



# Is SOA the next industry standard?

## Why SOA Matters to Human Services Agencies

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Vice President  
IBM Global Social Segment



# Agenda

- The business context for Human Services
- What is SOA and the Benefits
- Preparing for SOA
- What is IBM doing

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Social services and social security organizations around the world are facing a common set of challenges that are impacting their service delivery capabilities



## Executive perspectives driving Human Services Modernization



### CEO needs

- Ability to grow and offer improved services within budget constraints
- Increase responsiveness to client needs and legislative changes
- Improved focus on Program Outcomes and Staff flexibility
- Ability to integrate service delivery



### CIO challenges

- Aligning IT and business goals to grow capabilities and contain costs
- Building responsiveness and agility into the organization through IT
- How can IT help enable people and teams to be more effective?

# Organizations are reacting by changing their business approach

**Target Service Effectively**

Anticipating how clients & their needs are changing, & adapting to meet them

**Integrate Service Providers**

Concentrating resources on where the most good can be done for clients

**Increase Efficiency**

Adapting quickly to changes in legislation, policy or the organization itself and the demand for service and benefits

**Revolve around the client**

Providing services whenever they are needed while protecting clients' privacy

**Improve Client Outcomes**

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A social service is an activity that has a specified outcome intended to benefit an individual or group.

