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 future-ready, 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Cloud-based automation applications streamline processes around customer and employee needs, without being held back by outdated infrastructure.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 ever-changing, 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.
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 dynamic case management capabilities

Dynamic case management leverages several human- and 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 AI

**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.

76% of executives agree that organizations need to dramatically re-engineer the experiences that bring people and technology together in a more human-centric manner.
Four types of dynamic case management

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

2. Service Requests
   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

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

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

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.
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.

- **Improving decision-making**
  Consolidate relevant case-related information from all sources to provide a complete, context-rich picture for assessment.

- **Streamlining collaboration and sharing**
  Enable internal and external stakeholders to share information and opinions securely in a single workspace.

- **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.

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.

78% of customers expect to resolve complex issues by speaking to one person.
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.

Over 70% of organizations still depend on paper-based process.
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.