2.1 Use case scenario overview

This section outlines the simple scenario used in this book. We aim to create a scenario that is not industry-specific. This use case scenario and the resulting ECM solution should be applicable to many organizations.

> **Note:** This book is created as a reference guide to showcase a set of capabilities of IBM ECM products, their integration, and solution implementation. It is not intended to be a definitive guide to create a production-ready solution.

When working through this scenario, we encourage you to learn the capabilities of various IBM ECM products, and to discover how you can integrate and apply them to your ECM solution to meet your enterprise requirements.

2.1.1 Actors

The scenario consists of the following internal and external actors:

Client (Jackie) Is a customer of fictional Company A, who has a concern about the product and service she recently received.

Customer Services Representative (George)

Is responsible for the initial screening and management of inbound calls from clients.

Specialist (Rebecca) Is assigned product-specific and service-specific questions and concerns that the customer service representative cannot manage.

Manager (Tim) Is responsible for the review of exceptions, for example refund requests over a set value.

2.1.2 Scenario

Our scenario begins when Jackie places a call to fictitious Company A, because she has had issues with a product and service she recently received. George, the Customer Service Representative, receives the call. His conversation with Jackie helps George determine that a new case is required, because the path to resolution is outside of his responsibilities in the organization.

He captures the required information to create the new case within IBM Case Manager. George ends the call with Jackie and submits the new case for processing.