eBOOK



# Transform experiences with dynamic case management

Automate collaborative work for better decision-making and faster resolution

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### Digital, data-driven organizations are futureready, and automation can help get you there

In a matter of months, the pandemic confirmed what business leaders have been forecasting for years: the future belongs to digital, data-driven organizations. Many businesses had to kickstart their digital transformation, prompting a large-scale move towards cloud-based applications. One of the leading trends in this shift has been automation.

Cloud-based automation applications streamline processes around customer and employee needs, without being held back by outdated infrastructure.

Predictable, rule-based processes are relatively simple to automate. Yet most organizations have to quickly adapt to diverse and unpredictable situations involving multiple stakeholders and information sources.

In this eBook, you'll discover the benefits—to customer experience, employee productivity and operational efficiency—of automating these kinds of everchanging, ad hoc processes through dynamic case management.

35% of organizations are prioritizing customer/user experiences, and nearly 28% are placing greater emphasis on process automation.

93% of companies
report that their
existence is
jeopardized by
operating models
that can't keep pace.



### What is dynamic case management?

A "case" is any project, transaction, service or response that is "opened" and "closed" over a period of time to achieve resolution of a problem, claim, request, proposal, development or other complex activity. It is likely to involve multiple persons inside and outside of the organization, with varying relationships to each other, as well as multiple documents and messages.

A car insurance claim is just one example of a case. It's specific to an individual and involves wide-ranging information (accident reports, doctors' records, body shop quotes and more). All this content must be collected, analyzed and summarized to determine each step on the way to resolution.

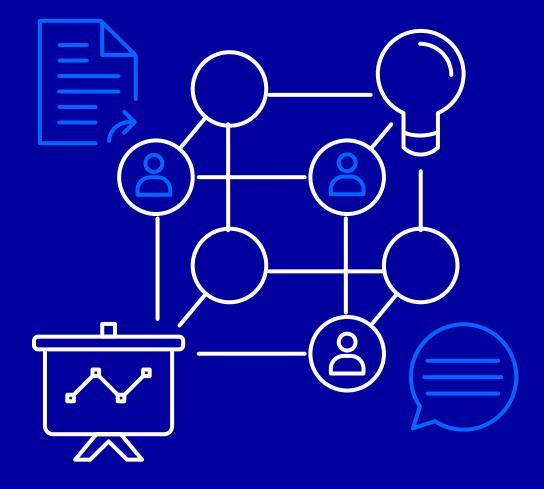
Dynamic case management has a defined goal with a clear beginning and end, but there's no rule book with prescribed steps because it requires:

- Multiple types of information from diverse sources
- Employee oversight and judgement
- Ad hoc internal/external collaboration
- Non-linear business activities
- Enhanced process flexibility

To handle these complex variables and ensure that resolution is fast, fair and effective, dynamic case management harnesses several powerful capabilities—including digital process automation to automate repetitive tasks, orchestrate processes across multiple systems and empower workers to make data-driven decisions.

51% of organizations report that half or

more of their business processes are not straightforward or predictable.



# The challenges of dynamic case management

Many organizations are grappling with:

- Scattered information
- Disjointed processes
- Inconsistent collaboration
- Poor visibility

These weaknesses not only hinder case resolution for those waiting for answers, leaving them disappointed and dissatisfied, but also frustrate knowledge workers immersed in the processes.

| Common pain points that case management can addr  | ess |
|---|-----|
| Difficulty and length of time taken to share information and documents between departments (or sites)                         | 69% |
| Ineffective handling of customer enquiries or complaints  | 68% |
| Lack of visibility and/or reporting into status of knowledge-driven work  | 60% |
| The length of time taken to process documents   | 59% |
| Bottlenecks in processes  | 57% |
| An inability to provide customers and potential customers with speedy responses   | 57% |
| Security issues   | 56% |
| Staff having to toggle between multiple applications to fulfil a request, respond to an incident, or conduct an investigation | 31% |
| Manually entering the same information into multiple systems  | 24% |

### Common dynamic case management capabilities

Dynamic case management leverages several humanand machine-centric capabilities.