**Job Skills  
Assessment**



**Employment**

**Nutrition  
Service**



**Healthy Diet**

**Substance  
Abuse Service**



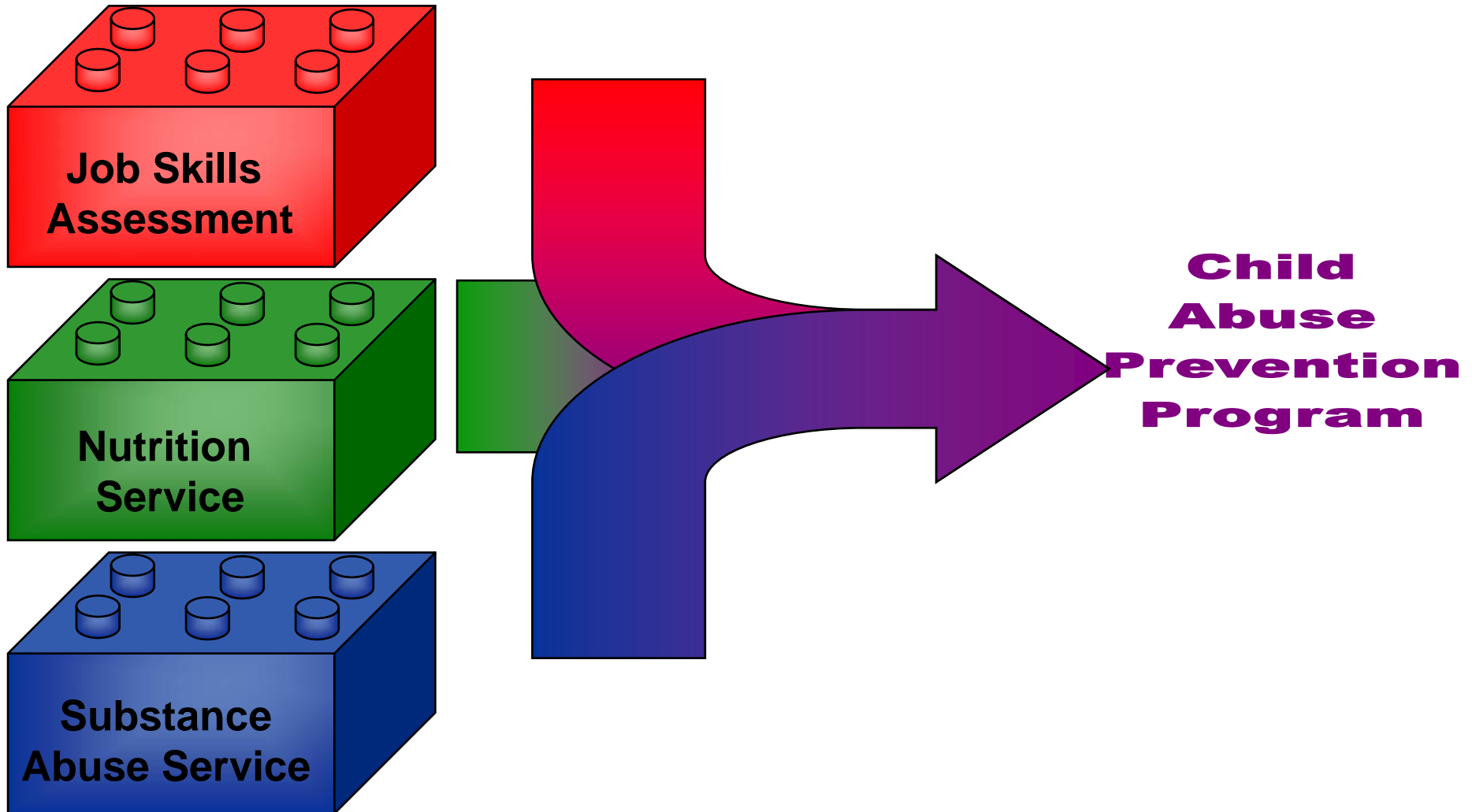
**Sobriety**

**Physical  
Therapy  
Service**

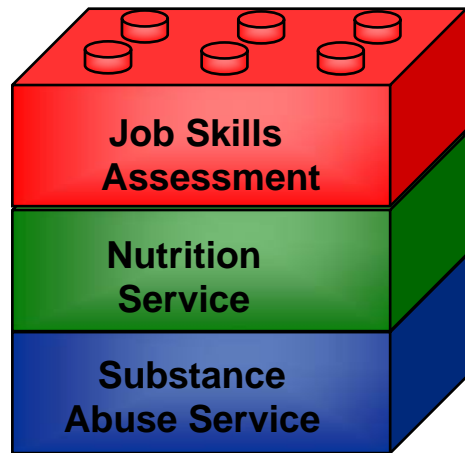


**Mobility**

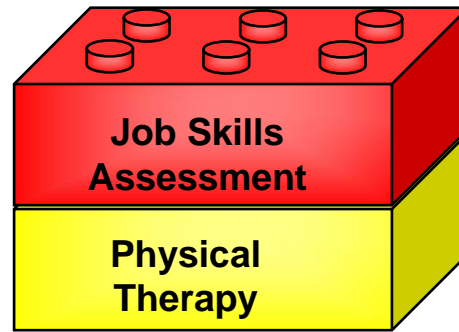
A set of services might also be offered as a group in order to deliver a program to address a specific problem



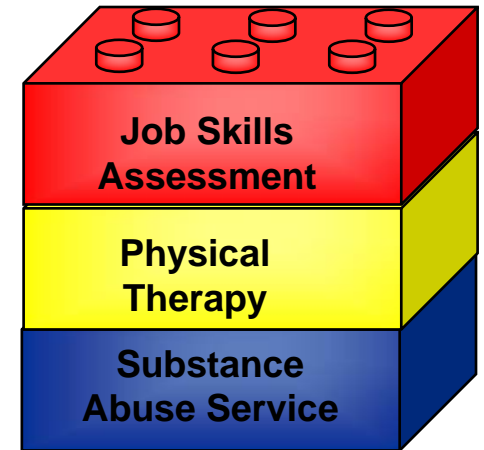
The same services can be grouped in different ways – into service plans – to meet different needs



**Child Abuse Prevention Program**



**Occupational Therapy**



**Vocational Rehabilitation**

*Services can be recombined and reused any number of times in many combinations. Moreover, a service can be used simultaneously for multiple purposes.*

Just as a social service is an activity with a specified outcome, an SOA service is a business activity that has a specified outcome.

Check Prior History



Is Client Known?

Open New Case



Begin Delivery

Determine Eligibility



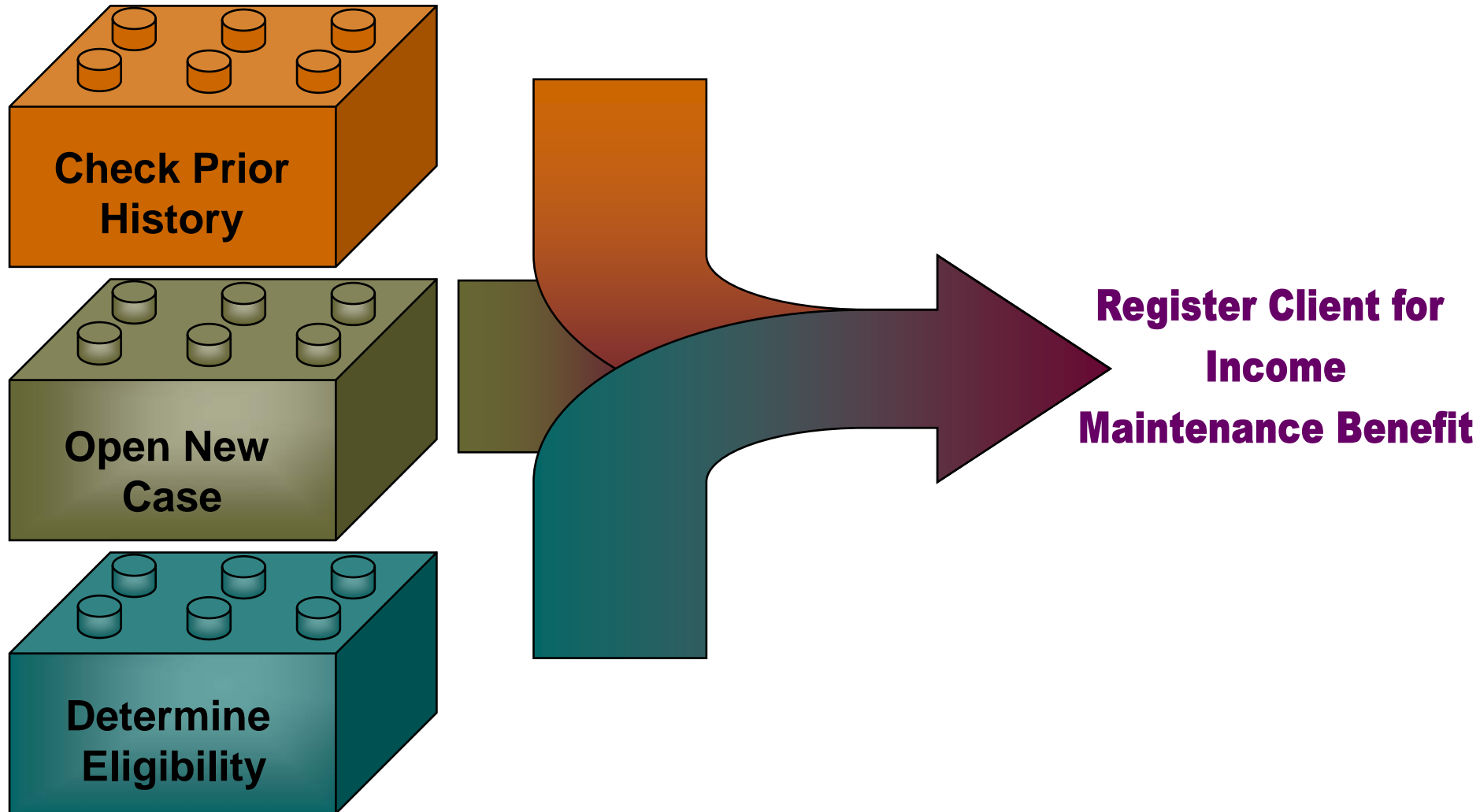
Is Client Eligible?

