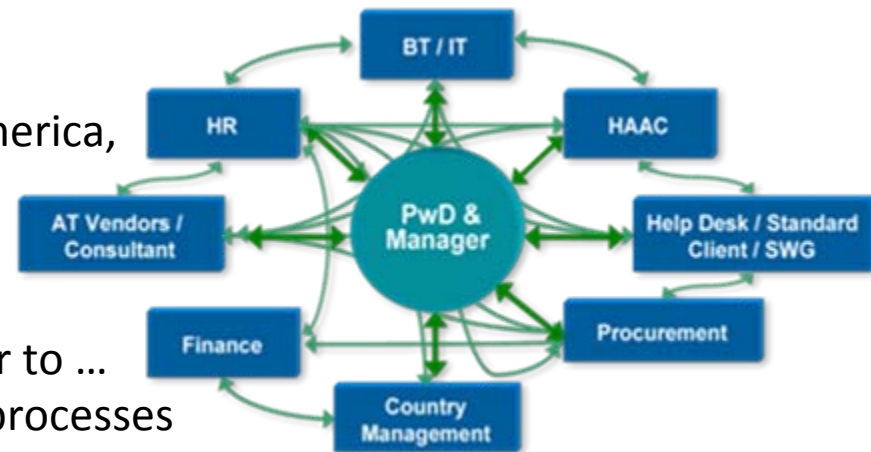




Need for Innovation: IBM Survey Findings

- **In spite of strong accommodation policy and programs, IBMers believe their competitive productivity has been hampered by under-accommodation**
 - A global challenge
 - More significant in areas outside North America,
 - some parts of Europe / Japan
- **Causes:**
 - Excessively time consuming for PwD & Mgr to ...
 - Understand accommodation policies and processes
 - Identify who is responsible for helping with various issues
 - Identify most appropriate accommodation solutions
 - Find or hire expert advice
 - Order, install, and configure
 - Inappropriately low expectations of PwD productivity
 - PwD concerned about being perceived as a burden
 - Keeping accommodations current seen as too risky and/or too costly





Need for Innovation: Process Issues

- In enterprises, accommodation processes are often...
 - **Locally executed** with wide variation in methodologies and outcomes
 - Highly dependent on **undocumented knowledge**, skills and experience acquired by passionate and dedicated few individuals
 - Hampered by **inconsistent** understanding of organizational responsibilities
 - Based on phone and e-mail communications that pose **privacy risks** and make issues difficult to track
 - Difficult to improve because process performance metrics and reports could only be **compiled manually**
 - **Lacking a feedback mechanism** to measure effectiveness from PwD perspective





Need for Innovation: Four Key Areas

Hiring & Retention	When employee accommodations are not comprehensive and optimally effective, retention rates can be lower
Employee Productivity	When the accommodations process is not defined, inefficient, unclear or confusing productivity rates of employees who require accommodations – and the team members who participate in the process – are lower
Government Penalties & Fines	Inadequate hiring and retention rates for employees with disabilities can result in companies having to pay higher quota-related fines to various governments
Health Insurance	Higher rates of employees on short or long-term disability, or worker's compensation, can result in higher overall costs in health insurance





Accommodations Innovation @ IBM

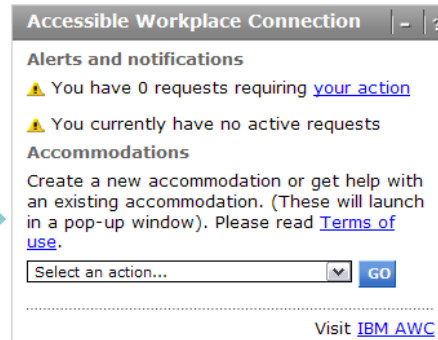


Innovation @ IBM: Integrated Process & Tool

Process Transformation	Process Supported by Tool
<ul style="list-style-type: none"> ▪ Simplifies ▪ Hides necessary complexity from PwDs/Mgrs ▪ Makes globally consistent ▪ Integrates with other business processes ▪ Establishes clear responsibility/accountability 	<ul style="list-style-type: none"> ▪ Steps users through process ▪ Manages teams ▪ Protects privacy ▪ Builds/manages global solution portfolio ▪ Enables proactive support



