



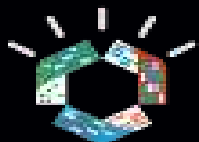
Delivering Highly Effective Results and Building for the Future: Part I

Joe Preston



Agenda

- Why WebSphere Portal Has Aligned Around Industries
- What it Means for our Customers and Partners
- What We are Providing
 - Information-Rich Websites
 - Tools and Templates
 - Componentry
- Industry Drivers and Customer Examples
 - Banking
 - Government
 - Higher Education



WebSphere Portal...

A strategic product for your strategic applications

Thousands of customers
with intranets,
B2B apps,
and customer-facing
internet apps

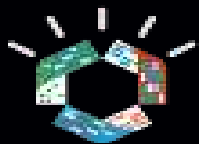
Smallest customer has
11 employees,
largest customer has
1M+ employees



#1 market share for
8 years running

Globally...
9 of top 10 banks
8 of top 10 retailers
12 of the largest telcos
50 major health providers
700 gov'ts + every G8 nation

***Over 300 million named users –
1 in 6 people worldwide with internet access is a
named user in a WebSphere Portal application***

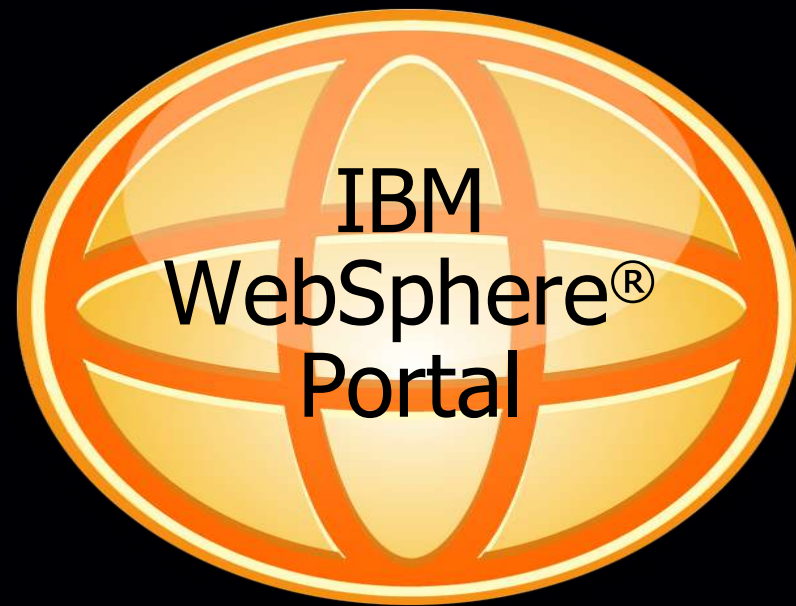


Smart Work

IBM PORTAL EXCELLENCE CONFERENCE 2009 - DUBAI



Portal Trends

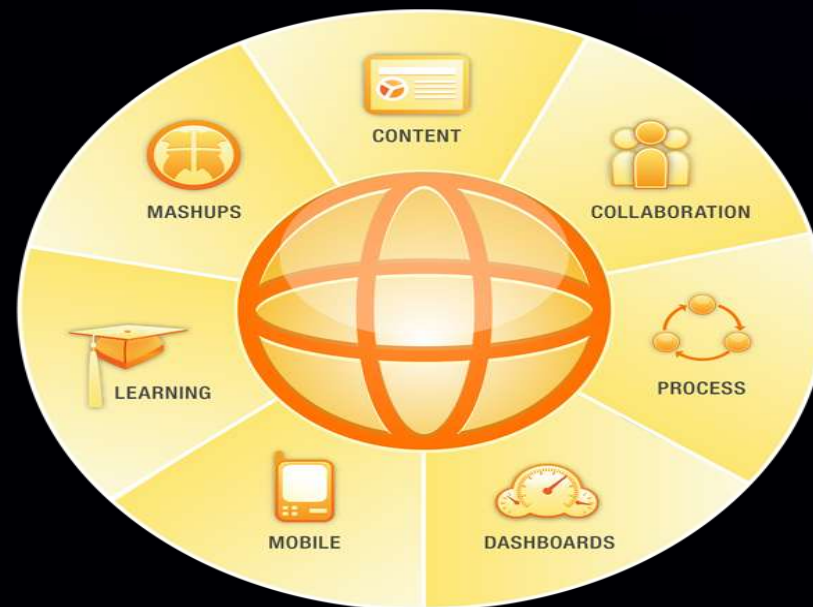


Core Integration Platform

Platform Excellence

2000 to Present:

- Platform for Standards and Governance
- Build Portal Applications
- Market consolidated to the largest platform players

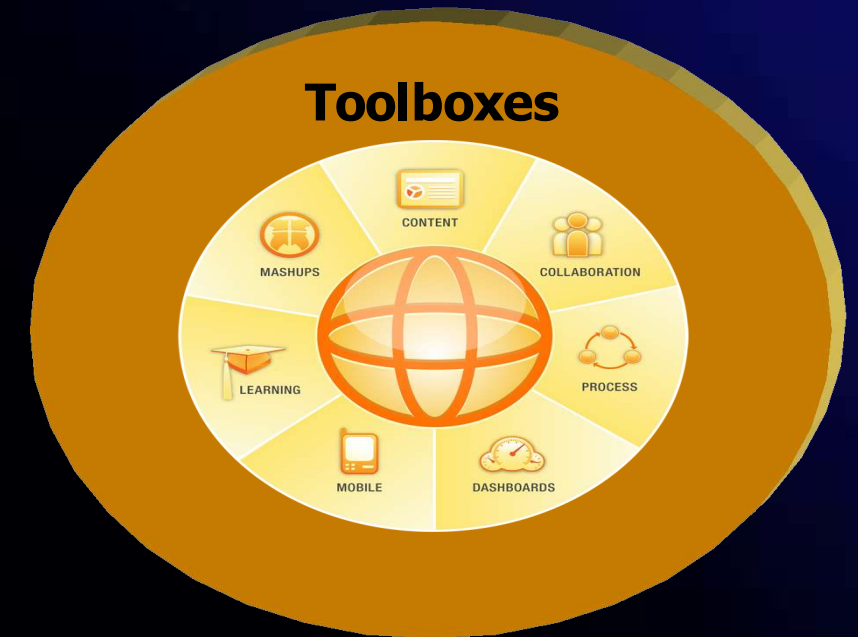


Accelerator Suites of Functionality to Match Customers Needs

Suite Excellence

2006 to Present

- Suites by big players
- Build Suite Composite Apps
- Integration of Components
- More Consolidation – ie WCM
- ROI, Business Impact focus

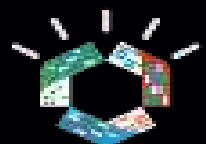


Industry and LOB templates, assets, and best practices to maximize "Out of Box" value

"Out of Box" Excellence

2009 into Future

- Out of box value from Suites
- Customized Template Apps - Deployment Flexibility
- Click To Cloud, Host-SaaS
- Agile, ie Business user directed

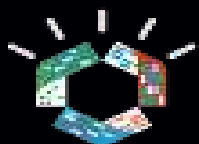


Why Focus on Industries?

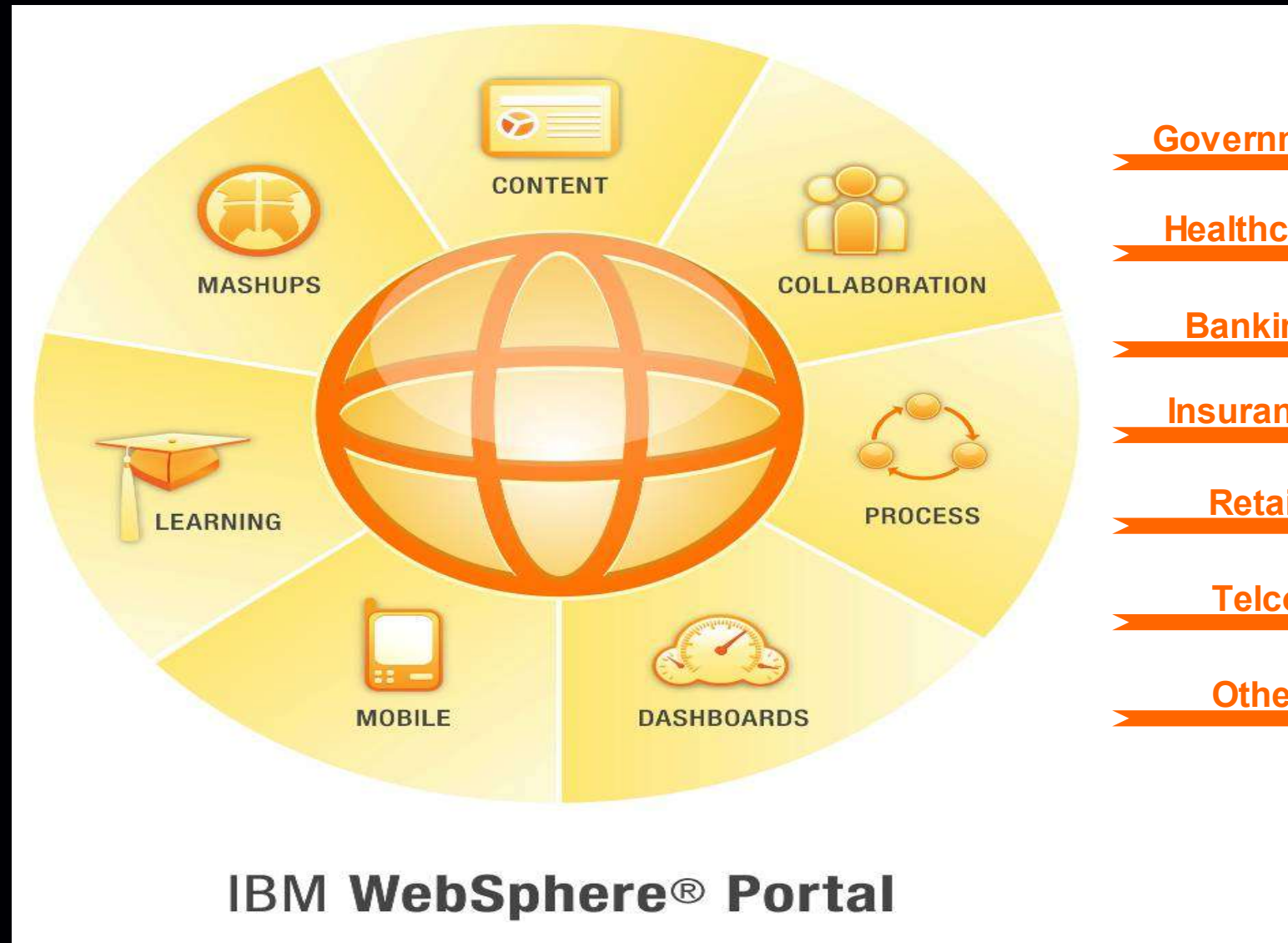
Partnering with Customers to Solve Problems

- Identify real problems and evolving needs
- Understand the most important business initiatives and challenges
- Grow insight into the most relevant solutions for an industry
- Shift conversation away from technology to a broader, more relevant vision of industry trends and specific needs

“What we didn’t want to do — as we had seen some other vendors do — is paint this marvelous scenario where advanced technology solves all the problems. We didn’t feel like that showed much depth of thought.” Jim Adams, Executive Director of IBM Center for Healthcare Management



Industry Emphasis for WebSphere Portal



- Government
- Healthcare
- Banking
- Insurance
- Retail
- Telco
- Other



Needs of the Business

Competitive advantage

Budget justification

Conversations with Sponsors

Introducing Industry Toolboxes for WebSphere Portal

- **Application Briefs**
describing solution scenarios.
- **Business Value Guides**
describing the value enabled by the WebSphere Portal and Accelerators, and help illustrate best-practice process and information flow.
- **Templates**
which can be used on top of WebSphere Portal to help jumpstart design and assembly of end solutions.
- **Demonstrations**
and recordings of example solutions design that illustrate how end solutions can look like.
- **Other Code Assets**
include sample Forms, Dashboards, or other Portlets which can help expedite the assembly of a solution.