### **Connected and Unified Information**

Information is the heart of any case, and it can come from diverse internal and external sources. Dynamic case management consolidates all this data in a centralized case workspace, offering employees quick and easy access to a holistic view of case-related information.

### Collaboration

Case-based work relies on extensive internal and external collaboration, traditionally via a mix of email, IM, in-person meetings and phone calls. Dynamic case management enables everyone to share information and opinions securely in one place, in context.

### **Digital Process Automation**

Automating case-based processes boosts efficiency, reduces errors and frees employees to focus on higher-value, complex steps that require their knowledge and experience. Automation capabilities can include:

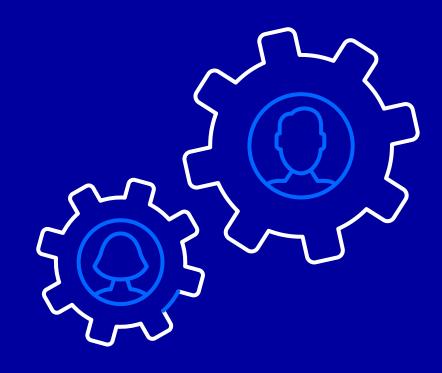
- Business Process Management (BPM)
- Ad hoc workflows
- Configurable business rules and logic
- Robotic process automation
- Analytics and Al

#### **Audit Trails**

Case-based work requires countless interactions and activities that can be difficult to track and assess.

Dynamic case management records all process events and provides a history of actions from case initiation to resolution.

agree that organizations need to dramatically re-engineer the experiences that bring people and technology together in a more human-centric manner.



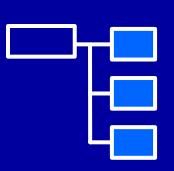
### 1. Process to Decision

What: Make a decision based on a large set of rules or policies

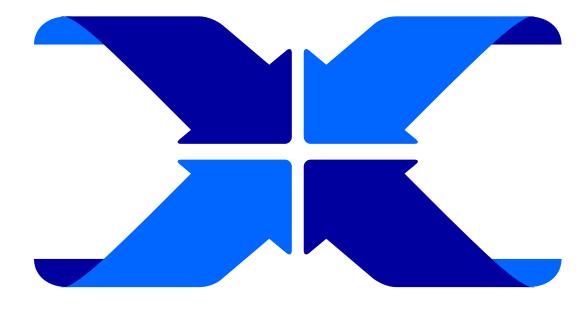
**How:** Usually follows a predictable path, but rules may change over time

**Examples:** Mortgage origination, Tax filing, Compliance audits

**Benefit:** Flexibility of control provides required structure while accommodating policy changes



# Four types of dynamic case management



Case-based processes are integral to organizations of all sizes in almost every industry.

Dynamic case management delivers benefits across four broad categories of work, ranging from most structured to most ad hoc.



### 3. Incident Management

What: Identify, report and resolve usually adverse incidents

**How:** Most often a proactive, high-level process, but can be reactive

**Examples:** Car/workplace accidents, HR grievances, Patient care

**Benefit:** Automatic, consistent, repeatable approach can be applied to similar incidents

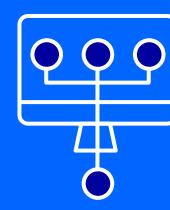


What: Meet contractual and non-contractual service obligations

**How:** Relatively structured, but stakes can escalate over time

**Examples:** Insurance claims, Warranties, Telecom provisioning

**Benefit:** Instant access to complete, current information speeds decisioning





### 4. Investigations

**What:** Capture and evaluate evidence on a specific event or situation

**How:** Reactive, long-term process with little structure

**Examples:** Fraud, Legal investigations, Background checks

**Benefit:** Convergence of all case information, including data and processes, in a single location

# The benefits and value of dynamic case management

In a time of fast-tracked digital transformation and rising customer expectations, dynamic case management is more important than ever. Fundamentally, it's about boosting your organization's resiliency by:

- Increasing employee productivity
  Automate repetitive tasks and
  create, track and manage cases
  in an integrated workspace for a
  unified view of approvals and status.
- Streamlining collaboration
   and sharing
   Enable internal and external stakeholders to share information and opinions securely in a single workspace.
- Improving decision-making
  Consolidate relevant case-related
  information from all sources
  to provide a complete, contextrich picture for assessment.
- Accelerating case resolution
   Leverage a centralized workspace,
   process automation, pre-configured
   process templates and ad hoc
   workflows for quicker resolution.

