

BPMCON: *React to Changing Business Conditions*

Case Study Keynote

Recorded 11/18/2010

BPMCON

BPM Case Studies

PROGRESS
SOFTWARE

IBM

Appian

Global360

Vance McCarthy - Program Director

PROGRESS
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BPMCON: *React to Changing Business Conditions*

Panel Speaker: Dr. M.A. Ketabchi



Dr. M. A. Ketabchi

Chief Strategist - Office of CTO

PROGRESS
SOFTWARE

PROGRESS
SOFTWARE

IBM.

Appian

Global360

How Do Enterprises Detect and React to Changing Business Conditions

BUSINESS
MAKING
PROGRESS™

Dr. M. A. Ketabchi

Chief Strategist

Office of CTO, Progress Software



Use Cases that Require BPM and BEP

External events may start or stop a process execution.

Completion of a process execution generates an event that starts execution of another process.

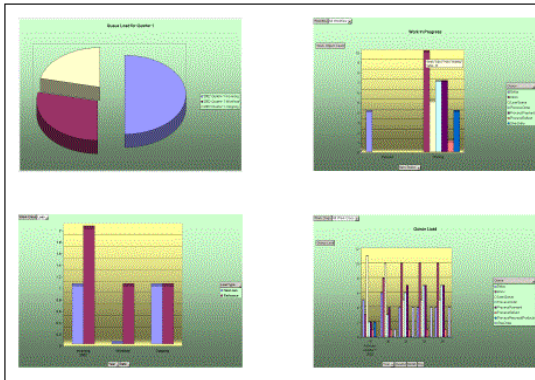
An external event informs an active process of changes that impact its execution.

A process execution halts at a step awaiting the arrival of an event.

Steps of the process execute by external systems, and people not interacting with BPM directly.

Leading the BPO Industry through BPM-Enabled Process Services

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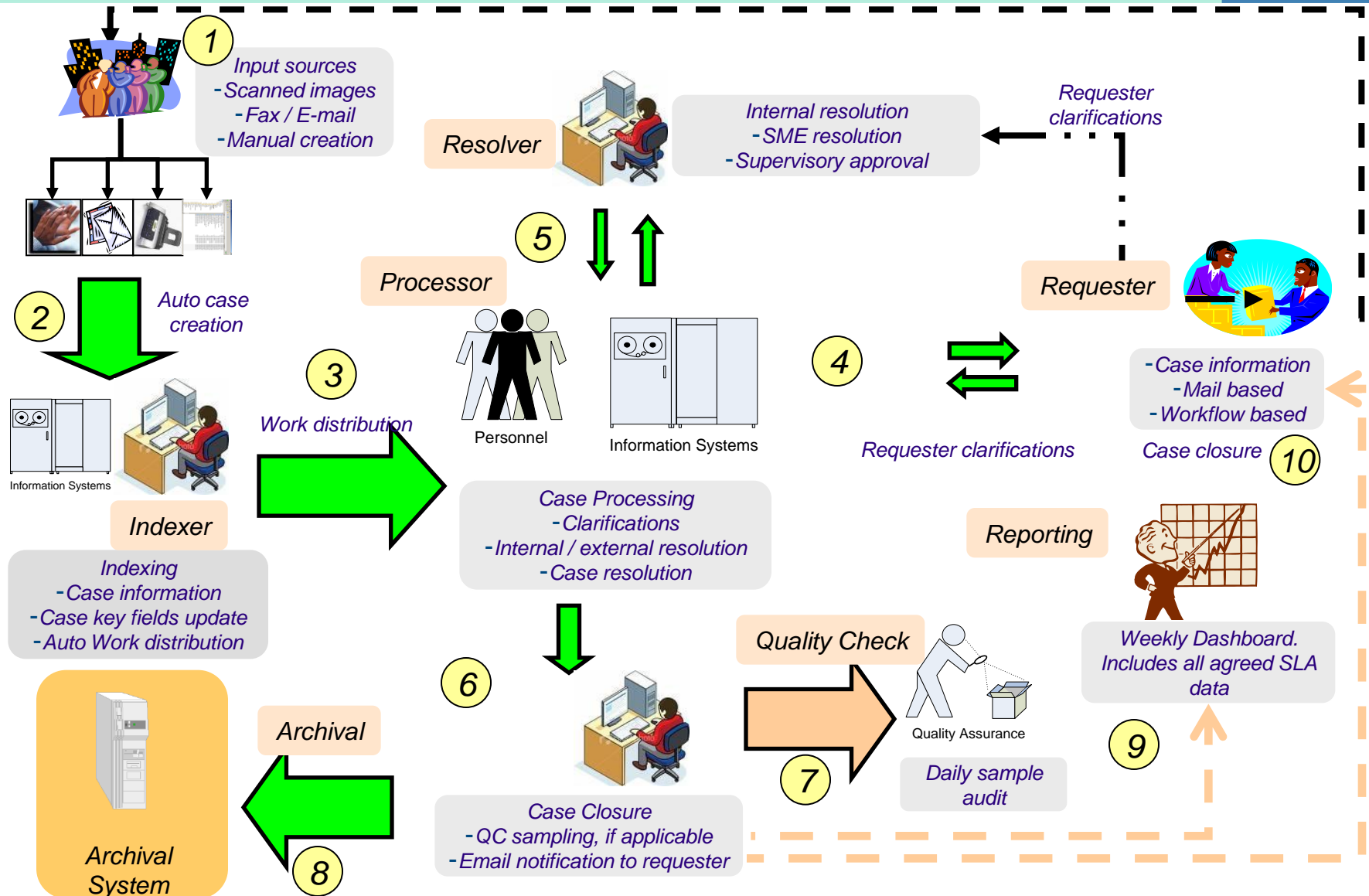
Serves more than 30 global companies around the world with Progress Savvion BPM.

