

DYNAMIC DOCUMENT CAPTURE

FOR ADVANCED CASE MANAGEMENT

➔ START HERE

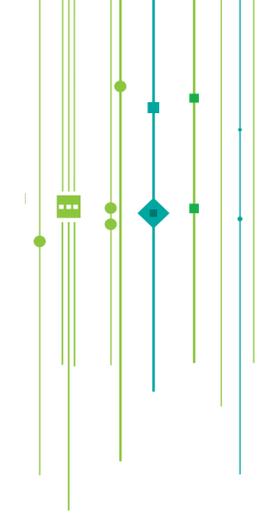
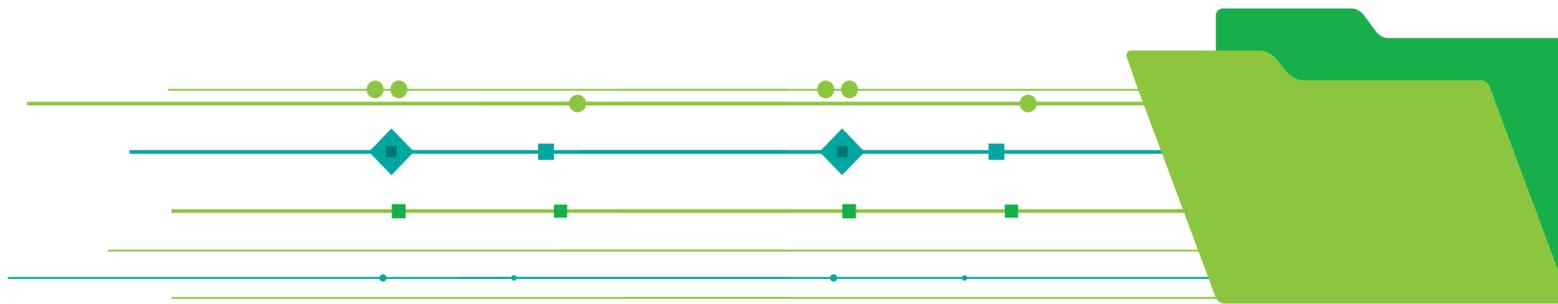


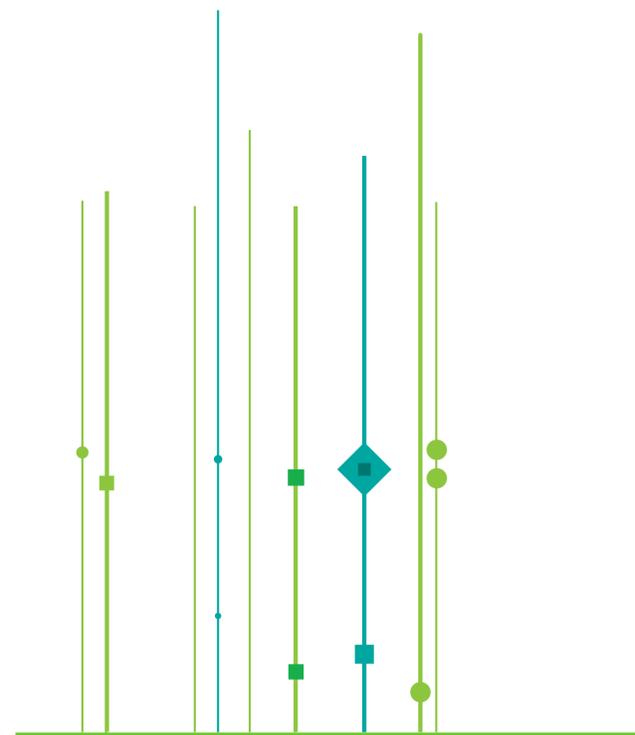
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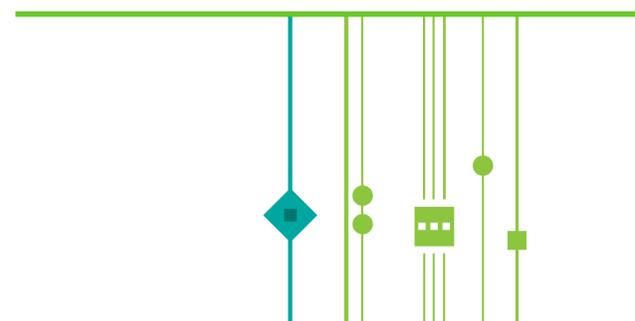
WHAT'S NEW IN DOCUMENT CAPTURE?