PwD/Manager



Web Application



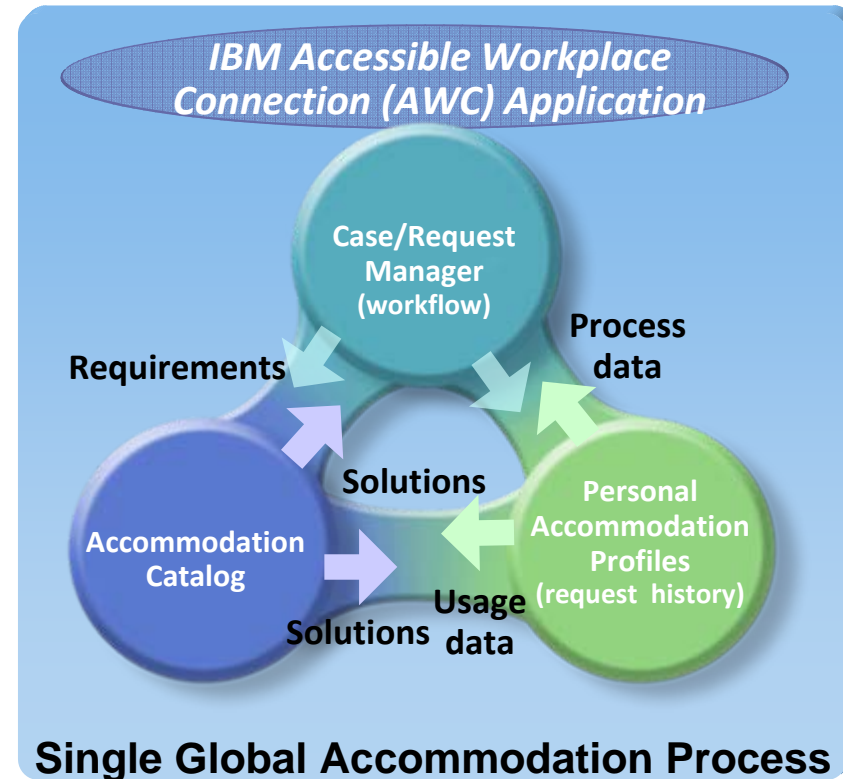
Back-End Accommodation Processes

- Single, simple, global, personalized point-of-entry
- Automated workflow mgmt



Innovation @ IBM: Accessible Workplace Connection

- **One-stop self-service portal helps employees manage workplace accommodation requests**
 - Centralized, consistent process
 - Improves efficiencies in request management, team assignments, communication, decision making
 - Powerful catalog with many accommodation types
 - Used for new accommodations, accommodation changes, and support/maintenance requests
 - Optional reporting module helps companies analyze and manage workplace accommodations
 - Automated email notifications, team handoffs
- **Does not replace existing processes/systems for:**
 - Fulfillment or procurement of accommodations
 - Electronic medical records storage
 - Inventory management



IBM AWC helps people who need accessibility assistance and their managers to acquire and effectively use accommodations that enable them to be competitively productive while also safe guarding the privacy of information about their personal situation and needs.



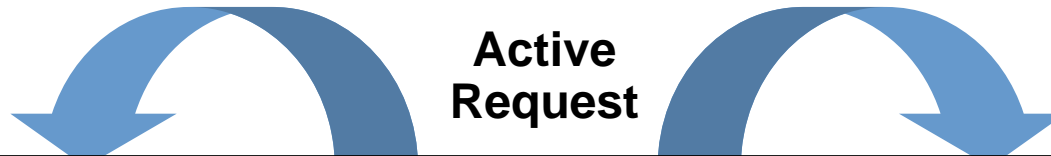
Innovation @ IBM: AWC Scope

- Focused on basic capabilities
- Objectives:
 - Simple way to acquire/support accommodations
 - Eliminate process confusion
 - Global consistency
- Accommodation request is centerpiece of new process (2 types):
 - Request for accommodations
 - Request for support
- Objective is to ensure accommodations are:
 - Reasonable
 - Comprehensive
 - Effective

The screenshot shows the IBM Accessible Workplace Connection (AWC) interface. At the top, it says "Hello William Curtis-Davidson" and "IBM Accessible Workplace Connection". Below this is a navigation menu with "Requests" and "My Profile" highlighted. The main content area is titled "Welcome to IBM Accessible Workplace Connection" and includes a "Help" link. A "Getting started" section lists three items: "What is an accommodation and how to request one", "Who is eligible for an accommodation", and "What is the process for getting an accommodation". A blue header for the "Accommodation" section is visible at the bottom of the screenshot.