United States [change]

Search

Home Solutions Services Products Support & downloads My IBM Welcome Rebecca Buisan [Not you?] [IBM Sign in]

IBM Industry Toolboxes for WebSphere Portal

Case Studies
Demos
Software Templates
Business Value Guides

Government Healthcare Banking Insurance Retail Telecommunications

Introducing IBM Industry Toolboxes for WebSphere Portal

Industry Toolboxes for WebSphere Portal provide a resource forum for customers and partners. They pair technology expertise with industry thought leadership to offer best-practice guidance optimized for the particular business you are in.

In this forum, you'll find resources that

- Showcase solutions from other customers in your industry
- Help concretely define and measure ROI and business value
- Demonstrate solution patterns
- Help jumpstart implementations through downloadable code assets

Freedom. Individuality. Speed.

"Our new h-dnet Dealer Portal is a HUGE success. Now dealers can spend less time online and more time helping customers get out on the road."

Tony Re, Director Global IS
Harley-Davidson

Watch the video (3.7MB)
Read more about the solution (348.7KB)
Get Adobe® Reader®

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www.ibm.com/websphere/portal/industry



Industry Toolboxes Help Answer...

“How does this help my business?”
(Value Alignment / Positioning)

WebSphere Portal Addresses Retail Banking Needs

Who's using Portal?

- Online Customers
- Tellers
- Customer Service Reps
- Payment Managers
- Risk Analysts
- Sales/Marketing
- Human Resources

How is Portal being used?

- Customer-service gateways
- Evaluation information aggregation
 - Marketing campaigns
 - Investment opportunities
- Back-office process consolidation
 - Payment processes
 - Auditing
- Hot-button dashboards
 - Event notification
 - News aggregation

“What does done look like?”
(Customizable Use Case Demos – DITL)

THE SOUTH FINANCIAL GROUP

Customer Control | My Bank Home | Products & Services | About Us

Account Search | Account Details | Account Management | Account Alerts

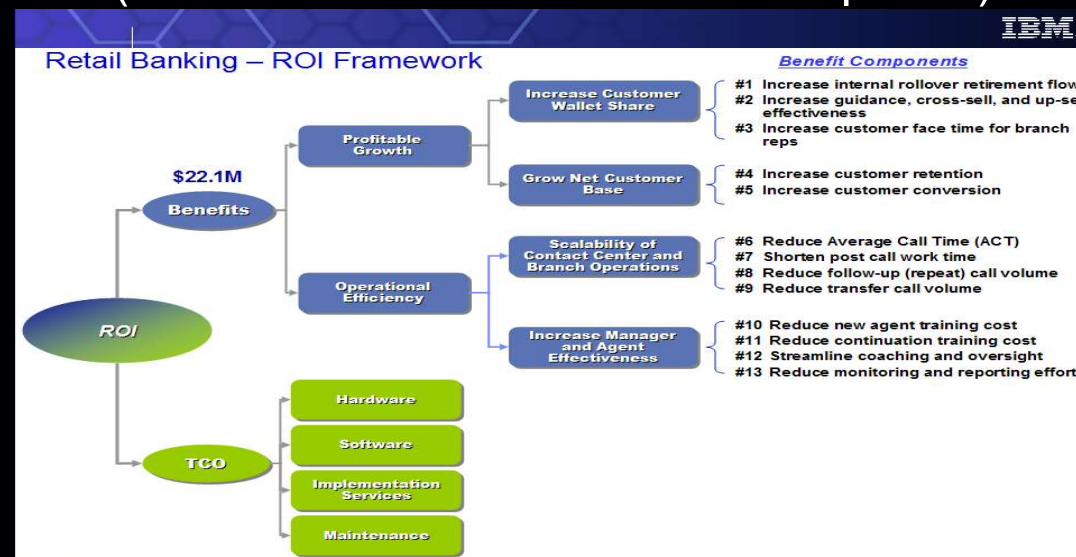
Account Summary: 3455 8388 018

Current Balance: \$3,187.00 | Available Balance: \$3,187.00

Primary checking | Money market | Savings

Auto Rates as low as 3.95% APR

“What is the ROI”
(Customizable Cost/Benefit Templates)



“How can IBM assist us build a value case”
(Consultative Sales Methodology, Assets, & Tools)

BVA Engagement Modules

Total Business Value

Business Value Alignment | Day in the Life Visioning | Process Modeling | Architecture Assessment | ROI/TCO Case

Deliverables

- Executive Summary:** Key findings, business pain challenges and issues, value drivers and business benefits
- Detailed Findings:** Benefits analysis, benchmark assumptions, process analysis, recommendations high-level implementation roadmap

BVA MODULES

- Consensus:** Management and operations stakeholder consensus on high value, practical, business process and community targets; alignment with business objectives, in Client business language
- Day-in-the-Life Visualization:** Personalized business scenario demo depicting what done looks like; built to illustrate Client use cases, in the context of the day-to-day work experience of the target user communities
- Process:** Process modeling of current business performance and characteristics as well as future-state process vision and associated improvement opportunities
- Technology:** Diagnostic discovery and analysis to identify the high-level technical requirements of the future state vision in the context of the Client IT environment and business value targets
- Numbers:** A structured, high-level ROI or TCO case that models the estimated financial benefit opportunity, required investment ranges, and associated financial return metrics of the proposed solution



Government Industry Toolbox for WebSphere Portal

Solution Areas

- **Government to Citizen**

- **Government to Business**

- **Public Safety**

- **Tax Collection and Filing**

- **Social Services**

- **Government Intranets**



Resources

- **Application Briefs**
Government to Constituents, Incident Management, Social Services
- **Business Value Guides**
Day in the Life click-thru demo
- **Demo Assets**
Tax solution with DB2 PureXML and Lotus Forms, Green County
- **Case Studies**
Vic Roads, Centrelink, Washington County, NYPD, Nova Scotia Land Registry, City of Dortmund, Australian Social Security

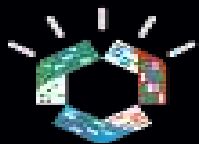


Government Solution Areas

- **Government-to-Citizen**
 - Helping governments more efficiently interact and share information with citizens
- **Government to Business**
 - Helping streamline costs, process tax, licenses, permits. Provide a platform to interact with stimulus efforts and provide transparency
- **Public Safety**
 - Helping those responsible for the safety and security of citizens to collaborate across agencies and with the public to effectively respond.
- **Tax Collection and Filing**
 - Gain efficiencies on how your government collects taxes. Close loop holes to maximize revenues, and enable rapid response to changing legislative requirements
- **Social Services**
 - Provide constituents with fast easy access to the critical services. Ensure that those that apply for services are truly qualified and that government resources are being used to help those truly in need.
- **Government Intranets**
 - Help Government workers stay informed and provide them with the tools they need to perform their duties in a more informed and efficient manner. Enable civil servants to deliver effective services.

Transportation Agency Delivers Real-time Updates over the Web

Technicka sprava komunikaci (TSK), the roads and infrastructure management service for Prague in the Czech Republic, needed a cost-effective way to deliver transportation updates to citizens, tourists and business constituents. Using IBM WebSphere Portal and Web Content Management software, the agency created a dynamic information portal. Prebuilt templates enable easy deployment and update.





Resources

- **Application Briefs**
Portal solutions for retail banks,
Streamlining account opening
- **Software Assets**
Loan application forms, banking dashboard KPIs
- **Demos**
Loan origination, online banking, bank branch teller,
mortgage processing
- **Case Studies**
Fifth Third Bank, HSBC, Navy FCU, Raiffeisen,
SORAM

Banking Industry Toolbox for WebSphere Portal

Solution Areas

▪ **Customer Care and Insight**

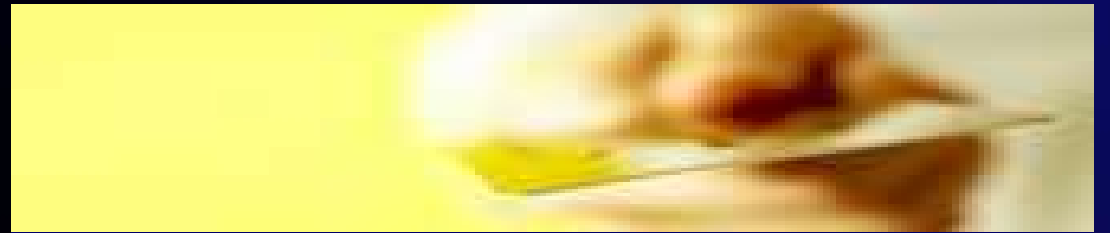
▪ **Multi-Channel Transformation**

▪ **Payments**



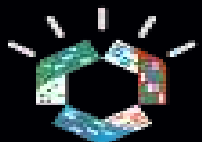
Banking Solution Areas

- Customer Care and Insight
 - Banking front-office solutions can help you maximize the value of face-to-face and self-service collaboration with your customers
- Multi-Channel Banking
 - Provide a consistent and exceptional user experience across all touch points with the customer, whether bricks and mortar branch, ATM, Web, or mobile device
- Payments
 - Tools to facilitate commercial bank payment transactions.
- Integrated Risk Management (coming soon)
 - Using WebSphere Portal as an integrated, secure platform for providing role-based access to risk management information (dashboards, content, alerts, etc) and other services



*"Our long-term relationship with IBM and HostBridge has enabled us to move our application development forward to provide Web-based applications that support our employees, who in turn services our members.... **it's been a quantum leap for us.**"*

Phil Arsenault , VP Tech Services
Navy Federal Credit Union



Healthcare Industry Toolbox for WebSphere Portal

Solution Areas

Healthcare Providers

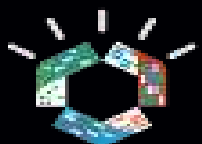
- Patient Portals
- Clinical Portals
- Patient Management Portals
- Employee or Intranet Portals

Health Insurance Plans



Resources

- **Application Briefs**
Calculating the ROI of a Patient Portal
- **Business Value Guides**
Physician and Clinician Aligned Clinical Environment
- **Software Asset**
Patient Portal Software and Wiki
- **Case Studies**
Duke University, Healthways, Memorial Health, Medstar, Trillium





Resources

- **Business Value Guides**
Value Impact Profile for Insurance, ROI Model
- **Software Assets**
Sample forms for ACORD, Claims Processing Dashboard, mobile insurance claims
- **Demos**
Agent Portal, Claims processing
- **Case Studies**
ACORD, Reliance Life, Prudential Woodmen of the World, Aviva, Royal Auto Club of Victoria

Insurance Industry Toolbox for WebSphere Portal

Solution Areas

■ Insurance Agent / Producer Portal

■ Multi-Channel Insurance Sales Delivery

■ Insurance Self Service

■ Standards-Based Process Improvement



Insurance Solution Areas



• Insurance Agent / Producer Portal

- Provides a place where agents – whether independent or captive – can get the latest product information, can help quickly create quotes under multiple coverage scenarios and can help them communicate and collaborate with customers, underwriters, claims processors and others.

