TECHNOLOGY INNOVATION

<PAPYRUS ACM>

Building Business Value Streams

Empowered by Adaptive Case Management
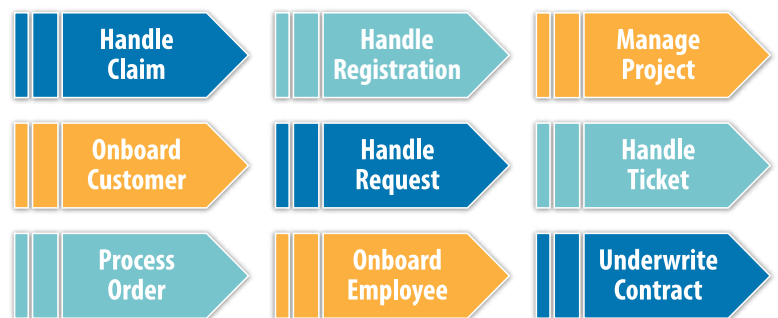# A New Way of Working!

PAPYRUS SOFTWARE

WWW.ISIS-PAPYRUS.COM

Think in Value Streams:
Adaptive Case Management

The **'Value Streams Thinking'** helps you set your mind on the customer and shield your customers from organizational complexities, allowing you to providing one-stop service and response with all interactions and activities related to the customer's request pulled into a single place.

Request → Handling → Case Work → Response

In the **Customer Engagement Cycle** alone there are many value streams, where your company provides value to the customer – from creating and running promotions and campaigns to providing highly personalized offers, policies, contracts and invoices. Value streams also include customer onboarding, handling personal data changes and claims, up-selling, cross-selling and much more.

Handle Claim   Handle Registration   Manage Project

Onboard Customer   Handle Request   Handle Ticket

Process Order   Onboard Employee   Underwrite Contract

■ **Eyes on Customer Experience**

A value stream typically starts with an incoming request – this can be a digital request via email or a request filled out in Facebook Messenger or any other request that is incoming via your portal, mobile app or any other channel, including a printed letter. You need to be open to all these channels and provide smart, engaging experiences with interactive forms, videos, live chat and chatbots, wizards and any other means to help customers quickly navigate and enter data, photos, documents and information you need to successfully deliver value.

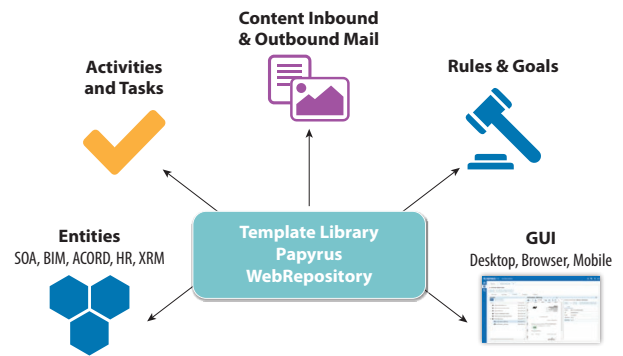Validate Claim → Investigate Claim → Settle Claim → Pay Claim → Close Claim

As everything is running in real time, automation and AI-support are indispensable. This technology will help you automatically process, extract, evaluate and transmit customer information in any format from anywhere to anywhere in order to immediately start handling the request and stay up to the task.

Customer requests can be handled in an automated way, or they may require human judgment and tapping into the knowledge and expertise of your employees and teams who have the right skills, availability and authority to handle specific types of requests. Work does not need a predefined flow, it requires clear goals and authority assigned to a specific performer.

Integrated Elements of a **Value Stream**

The **Papyrus Platform** brings together everything that belongs together – data, content, communication, processes, goals and rules – storing and managing all the content and communication centrally, making sure that everything is fully integrated and available wherever it is needed.