Innovation @ IBM: AWC Request Process



Draft Request	Initial Team Formation	Assessing Needs	Acquiring Solutions	Evaluating Solutions	Closed Request
User chooses reason, describes problem. Optional: add draft solutions from catalog	Request admin reviews request, modifies default staff assignments suggested by system. Team membership grants access rights.	Solutions added to request from catalog. Each solution is reviewed, discussed, and approved or rejected.	Solutions are ordered, delivered, installed & configured. Request administrator updates progress of each solution in system.	PwD uses, evaluates, provides feedback and solutions are dispositioned. Inadequate solutions return processes to assessing needs.	When all needs are met, request administrator closes request. All team members lose access except PwD and process admin (super user).





Innovation @ IBM: AWC Supports Multiple Roles

- **Process & Request Administrators**

- Process Administrator
- Backup Process Administrator
- Request Admin/Team Lead
- Backup Request Admin/Team Lead
- Other Accommodation Team Members

- **Requestors & Managers**

- User for whom a request is made
- User who drafted a request
- Requester's Manager

- **HR Partners**

- **Medical Case Workers**

- **Legal Representatives**

- **Accommodations Specialists**

- IT Accommodations Specialist
- Site Accommodations Specialist
- Services Accommodation Specialist
- Mobility Accommodations Specialist
- Ergonomics Accommodations Specialist

- **Portfolio Managers (Catalog Managers)**

- IT Accommodations Portfolio Manager
- Site Accommodations Portfolio Manager
- Services Accommodation Portfolio Manager
- Mobility Accommodations Portfolio Manager
- Ergonomics Accommodations Portfolio Manager
- Medical Accommodations Portfolio Manager
- Accommodations Catalog Entry Owner



Building a Workplace Accommodations Business Case



Business Case: Key Steps

- **Step 1:** Setting Innovation Goals
- **Step 2:** Gathering Business Case Data
- **Step 3:** Determining Potential ROI*
- **Step 4:** Making the Business Case



To achieve innovation, it is necessary to build a business case. This will help outline the potential concrete returns on the investments of time and resource that will be required to plan and implement the innovation, so the enterprise can realize the larger benefits.

*ROI – Return on Investment



Business Case Step 1: Setting Innovation Goals

Hiring & Retention

Employees are better accommodated, resulting in **higher retention rates**, and **potentially lower hiring / re-training costs**

Employee Productivity

The accommodations process is better defined, more efficient, more clear and less confusing, so **productivity rates of PWD employees and team members who participate in processes are higher**

Government Penalties & Fines

Adequate or improved hiring / retention rates for PWD employees can result in companies having to pay **less quota-related fines to various governments**

Health Insurance

Potentially lower rates of employees on short or long-term disability, or worker's compensation, can result in **lower overall costs in health insurance**





Business Case Step 1: Example Innovation Goals

Hiring & Retention

Reduce attrition rate of PWDs relative to non-PWD employees to support diversity objectives.
GOAL: Reduce PWD attrition rate from 5% to 3% higher than non-PWD employees

Employee Productivity

Make the accommodations process more consistent and efficient by measurably improving employee productivity for PWD employees and others working the process.
GOAL: Increase productivity by 38%.