Delivers extended-enterprise process solutions.

More than 2500 concurrent BPM users perform tasks on behalf of clients.



BPM-Enabled Case Management



Will Enhance Values Delivered to its Clients by Detecting and Responding to Issues Earlier

BUSINESS
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PROGRESS

Business Challenge

- Ability to work with existing systems remotely
- Capability to handle multiple input sources
- Complete end-to-end tracking

Solution

- BPM solutions with standard human and system interfaces

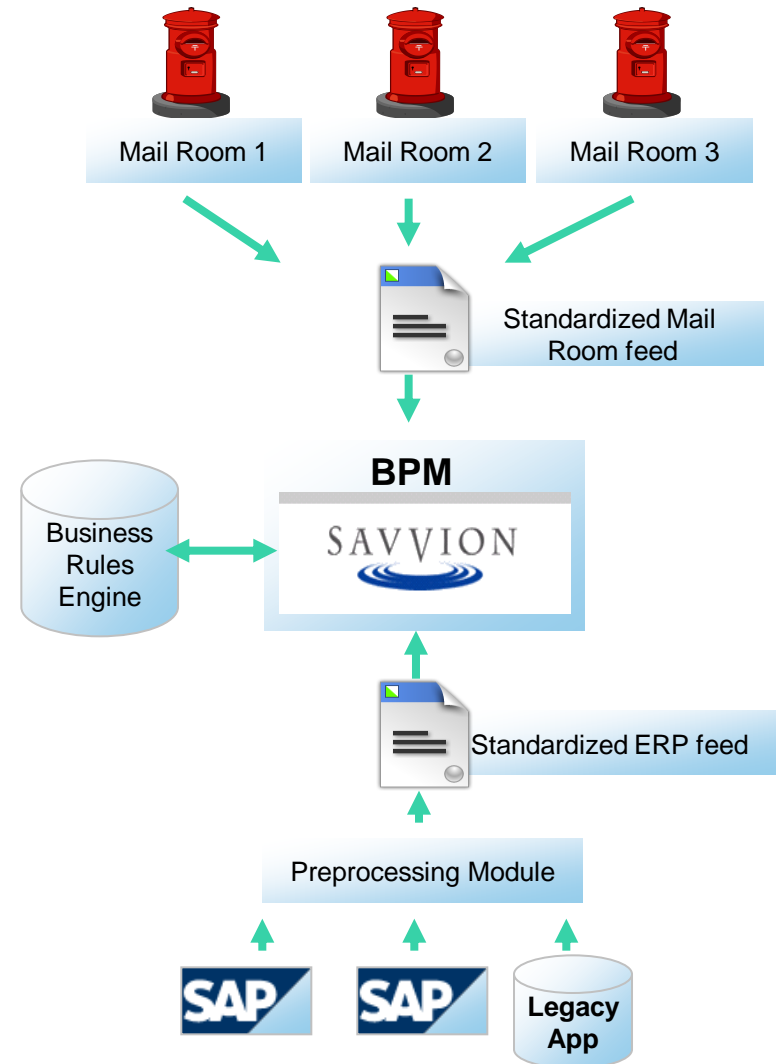
Business Impact

- Process standardization
- Uniform Process Metrics and KPIs