Content Inbound & Outbound Mail

Activities and Tasks

Rules & Goals

Entities
SOA, BIM, ACORD, HR, XRM

Template Library Papyrus WebRepository

GUI
Desktop, Browser, Mobile

■ Data Integration

Papyrus Service Oriented Architecture – with support for all common protocols – allows facilitated integration with any application, device, file, channel and service via loose coupling and a handshake procedure without coding. Connecting to various systems to provide data and additional information, as well as automatically aligning teams and alerting people who should be in the know, is of crucial importance and needs to be supported through enabling technology.
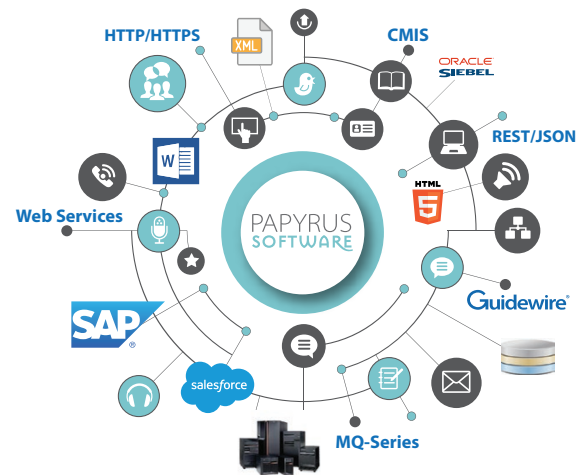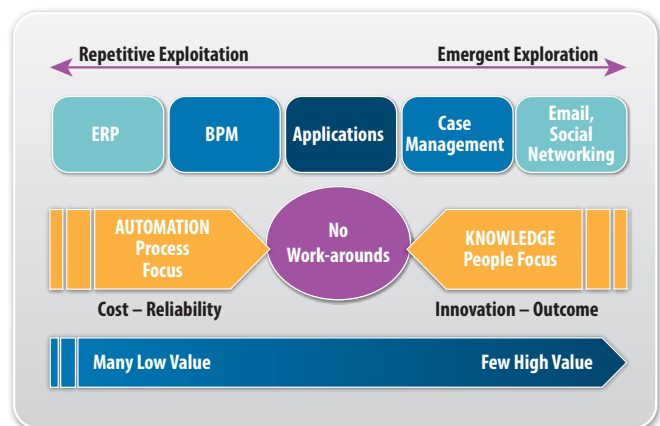

■ Goal-Oriented Process

Integrated BPM and Adaptive Case Management support automation and orchestration of all types of processes – from fully automated robotic processes to adaptive collaborative processes and case management – in one single environment. You may automate what is possible and empower knowledge work in an integrated process landscape for exception handling, ad hoc and unforeseen tasks. **All on one platform!**

COMMUNICATION: Customer interactions are supported by Omni-Channel communication powered by adaptive processing across devices and channels and over time, based on a holistic view of the customer with consistent messaging across numerous touchpoints via chat, web, email, mobile, social, phone, fax and print – inbound and outbound.

Papyrus Integrated Process Landscape

CONTENT: The solution provides central management of all content and ensures compliance, effectiveness and reuse across the organization. The content is provided to employees and customers through web, mobile and cloud – from anywhere to anywhere.

ACM Empowered: The Papyrus Business Commun
technologies – RPA, AI-Powered Process and Ad
Outbound Omni-Channel Communication and Co

### ◾ Papyrus Adaptive Case Management

Customer requests can be handled ad hoc – in a fully automated way – without delays. Triggered by the incoming information and rules, the solution activates a series of events with the correct goals and activities dynamically executed to successfully **deliver value to the customer.**
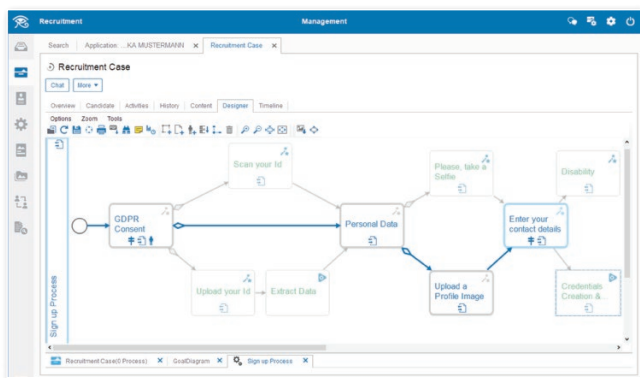
Process Design based on Rules and Goals