Multi-Channel Insurance Sales Delivery

- Traditional agent sales channels do not meet the needs of many new and younger insurance customers. These customers are requiring sales information in a variety of new channels such as mobile devices, web sites and kiosks. These tools help businesses provide information regardless of the interface a customer chooses.

Insurance Customer Self-Service

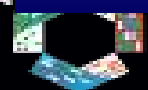
- Increasingly customers are expecting that they should be able to initiate and in some cases manage the entire activity themselves – whether starting a claim or requesting a quote. These tools provide customers with the ability to initiate or process common activities themselves, without needing a call center or branch office.

Standards-Based Process Improvement

- The Insurance industry has adopted ACORD's standardized forms, resulting in streamlined workflows that reduce redundant processing and improve efficiency. ACORD forms meet compliance requirements in all states and jurisdictions where they are used, and are filed with regulators on behalf of ACORD members. ACORD eForms are powered by Lotus Forms.

“There was ample scope for us to be more proactive in the way we serviced our clients. Plus, growing profit in a mature business such as insurance requires reducing costs.”

David Kennington
VP of Information Systems,
Prudential



Retail Industry Toolbox for WebSphere Portal

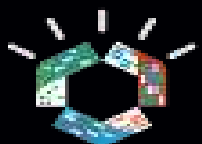
Solution Areas

- **Vendor Management Portals**
- **Store Operations Portals**
- **Franchise / Dealer Portals**
- **Retail Workforce Management**



Resources

- **Application Briefs**
Building a customer-centric business through information and collaboration
- **Business Value Guides**
Boosting store efficiency
- **Software Assets**
Vendor on boarding forms, Employee leave and job application requests, Retail surveys
- **Case Studies**
Slumberland, Sainsbury, GXS, North Face, Isuzu, Harley Davidson, Compar Bata



Telecommunications Industry Toolbox for WebSphere Portal

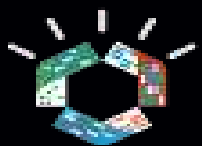
Solution Areas

- **Service Innovation**
- **Service Creation**
- **Service Management**



Resources

- **Application Briefs**
From Collaboration to Innovation: Leveraging Web 2.0 to Accelerate New Service Ideas
- **Business Value Guides**
Telco ROI benefits framework
- **Software Assets**
Service Provider Delivery Platform
- **Demos**
MyWi Telco Consumer Portal
- **Case Studies**
Verizon Wireless, Bharti, Cable and Wireless, mblox, Kapsch



Telco Industry Solution Areas

- Service Innovation
- Deliver value to customers and exceptional user experiences to customers on the go. With intense competition with intense competition and ongoing price wars, telecommunication providers must rapidly adapt to change and deliver services quickly and cost-effectively. Mashups and Portal solutions provide the flexible platforms to enable this.

- Service Creation

- Portals enable telecommunications companies to leverage complex infrastructures to address new marketplace opportunities by extending market reach with finer grain targeting of service offerings and providing third-party access to telecom network capabilities for enhanced services and revenue opportunities.

Service Management

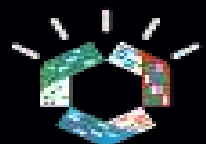
- Portals help build agility into operational environments. As your interface to your customer, a portal can help improve quality of service, reduce customer churn, and deliver real time end-to-end visibility into the source and resolution of issues.



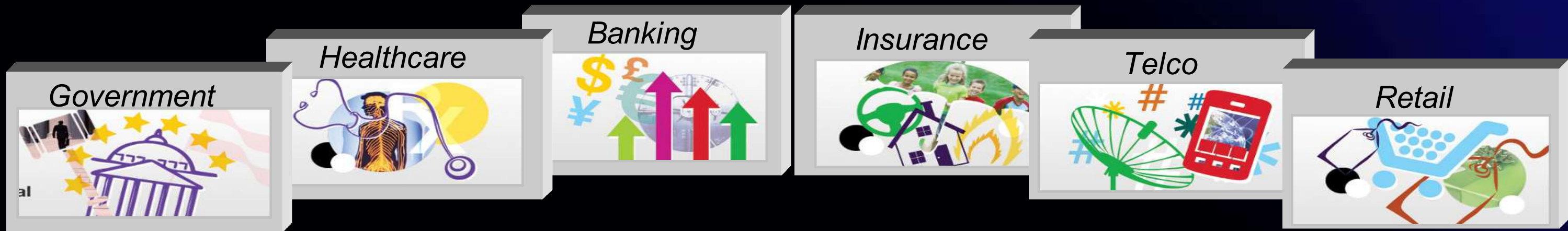
WebSphere Portal and WCM Fuel

Verizon Wireless Business Drivers

Timely adoption of smart phones
Promote mobile web growth and data usage
Reduce call center costs via customer self service
Support for diversified handsets and custom browsers
Cross sell/Up sell (ring tones/ring back tones, games, etc)



IBM WebSphere Portal Industry Templates



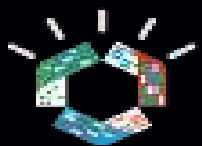
Industry focus to accelerate solution construction for specific business needs

Prebuilt Portal Sites contain structure and commonly used components for a target industry.

Built-in best practices help IT to dramatically speed time-to-market and reduce the cost of deploying portal-based business solutions that span the Lotus portfolio

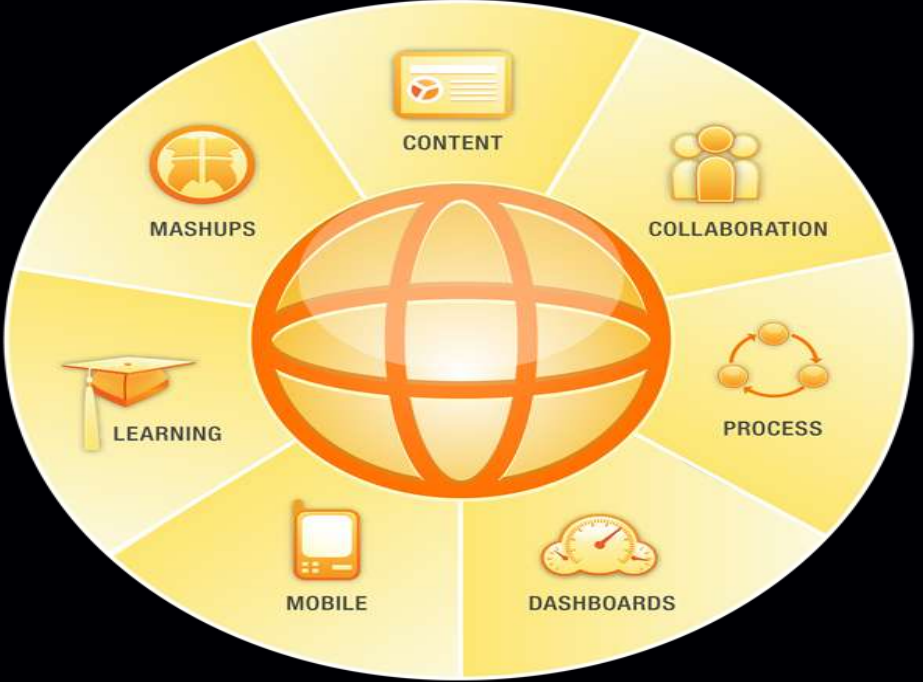
Showcase for successful interaction patterns solving recurring user needs in a best practice way.

Customers, Business Partners and IBM Services can readily configure, customize, extend and change (Portlet Factory Models included).



Using Industry Templates

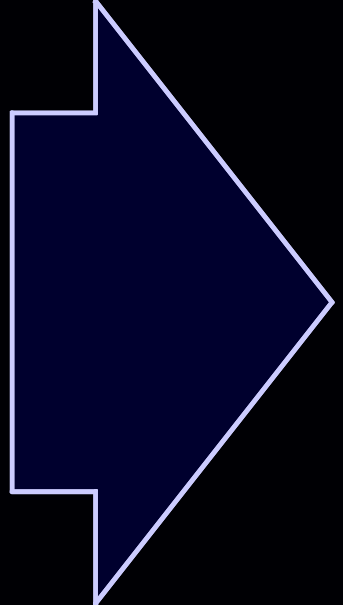
WebSphere Portal
IBM Accelerators for Portal



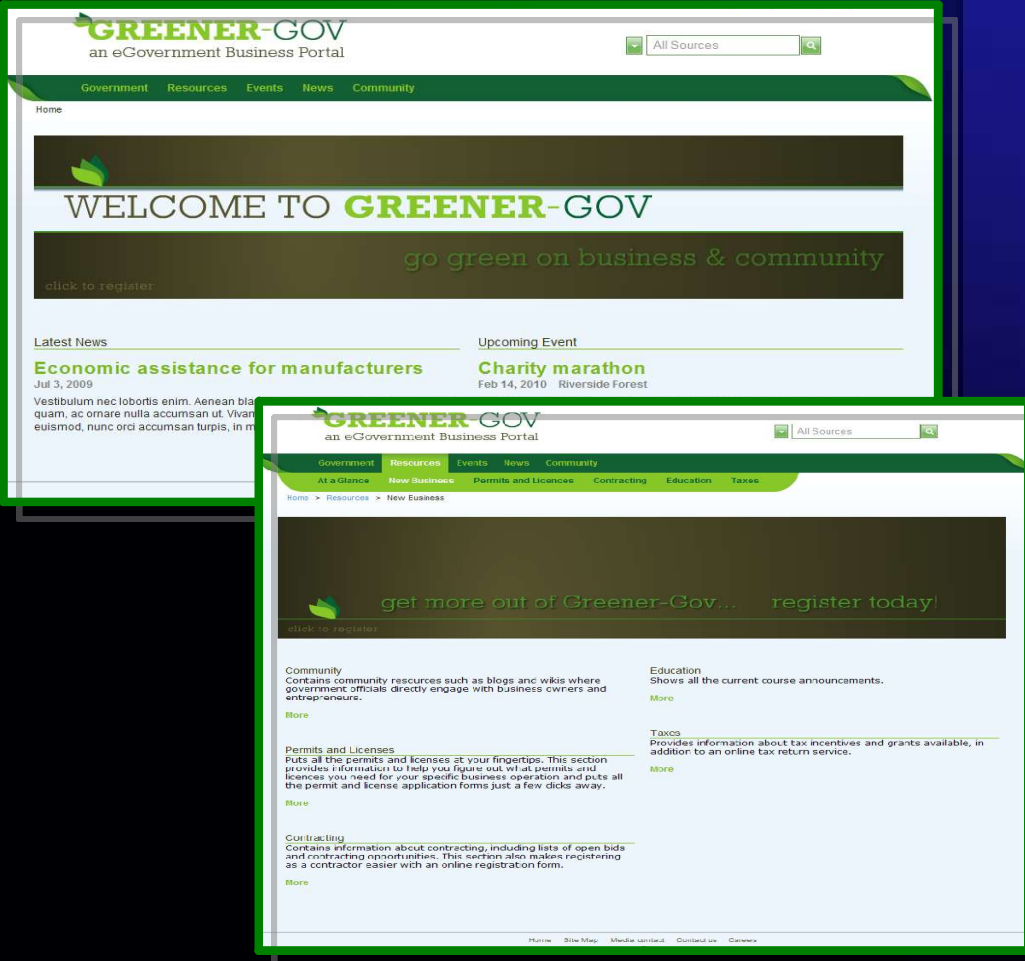
Industry Template

Industry Template

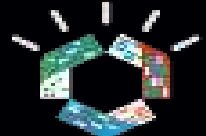
- Web Content Catalog
- Site Structure
- Self Registration
- Unified Task List
- Checklist Framework
- Portal Form Integration
- Industry KPI's
- Secure Messaging



Prebuilt Industry Portal Site



Industry specific implementations to jumpstart your project with prebuilt best practice websites.