RPM Extension

- Correlate events to identify patterns that lead to fraud, violations and inefficiencies
- Build preventive and corrective processes
- Receive up to date status of applications

Solution Overview



Leading the College Financial Services Market



Fortune 500 company
serving 10+ million active
customers.

Has been recognized by
analysts and IT media as
top IT innovator.

Manages more than \$185
Billion active loans at any
given time.

Responding to Extensive External and Internal Changes

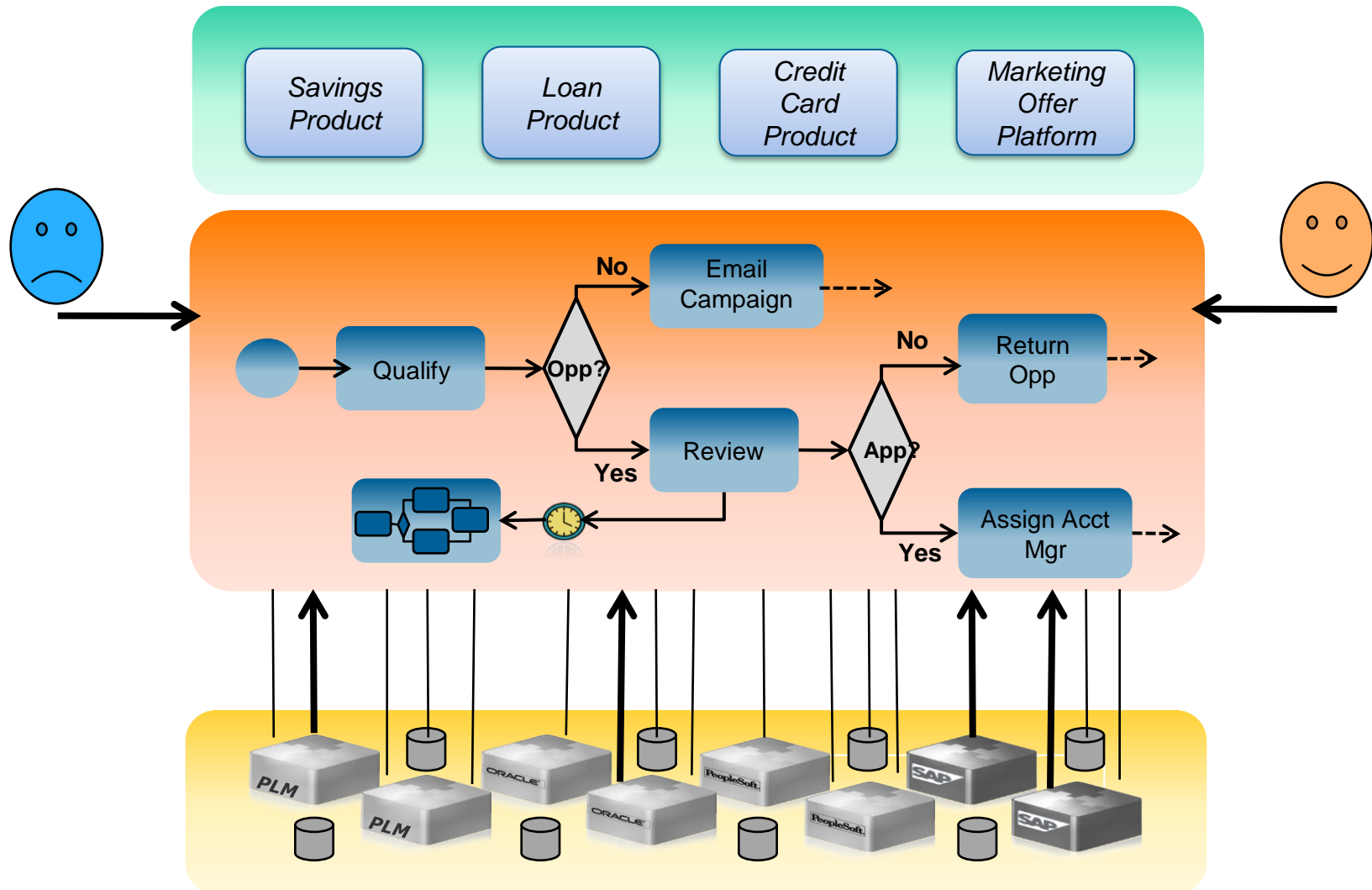
Transition from whole sale loan strategy to consumer focused retail marketing driven strategy.