Document capture has come a long way in its 25-year existence—especially in the last 10 years when most organizations saw it merely as a necessary evil to store documents as images. Today's advanced capture solutions combine proven automation technologies to identify, classify, read and accelerate documents into a business process—with little to no human intervention. Capture has become omnichannel itself, able to incorporate paper using scanners and multifunction devices (MFDs) but also digital forms such as email, PDFs, attachments and faxes. Increasingly, document capture is going mobile, turning your smartphone into an advanced document capture device.

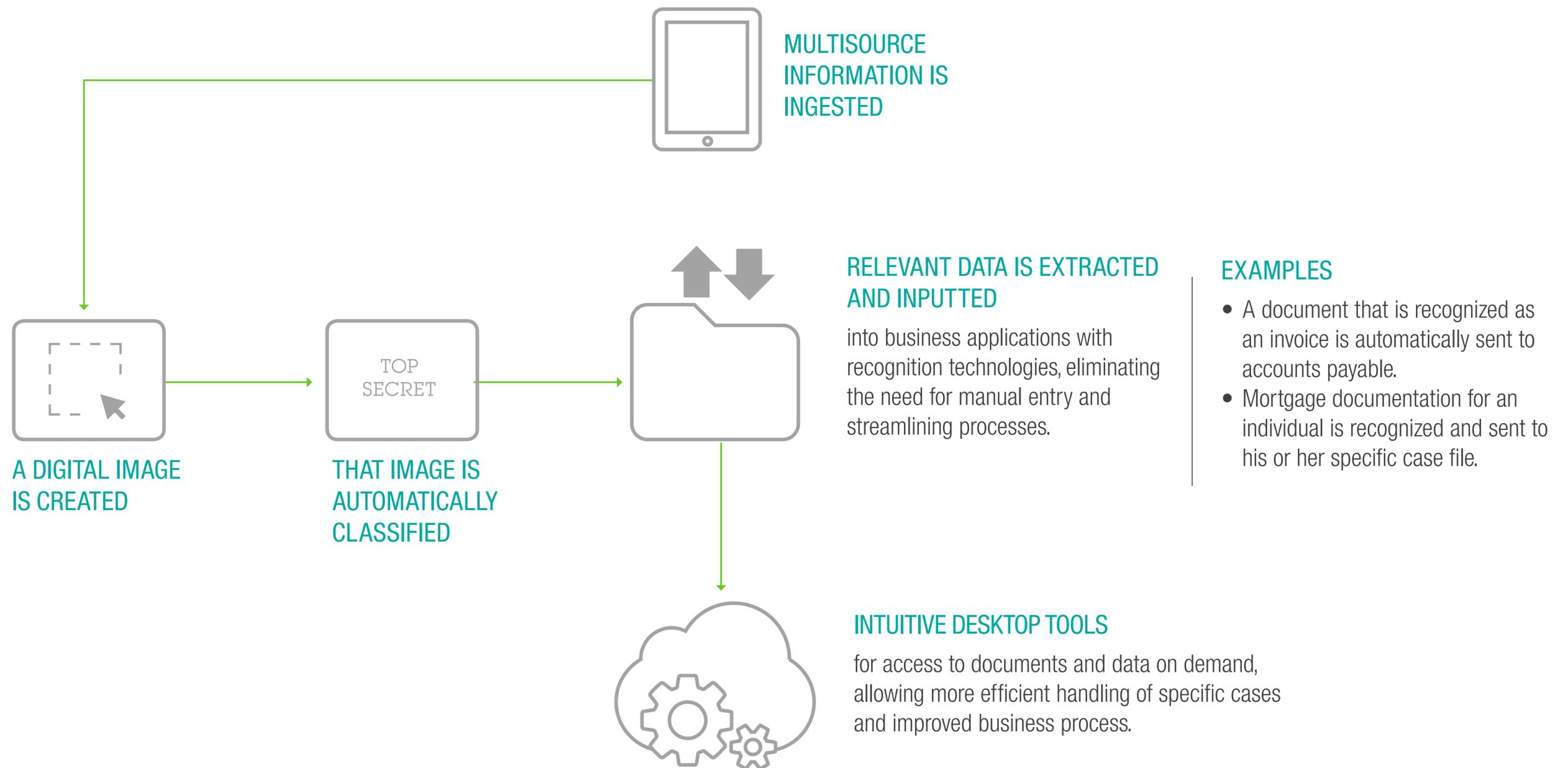


STREAMLINED PROCESS

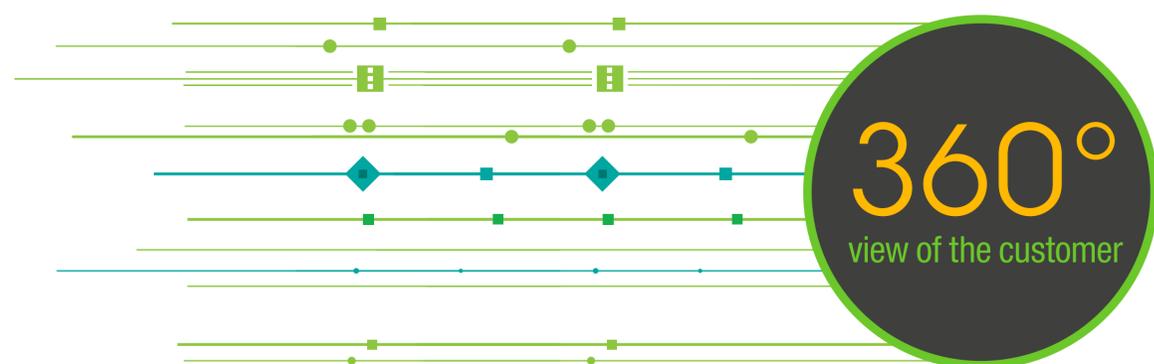
In this new omnichannel world, organizations need to move beyond simple scan-to-filing capture technology. Today's advanced document capture has become a multisource, multichannel system of orchestrated classification and recognition technologies that automatically understands what a document is and its purpose in the business. When coupled with advanced case management solutions, decision makers are provided with the right content at the right time, and organizations have a set of dynamic tools to enable better business outcomes.



TODAY'S CAPTURE SOFTWARE IN ACTION



WHAT IS ADVANCED CASE MANAGEMENT?



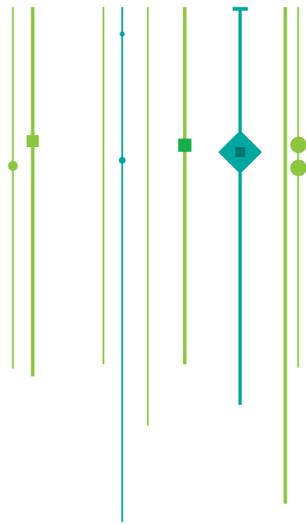
The new omnichannel world

