THREE KEYS
to effectively embracing case management

Ready to embrace case management? Three things to keep in mind

Case management. The concept is all the rage within the IT industry. And whether you realize it or not, your organization is already tackling this type of business problem. Work driven by information. Work that is unpredictable. Work that requires human decisions and discretion.

These are the types of processes that often directly touch your customers, constituents, students or employees. Areas like IT help desk, contract management, claims processing, customer service, project management, incident tracking, compliance tracking and more. Effectively managing this information-centric work will keep your customers happy, your employees productive and your organization healthy and profitable for years to come.

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1 IDENTIFY OPPORTUNITIES
for a case management approach

The first step toward embracing a case management approach is to identify where it can be useful in your organization.

Case-style work goes beyond the courthouse or social services agency. It's any style of work that requires human decisions and discretion – typically driven by information. This includes everything from the IT help desk to contract management to customer service and more.

Where can you benefit from case management?

- Look for areas in your organization that are heavily dependent upon your knowledge workers – things that can't be predicted or fully automated.

- Look for work that is currently managed in scattered spreadsheets, paper files or departmental databases like Access or Lotus Notes. How are you handling the related information and key supporting content required to make decisions? Is information getting lost, misplaced or frequently out-of-date?

- Think about the processes, people and departments that are customer-, employee-, constituent- or student-facing. Do you want to improve these relationships and better manage the critical information that supports them? Are customers complaining about long response times or are incidents taking too long to resolve?

- Think about "gaps" that exist in your day-to-day work – the areas that your major line-of-business applications can't fully support. For example, can you easily access related documents, notes and more from your student information system, ERP or EMR? Are employees spending time switching between multiple systems to get work done?

Once you've identified the opportunities for case management, determine where you are experiencing the biggest pain – whether it be cost, time or quality of service – and start there.

In the next step, we'll highlight the different options you have to adopt case management to solve your identified business pains. »

According to AIIM research, 58% of organizations consider case handling to be vital or very important to their customer experience management. *

According to AIIM research, 42% of organizations surveyed said that dealing with unstructured inputs and connecting to key business systems was a top pain point. *

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2 EVALUATE
your case management options

After determining where you can use case management, the next step is determining which approach is the best fit for your organization.

When it comes to taking a case management approach, you have several options: build, buy or configure. You could have your developers in IT build applications from scratch with custom coding or purchase multiple point solutions that are each specific to one process.

However, an important aspect to keep in mind is the IT support and involvement required for these initiatives. Custom-coded applications take longer to build and are more difficult to change. Point solutions, while effective for a specific process or use, can't be easily extended or connected to other areas of your organization. So if you anticipate needing other case management applications down the road, niche solution providers aren't your best bet.

Another (better) option is to configure case management business applications on one point-and-click platform.

The benefit of creating business applications with a point-and-click configuration tool is that IT doesn't have to spend time developing, updating and maintaining custom coding. IT can work directly with business users to more rapidly respond to and create solutions for various business problems.

With business applications created on one comprehensive, scalable platform, you realize a lower total cost of ownership while providing IT with one place to manage updates, security and maintenance. Plus, by leveraging an enterprise content management (ECM) solution for case management, you build data-driven business applications on the same platform where you're storing your key documents – instantly connecting all your information and critical supporting content.

An ECM platform also allows you to take advantage of any beneficial built-in functionality, such as security controls, document management capability, workflow automation and more.

In the next step, we'll discuss the importance of looking toward the future when defining your case management strategy. »

According to AIIM research, while 37% of organizations have a case-capable support system, 28% are using customizations, workarounds or add-ons to handle case scenarios.*

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3 LOOK TOWARD THE FUTURE

The final step in embracing case management is looking beyond what you need now, and determining what your needs will be in the future.

When you're looking to embrace case management, keep the future in mind. First, what is the end result you're trying to reach? Better customer service, faster incident resolution, more efficient contract handling, enhanced project management, more satisfied or productive employees? By determining what successful outcomes look like to you, you'll be able to make better decisions on time, resources and focus areas.

Next, you want a solution that can scale and shift with changing business needs as well as extend to other processes, departments and users. When it comes to case management, you shouldn't have to reinvent the wheel. Taking a phased approach is often a successful strategy. Determine your most pressing business pain and start there, expanding your applications over time to an enterprise-wide solution.

Third, your software vendor will become a longtime strategic partner throughout your case management endeavors. Choose a vendor who has experience with data-driven applications and proven implementations in the case management space. Look to resources like the Forrester Wave™ for Case Management or find out if that vendor's customers have received any awards or recognition

for their solutions. Your vendor should understand the dynamic nature of case management and have the ability to stay flexible and proactive as technology and business environments change.

The right solution expands beyond your immediate needs. If you're looking for a system to manage facilities projects, it should also have the ability to add value to human resources, accounting and legal. Your solution needs to integrate seamlessly with other line-of-business applications, leveraging existing IT investments across your enterprise.

Finally, think about your business users. The process owners. The ones managing cases on a day-to-day basis. They want a simple interface with access via mobile devices, email inboxes and line-of-business applications. They want a better way to get work done and complete access to all the information they need to provide customer service, resolve issues, track information and manage relationships.

A case management solution empowers them with one complete view of all the data, documents, notes and other information surrounding a case, customer, incident or relationship. By eliminating the need for them to switch between applications, paper folders, spreadsheets and file shares to get their work done, you'll increase both productivity and satisfaction.

Learn more at **OnBase.com/CaseManagement ››**

The latest AIIM research suggests that the biggest business drivers for improving case management capabilities are improved process productivity, stronger compliance/reduced risk and more effective internal collaboration.*

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