Client Referral

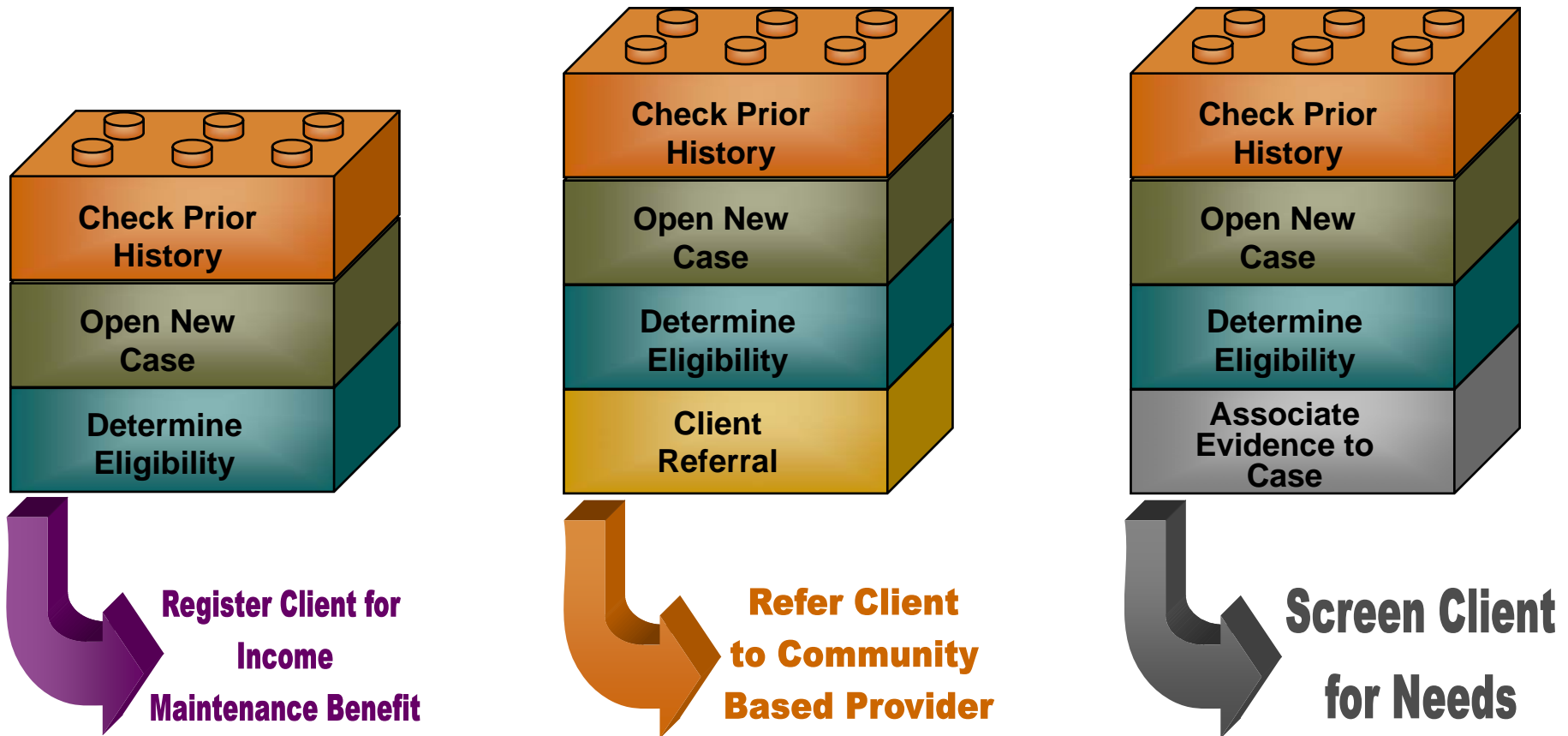


Assign client to provider

SOA services can be assembled into Composite Business Services (CBS) in order to accomplish various business functions.