Smart Work



Jumpstart Template: Healthcare Patient Portal

For Hospitals and Providers

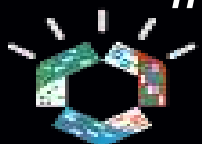
Connected Patients for Better Care and Satisfaction

The IBM Healthcare accelerator combines with IBM WebSphere® Portal software to help Hospitals empower patients via an online Patient Portal.

- **Improved Patient Care**
through better patient communication
- **Increased Patient Satisfaction**
by improving the patient experience
- **Improved Efficiency**
by empowering the patient
- **Greater Healthcare Innovation**
by freeing people to focus more on care (and less on administrative tasks)
- **Foundation for additional Health Portals**
e.g. Physician, Clinician and other Portals



Patients are consumers, and as such have an expectation to be able to do everything via the Web – including managing their healthcare – in real time.



Jumpstart Template: Government to Business Portal

NEW

The Government to Business Solution

Connected Governments leverage robust, secure, manageable solutions to deliver the latest Web 2.0, easy, fast, flexible technologies to their users.

- **Become “business friendly”**
through better communication
- **Spur economic development and launch new stimulus programs**
- **Gain efficiencies**
through e-government delivery of service (Online Forms for taxes, permits, registration, license)
- **Capture more revenue and close loop holes**
through improved user guidance and feedback
- **Includes pre-built web page templates, checklists, forms and content**
- **Based on WebSphere Portal, Web Content Management, and Business Process Accelerator**



Government customers worldwide are using IBM Portal and Collaboration tools to deliver innovative services to their constituents



Advanced Self-Registration

NEW

- **Enhanced profile generation** (user attribute and group membership)
 - customizable
- Email validation or immediate activation options.
- Security Question management.
- *Built with Portlet Factory and provided as ready to deploy WAR file and WPF feature set for custom development.*

Register your account

Step 1 - Provide information required to create a new account.

* First Name

* Last Name

* User ID

* E-mail Address

* Confirm E-mail Address

* First Security Question
What is your mother's maiden name?

* First Security Question Answer
Your answer must be at least 4 characters long.

* Second Security Question
The first and second security questions cannot be the same.
What is your mother's maiden name?

* Second Security Question Answer

Help and Hints

This page contains several questions required to create a new account. You can provide additional information to personalize your account and profile in the following pages. Alternatively, you can complete the registration process and update your profile at a later time.

Click **Next** to continue the registration process.

* indicates a required field.

Edit My Profile

Change or update your profile information on this page.

User ID
my.ID

* First Name

* Last Name

Help and Hints

You can change or update your profile information on this page at any time.

If you do not have a legal name or business number, leave the fields blank. You can provide this information at a later time.

The address information you provide should correspond to the location where your business is legally registered.

Click **Finish** to review and submit your updated profile.

* indicates a required field.

Activate your account

Verify your user ID and specify a password to complete your registration and activate your account.

User ID
my.ID

* Password
Your password must be at least eight characters long and contain a combination of at least one uppercase letter, one lowercase letter, one digit, and one special character.

* Confirm Password
Confirm your new password.

Thank you for registering.

Your user ID: test1Stefan

Open the following link to complete the registration process.
[http://dubsoablade02.mul.ie.ibm.com:10040/wps/portal!/ut/p/c5/tZBJkoJAyXKqItxB3x6F4xe5hE4rtFr9AizDaFU!/?](http://dubsoablade02.mul.ie.ibm.com:10040/wps/portal!/ut/p/c5/tZBJkoJAyXKqItxB3x6F4xe5hE4rtFr9AizDaFU!/)

If you require assistance or did not register for an account, contact Customer Support at 1-800-xxx-xxxx.

Thank you,
Customer Support





- Password reset support.
- Easy to use.
- Security Question validation.
- *Built with Portlet Factory and provided as ready to deploy WAR file and WPF feature set for custom development.*

User ID:

Password:

[Forgot your password?](#) [Resend activation mail](#)

Forgot your password?

Answer the security question

Answer the security question to verify your identity.

* What is your place of birth?

Help and Hints

You must provide a valid answer to the security question to reset your password.
Click **Back** to return to the previous page.
Click **Next** to submit your answers and proceed.

Forgot your password?

Enter a new password

Enter a new password to reset the password for your account.

* Password

Your password must be at least eight characters long and contain a combination of at least one number and one letter.

* Confirm Password

Confirm your new password.

Help and Hints

The new password that you enter will reset the password for your account and replace the previous password. You will receive a confirmation e-mail after your password is successfully reset.
Click **Back** to return to the previous page.
Click **Finish** to reset your password.
* indicates a required field.



Enable your users to accomplish tasks more successful and more efficient

NEW

- Quickly find out what your next required steps are.
- Share best practices and procedures with customers, partners and colleagues.
- Stay on top of the work across all systems you need to deal with.
- Automatically use the most efficient tool for the task at hand.

Government Resources Events News Community My Account

At a Glance New Business Permits and Licences Contracting Education Taxes

Home > Resources > At a Glance

Upcoming Event

Employee benefits
Jan 8, 2010 Local university
A symposium to exchange ideas on how to attract and retain top talent in the current economic environment is set to take place this summer.

Upcoming Course

Building and Leading Effective Teams
Aug 19, 2009, 04:00 AM
Local university
This course is intended to provide participants with a range of team building techniques and strategies for leadership.
Open for registration.

Checklists available to users who select convenience store as their business type

Guide Me
Click on one of the links below to begin the guided activity.

- Convenience Store Registration
- Lottery Retail License
- Sales Tax Registration

Home > My Account

My Activities
Use the interactive tools on this page to help you keep track of and complete your business activities and tasks. When you enter is saved so you can stop and return at a later time to finish the activity.

Refresh

Source	Title	State	Owner	Originator	Escalated
Checklist	Sales Tax Registration Claimed	d.naro	d.naro		No

Sales Tax Registration
Use this checklist to register your sales tax.

Required Learn More Proceed Check/Uncheck Completed

- 30 Days Before Sales Tax Registration
- Sales Tax Collection and Remittance Guidelines ? ? ?
- Submit sales tax forms * ?

Finish Delete Refresh

Unified Task List

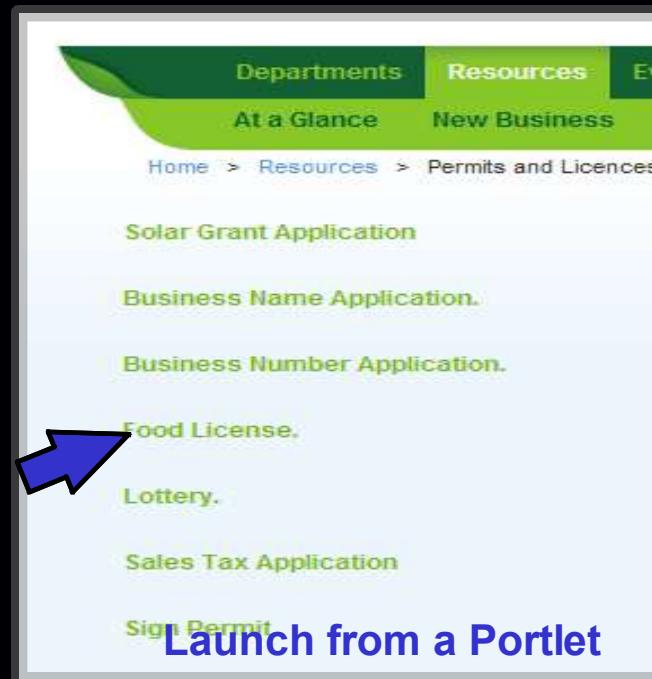
Checklist portlet



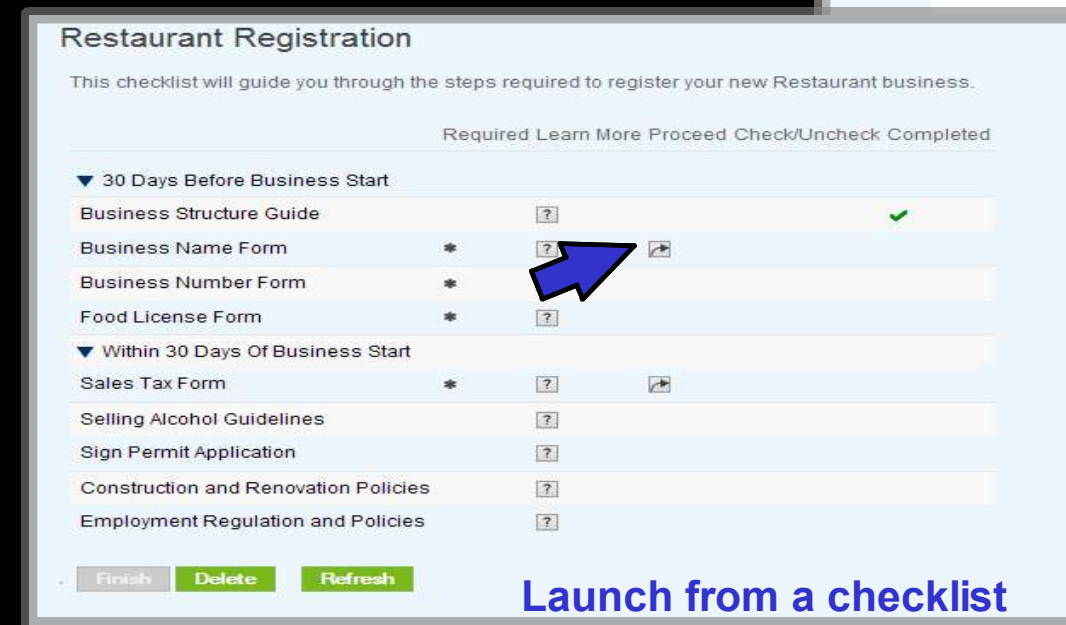
Simplify your Customer Interactions - Lotus Forms

NEW

- Electronic forms simplify business tasks by providing user guidance and validation.
- Use Lotus Forms within your WebSphere Portal without any additional development.
- Easily launch an electronic form from the Unified task list, from a checklist, or any other custom Portlet.
- No client installation needed.