When a business process is unpredictable, static workflow models do not work. In the new omnichannel world, decision makers need a flexible tool to view the content relevant to a customer, investigation or incident, and they need to be able to assign new tasks and collaborate with other decision makers quickly and easily. Furthermore, when a customer request is satisfied, an investigation is closed or an incident is resolved, a complete audit trail is often required for reporting and compliance. Advanced case management offers knowledge workers and decision makers all of these capabilities in an environment that helps organizations focus on the customer's application, request or issue and seamlessly connect channels, creating a 360-degree view of the customer.

Solving the omnichannel problem

Case management solutions enable organizations to:

- Understand the content that makes up a customer's individual case
- Identify the most relevant information in real-time customer interactions
- Increase efficiency of communicating the variety of data through customized templates
- Gain new insights to customer cases through content analytics
- Provide a consistent user interface across the range of devices that may be used in an organization
- Streamline lifecycle governance, protect customer data and facilitate compliance with data retention regulations



MORE SPEED. BETTER RESULTS.

When advanced document capture and case management are combined, an organization can capture content from virtually any channel in real time and update cases for a comprehensive view that enables organizations to achieve the total visibility that customers expect. Customers also count on interactions to be personalized and communicated through their desired methods. By implementing an accelerated case management solution with capture and case, organizations can help build and retain loyal customers.