Goal-oriented processes are rule and event driven, taking different routes to achieve the target. Pre-defined processes can become adaptive, if needed, or employees can simply do the work and allow the system to chart a process in real time. In any case, enterprise teams are free to handle each and every customer situation, flexibly processing unforeseen events and exceptions in customer requests on-the-fly.

There is no process without content, and content without process you don't need.
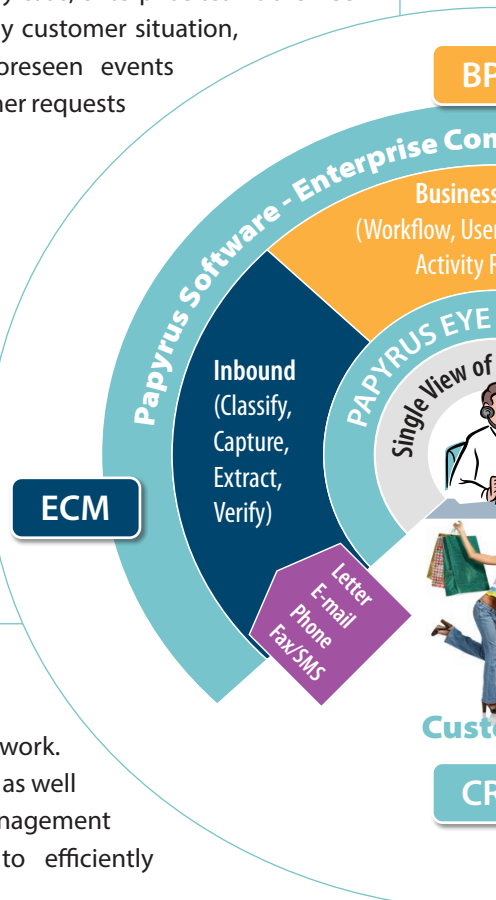
◾ Embed Inbound Mail Communications