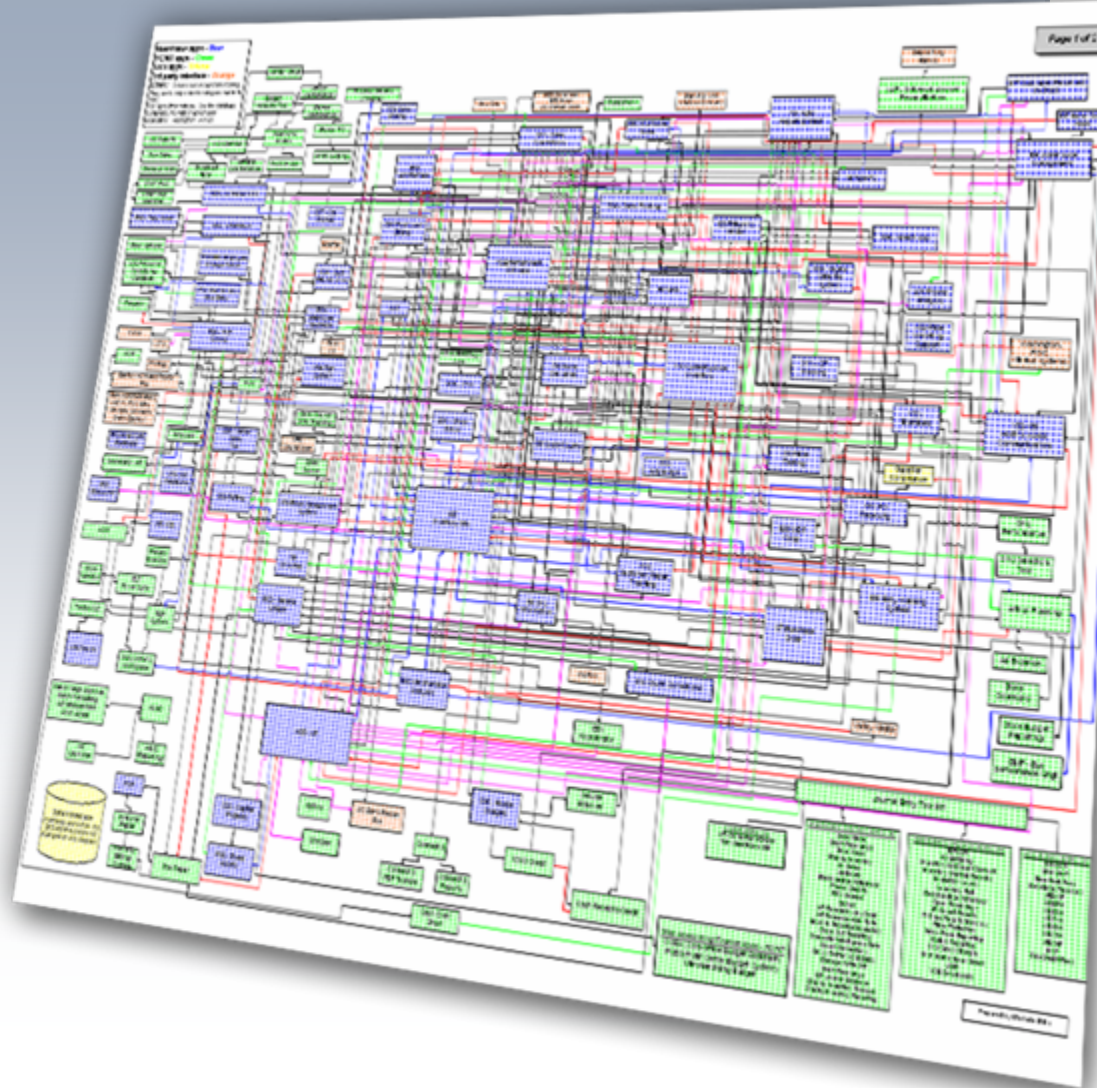


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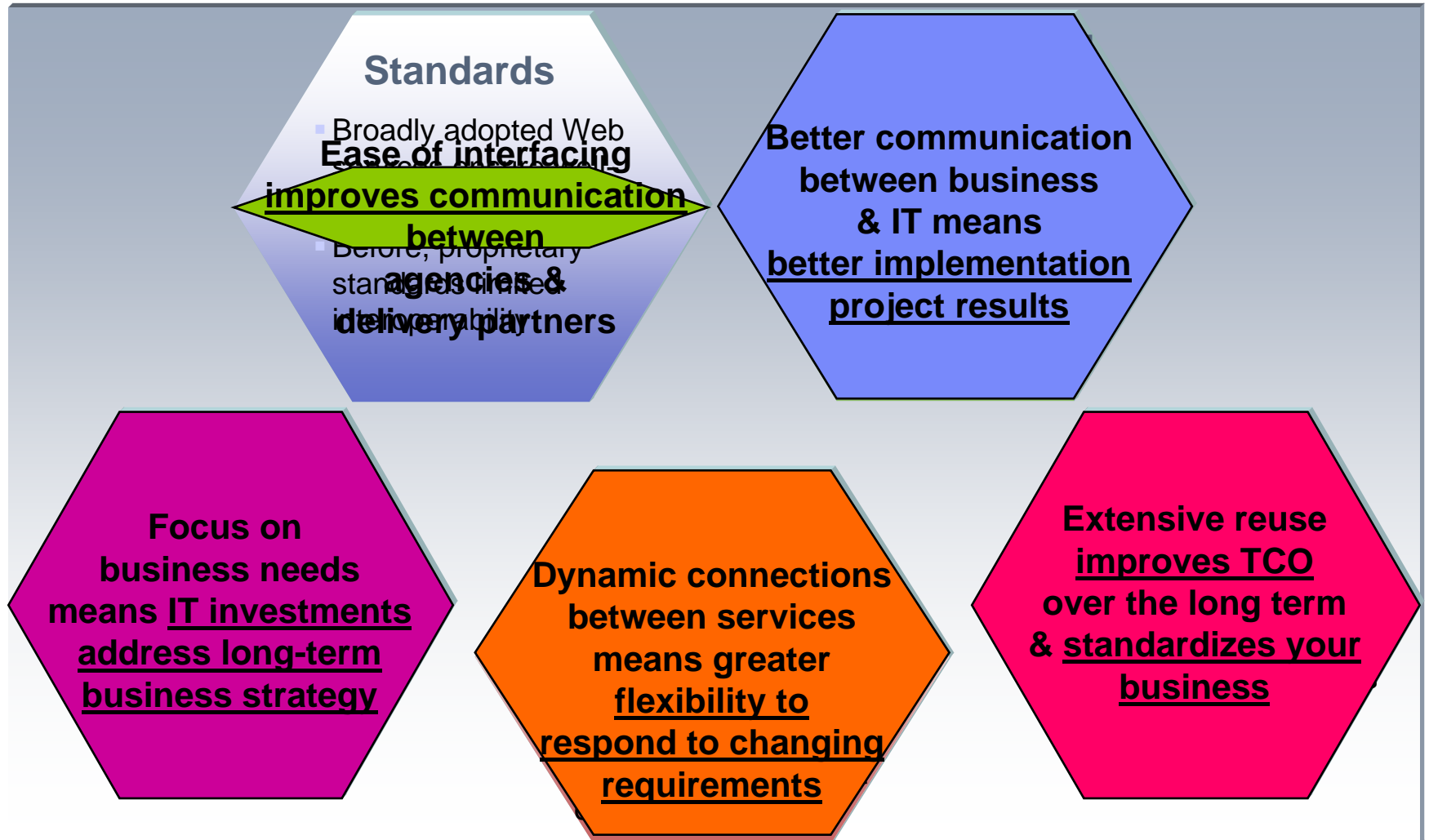