Departments Resources Events News Community My Account
Home
Solar Grant Application
Check this box if this is your first Green County grant application.
Solar Energy Matching Grant Application
Renewable Energy Incentive Program
1. Introduction Step 2 Step 3 Step 4 Step 5 Step 6
This is an application for a grant to assist with costs of switching to solar energy.
This Grant is from the Green County Grant Repository, with Policy Number: SEG-000000
Is this your first Green County grant application?
Enter your Green County Grant ID: Your Grant Application Reference Number:
Date:
How you plan to use solar energy:
Is this a new project or an extension on a previous project?
 New Project Extension
Estimated start and finish dates of installation and implementation:
Start: Finish:
Previous Next
Grant money for both photovoltaic panels and solar water heating, two separate applications must be
Your Grant Application Reference Number (GAR) is for filing and tracking purposes only. Please
record this number. If you already have a Green County Grant ID then this application will be added to your
account. If you do not already have an account, click the "Create an Account" button to create one.
Lotus Forms Save



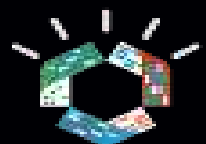
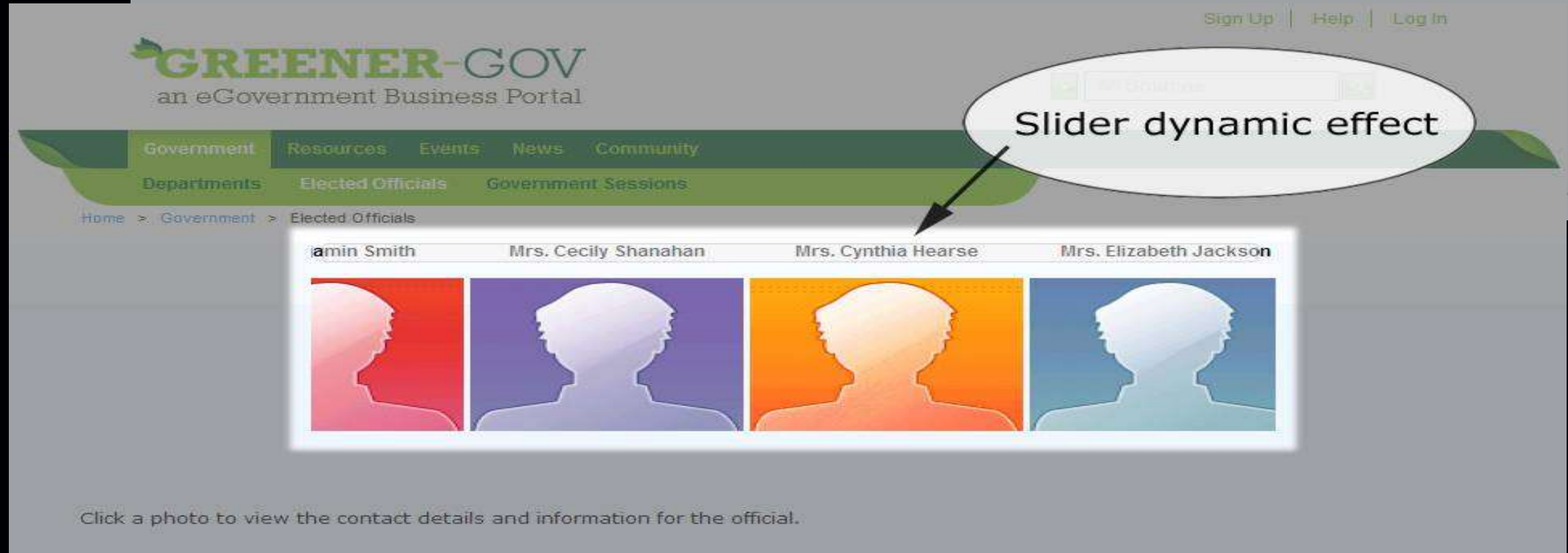
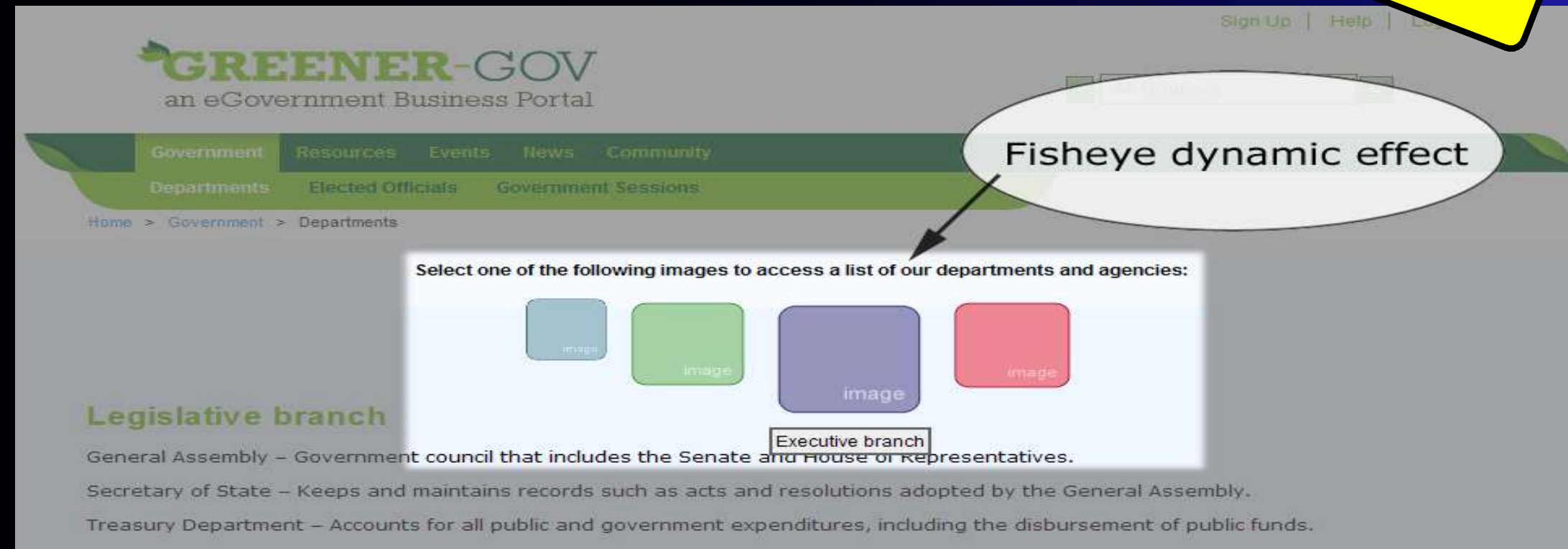
Smart Work



Web Content Catalog – Ready to use for your Website

NEW

- The IBM Government to Business portal template includes the Web Content Catalog.
- Sample content that displays on the portal pages when installed.
- Blog and Wiki templates
- Dynamic effects for images
- Presentation and authoring templates for site content
- Personalization components



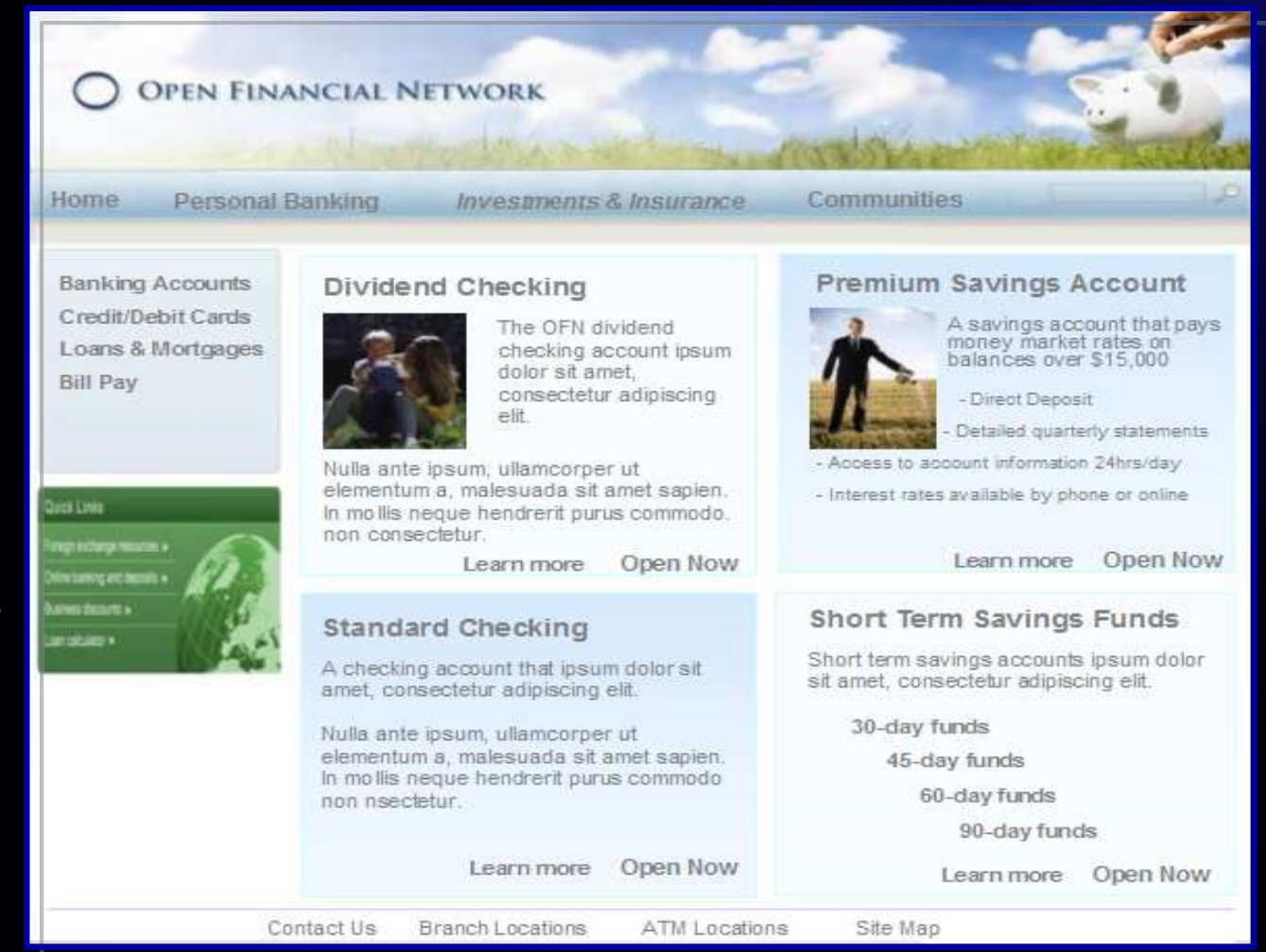
Jumpstart Template: Online Banking Portal

Future

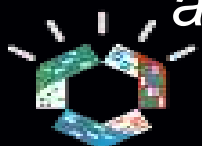
Connected Customers for Better Access to Financial Information

The IBM Online Banking Portal combines with IBM WebSphere Portal software to help Banks empower customers via an online Banking Portal.

- **Improved Customer Access**
anonymous and authenticated access
- **Increased Customer Satisfaction**
personalized services, information and offers
- **Improved Efficiency**
by empowering the customer self service
- **Greater Banking Innovation**
by freeing bankers to focus more on services (and less on administrative tasks)
- **Foundation for Multi Platform Banking**
extend to Mobile, Kiosks and other platforms



Banking customers have an expectation to be able to perform all banking activities wherever they are and at any time via the Web.



Smart Work



IBM WebSphere Portal Business Solutions Catalog

The screenshot shows the IBM WebSphere Portal Business Solutions Catalog website. The page is titled "IBM WebSphere Portal Business Solutions" and is described as "The leading enterprise portal for On Demand business". It features a search bar, a "Browse by" section with dropdown menus for "IBM products", "Industry", "Provider", and "Solutions", and a list of featured solutions. Two featured solutions are highlighted: "IBM WebSphere Portal Widget Portlet" and "IBM Lotus Web Content Management Rendering Portlet". Both solutions have a 5-star rating and a popularity indicator of 5 stars. The page also includes a "Related links" section on the left and a "Welcome" message in the top right corner.