When executing value streams, you will typically need automation and adaptive case work. This needs inbound and outbound communications, integration with content services as well as business process management and collaboration – to efficiently complete all tasks.
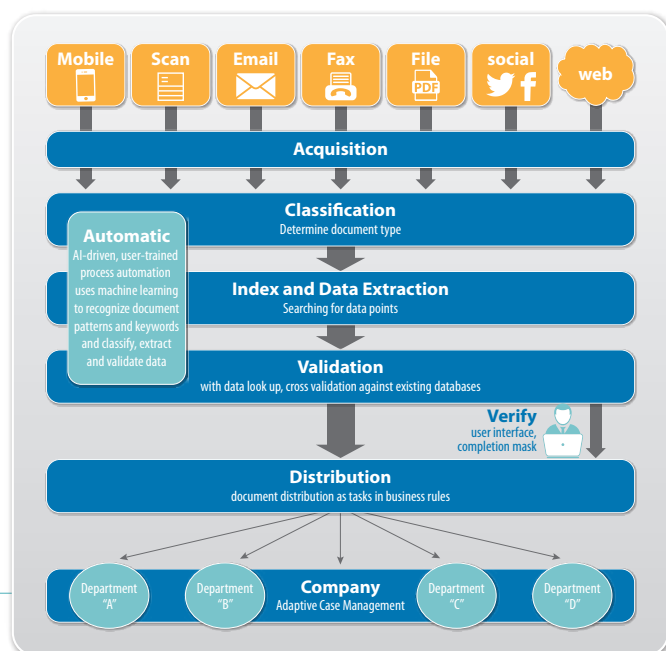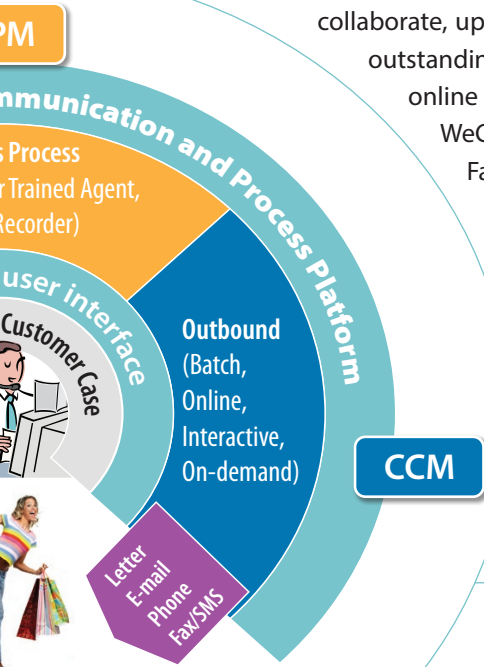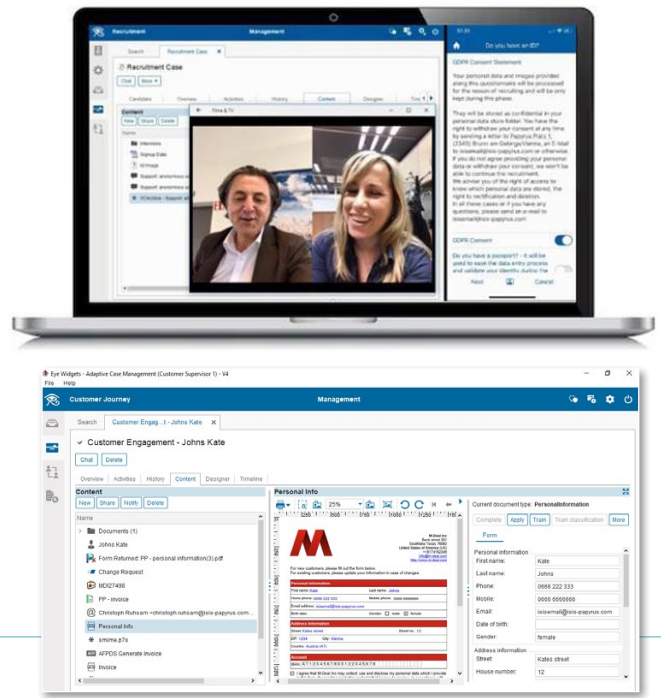

Papyrus Software captures ALL incoming content, performs machine-learning classification, extracts and validates business data, executes automated business responses and initiates straight-through or user-interactive processes.

From the incoming request to fully automated robotic processing, to collaborative work, design and delivery of any type of document and communication, to reporting and auditing – all is provided in one environment linked up in **ONE BUSINESS VALUE STREAM.**

■ Open for Business – Papyrus User Interfaces: Desktop, Browser, Mobile

The adaptive way of working puts people at the center of a process, allowing them to apply their judgment and expertise, while collaborating with virtual teams to achieve the best possible outcome. This method is supported by Omni-Channel communication, social collaboration, AI-powered decision making and a **Single View of the Customer** with all conversations, content, processing and data at their fingertips. Employees can effectively connect, collaborate, up-sell, cross-sell and deliver outstanding customer experience online via chatbot and live chat, WeChat, WhatsApp, Skype, Facebook, SMS, email, social, mobile, web or traditionally via paper – wherever the customer is located. The customer's response is provided directly from that case.