# SOA removes the barriers to business flexibility and reuse.

- Starts to simplify the complex environment most agencies have developed over time
- Provides a roadmap for cross-program applications
- Defines business process standards
- Positions functions for re-use, leading to more efficient implementations
- Allows you to extend legacy applications
  - Faster program introduction
  - Lower implementation costs



# What differentiates SOA from claims like this in the past?



Service-oriented Architecture is a framework that bridges the gap between business goals and technical challenges.

*A service-oriented architecture (SOA) is a framework that takes **everyday business applications** and breaks them down into **individual business functions, called services**. SOA lets you build, deploy and **integrate these services independent of applications and the computing platforms on which they run**.*

### ... a service?

A **repeatable business task**  
– e.g., check claim status;  
apply for benefit

### ... service-oriented architecture (SOA)?

An IT **architectural style** that  
supports  
service orientation



### ... service orientation?

A way of integrating your  
**business as linked services**  
and the outcomes that they  
bring

### ... composite business services (CBS)?

A set of **related and integrated**  
services that support a business  
process built on an SOA

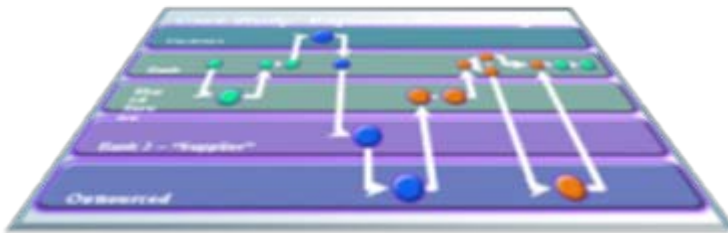
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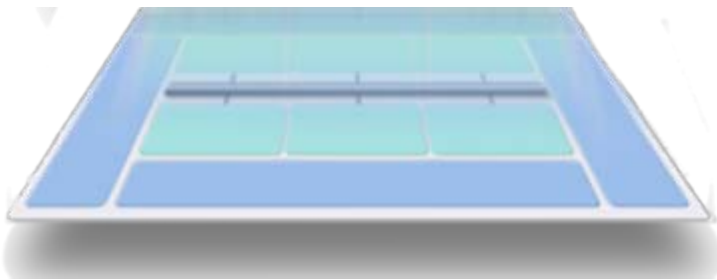
Agencies that want to leverage the benefits of SOA need to think differently.



***Business Architecture***



***Business Processes***



***Technology***

- Forces a broad, enterprise visions – what is “your” enterprise?
  - Overall business architecture
  - Common business processes
  - Underlying technology frameworks
- Identify the business areas that are most in need of change and establish clear priorities