A one-stop shop for IBM and Business Partner solutions

The catalog is a Web-based clearinghouse for thousands of portlets, WebSphere Portal solutions from IBM and hundreds of IBM Business Partners, sample dashboards, and line-of-business (LOB) and industry key performance indicators (KPIs) that work with IBM® Dashboard Accelerator.

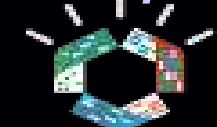
Plus, the catalog itself is built on the WebSphere Portal platform, providing an excellent example of what's possible with portal software from IBM.

A note to IBM Business Partners: introduce your solution to businesses worldwide

The WebSphere Portal Business Solutions Catalog provides a vehicle for introducing your WebSphere Portal solutions and services to a worldwide audience and driving leads. Because the catalog is available in many languages, it's ideal for promoting regional solutions.

And listing your solutions in the catalog is easy. Just go to the catalog home page, click on the Getting Your Solutions into the Catalog link and follow the instructions. You can also advertise events related to your catalog-hosted solutions on our news portlet.

<http://www.ibm.com/software/brandcatalog/portal/portal>



Smart Work



A
Smarter
Planet



Banking

- Portal + Banking
- Customer Examples



Smarter Banking



50%

Percentage of customers who would give their bank **only two chances to fail before considering a change in banks.**

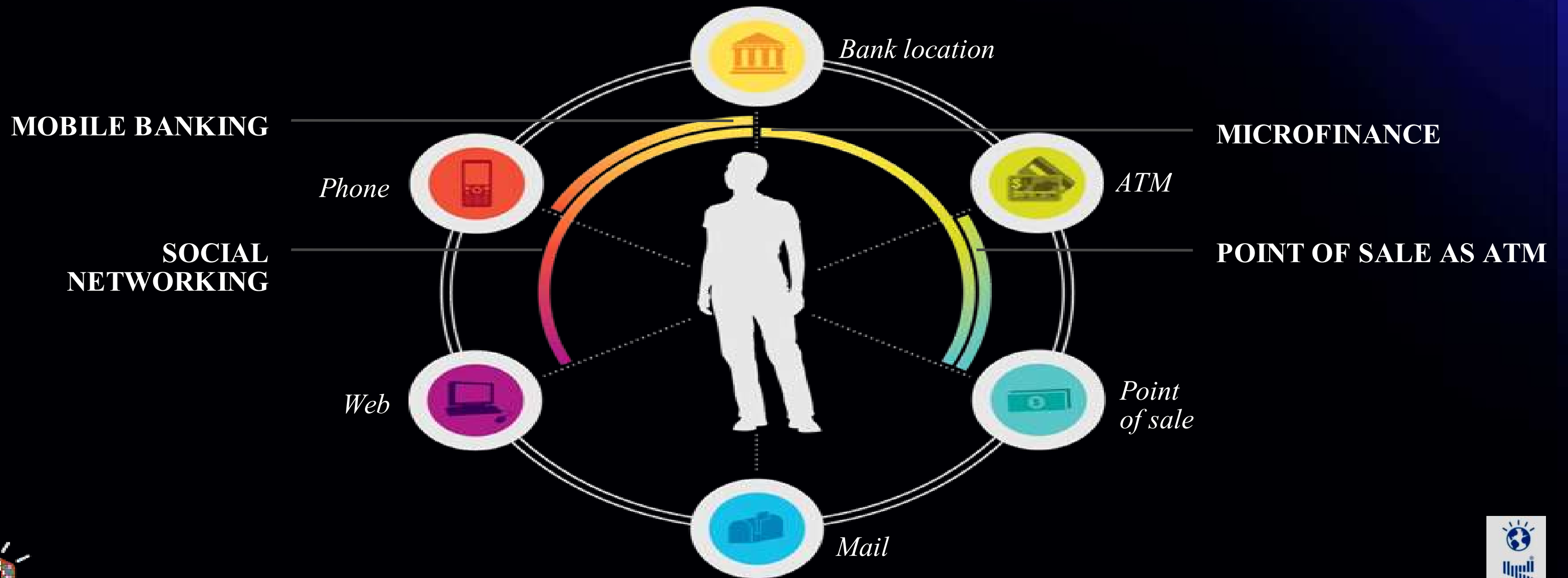


25 billion

Global trading systems are under extreme stress, handling billions of market data messages each day.

Drawing on marketplace insights and engaging customers as co-developers

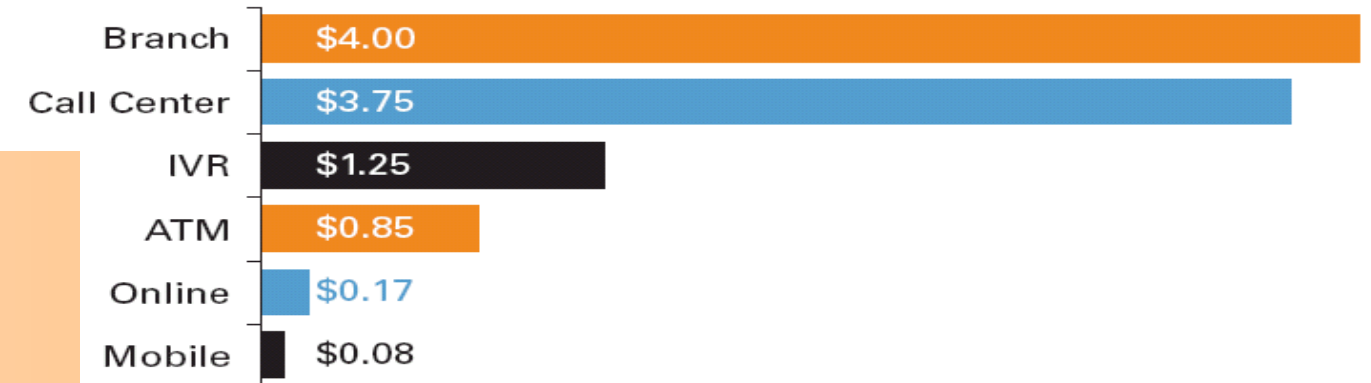
a smart financial institution tailors products and services on demand and delivers them through an ever-evolving and increasingly interconnected set of channels.



Industry Drivers For Productivity Solutions

Per-Transaction Costs by Banking Channel

Mobile is the lowest-cost banking channel to serve on a per-transaction basis.



Source: TowerGroup, Fiserv/M-Com Data: Mobile transaction costs based on actual data from M-Com, international mobile banking and payments solutions provider and Fiserv partner whose technology powers Mobile Money from Fiserv.

- **Improve integration between channels to drive revenue growth:**

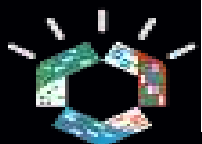
- Differentiate service to stand out from their competitors
- Provide Mobile Solutions
- Integrate communications across service channels
- Provide personalized services for all channels

- **Increase productivity, reduce costs**

- Agent and Customer Self Service
- Increase sales channel productivity
- eForms Solutions

- **Create a powerful user experience for agents, advisors and customers:**

- Simply the user experience for agents and customers
- Improve the way agents sell to and manage their customers
- Leverage Web 2.0 capabilities



WebSphere Portal Solutions in Today's Financial Climate

Top Three Imperatives*

1

Retain Customers *through Rich User Experience*

- Account information, customer service, targeted marketing tailored for each customer
- Interactive, integrated search and help
- Built-in Web 2.0 online collaborative experience

2

Reduce Costs *by Maximizing Existing Assets*

- People, processes and data are all linked by Portal
- Empower everyone with managed content they need in a format they understand
- To all channels, mobile, web, desktop clients
- Portlet Factory speeds up portal delivery

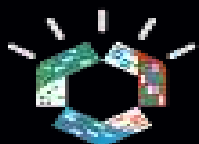
3

Prepare for Merger and Acquisition *by Managing Integration Risk*

- Integration at the glass streamlines cross-department productivity
- WebSphere Portal is the 8-year Portal market leader
- IBM at the forefront of major business innovations: SOA, Web 2.0, Enterprise Mashups

*From interviews of Americas, EMEA and AP banking leaders (October 2008 – present)

IBM PORTAL EXCELLENCE CONFERENCE 2009 - DUBAI



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WebSphere Portal Addresses Banking Needs

- **Who's using Portal?**

- Online Customers
- Tellers
- Customer Service Reps
- Payment Managers
- Risk Analysts
- Sales/Marketing
- Human Resources

- **How is Portal being used?**

- Customer-service gateways
- Employee intranet
- Evaluation information aggregation
 - Marketing campaigns
 - Investment opportunities
- Back-office process consolidation
 - Payment processes
 - Auditing
- Hot-button dashboards
 - Event notification
 - News aggregation



• DEMO

Retail Banking | My Shares | WholeSale Banking | More... Heather Reeds | Edit My Profile | Help | Log Out

OPEN FINANCIAL NETWORK

Heather's Home | Online Education | Small Business Resources | Products | New Page

Add Content | Change Appearance | Share Page

My Accounts

View Accounts | Pay Bills | Online Deposits | Transfers | Brokerage | Customer Service

Account Name	Account Number	Balance
Regular Checking	*3972	\$ 2,347.83
Platinum Business Checking	*1409	\$ 23,926.07
Savings	*9607	\$ 4,120.98

Recent activity

- 01/19/09 Pending Payment to MasterCard in the amount of \$250.00
- 01/18/09 Withdraw from Savings *9607 in the amount of \$1,000.00
- 01/18/09 Transfer from business checking *1409 to regular checking *3972 in the amount of \$3,500.00

[More Activity](#)


Quick Links

- Foreign exchange resources »
- Online banking and deposits »
- Business discounts »
- Loan calculator »

Investor Publications

- Getting Started with a Mutual Fund Connection »
- A Look at 401(k) Plan Fees »
- Tips for Online Investing: What You Need to Know »

Personal Advisor



Frank has shared local community resources with you. [See more](#)


Congratulations on your company's 5 year anniversary! Here's a low-interest line of credit for your growing business. [See less](#)

At Open Financial, your success is our top priority, and we noticed that your business is growing! We have a pre-approved, low-interest line of credit just for you. If you're interested, click here for more info.