Significant organizational restructuring and business application modernization

Applications built on monolithic platform, need to run on component based architecture

Progress Responsive Process Management Connects Business to Enterprise IT

BUSINESS
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PROGRESS





BUSINESS MAKING PROGRESS

PROGRESS
SOFTWARE

BPMCON: *React to Changing Business Conditions*

Questions & Answers

Q&A

BPMCON: *React to Changing Business Conditions*

Panel Speaker: **Jasmine Basrai**



Jasmine Basrai

*Director of Product Management,
Blueworks Live*



BlueworksLive®

Case Studies featuring PRC and Lincoln Trust



Jasmine Basrai, Director of Product Management, IBM Blueworks Live

Combined for Customer Success!

IBM + Lombardi – A Match Made for Business!



- Award Winning BPMS
- Industry Leading BPM Product
- BPM Expertise & Consulting Services
- Role-based BPM Training & Certification
- Strong customer relationships



- 96 of Fortune 100 run WebSphere, 81 run FileNet/ECM
- Award Winning BPMS
- Industry Leading SOA & BPM Capabilities
- Industry Knowledge in 17 Industries
- 15,000 plus partners
- 100,000 customers

Lombardi's award-winning BPM capabilities will be made available throughout the world as part of the IBM BPM Suite!

Delivering More Business Value and Quicker Return on Investment with Leading Capabilities in BPM

Fast Facts



IBM BPM Blueprint



BPM BlueWorks *Beta*

2007	Introduced	2009
Process discovery & documentation tools	Focused on	Community & content tools for building COE
Process stakeholders	Audience	Internal BPM champions
Thousands of customers	Adoption	Thousands unique visitors / month

IBM customers have documented and improved processes

Business Challenge

100,000+ monthly paper-based client requests lead to lost documents and complaints

Solution

Documented and automated over 145 processes

Results

- **\$2.2 million** in savings to date
- **120%** ROI in one year
- **25%** increase in employee productivity
- **50% - 75%** reduction in cycle times



Centralizing Functions Through Standardization

Business Challenge

Document and standardize processes across 14 domestic and 5 international call centers

Solution

The ability to centralize core workforce management functions due to large part of standardized process

Results

Substantial bottom line impact due to reduced costs



Get started collaborating to streamline, document, and run business processes today

- [Free 30 Day Trial](#) to begin documenting your projects
- Stay tuned for November 20 when [IBM Blueworks Live](#) goes live!



blueworkslive.com

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Questions & Answers

Q&A

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Panel Speaker: **Samir Gulati**



Samir Gulati

VP of Marketing

Appian

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Be Part of the Process

Samir Gulati, VP of Marketing

Appian

Appian At-a-Glance



Corporate HQ:

Reston, VA
(near Washington, DC)

EMEA HQ:

London, England

Founded:

1999

CORE STRENGTHS

Leadership

Strong management team with expertise in BPM and related technologies

Experience

Highly-skilled process staff with proven solution delivery track record

Results

More than 3 million seats deployed

PRODUCTS

Appian 6

Comprehensive BPM suite

Appian Anywhere

Only Complete BPM Suite Available in an On-Demand SaaS Offering

Appian Forum

Free online community for collaboration and knowledge-sharing

BPM Applications, Templates and Collaboration

Jump-start deployments

Appian Customers See Significant Results

IT Service Management



\$28M in productivity savings



100% increase in service capacity

Sourcing & Procurement



\$9 million in first-year savings



Reduced requisition processing time and automated policy enforcement

Service Delivery and Support



€12M per year productivity savings



1,800 forms consolidated to 300 for managing housing communities

Financial Operations



95% reduction in quote-to-cash cycle time



\$5M annual savings from Purchase Price Variance solution

Case Management



Automated core quote-to-bid process to improve efficiencies



Lifetime health case management for 1M+ members

Compliance and Risk Management



30% lift in overall credit risk management efficiency



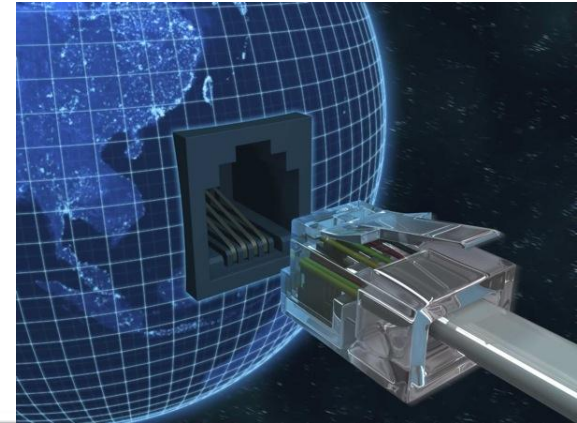
Using BPM for regulatory oversight process for US banks

Case Study: Nokia Siemens Networks

NSN Facts

- Created through merger of Nokia Networks Business Group and Siemens carrier businesses
- Global leader in telecommunications hardware, software and services
 - 60,000 employees in 150 countries
- Offers a complete portfolio of mobile, fixed and converged network technologies and professional services to more than 600 global Communications Service Providers

**Nokia Siemens
Networks**



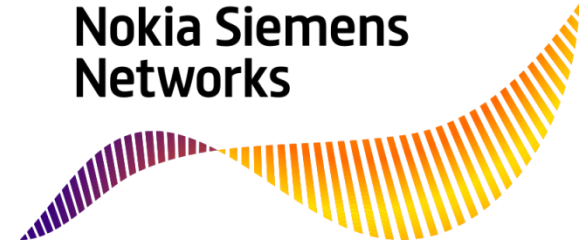
Appian

Case Study: Nokia Siemens Networks

Business Problem

- Merger formation resulted in a heterogeneous technology and tools landscape
- Large enterprise systems (ERP from SAP), and other rigid and disconnected sales workflow, resource and knowledge management applications
- This placed limitations on real-time business management, future planning capabilities, data accuracy, reporting and more
- NSN required a single system and process framework to provide full end-to-end visibility and control over its dynamic core business components

Nokia Siemens
Networks



Appian

Case Study: Nokia Siemens Networks

Nokia Siemens Networks

Appian displaced SAP and internal BPM development to deliver a holistic BPM program across the organization's value chain.

Appian Solution – ZEUS (named for the Greek god of control)

- Transformed how NSN operates through a common process framework and platform managing:
 - Sales, Delivery, Resources, Technical Support, Competency Management and Remote Delivery/Off-shoring
- Touches customers, employees, suppliers, and back-end system-to-system processes
- Acts as the central system for overall business management