Positive business results

- Rapid resolution to customers' specific cases
- Expanded knowledge that allows for better focus on customer engagement
- The ability to dynamically manage information routing
- Delivery of personalized solutions to customers for recurring business revenue
- Increased return on investment (ROI) through efficient case management with minimal staffing

Customer benefits

- Faster service and incident resolution times
- Interaction that provides ideal solutions to customers quickly
- Open channels of communication personalized to their preference (email, text, voice or other forms of communication)
- Elimination of the need to retell their story each time they interact with an organization

BANKING

UNION BANK TAKES CONTROL

Business situation

To assist in its efforts and achieve its goal of becoming a top 10 bank in the United States, Union Bank implemented essential elements of IBM FileNet® Content Manager software and launched an approach to streamline processes and eliminate waste.

Results

- A 360-degree customer view with a reduction in total processing speed
- Efficiencies in workflow-automation applications that are deployed between multiple offices in four weeks or less versus six months or more
- 70 percent ROI within 18 months of implementation
- Access of documents in seconds versus hours
- Processes such as fee adjustments and address changes completed in minutes versus a few days
- Increased speed of onboarding new accounts



“Now we can use a document to start a process and IBM Case Manager workflow modeling capabilities puts control in the hands of the business,” says Albert Pena, VP of bank operations at Union Bank. “Project turnaround is the fastest in the bank’s history.”