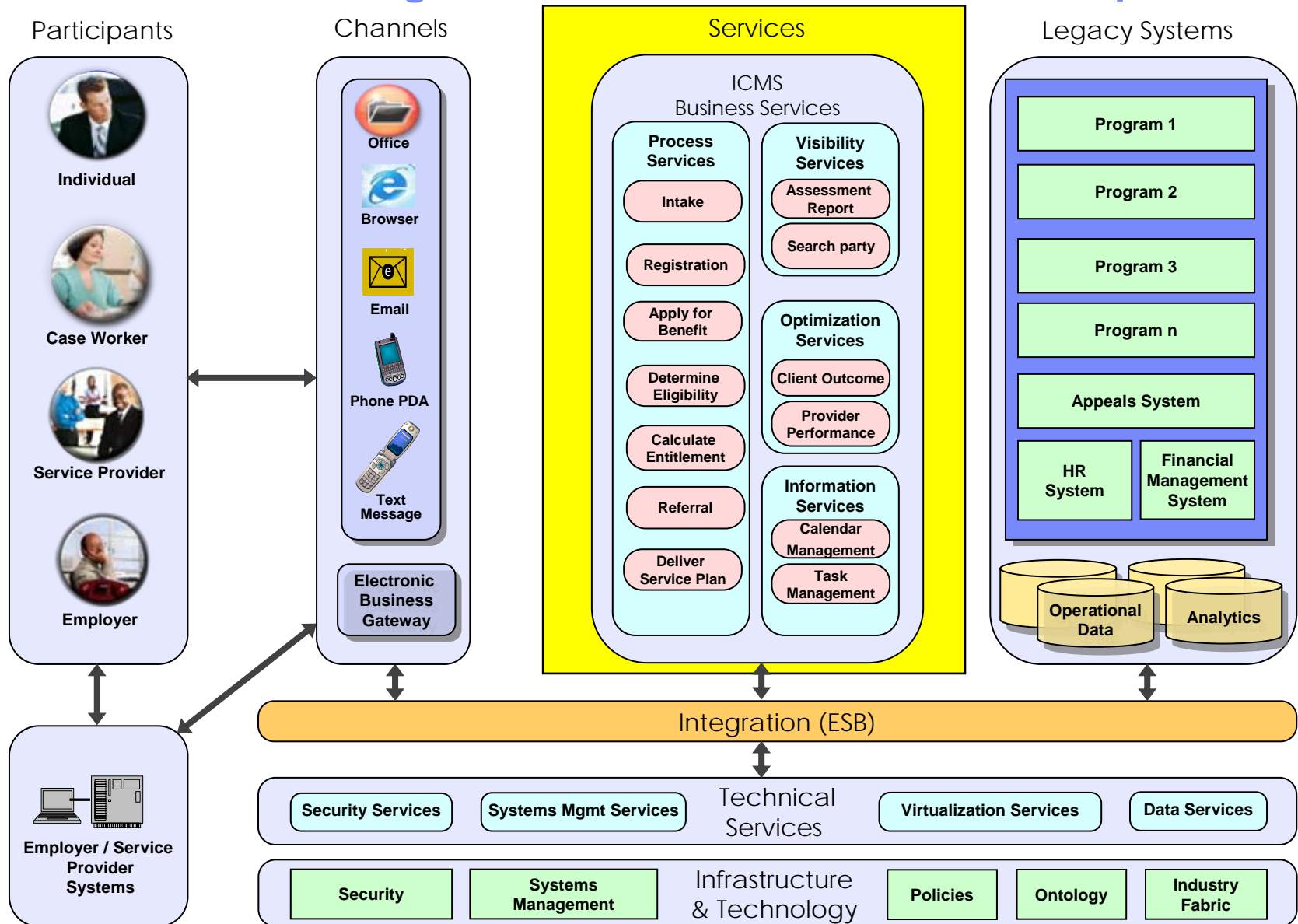
# IBM uses our component business model for Social Services to help organizations define their business architecture.



V3 2007

	Social Policy	Program Development	Outreach	Relationship Management	Case Management	Program Financial Management	Compliance and Integrity	Business Services
Policy & Strategic Planning	Policy Setting and Governance	Policy Interpretation and Legislation Support	Campaign Planning	Service Provider Strategy	Service /Case Modeling	Collection Strategy	Risk Universe	Financial Strategy
	Partnership and Community Engagement	Integrated Program Development		Client Engagement Strategy		Payment Strategy	Compliance and Integrity Strategy	HR Strategy
Oversight & Accountability	Outcome Evaluation and Performance Analysis	Product Design	Campaign Design	Service Provider Planning, Budgeting, & Monitoring	Case Supervision	Program Accounting	Compliance and Integrity Control	Financial Management
	Strategic Reporting	Product Administration	Campaign Administration	Performance Management	Performance and Outcome Management	Funds Management		HR Management
					Appeals	Banking Arrangements		IT Management
Service Delivery	Analysis and Forecasting	Product Implementation & Capability Management	Prospect Management	Recruiting, Licensing, & Contracting	Benefit/Service Eligibility & Calculation	Program Account Reconciliation	Conduct Compliance and Integrity Assessments	Financial Delivery
				Intake/Registration	Benefit/ Service Planning and Delivery	Collections		Ongoing Risk Detection, Prevention, and Reporting
	Community Building		Marketing and Advertising	Screening & Referral		Performance Measurement	Payments	Quality Assurance
				Client/Service Provider Communication	Debt Collection		Banking Operations	

# IBM's SOA Reference Architecture supports multiple approaches to Modernization including COTS and custom solution development.



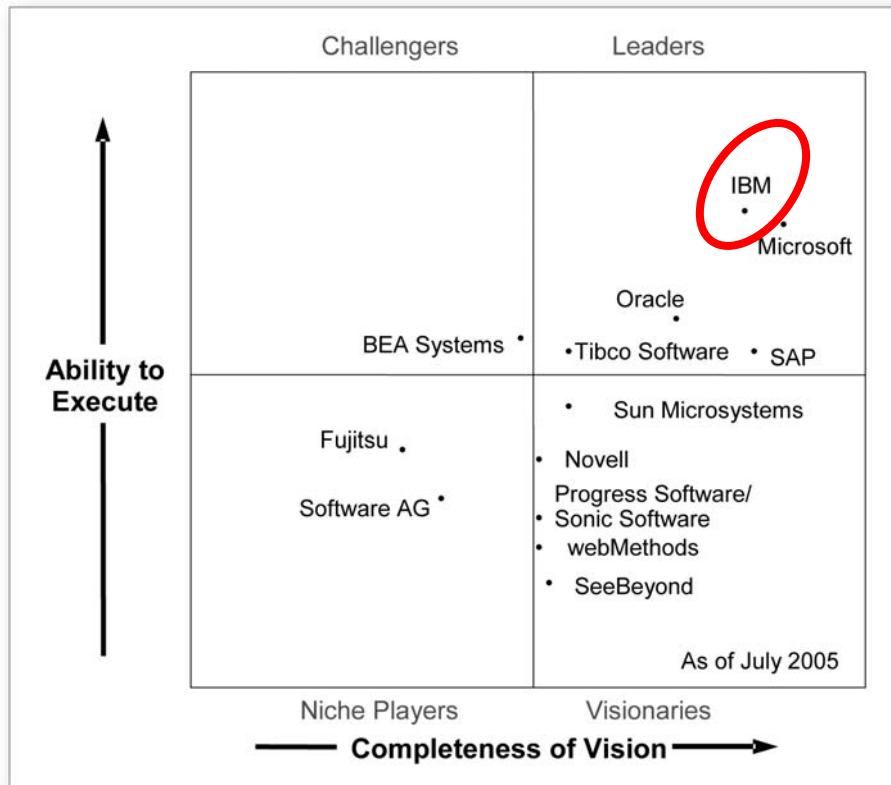
## Lessons Learned from Implementing SOA across Industries