PM

mmunication and Process Platform

s Process
(r Trained Agent, Recorder)

user interface

Customer Case

Outbound
(Batch,
Online,
Interactive,
On-demand)

CCM

Letter
E-mail
Phone
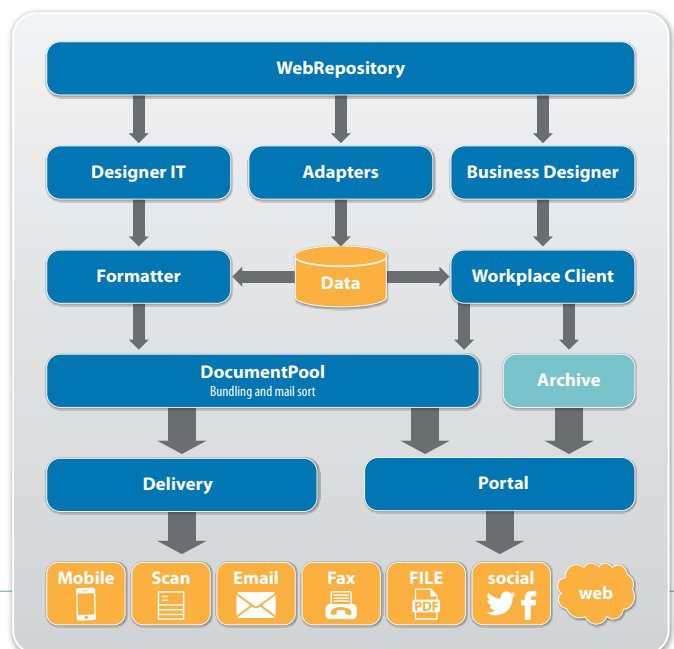Fax/SMS

omer

RM

■ Embed Outbound Business Communications

The Papyrus smart document design puts the business in control and enables non-technical users to work easily and efficiently to develop and deliver documents of any complexity – from consolidated bank statements and insurance policies, billing and complex contracts, to the correspondence, chat- and chatbot-enabled communications and marketing campaigns.

This process uses one set of definitions and document resources, shared across different communication applications, channels and between the business and IT.

Any communication is dynamically created and delivered via Online Channel, mobile, email or any other communication channel where customers can directly sign and submit documents to be instantly processed by your back office systems in real-time.

WebRepository

Designer IT | **Adapters** | **Business Designer**

Formatter | **Data** | **Workplace Client**

DocumentPool
Bundling and mail sort

Archive

Delivery | **Portal**

Mobile | Scan | Email | Fax | FILE | social | web

Transforming Case Management from
Physical to Digital

Seamless communication and collaboration through Papyrus ACM established a powerful digital-era business solution

CHALLENGE

The company's *Creative Services Team* provides all marketing and regulated materials for external and internal use, which adds up to a repertoire of more than 60 media types in 30 different languages. The work of the *Creative Services Team* was 90 percent paper-based, with documents gathered in physical case folders containing mostly written information. This system of case management was both time consuming and inefficient. Workflows were handled manually and case files moved physically between different groups, often creating bottlenecks. Proofs and deliverables had to be printed then added to each case file.

THE SOLUTION

An Enterprise Content Management System (ECMS) based on the Papyrus Adaptive Case Management (ACM) framework brought WellCare a unified case management platform in which the *Creative Services Team* can handle workflow and content digitally, preserving work time and material resources.

Legacy case management system

The Papyrus ACM solution provides adaptive, goal-oriented workflows where administrators can react to unforeseen situations with real-time changes, such as adding goals or content. The *Creative Services Team* can govern its processes without involving IT departments. This new system has reporting and tracking features that provide management with detailed operational performance numbers of the *Creative Services Team*. Administrators use integrated quality assurance measures, such as predefined checklists and approval cycles, to continuously improve workflow quality.

STANDARDIZED CASE HANDLING AND WORKFLOW

Work requests for the *Creative Services Team* are standardized online request forms that use dynamic fields to gather required information. Every request form opens a case that specialists then triage to make a judgement on whether to move forward with the request. The Project Management Team reviews each request and assembles workflows based on available goal templates. Project Managers can create new case templates based on proven workflows to enhance the ACM library.

