

Automation Rate Achieved
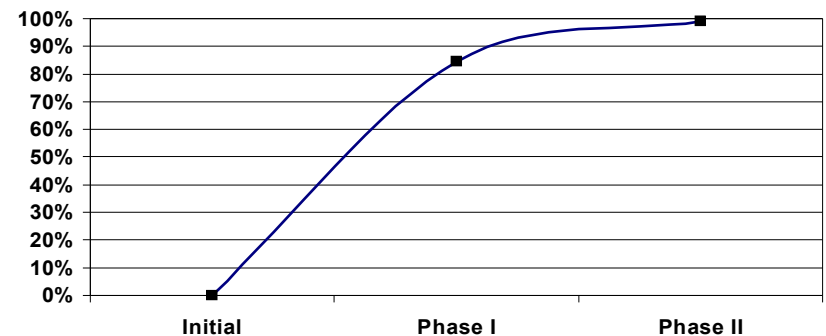
Global 500 Financial Services Company

Challenge

- **Regulatory Compliance and Agility in the face of Litigation**

- **3.6 Billion existing emails**

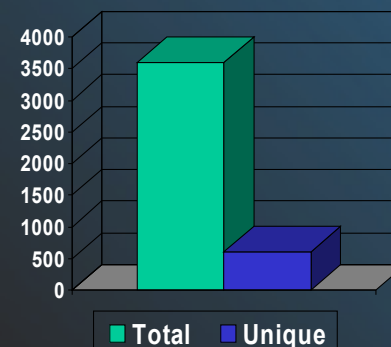- **1.2 million new email messages per day with a 5% estimated annual growth rate**

Solution

- **IBM Content Manager as a trusted litigation vault**

- **IBM Content Collector to ingest Lotus Notes emails with full fidelity**

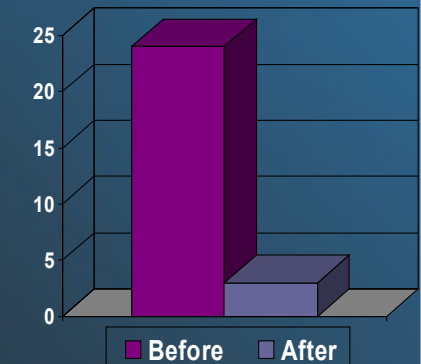- **IBM eDiscovery Manager to search, cull, and export case-relevant content**

Business Benefits

- **Ability to respond to discovery requests reduced from 6 months to weeks**

- **Mailbox and storage savings through de-duplication of 3.6B emails to 600 M unique**

- **Enabling Corporate Compliance and eDiscovery initiatives across this full set of emails**

Millions of Emails

4000	
3500	
3000	
2500	
2000	
1500	
1000	
500	
0	

■ **Total** ■ **Unique**

Weeks to Respond

25
20
15
10
5
0

■ **Before** ■ **After**

Spectra Energy

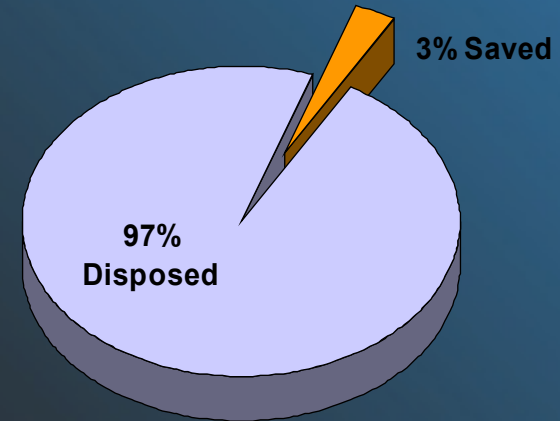**Spectra Energy**

Challenge

- **Federal Energy Regulatory Commission (FERC) compliance**

- **Significant legal exposure due to over-retention of emails**

- **Needed to meet the needs of business users while enabling compliance**

Solution

- **FileNet Process Manager, Records Manager, and Email Manager for compliance workflows**

- **IBM ZeroClick for automated records declaration of content**

- **Integrated email client allows users to easily save pertinent emails as business records**

Business Benefits

- **Able to dispose of over 5 Million emails in the first 3 months**

- **Only 3% of all emails over 2 years old are now retained**

- **Over 600GB in annual storage savings**

- **Reduced legal exposure**

3% Saved

97% Disposed

Collaboration

WCM

Forms

Office Productivity

Lotus.