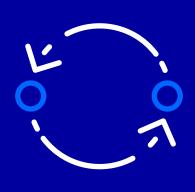
Together, these benefits enable your organization to deliver positive employee and customer experiences and enhanced operational efficiency.

| Desired benefits of case management  |     |
|--|-----|
| Increase employee productivity and efficiency                                  | 77% |
| Improve compliance and governance  | 74% |
| Increase process automation  | 74% |
| Digital transformation   | 71% |
| Improve collaboration, internally and/or with clients                          | 71% |
| Reduce costs   | 68% |
| Improve record keeping and audit trails  | 65% |
| Eliminate paper  | 61% |
| Improve management visibility and control                                      | 58% |
| Eliminate inefficient tools like spreadsheets,<br>Access/Lotus Notes databases | 55% |
| Reduce errors caused by manual processes and tracking                          | 33% |

# Improve employee engagement by organizing around high-value outcomes

Employee engagement is always crucial to productivity, especially during times of economic uncertainty. Therefore, it's vital to support and empower employees at every level of case-based processes.

Eliminating paper-based processes, multiple logins and time-wasting searches by consolidating information in an integrated case workspace frees up time for employees to pursue work that's more rewarding, both to them personally and to the organization. Dynamic case management reduces routine, manual work and empowers teams to be problem-solvers focused on high-quality interactions with customers.



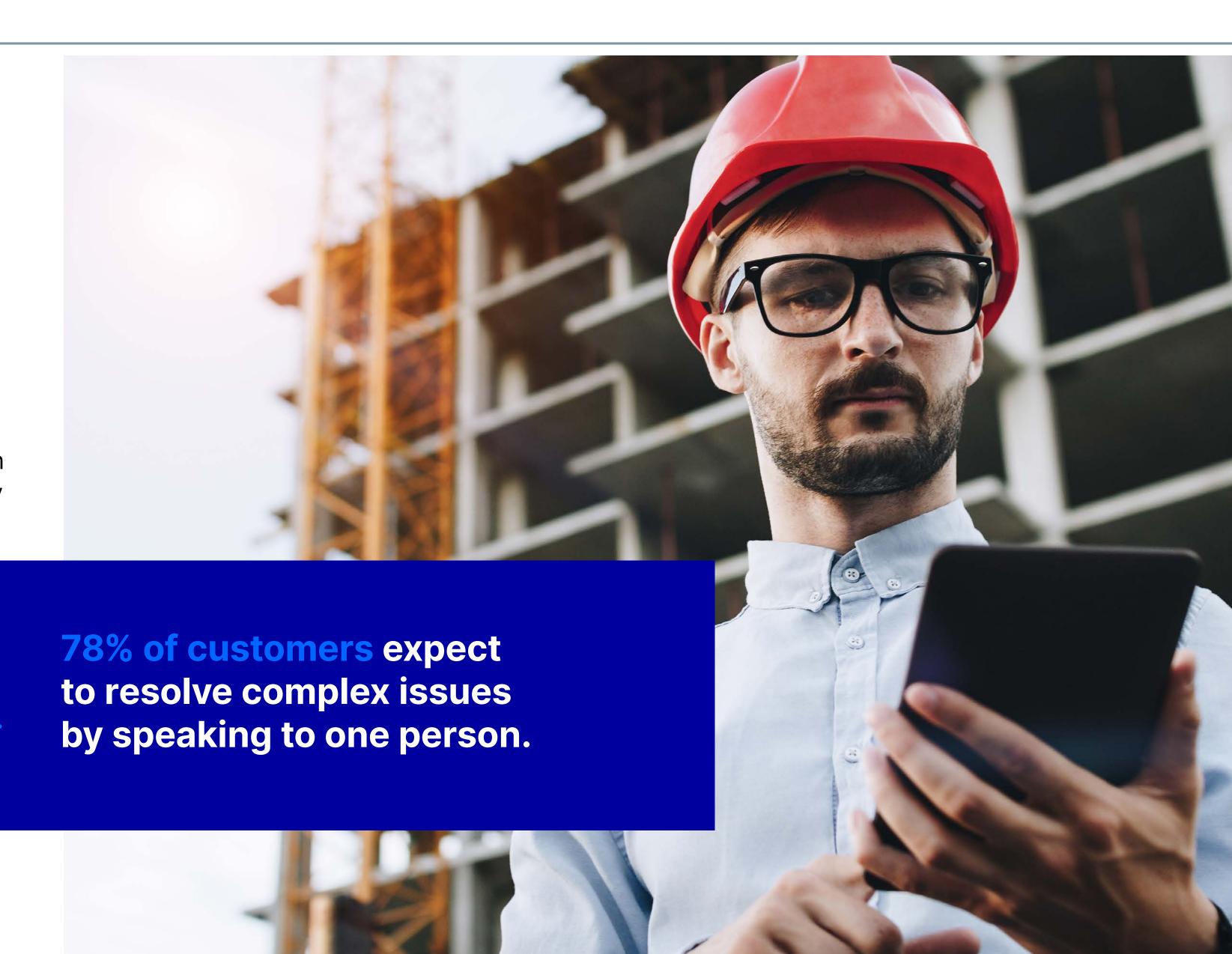
80% of consumers place equal emphasis on flawless engagement with a company as they do on product quality.