LOGISTICS

GLOBAL LOGISTICS COMPANY GETS COMPETITIVE

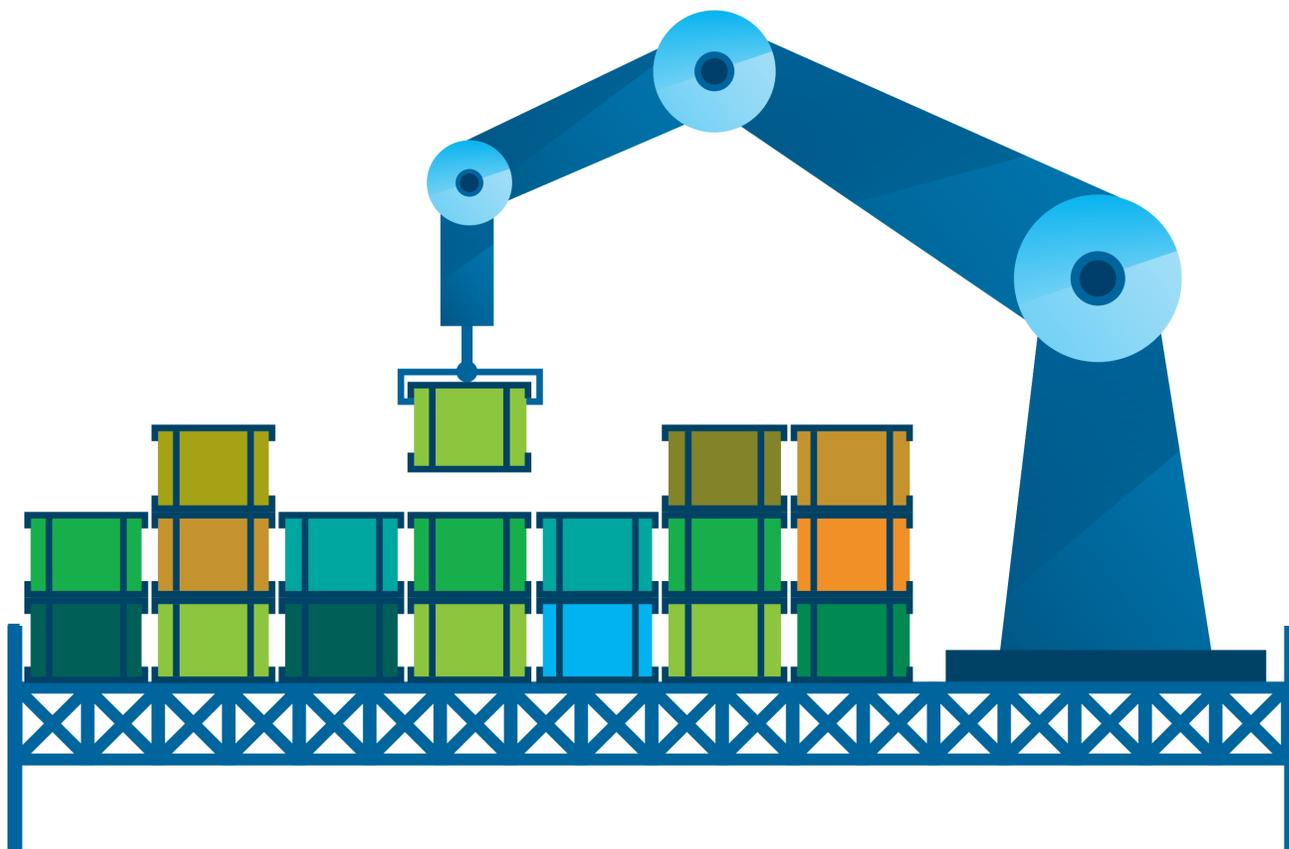
Business situation

A global logistics company implemented IBM Datacap capture software in an effort to streamline processes and increase production. The results have allowed it to remain a top competitor in its industry.

Results

- The company experienced a USD13 million ROI in a three-year period.
- Streamlined processes and consolidation of the core team delivered gains in efficiency and a 30 percent reduction in required staffing.
- The company gained improvement on process inquiries and obtaining answers quickly.
- Elimination of printing and postage delivered an estimated cost savings of USD1.1 million in a three-year, risk-adjusted present value.

IBM's capture and case processing technology helped the organization route, deliver and track shipments, helping ensure that all business processes are met as services are expedited, resulting in a positively elevated customer experience.



GOVERNMENT

HAWAII HUMAN SERVICES RAISES THE BAR

Business situation

Hawaii's Benefit, Employment and Support Services Division (BESSD) is the largest division in the state's Department of Human Services, providing services through nine programs. With 14 processing centers statewide and 34 physical locations, the division aimed to improve citizen support services; cut down on fraud and duplicate requests for services or support; and eliminate service delays resulting from manual, error-prone paper processes; limited access to case files; lack of storage for documents; and slow, inaccurate response to citizen applications and requests.