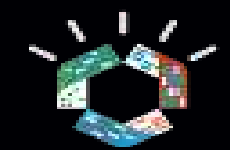
[Contact me](#)

Change Your Community

Sign up today and we'll donate 10% of what you spend on your OFN check card to your favorite local charity each year! >



[More Info](#)



Smart Work



Sparda Bank – One Portal for All



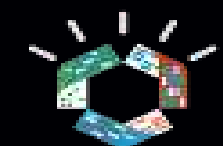
Integration of 12 regional banks

Integration of many financial applications

- 3 Million Bank Customers in 12 regional banks
- 1.5 Million Internet Banking Customers
 - Of which around 1 Million are regular users, resulting in
 - 10 Million sessions / month
- Sparda needed a single Portal
 - For customers; for employees
- WebSphere Portal's high performance
 - Exceeded Employees' requirements
 - Exceeded Customers' expectations
- Availability of banking systems critical to success and acceptance**

Portal performance measurably better than requirements

Performance						
	Performance	Avg [s]	Min [s]	Max [s]	Std.Dev.	Histogram
<input checked="" type="checkbox"/> Transaction Response Time		18,46	0,13	23,66	2,51	
Page Times						
	Performance	Avg [s]	Min [s]	Max [s]	Std.Dev.	Histogram
<input type="checkbox"/> Average Page Time		3,09	0,10	10,62	1,88	
<input type="checkbox"/> Internet_Portal_SPB_DSL_01_Verbinden	100,00	2,31	0,10	3,59	0,23	
<input type="checkbox"/> Internet_Portal_SPB_DSL_02_Anmeldung	100,00	2,68	2,42	5,22	0,39	
<input type="checkbox"/> Internet_Portal_SPB_DSL_03_Abmeldung	100,00	1,05	0,88	2,28	0,13	
<input type="checkbox"/> Internet_Portal_ZVB_SPB_DSL_01_Ueberweisung	100,00	2,83	2,65	4,67	0,19	
<input type="checkbox"/> Internet_Portal_ZVB_SPB_DSL_02_Ueberweisung_Ablehnung	93,49	6,55	3,40	10,62	2,02	
<input type="checkbox"/> Internet_Portal_ZVB_SPB_DSL_03_Empfaengerliste	100,00	3,13	2,84	4,69	0,22	
Custom Timers						
	Performance	Avg [s]	Min [s]	Max [s]	Std.Dev.	Histogram
<input type="checkbox"/> Internet_Portal_ZVB_SPB_DSL_Session_komplett		18,58	15,41	23,64	2,01	

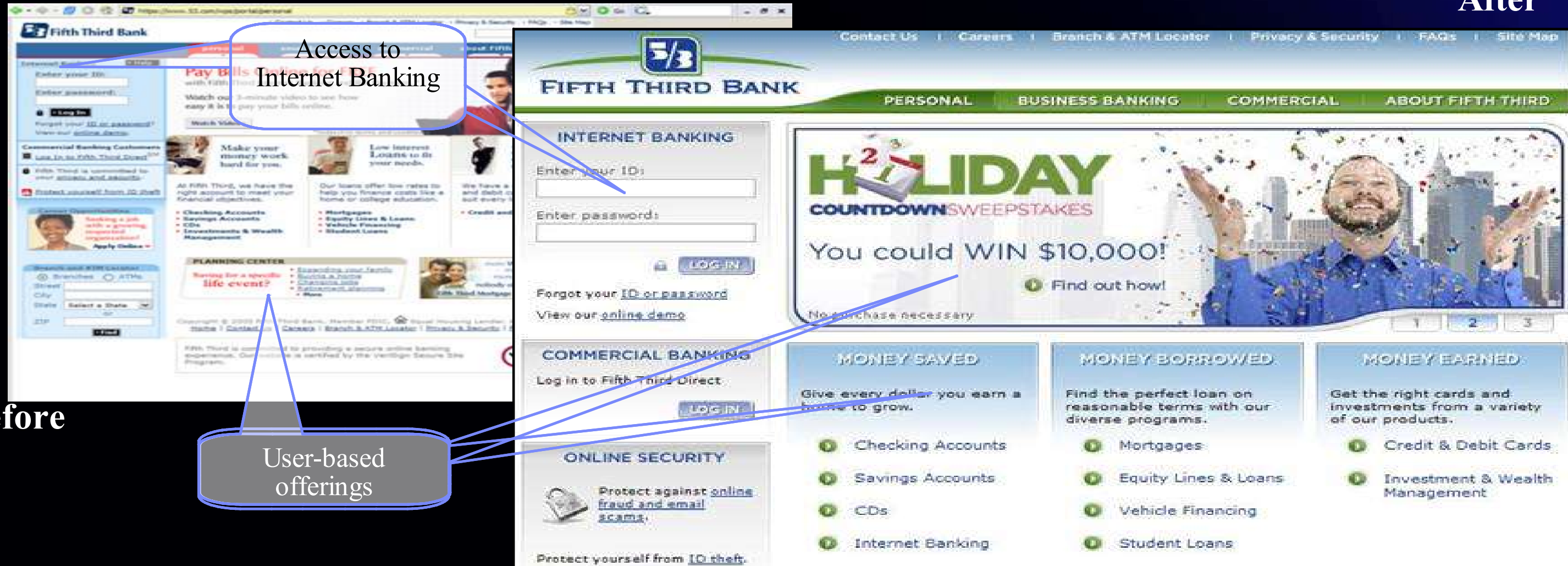


Smart Work



Fifth Third Bank – Improving Customer Content

After



Before

- Merchant services for retailers & ATM Processing Services for financial institutions
 - 17 billion transactions worth more than \$138.6 billion annually.
- Portal & Content Management Solution



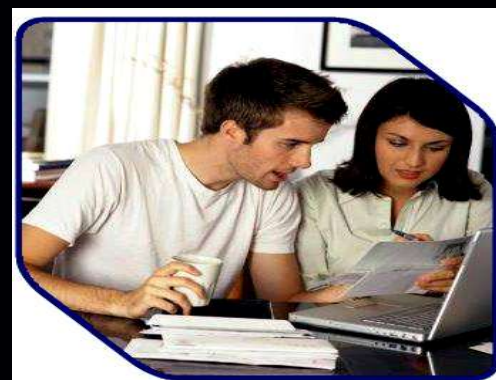
GE Capital - Australia & New Zealand

Business Transformation - Online engagement is the big win

New Levers



Revenue

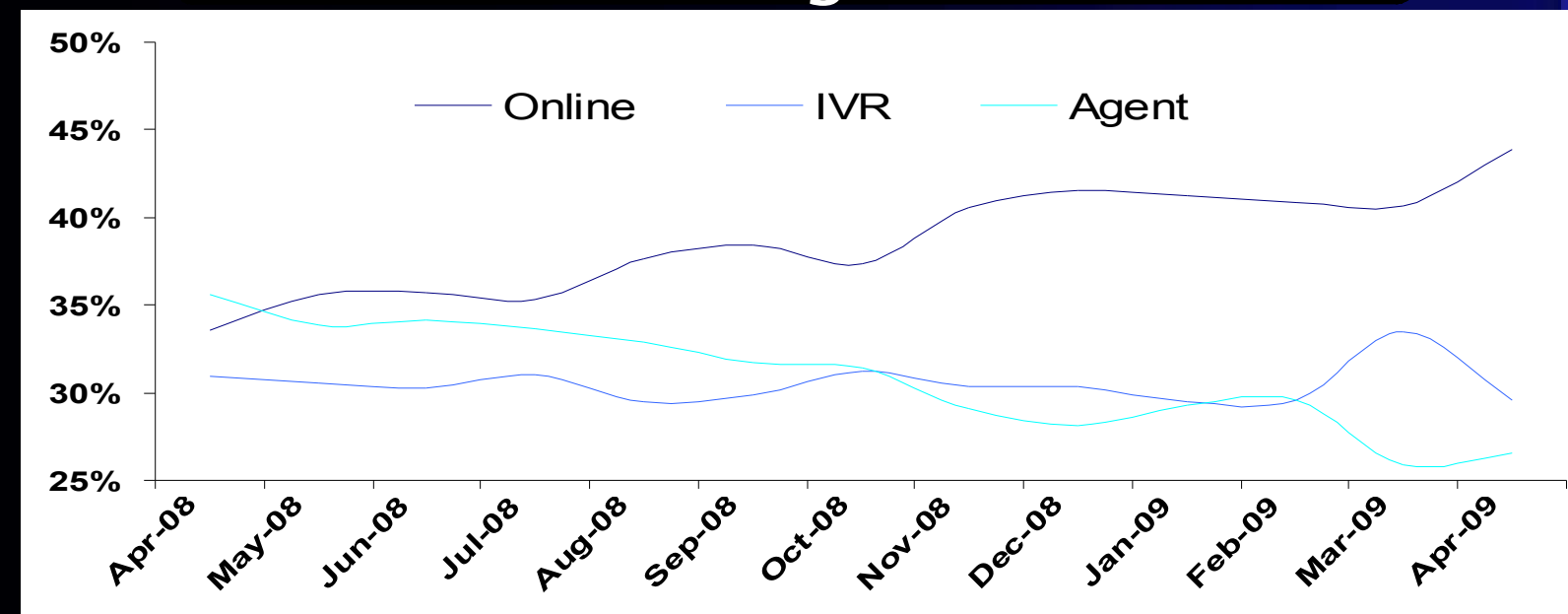


Digital Process

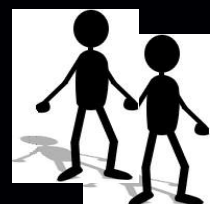


eMarketing

Online Usage Growth



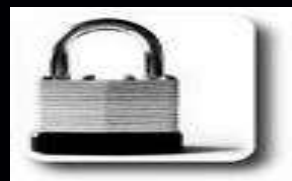
Why it Will Be Better



1:1
Relationship



Web 2.0



Trust
& Safety



Mobile

Strong Payback

- Productivity
- New Revenue
- Reduced Operating cost
- Technology Reuse



AMP – Process Acceleration



Australian wealth-management company improves productivity with WebSphere Portal and IBM Process Accelerator.

Business Needs

- Improve access to customer and product information.
- Increase customer face time.
- Seamless integration.

Delivery

- Multi-Channel – Retail, Advisers, Internal.
- Common SOA framework.
- Portal fronts backend systems.
(Siebel, Oracle, Vignette, Sharepoint, mainframe)

Results

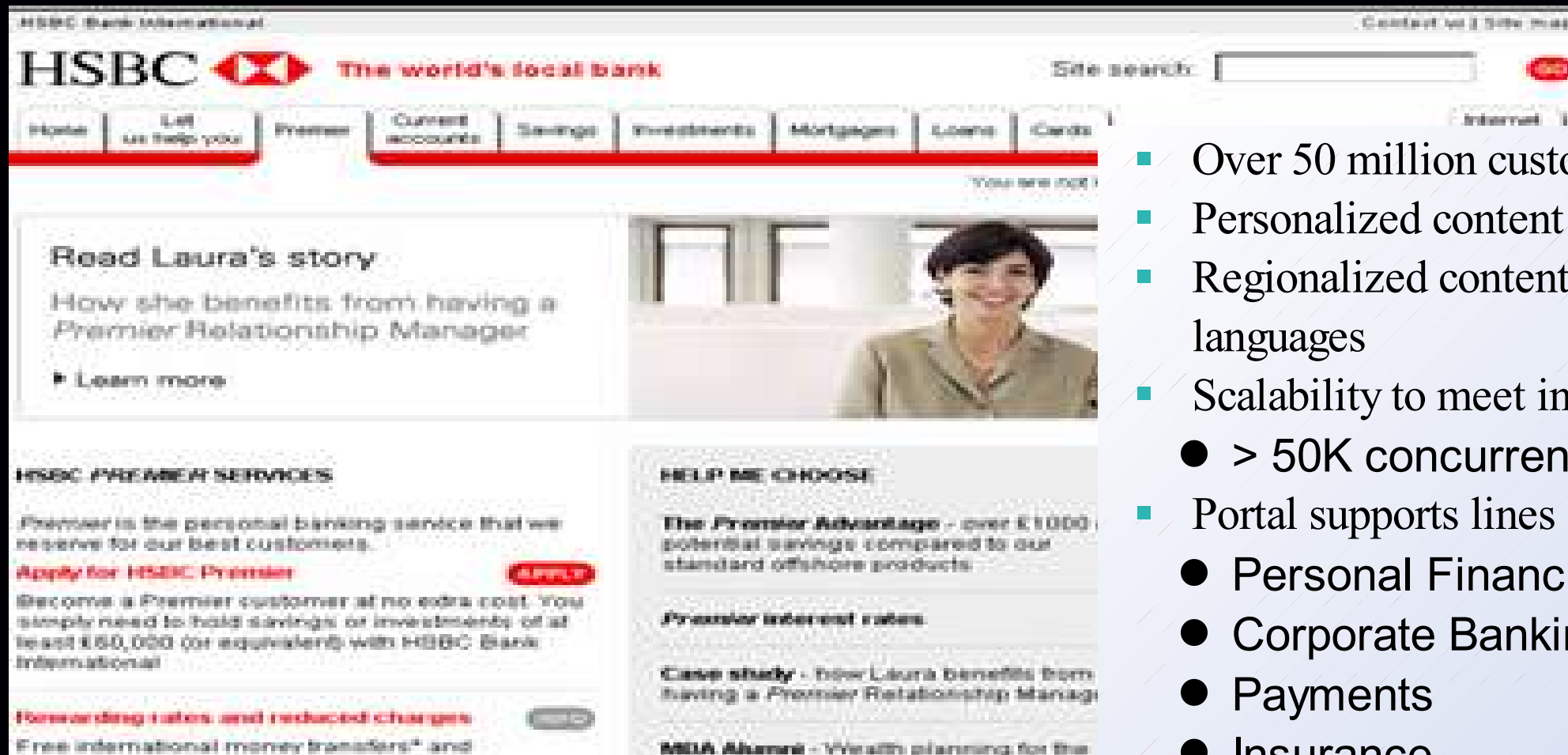
- Forms met business case in **under 10 months**.
- **Expected 3 year adoption rate met in 3 months**.
- **70+% of all forms completed electronically.**