Results

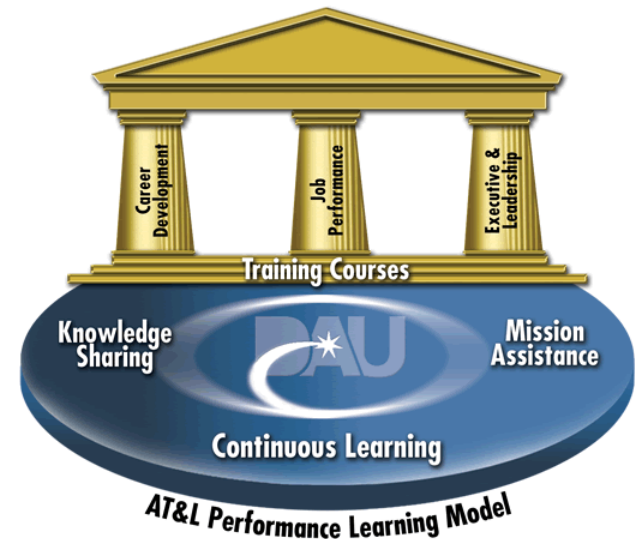
- Benchmarked **€12 Million annual productivity savings** spanning all employee levels
- Skill and resource management optimized against sales forecasts delivers more accurate view of revenue and profitability
- Real-time reporting enables faster and better management decisions making



Case Study: Defense Acquisition University

DAU Facts

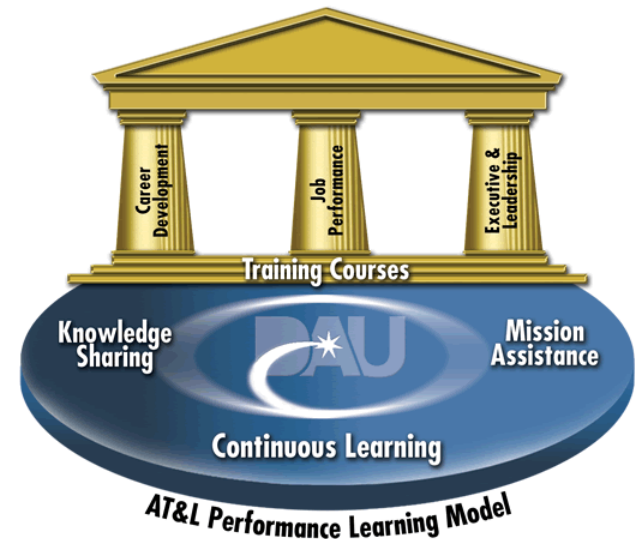
- Department of Defense (DoD) corporate university for acquisition education
- Provides mandatory, assignment-specific and continuing education courses for DoD's Acquisition, Technology, and Logistics (AT&L) community
- Mission is to enable smart business decisions to deliver timely and affordable capabilities to U.S. warfighters
- AT&L community currently consists of over 134,000 Army, Navy, Air Force and Defense agency professionals serving in 13 acquisition, technology, and logistics career fields
- Reports to the Office of the U.S. Secretary of Defense



Case Study: Defense Acquisition University

Business Problem

- DAU sought an advanced IT solution that would allow the organization to be “run like a business”
- This required visibility across the organization, automation of repetitive processes, and intuitive system interfaces for employees and students
- Elimination of paper processes, strict enforcement of policies and flexible performance reporting were key goals
- DAU has been lauded by numerous industry associations and publications for its technology infrastructure
- This tradition of excellence clearly set a high bar for DAU’s selection of a BPM vendor



Case Study: Defense Acquisition University



"Appian's BPM platform provides us a state-of-the-art tool for implementing financial controls, collaboration, and performance reporting. It acts as our central business system."

Mark Whiteside, Performance and Resource Management Director

Appian Solution – The DAU Business System

- Streamlines and automates:
 - Micro Purchase Requests
 - Training Requests
 - Invoice Tracking
 - Suspense Tracking
 - Hiring Actions
 - Personnel On-boarding/Off-Boarding
 - Transfer actions
- Delivers capabilities for:
 - Request tracking from submission to completion
 - Enterprise-wide standardized business rules and workflows
 - Document library to aid in the creation of hiring actions
 - Automatic generation of government forms
 - Real-time reporting

Results

- Web-based environment to enforce policies and increase efficiency, reliability, and visibility
- 50% reduction in on-boarding time; significant reductions in requisition processing times
- Consistency of reporting ensures accurate data for performance measurement and planning