- Don't expect maximum flexibility without SOA
- Don't just do technology – it is a transformation of the way you do business
- Don't throw everything out!
- Don't bite off too much – Think phases – not BIG BANG!
- Don't forget to set expectations
- Don't expect to do this without a cultural change through governance
- Don't forget the right skills
- Don't expect the flexibility without open standards
- Don't do this alone – leverage partners who have experience
- Don't forget the importance of the first project – plan ahead

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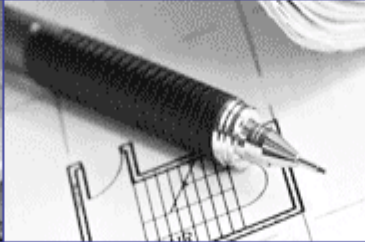
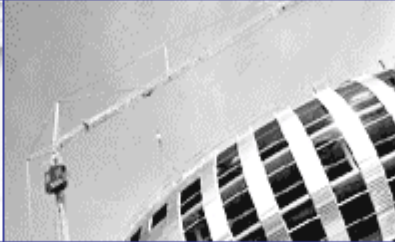

IBM is the recognized industry leader in both our SOA vision and ability to execute with clients.



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- Vision to address business problems with the power of SOA
- SOMA – proven SOA business modeling and development methodology
- Market leading tools that are integrated from end-to-end
  - Websphere Business Modeler
  - Websphere Integration Developer
  - Rational Suite to manage implementations from requirements to testing
  - Monitoring tools for continuous improvement
- Offerings to support you every step of the way

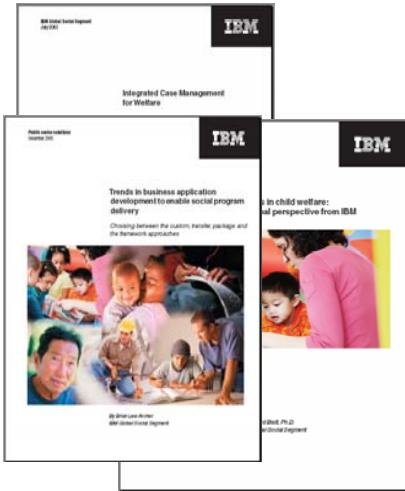
**IBM SOA Offerings can help you realize the value of SOA within your own organization, according to your own plan.**

				
	<b>Planning</b>	<b>Design</b>	<b>Implementation</b>	<b>Management</b>
<b>IBM Offerings</b>	IBM Business Enablement Services for SOA	IBM Design Services for SOA	IBM Implementation Services for SOA	IBM Management Services for SOA
<b>What It Does</b>	Identifies how an SOA can help you meet business goals	Creates a specific, detailed SOA and Web Services plan	Builds and deploys the SOA and associated Web Services	Provides ongoing performance monitoring, maintenance, and requirements verification
<b>Why It's Worth It</b>	Fosters alignment of business and IT; helps prevent costly missteps	Prepares your enterprise for the SOA	Smoothly implements a security-rich SOA	Helps ensure that the SOA is proactively managed for optimal business value