■ Business Benefits of Papyrus ACM Framework

COST SAVINGS, TIME REDUCTIONS

WellCare experienced a 75% reduction in printing, paper and physical file storage costs, along with a 20% reduction of rework due to quality improvements. Job lifecycle time savings are at least 20% due to eliminating the human hand-off bottlenecks and adding ad-hoc goals that trigger predefined workflows.

INCREASED REVENUES

WellCare is currently expanding at a pace of more than 2% per year, with increasing needs for materials. The ability to expand the overall material creation capacity enables the entire company to expand and meet its growing needs.

QUALITY IMPROVEMENTS

Improved quality with explicit, in-process quality checks throughout the project lifecycle reduces the risk of late or inaccurate materials and related regulatory fines.

BUSINESS GOALS ACHIEVED:

- Transform case management from physical to digital system, handling tasks, goals and documents
- Quality assurance measures added to the workflows
- *Creative Services Team* manages workflows without involvement of IT personnel
- Minimize usage of paper documents
- Checks, approvals occur throughout the creative lifecycle
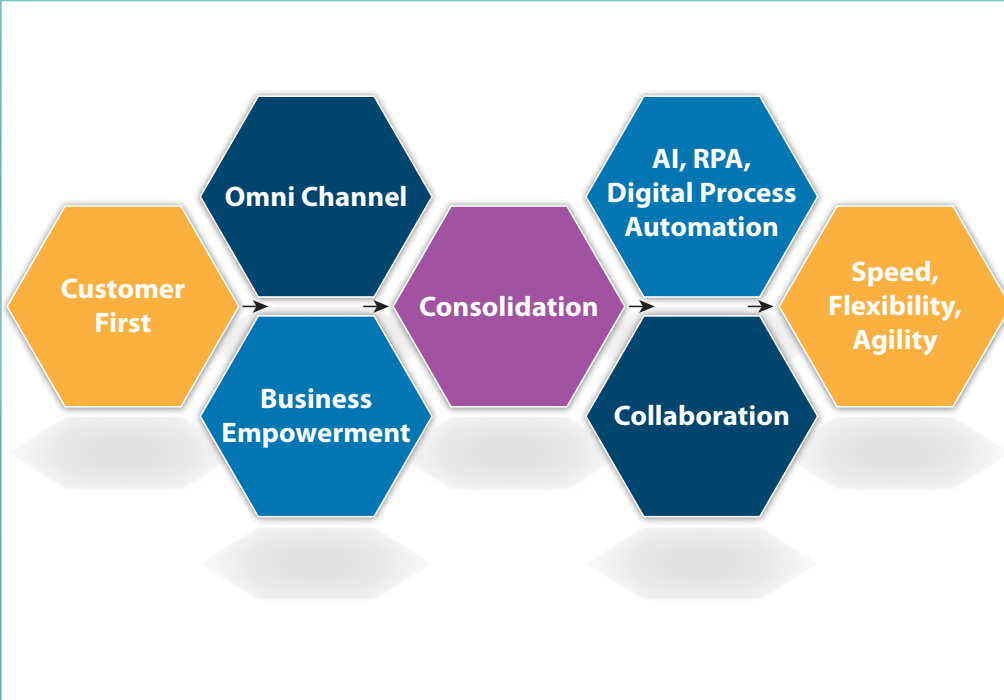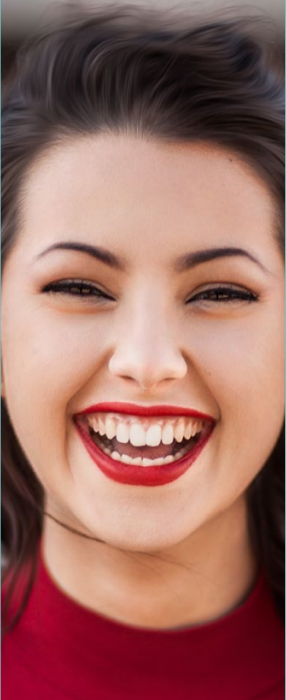
Building **Business Value Streams** – We Help You Create Value

As a GENERIC platform solution, the same enabling technology can be used over and over for any value stream and any use case in a number of ways. This allows organizations to eliminate fragmented work and disjointed customer experience, bringing together people, departments and systems across the enterprise to achieve the common goal.