# Deliver efficient, personalized, seamless customer experiences

In today's digital world, customers expect consistently positive experiences. When they have a request or issue, they want a quick, satisfactory response—from first contact to resolution.

By streamlining the connections between people, information and workflows while always keeping case progression visible, dynamic case management enables fast, accurate results. This helps foster strong long-term relationships with customers, citizens, subscribers or any user group your organization serves.

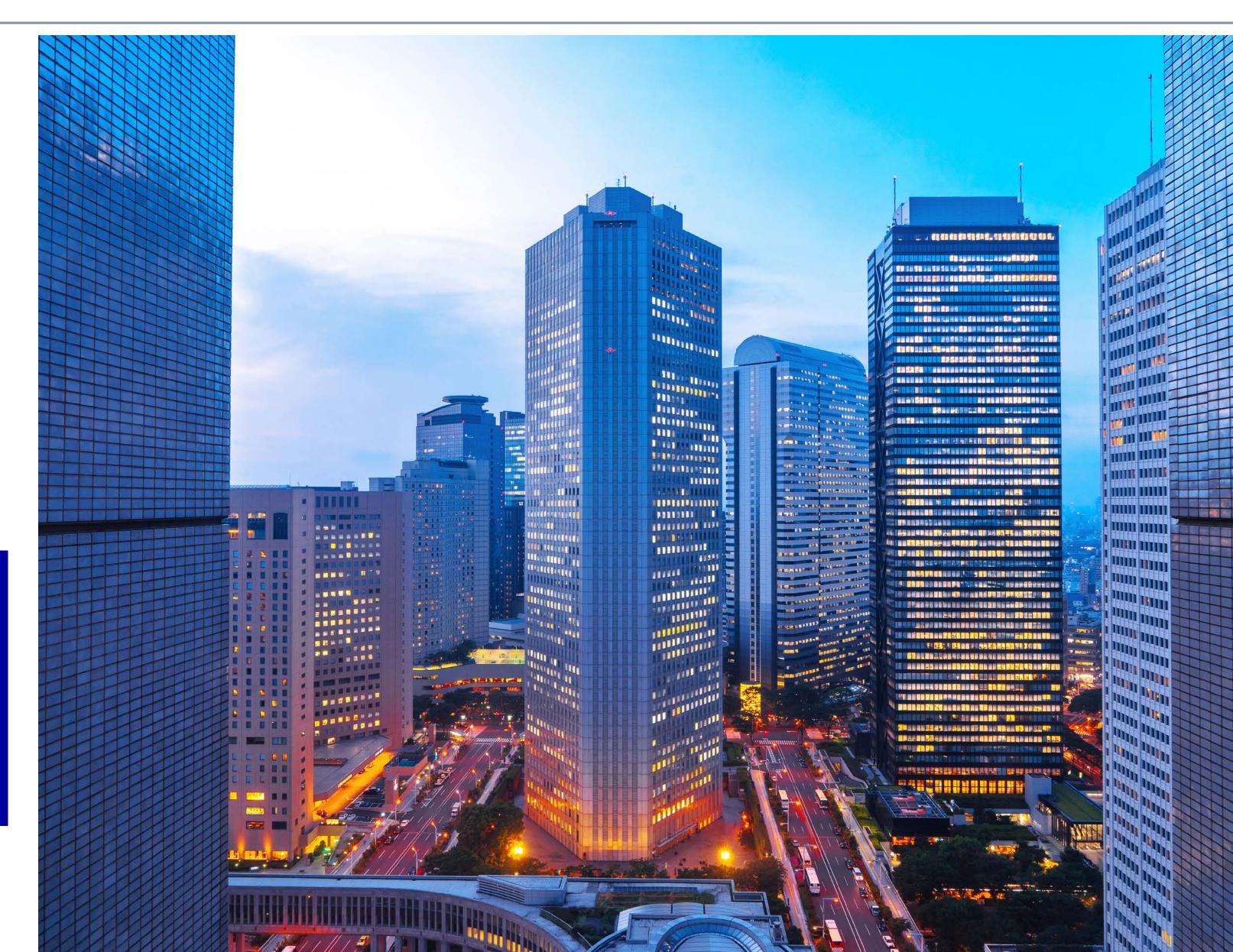


### Increase operational efficiency

Organizations must continually find ways to rethink and optimize their operations. The shift to remote work caused significant disruption and losses for companies that relied on manual processes.

Dynamic case management allows your organization to eliminate paper and stop wasting time searching for case information in multiple silos. Greater agility, speed and accuracy translate into operational efficiency and reduced costs.