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Questions & Answers

Q&A

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Panel Speaker: **Steve Russell**



Steve Russell

*CTO and
Senior VP of R&D*

Global**360**

Global 360 Customer Successes

Steve Russell, CTO and SVP R&D

Global 360 Overview

Enterprise-class Process Platform for Process & Case Management

Recognized BPM Market Leader



Growing by 40% over the last 12 months

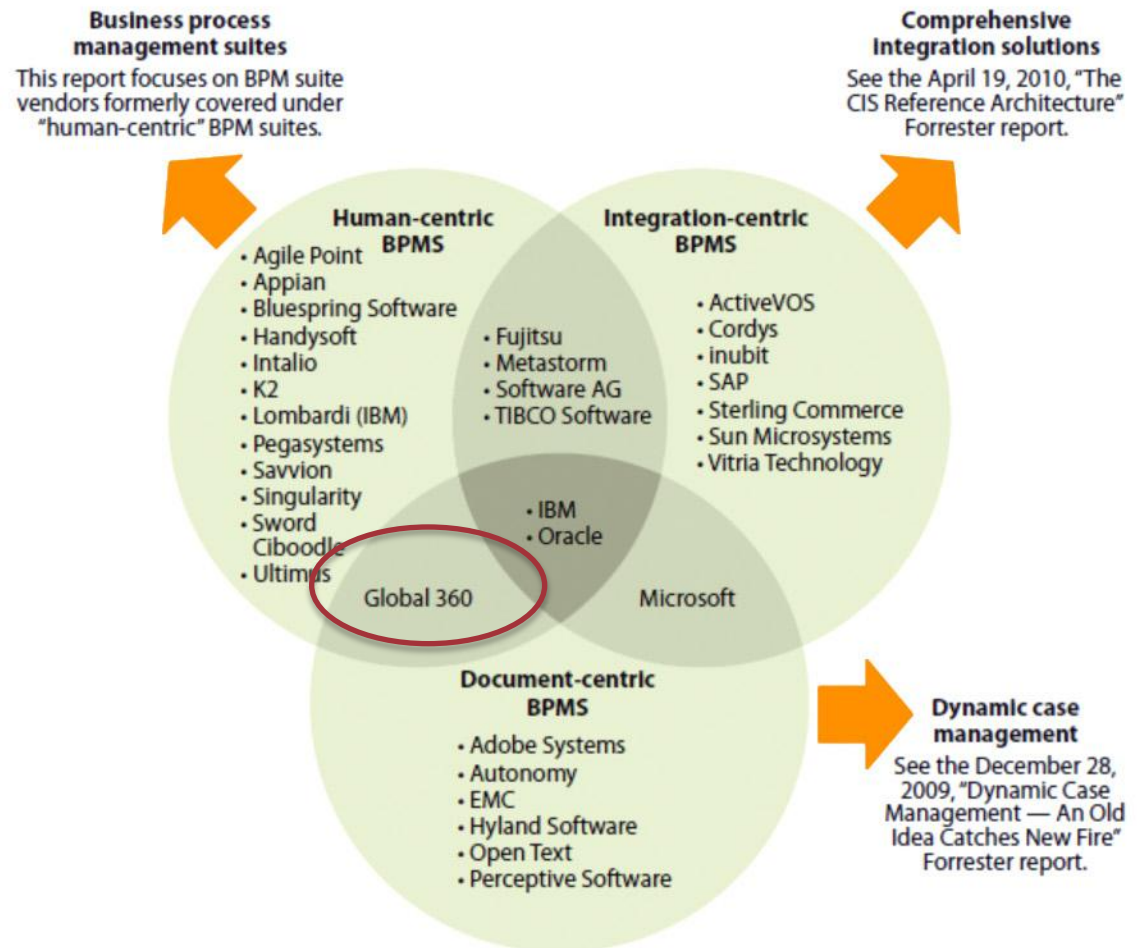


Global 360's Unique Position in the BPM Market

Global 360 is the only vendor that is recommended by Forrester for both Human and Document Centric BPM.