Government Penalties & Fines

Reduce the overall amount of fines paid to governments as a result of penalties for non-compliance.
GOAL: Reduce fines by 25%

Health Insurance

Reduce the overall costs for short term and long term Worker's Comp insurance payouts through better accommodation of employees.
GOAL: Reduce costs by 15%





Business Case Step 2: Gather Business Case Data

Dimension	Key Data Points	Business Goals
Attrition	<ul style="list-style-type: none"> ▪ Average base salary – All employees ▪ No. of PwDs Employees – US/Global ▪ Current attrition (%) <ul style="list-style-type: none"> ➢ All employees ➢ PwD employees 	<ul style="list-style-type: none"> ▪ Future attrition (%) <ul style="list-style-type: none"> ➢ All Employees ➢ PwD employees
Productivity	<ul style="list-style-type: none"> ▪ Average current hrs / accommodation <ul style="list-style-type: none"> ➢ PwDs, ➢ Managers, ➢ Medical/HR, Other ▪ Number currently completed / year 	<ul style="list-style-type: none"> ▪ Average future hrs / accommodation <ul style="list-style-type: none"> ➢ PwDs, ➢ Managers, ➢ Medical/HR, Other ▪ Number to be completed / year (future)
Fines	<ul style="list-style-type: none"> ▪ Current fines paid <ul style="list-style-type: none"> ➢ Americas (NA, CA, LA), ➢ Europe, Asia/Pacific, ➢ All other geos 	<ul style="list-style-type: none"> ▪ % reduction of government fines to be realized from implementing accommodation innovations
Health Insurance	<ul style="list-style-type: none"> ▪ Average current / futures costs / case <ul style="list-style-type: none"> ➢ Short term, Long term, & Workers Comp ▪ Average No. of current cases / year <ul style="list-style-type: none"> ➢ Short term, Long term, & Workers Comp 	<ul style="list-style-type: none"> ▪ % reduction of short term, long term, & workers comp cases to be realized as result of implementing Accessible Workplace Connections (AWC)



Business Case: Determining Potential ROI

Dimension	Current Cost / Yr	Est. Savings / Year	Future Est. Cost / Yr	Year 1 Est. Savings	Year 2 Est. Savings	Year 3 Est. Savings	Year 4 Est. Savings	Year 5 Est. Savings	Total Est. Savings
Attrition									
Productivity									
Fines									
Health Insurance									
Subtotal									
Invest Innovation Tech									
Invest Staff									
Est. ROI									

This table is an example of the potential ROI outlined against the four key areas of accommodations innovation value. This is modeled after how IBM built its own business case and work with clients.



Business Case Step 4: Making the Business Case

- 1. Create compelling presentation on innovation potential**
 - Integrated process, organizations and tools
 - Business case/ROI
 - Summary of benefits that can be realized including "classic" **soft** benefits e.g., marketing, patents, customer support, etc.
- 2. Socialize innovation potential among stakeholders:**
 - HR Diversity, Medical, Legal, etc.
 - Engage people in key roles if they exist (e.g. process admins, request handlers, Diversity Networks, medical case managers, ergonomics, facilities, ICT accessibility, etc.)
- 3. Engage credible external thought leaders and consultants**
 - For example, IBM offers a "Phase 0" Consulting Service focused on process, organization, and tools innovation strategy
- 4. Secure stakeholder and executive commitment**





IBM Can Help Enterprises Innovate



IBM is Commercializing AWC for Clients

- **Internal IBM innovation in process of commercialization**
- **IBM Hosted Software-As-A-Service (SaaS)**
 - Least disruptive, quickest deployment
 - Similar to other outsourced HR / Benefits software
 - Secure interfaces to customer enterprise HR reference data, employee directory, email (SMTP)
 - Integration with single sign-on, privacy, security to customer intranet environment
- **Required Services**
 - Phase 0 AWC **Assessment** Services
 - Phase 1 AWC **Configuration** Services
 - Phase 2 AWC **Deployment** Services
- **Optional additional services**
 - IBM Cognos Reporting Modules





IBM: AWC Client Offering Phases

Phase 0: AWC Assessment

Assess Fit of AWC & Build Business Case

- Conduct interviews and review current state
- Document accommodation current state (As-Is Report)
 - Process, Organization, Accommodation Types, Technologies
- Develop to-be state
 - Process, Organization, Accommodation Types, Technologies
- Develop implementation plan
- Develop business case

Phase 1: AWC Configuration

Develop Custom AWC Configuration

- Change management support (for to-be state changes to orgs, process, accommodation types)
- Define and validate requirements
- Create detailed architecture & technical specs
- Design external interfaces
- Customize AWC application
- Define and prepare training and education materials
- Develop AWC testing and deployment plans