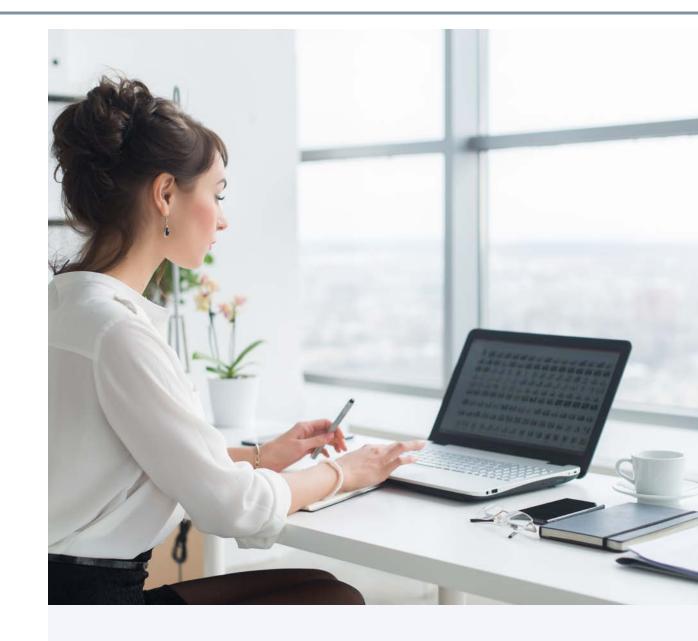
### Conclusion

Unified, efficient case management is critical to staying competitive in today's digital world. The next wave of productivity gains will come from empowering employees addressing ad hoc, collaborative interactions between people, processes and content.

Dynamic case management gives organizations a faster, simpler way to bring consistency, accuracy and speed to these types of processes. It enables knowledge workers to make data-driven decisions and deliver optimal customer experiences.

Whether you need a SaaS application with pre-configured case-based process templates for quick time to value or a solution that supports complex requirements and stringent compliance needs, dynamic case management can help your organization digitally transform through automation.

To learn more, visit opentext.com/process.



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