Source: Forrester BPMS Wave, September 2010

Figure 4 Forrester's Evolving Coverage Of BPM Suites





Nissan Motor Acceptance Corporation

Business Challenge

Overview: Wholly owned subsidiary of Nissan North America

- Retail financing, pioneered eContracts
- Lease financing for Nissan and Infiniti
- Floorplan , wholesale financing

Problem: Manual, regionally-based auto-financing process

- 25,000 loans / month
- 125 employees
- 10-hour days / six-days-a-week





Nissan Motor Acceptance Corporation

Solution Results

Solution: Automated loan processing system for better control and instant access to information so loan agents in 10 regional units can process contracts from any state.

Results: Improved quality of bookings, in less time with less staff.

- 83 employees working 8 hour days process 45,000 loans / mo
- Process paper contracts within 24 hours
- Process all e-contracts by 2pm each day
- Track productivity of processors, business



Business Challenge

Overview Group of affiliated insurance and financial services companies.

- Life Insurance, Retirement Plans, Annuities, and Employee Benefits
- \$21B in assets,
- 1.8 million customers
- Partnered with 20,000+ agents/advisors

“Primarily, we needed the flexibility to handle multiple types of workflows and automate processes. We were looking for a product that could make intelligent decisions.”

Problem: Manual, paper-based systems required hiring of 4 additional staff for every 100 new applications.

- 600 – 900 applications per week with 10 – 100 pages each



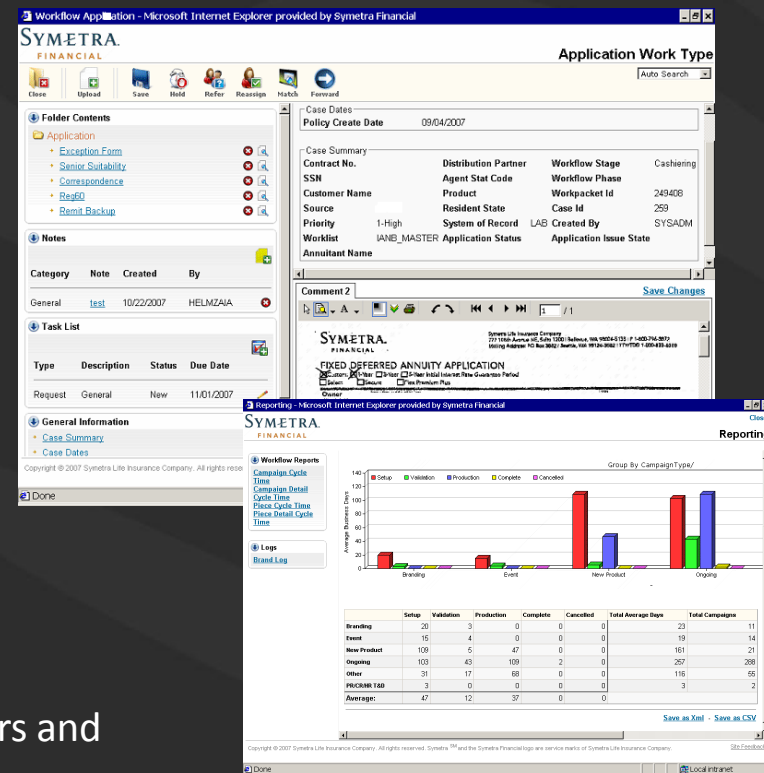
Solution Results

Solution: Automated 5 Core Processes with varying workflows and case requirements

- individual life, retirement services and income annuities new business and client services
- Marketing operations dashboard and audit controls

Results: 67% increase in processing throughput, responsiveness and compliance controls

- 37% Reduction in Cycle Time
- Increased Productivity ; 30% for Case Managers and 20% for Underwriters
- Engaged in new sales channels



Problem: Manual Credit Claims Resolution Process
Impacting Customer-to-Cash Performance

- Credit claims volumes high
- Process manual and inefficient
- More than half of Accounts Receivable employees dedicated to credit claims resolution

Results: Streamlined Claims Processing and
Correspondence

- One minute document collection (avg.)
- High-dollar claims are resolved the morning after the deduction is taken
- Researched claims are resolved within the 5 day goal



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Questions & Answers

Q&A