“There's a definite link between the efficiency of the portal, increased revenue and cost savings.” Roy Crociani, IT director, AMP



HSBC – Global Customer Service

- running the brand on WebSphere Portal



- Over 50 million customers
- Personalized content based on account level and usage
- Regionalized content delivered to over 40 countries/languages
- Scalability to meet increased demand
 - > 50K concurrent user capacity at one site alone
- Portal supports lines of business:
 - Personal Financial Services
 - Corporate Banking
 - Payments
 - Insurance
 - Premier
 - Stock Trading

<http://www.hsbc.com>



Smart Work



HSBC: Crafting an Exceptional User Experience



Banners using customer data held in the back-end

Mr Bannister,
you can protect your family with our affordable term life plan
▶ find out how



Under Pressure?
With your own Relationship Manager, sorting out your finances is fast and convenient. So you can make the most of your free time
▶ Learn more



Mr Parsons,
you're important to us, so we'd like to offer you your own Relationship Manager
▶ Learn more about Premier



Mr Hicks,
if you upgrade to Premier you'll benefit from the advice and insight of your own Relationship Manager
▶ Learn more about Premier



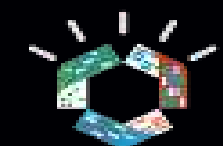
Mr Hamilton,
as one of our best customers are you making the most of the rewards available to you?
▶ Show me



Mr Fray,
we're developing new online services exclusively for Premier customers, so we'd really appreciate your feedback
▶ Go



HSBC 



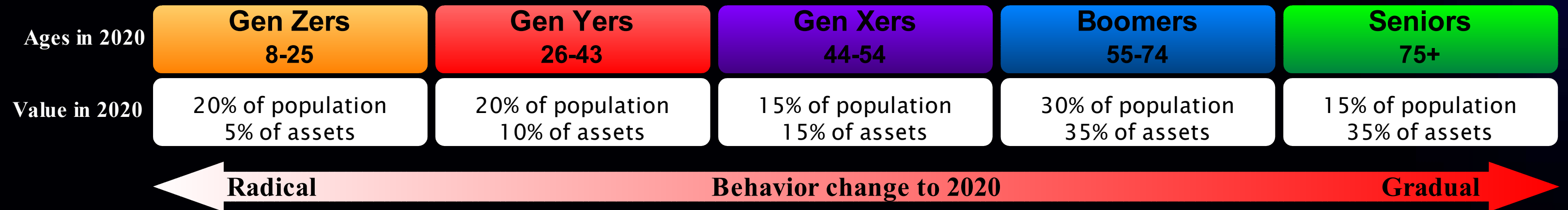
Smart Work



The Future of Banking Customers: 2020

Behavioral Changes...

...Communities of Use



Postbank Netherlands

- rethinking the Internet customer experience

Internet banking v2.0: "It is about facilitating money for customers"



TALKING BANK

The bank is there at moments when people are busy with money

BLENDED COMMUNICATION

Integration of new media in the customer process

FACILITATOR ROLE

From keeper to facilitating money

Postbank Experiences

Choose your experience ▶



Experience 1 Online advice



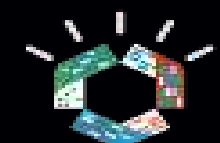
Experience 2 Postbank Buddy



Experience 3 Postbank Messenger



Presentation 16 November | Kim Verhaaf | Head of Internet Channel Development



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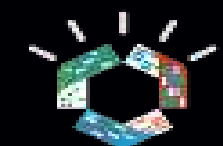
First Direct – 100% Internet Bank

- a rich selection of podcasts and other community features

The screenshot shows the 'first direct interactive' website. At the top, there's a navigation bar with 'home', 'firstdirect.com', and 'tell us what you think'. The main content area features a 'fd podcast' section with the tagline 'a little word in your ear'. Below this, there's a list of podcasts with columns for 'title' and 'uploaded'. The first entry is 'Energy Doctor' by Mark London, dated 04/05/07, with a description: 'Energy Doctor, Mark London, visits a first direct customer's house to see what changes they could make to save energy.' Below the list are buttons for 'rss', 'listen', and 'download'. At the bottom, there's a navigation menu with icons for 'energy', 'fd magic bus', 'fd virtual forest', and 'fd clarity', along with a 'more +' button. A footer contains the text: 'first direct is a division of HSBC Bank plc. © HSBC Bank plc 2005. All Rights Reserved. We're obsessive about the quality of our service, so we monitor or record calls to make sure everything's tickety boo.'

- 1989 – first UK telephone bank
- 1999 – first UK text banking
- 1999 – internet banking
- 2001 – offset mortgage
- 2004 – internet + aggregation
- 2006 – webchat service
- 2006 – tested video banking
- 2007 – fd interactive

- **fd compete** – competition
- **fd decide** – which mortgage
- **fd energy** – energy saving tips
- **fd magic bus** – events schedule
- **fd virtual forest** – turn off paper statements
- **fd clarity** – customer comments



Smart Work



HSBC Hong Kong – Bringing Mobility to Banking

Hong Kong Home Personal HSBC Premier Commercial Corporate MPF About HSBC Careers Contact us

HSBC  The world's local bank

Search: GO 中文

▶ Personal

- ▶ HSBC Premier
- ▶ Banking
- ▶ Investments
- ▶ Cards
- ▶ Mortgages

Enjoy a steady income even after retirement

RetireEnrich Protection Plus

Successfully enroll to enjoy HK\$800 supermarket coupons

Mobile Business Banking available at HSBC Hong Kong

November 24, 2008 at 11:23 pm · Filed under [Software](#)

★★★★★ (5 votes, average: 5 out of 5)




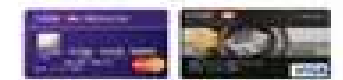
Service Highlights

- Access your account details
- View up-to-date account balances
- View transaction history

Though this mobile service does not provide that much in functions than just passive access it is a step forward. It helps to check on the go if a customer paid invoice number #4711 already or not. The service works pretty well with the BlackBerry Curve 8320 browser (which I used for testing) but it should work on new BlackBerry devices like the Bold, Flip and Storm as well.

Mobile Website for HSBC Commercial Banking: <https://mobile.commercial.hsbc.com.hk>

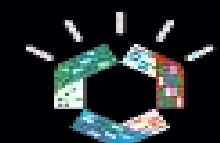
HSBC  The world's local bank



A Class Above

Mobile Protection Plan (Business)

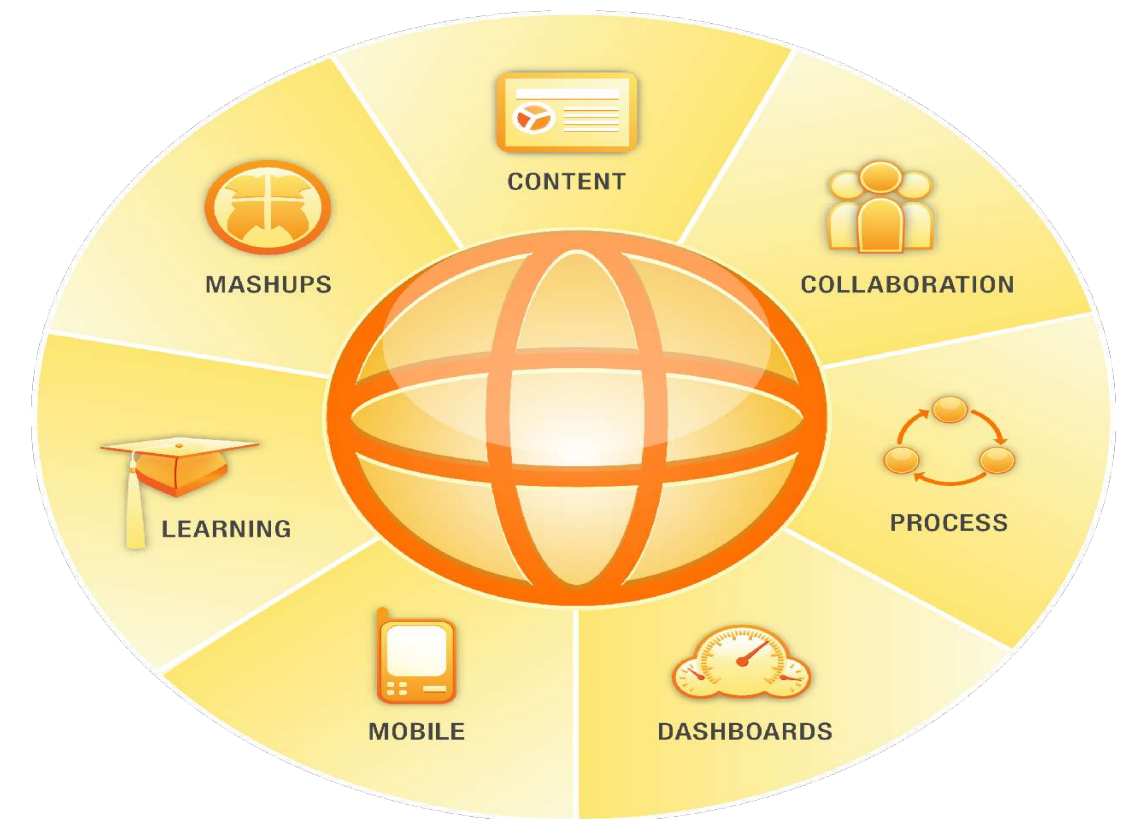
to enjoy up to
on premium
er



Smart Work



IBM WebSphere Portal for Banks





Thank You

