

Case Management: A Consolidated View of Customer Care

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Case management may be defined differently across industries, but those who rely upon it to service, retain and acquire customers know well that it is a complex and critical component of customer operations that can make or break your business in a competitive environment.

The central, common issue in case management is that all too often, cases take too long to close due to any of number of internal factors, including:

- Limitations in adapting to changes in corporate policies and processes
- Missing collaboration between knowledge workers and external experts
- Limited resources to support key activity
- Misplaced and siloed information
- Lack of standardization (content, process and systems)
- Difficulty of enforcing compliance with policies, regulation and best practices
- Lack of visibility into meaningful key performance indicators

Experts agree that a case is not simply a collection of isolated activities, processes and documents, but a single and evolving entity progressing toward completion. Efficient business case completion must be enabled with collaborative processing for structured AND unstructured data that results in an integrated solution combining documents, data extraction, business processes and rules, content management and customer communications in a unified approach.

Business and IT organizations in the enterprise have learned that successful execution of case management requires the best of all worlds – BPM for workflow, productivity and accountability; ECM for collaboration, compliance and communications; and CRM for customer history, service, satisfaction and retention.

Beyond BPM

Defining and automating processes is just part of the story in case management. Processing a typical claim requires not only the management of various types of information - audio and video files, electronic forms, documents and e-mails – but also action and approvals from multiple knowledge workers and experts in consecutive or parallel processes to resolve the case.

KEY CASE MANAGEMENT SCENARIOS

- Claims Management
- Contract Management
- Underwriting
- Procurement and Purchasing
- Campaign Management
- HR/Benefits and Compensation Administration
- Customer Account Management
- Fraud Investigation
- Customer Service and Repairs

A diverse range of customer-facing activity relies upon case management, which may involve communications that are one-to-one and/or one-to-many

In addition to standard processes and activity that must always be completed, the adaptive (or dynamic) case management we demand today involves ad-hoc, on-the-fly activity, events, decisions and processes within and alongside those predictable parts of bringing a case to resolution. But today's knowledge worker is often placed in a straightjacket of policy and process restrictions that prevent successful (or efficient) resolution of the case within the boundaries of the corporate rules.

State- and event-based processing and business rules speed up the completion of the business case by allowing and enabling ad-hoc elements and rules to be addressed and incorporated into the progress of the case, by enabling knowledge workers to do what they do best with what they know best.

Rather than routing the case folder to the next task sequentially down the line, a case must advance through both external and internal events:

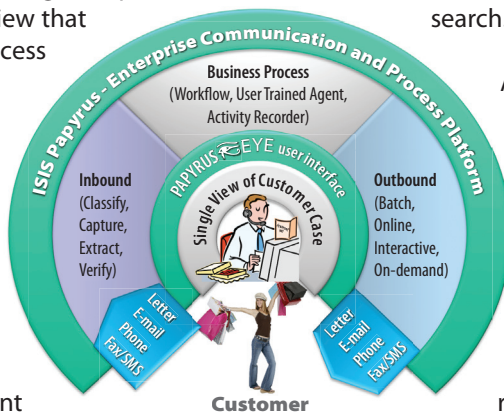
- External events: Message content from a phone call, letter, fax, or e-mail is added to the case folder upon receipt and new tasks or processes may be triggered or created
- Internal events: Assignments and business rules allow case workers assign tasks and initiate processes as well as to enable fully automatic creation, assignment or triggering of tasks based on external events, task completion or expiration of deadlines

Single Customer View

A holistic view of all tasks and business processes, including deadlines, documents, contracts and all related communications, guarantees 24/7 real-time access to all pertinent information for a case or claim. Represented by the case folder, the case as a whole is easily understood through simple review of the unified and customized view that summarizes the status and provides access to key content and details.

Two major keys for success are 1) the optimization of rule-based processes and 2) the integration of inbound and outbound business correspondence, electronically connecting business partners while creating an efficient, holistic process.

Collaborative business case management improves transparency, turnaround and efficiency by consolidating all relevant information for internal administration, customer care and external staff, analyzing data and improving processes collaboratively across departments, functional levels and locations. Deadlines and strategic targets can be incorporated into the work-flow to ensure service-level requirements are met on time and on budget.



Service Quality & Efficiency

Effective case management results in improved service quality and less process time for customers and partners. Using process-enabled document capture technologies, for example, digitizes documents to automatically extract, classify and index data for expedited processing, analysis and search.

Automating administrative processes and audits operations improves effectiveness in the procedural flow by optimizing time and attention for those steps that only human judgment or action can accomplish. Events or status changes can trigger automatic alerts for immediate action when required, and dynamic task assignment routes work to available staff according to roles, skills and priority.

A truly effective case management solution offers an integrated solution combining data, business processes and rules, document creation, capture and output management with support for dynamic business process management in a single platform.

INTEGRATED CASE MANAGEMENT: THE REQUIREMENTS

- State-driven / event-based processing
- Centralized storage of inbound and outbound documents in a virtual case file
- Consolidated view of all procedures (activities, calendar, checklists)
- Distributed capture and classification of incoming complaints, requests or claims
- Rule-based optimization of business processes
- Ad-hoc process updates
- Integrated correspondence via browser or fat client
- Collaboration across departments, partners, agents and customers
- Output management from print to archive
- Easily definable GUI in multiple languages with automated Web and desktop distribution
- Integrated sign-off, auditing, reporting and legal compliance
- Integrated user authorization and authentication, change management and versioning
- Seamless integration with business applications

About ISIS Papyrus:

ISIS Papyrus Software provides enterprise software for personalized customer communications and process optimization business applications in the global financial, insurance, utility, telecom, healthcare and public sectors. Worldwide more than 2,000 enterprise customers use Papyrus standard software for business applications to manage customer communications and billing, case management, business correspondence, multichannel delivery, ADF, indexed capture, transpromo and archiving across systems and departments.

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