***Optimum business value is obtained by proceeding through each phase in a continuous process.***

# IBM has made many human-service specific thought leadership investments to support you in your journey with SOA.

## White Papers



## Conference Papers



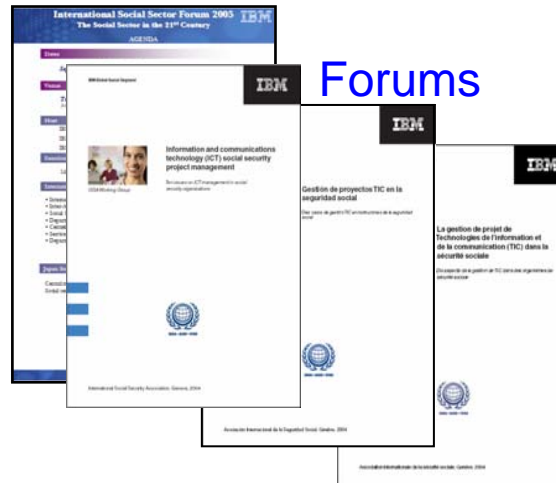
## Research



## Industry Points of View



## Forums



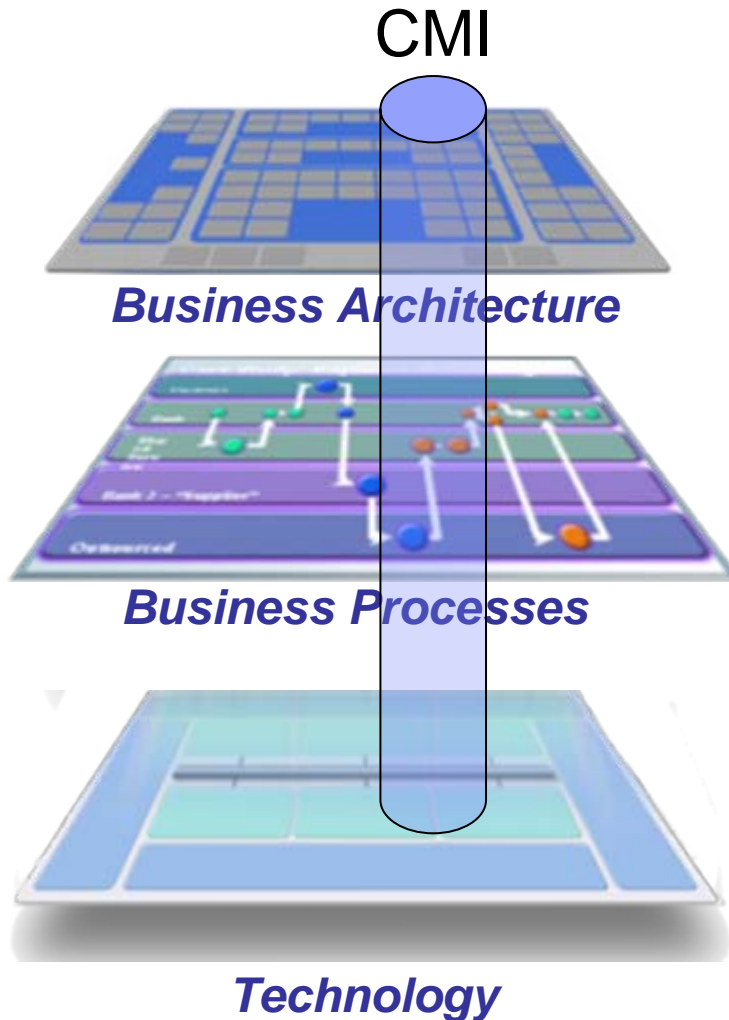
## Visioning



# On Demand Vision for Social Program Delivery



# IBM is delivering new social services Composite Business Services

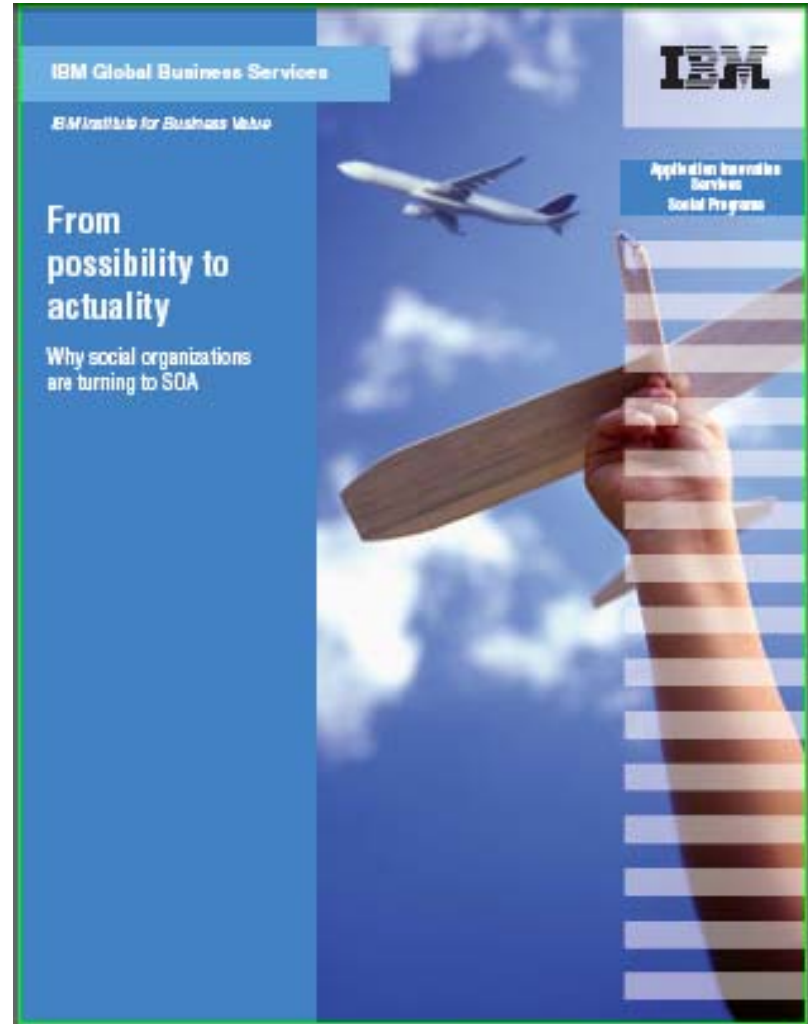


## ■ Case Management Infrastructure is our first CBS

- Case Management
- Party Management
- Workflow and Rules Management
- Facts and Evidence Management
- Case Notes and Calendaring
- Workplace and Administration

# “From Possibility to Actuality”

- A new paper from IBM
- Illustrates SOA from a business perspective
  - Bringing pension forecasting into reality
  - Pro-actively managing disability benefits
  - Managing employment services at the point of contact
- Available at IBM booth #125



# For more information

- Visit IBM booth #125/126
- Visit: [ibm.com/government/socialsegment](http://ibm.com/government/socialsegment)
- For a copy of the presentation, contact Grace Rock:  
[grock@us.ibm.com](mailto:grock@us.ibm.com)