■ Papyrus User Trained Agent – UTA

For the purpose of process discovery, the Papyrus User Trained Agent performs **pattern recognition** on the data objects and their relationships across the complete state space of a business case, each time an action is performed by an actor role. The UTA analyzes what elements of the pattern are relevant for its subsequent repeated actions. This analysis includes information about previously executed steps and their results. If the actor performs the recommended action, the confidence level of that recommendation is raised, if not, the confidence level is lowered. One or more of the most confident recommendations can be presented.
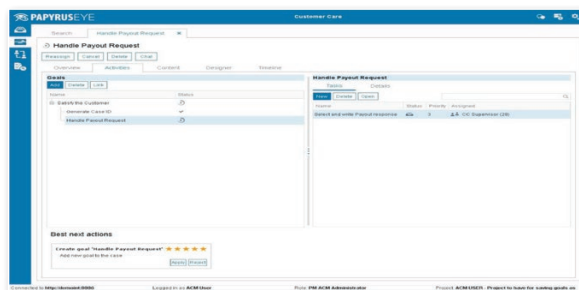

■ Embed Social, Email, Phone

The **Papyrus EYE Widget UI** allows the dynamic inclusion of general web content, such as Facebook, YouTube, Twitter, LinkedIn or Google Maps into the application. This allows the business to create very customer – oriented applications without opening these applications to misuse.
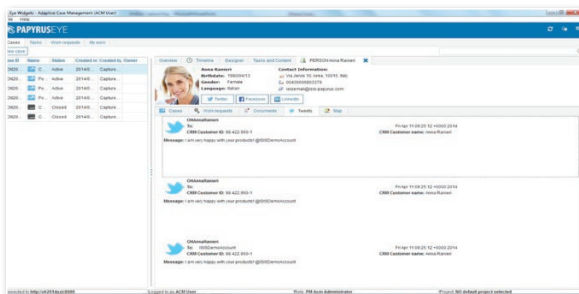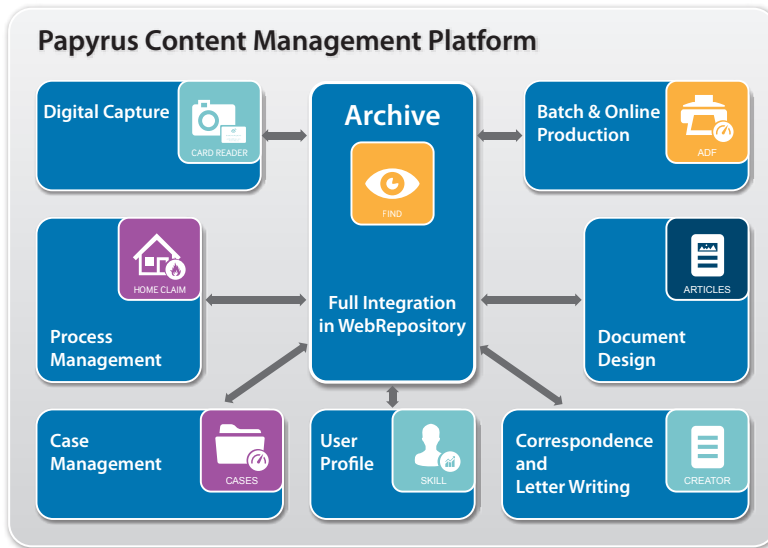