Phase 2: AWC Deployment

Deploy & Support Customized AWC

- Change management support
- Prepare testing and production environments
- Develop secure external interfaces to customer data
- Conduct testing
- Conduct training and education
- Deploy customized AWC into production environment
- Provide application support
- Plan future enhancements (including reporting)



IBM: Phase 0 Helps Clients Assess Fit of AWC

Phase 0 Assessment

Assess Fit of AWC & Build Business Case

Average

3-4 months duration

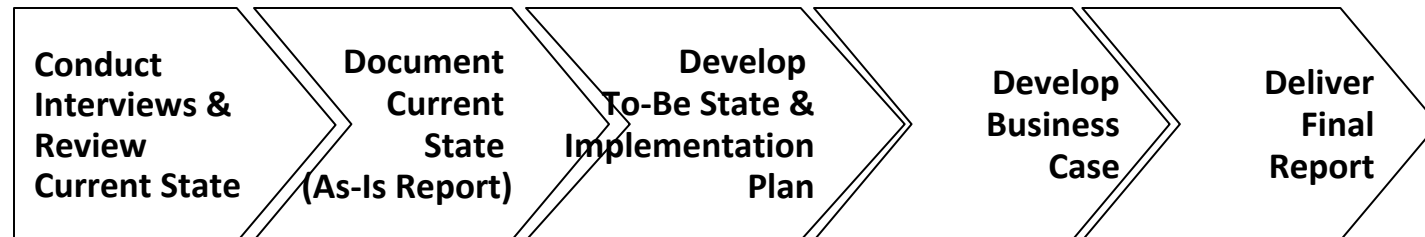
400-500 hours

2 IBM consultants

In a Phase 0 AWC Assessment Services engagement: IBM assesses the customer's organizations, processes, accommodation types and technologies against the IBM benchmark / best practice.

Organizations	Processes	Accommodation Types
<ul style="list-style-type: none"> ▪ Core <ul style="list-style-type: none"> ▪ Process Owner (e.g. HR Diversity, Health / Disability) ▪ ERGs ▪ Accommodation Portfolio Managers ▪ Enterprise I/T & Services ▪ Fulfillment <ul style="list-style-type: none"> ▪ Requestors & Managers ▪ Accommodation Specialists ▪ Medical Case Workers ▪ Medical Clinicians ▪ Supporting <ul style="list-style-type: none"> ▪ HR, Legal, Procurement ▪ Union (Optional) 	<ul style="list-style-type: none"> ▪ Core <ul style="list-style-type: none"> ▪ Process Ownership & Management ▪ Process Administration ▪ Portfolio Management ▪ Request Creation ▪ Request Management ▪ Fulfillment <ul style="list-style-type: none"> ▪ Request Fulfillment ▪ Medical, HR, Legal and optional Union Review of Requests ▪ Supporting <ul style="list-style-type: none"> ▪ Procure and install accommodations ▪ Train / support requestors 	<ul style="list-style-type: none"> ▪ Assistive Technologies ▪ Non-Standard IT SW & HW ▪ Building or work space adjustments ▪ Ergonomics equipment ▪ Accessibility Services ▪ Job Adjustments ▪ Mobility ▪ Other Medical Accommodations

Existing & Strategic Technologies





Summary



In Summary

- **Workforce diversity can provide competitive advantage** but companies must make sure employees are effectively accommodated and competitively productive
- **A consistent, global implementation** of public and private accommodations is imperative in order for to realize this advantage
- **An integrated process supported by Accessible Workplace Connection** is helping IBM innovate
- **A innovation business case can be developed to outline potential business value in four areas** (retention, productivity, government fines, healthcare costs)
- **IBM is commercializing Accessible Workplace Connection** to help other companies innovate





Contacts

- **Christine Banke**

- Business Development
- IBM Human Ability & Accessibility Center
- banke@us.ibm.com

- **Bill Curtis-Davidson**

- Business Development
- IBM Human Ability & Accessibility Center
- wacurtis@us.ibm.com

- **Phill Jenkins**

- Business Development
- IBM Human Ability & Accessibility Center
- pjenkins@us.ibm.com

- **Matt King**

- I/T Chief Accessibility Strategist
- Office of the IBM CIO
- mattking@us.ibm.com



www.ibm.com/able