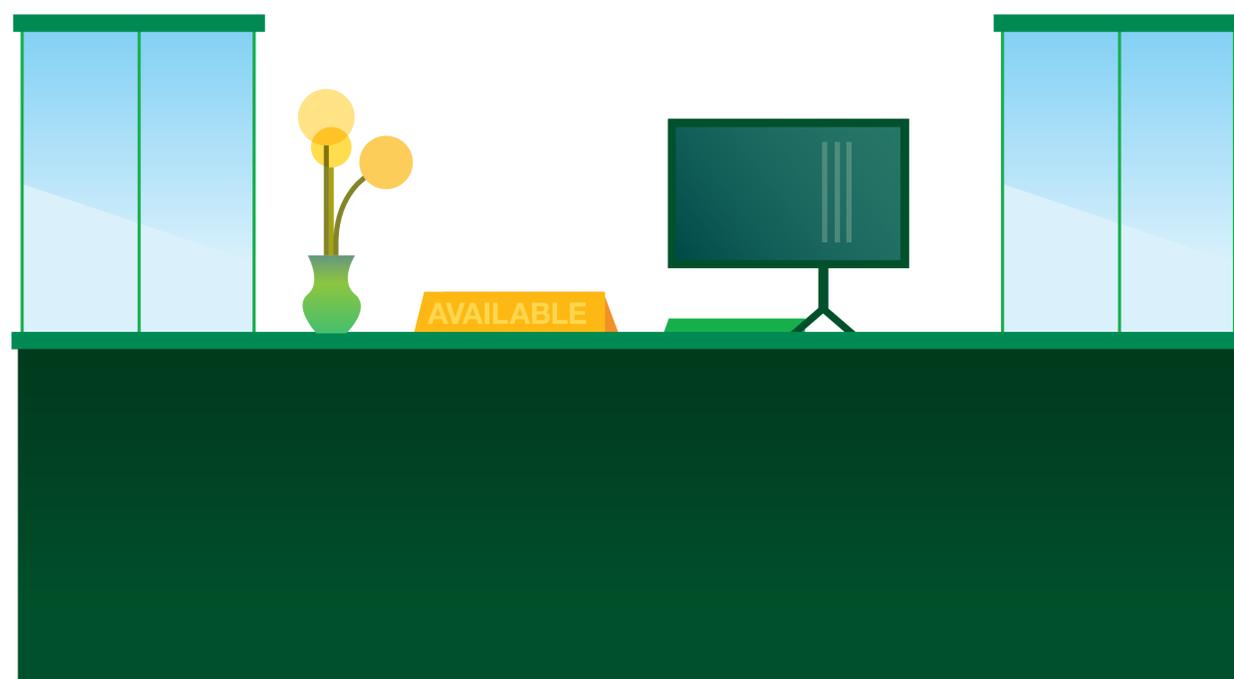
Results

- Reduced time needed to get case information: Caseworkers can now retrieve vital case information in seconds versus the 15 minutes it used to take.
- Improved fraud control: Eligibility system integration provides efficiency while tracking duplicate requests, minimizing time spent investigating fraudulent requests.
- Eliminated paper storage: Documents are now destroyed 30 days after their scan date, reducing the amount of space needed for paper storage.
- Allowed case reviews to be conducted from anywhere: This reduces travel time and eliminates the need to transport case files while minimizing shipping costs.
- Improved collaboration with other state agencies: Digitized documents can be emailed quickly instead of having to be located copied or faxed and then refiled.
- Reduced client contact times: Caseworkers can access documents while on the phone with clients — no more hold time or callbacks.

With a combined document capture and case management solution from IBM, the agency now supports more consistent process management, better mitigates fraud and provides instant accessibility to information captured with a 360-degree case view from any of its 34 locations.

BANKING

LARGE U.S. BANK GOES DIGITAL TO SPEED CUSTOMER RESPONSE



Business situation

A large bank in the United States decided that it needed to move away from manual paper processing and engaged IBM to help devise a document capture and case management solution that would help it:

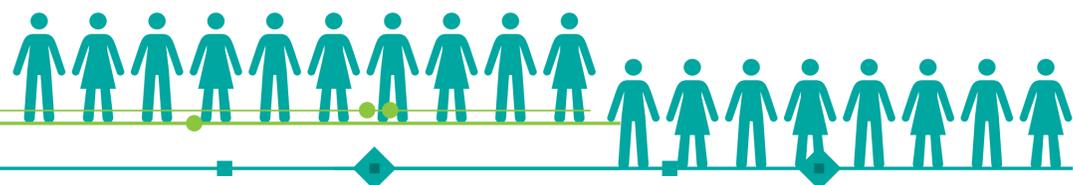
- Improve business agility, eliminating paper and content centric transactions at the earliest stages possible
- Improve collaboration internally, because paper documents did not lend themselves well to collaborative efforts
- Improve response times to customers
- Meet service level agreements that were continually missed

Results

- Improved productivity by removing manual steps
- Established an enforceable full corporate governance model (product, process, content, infrastructure, organization and so on)
- Achieved cost savings by integrating and automating content and gaining flexibility in externalized business rules
- Improved customer satisfaction with improved responsiveness
- Gained true integration of people, process and information in operations and post-operations compliance

**Cost savings. True integration.
Improved productivity.**

TODAY'S LANDSCAPE OF CUSTOMER ENGAGEMENT IS MULTIFACETED



The avenues in which businesses large and small can interact and communicate with their customers have become increasingly vast. The opportunities to connect with customers, understand their needs through capturing important data and help deliver individualized solutions continue to expand.

Customer case management now involves the need to capture data from multiple channels and in multiple media formats. Capture software is today, and will remain, a critical element that can assist in the understanding, classification and efficient management of unstructured and semistructured information.

The latest advancements in document capture technology present a robust solution that's specifically developed to assist organizations across their enterprise and on a global scale to efficiently manage the critical details of their business. The result is dynamic, adaptive workflows for significant business performance and an extraordinary customer experience.

For more information

To learn more about IBM capture and case management software, please contact your IBM sales representative or IBM Business Partner, or visit:

ibm.com/software/products/en/casemana

ibm.com/software/products/en/datacap



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Software Group
3565 Harbor Boulevard
Costa Mesa, CA 92626-1420

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