■ Integration with VOIP Phone Systems

Papyrus provides chat/chatbot, WeChat, WhatsApp and social interaction with co-workers – all under control of the role/ policy authorization and in context with the process.
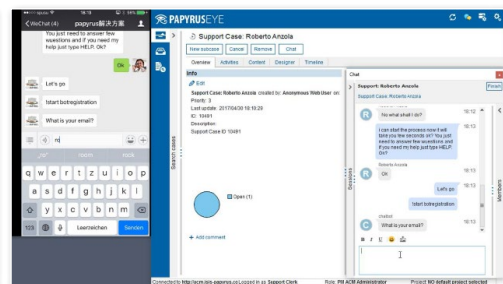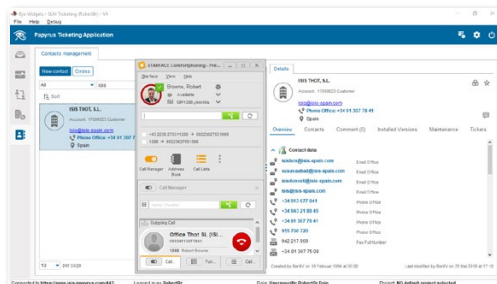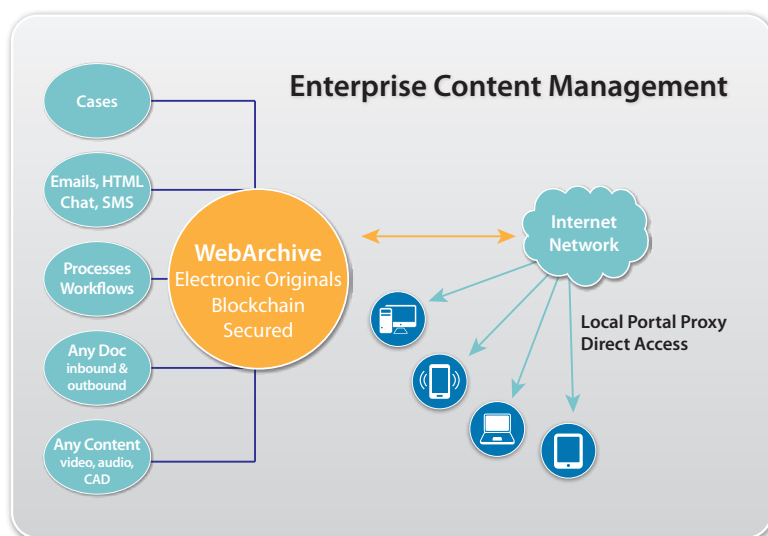
Building **Business Value Streams** by Leveraging Enterprise Content Services

The Papyrus Platform provides central management of all content and ensures compliance, effectiveness and reuse across an organization. The content is provided to employees and customers through web, mobile and cloud – from anywhere to anywhere.

Papyrus Content Management Platform

- Digital Capture — CARD READER
- Archive — FIND
- Batch & Online Production — ADF
- Process Management — HOME CLAIM
- Full Integration in WebRepository
- Document Design — ARTICLES
- Case Management — CASES
- User Profile — SKILL
- Correspondence and Letter Writing — CREATOR

■ Collaborative Content Services

Any kind of inbound or outbound document, resource, email, video and voice from any source or any other content can be easily uploaded and stored. Every object in the system – all formats (AFP, PDF, TIFF/ fax, email, data, MS Word, audio, video…), entire workflows and complete CASES over the entire lifecycle (data, processes, activities, content, views, service interfaces (SOA)) – is automatically stored/archived at a specific point in time.

Enterprise Content Management

- Cases
- Emails, HTML Chat, SMS
- Processes Workflows
- Any Doc inbound & outbound
- Any Content video, audio, CAD
- **WebArchive** Electronic Originals Blockchain Secured
- Internet Network
- Local Portal Proxy Direct Access

Collaborative case work **connects people and departments working together on the value stream** and allows them to collectively share information, negotiate, investigate, make decisions, create proposals etc., while communicating the results back to the customer. And of course, there is an ongoing communication with the customer. Often there is something missing and you need the customer to send additional information, sign documents, send and resend files, or you simply need to keep the customer informed – constantly receiving, sending and collaboratively working until the goal is achieved.