Mashups

Business Optimization

Performance Management

Business Intelligence

Information Management

Trusted Information

Information Integration

Structured Data
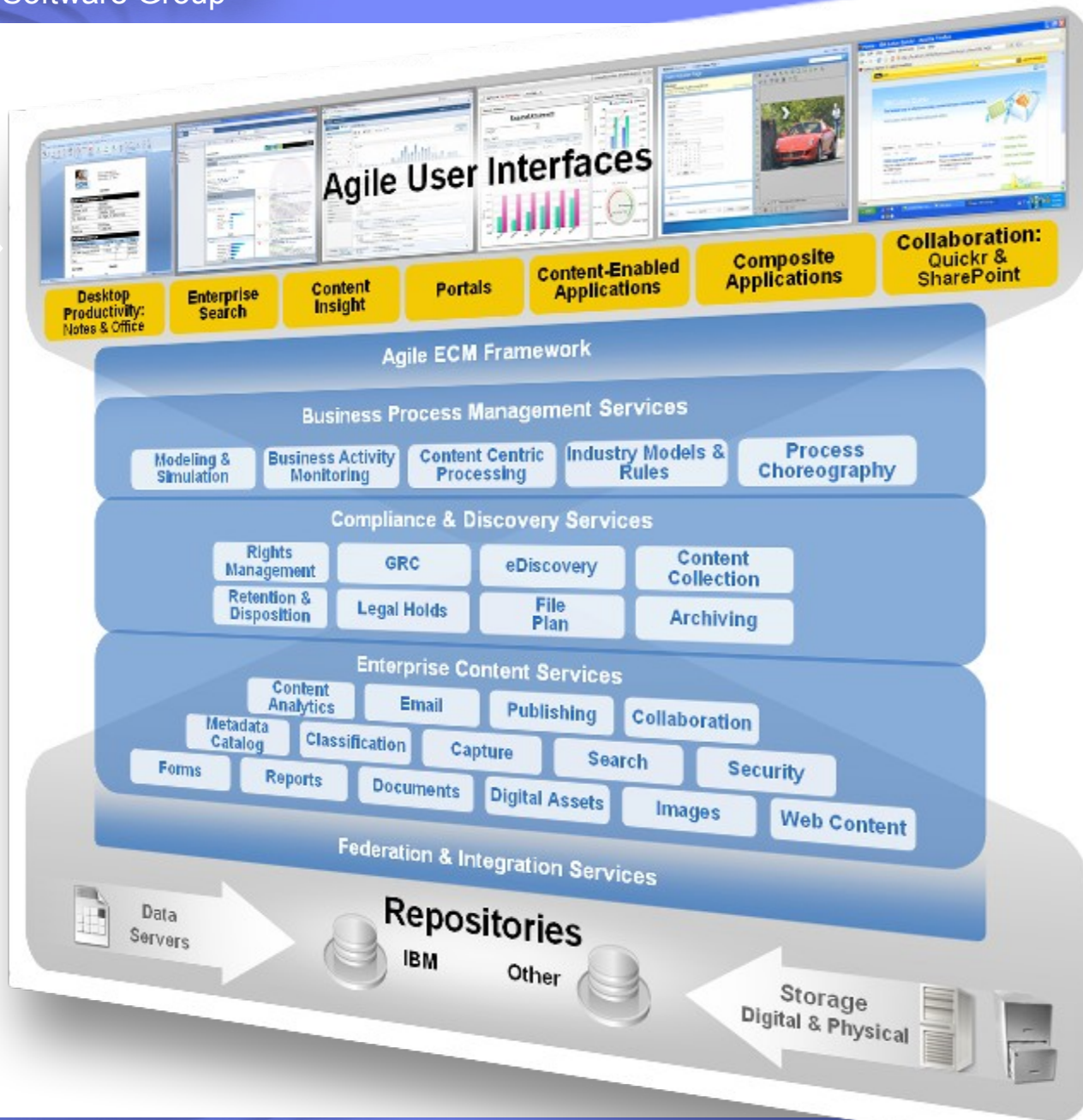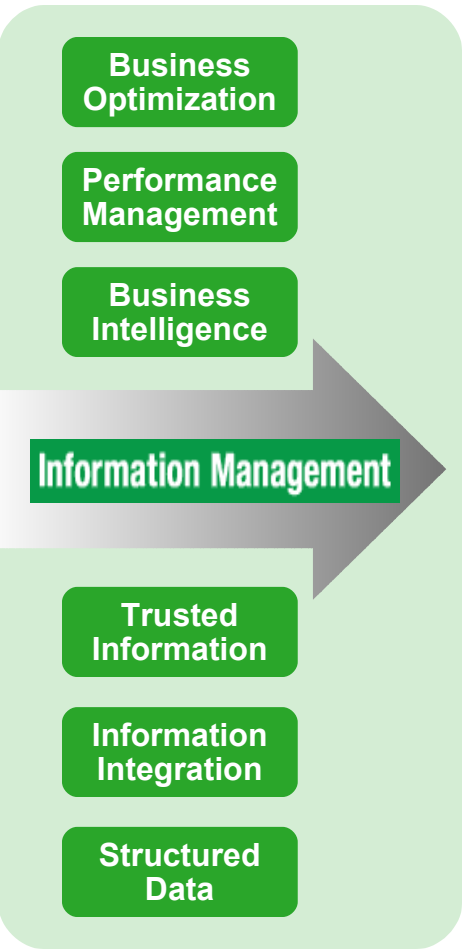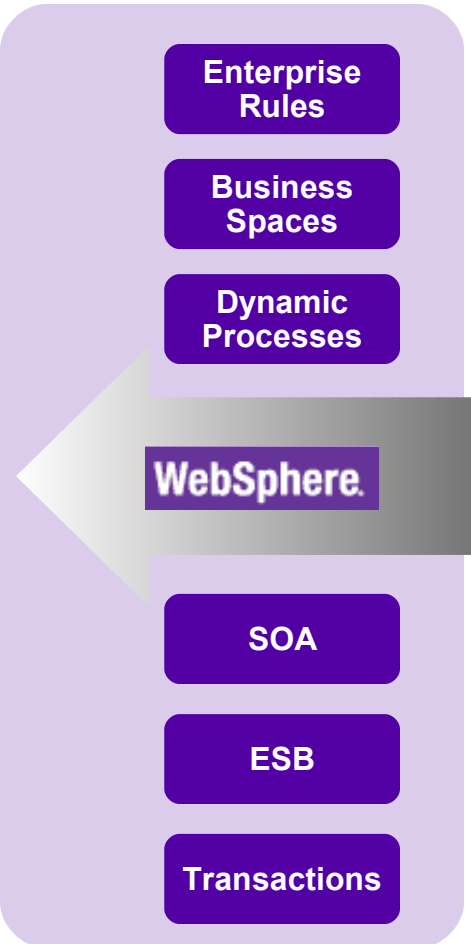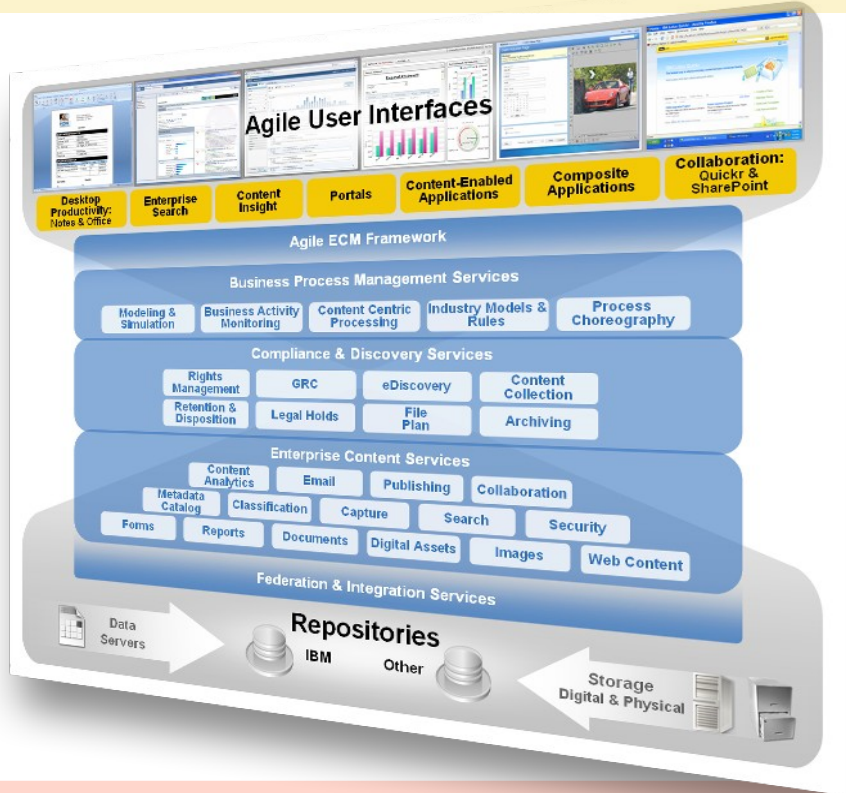
Microsoft Sharepoint
Microsoft Exchange
Oracle
......

Agile User Interfaces

| Desktop Productivity: Notes & Office | Enterprise Search | Content Insight | Portals | Content-Enabled Applications | Composite Applications | Collaboration: Quickr & SharePoint |

Agile ECM Framework

Business Process Management Services

| Modeling & Simulation | Business Activity Monitoring | Content Centric Processing | Industry Models & Rules | Process Choreography |

Compliance & Discovery Services

| Rights Management | GRC | eDiscovery | Content Collection |
| Retention & Disposition | Legal Holds | File Plan | Archiving |

Enterprise Content Services

	Content Analytics	Email	Publishing	Collaboration
Metadata Catalog	Classification	Capture	Search	Security
Forms	Reports	Documents	Digital Assets	Images	Web Content

Federation & Integration Services

Data Servers

Repositories
IBM   Other

Storage Digital & Physical

Enterprise Rules

Business Spaces

Dynamic Processes

WebSphere.

SOA

ESB

Transactions

TSM/HSM

Tivoli.

Information Infrastructure

Protected Storage

Tiered Storage

Partner solution – leveraging IBM ECM

- Case Management
  - Case registering
  - Case distribution
  - Monitoring and follow-up
- Document Management
  - Office productivity tools integration
  - Production of case documentation
  - Categorisation (file plans, key words, etc)
- Contact Management
  - Contact register
  - Dossier structure
  - Communication history
- Security
  - Item level security
  - Security Classification
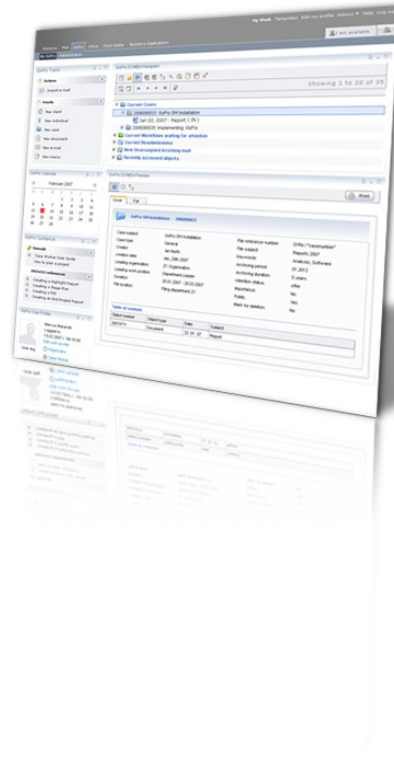
- Structured and ad hoc workflow
  - Process automation
  - Review cycles
  - Rules management
- Guidance
  - Proactive User Guidance
  - Contect sensitive help
- Forms management integration
  - Self service
- Portal based front
  - Self service
  - Role based UI
- Search

- Multi language support

IBM Offerings & Customer Benefits

IBM Offering

IBM FileNet P8 BPM
IBM CM8
IBM Content Manager OnDemand

No Paper Weight

Move from paper-based records to electronic records

Partner solutions

GoPro

Business Benefit

Reduce Costs and Risks

- Of labor costs and physical records storage by automating manual processes
- address information storage, auditability and retrieval needs from regulations, eDiscovery and other legal requirements
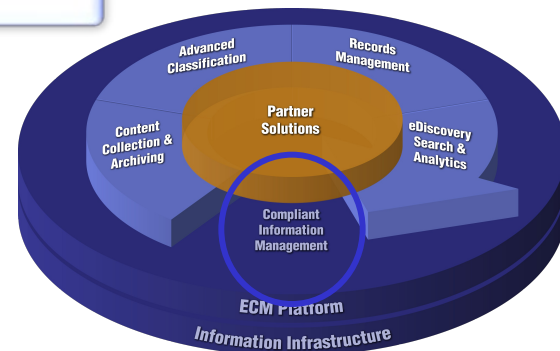
Increase Productivity

- For employees focused on managing records as well as business users across all business applications
- Improve visibility into paper-based, manual business processes to support better business decisions
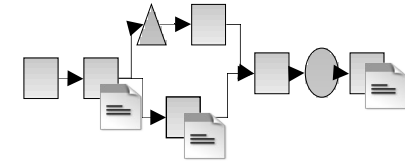
Payback period of 4 months, $11 Million saving in year one, and $36 Million over three years, or 263% ROI
Industry: Banking

Call to action – ask your self these questions

Cutting costs and risk

· Approximately how much does your organization spend each year to store paper?

· How much are you storing that your really don't need to ?

· How much are you storing in paper format that was born digitally?

· How many copies do you have of paper?

· How much time does your organization spend on filing paper?

· How many copies of the same file or mail exist in your environment?

Increase productivity

· Can you improve customer service by having all information at your fingertips ?

· How many people can you release to other value producing activities instead of managing paper?

· How many more customer/citizen requests can you process if everything was electronic

· How can you improve your business if citizens/ customers could fill out web forms instead of mailing paper

· How can you serve your customer better by delivering information electronically – ready to ingest

Call IBM or a IBM Business Partner for a workshop

Payback in 4 months = 3 Year ROI 263%

¿ **Opportunity Lost Each Day from Delay = $40,000**

¿ **Annual Unnecessary CRC Expenses = $423,000**

¿ **Manual Procedures Consume 41% of Workday**

Reducing costs while improving your productivity can't be a bad value proposition these days