Agenda

- From routine work to knowledge work
- Case management (CM) and business process management (BPM): what’s the difference?
- How CM and BPM work together
Work: Taylor vs. Drucker

- Scientific management
- Standardize processes to increase efficiency

- Management by objectives
- Participants choose actions to meet goals
Routine Work

- Routine work can be analyzed and a common pattern derived...it can be automated by traditional process automation means.

Mastering The Unpredictable
Knowledge Work

Knowledge work...does not have the level of repeatability found in routine work. When it comes to work automation, any advantage gained from similarities is overwhelmed by the additional costs of having to accommodate the differences.

*Mastering The Unpredictable*
BPM Defined (Gartner)

- Optimizing the performance of end-to-end business processes
- Making the business process explicit and visible to business and IT through modeling, monitoring and optimization
- Keeping the business process model in sync with process execution
CM Defined (Forrester)

- Collaborative, dynamic, and information-intensive process
- Requires incremental and progressive responses from the case handler to determine actions to meet goal
Proposal for CM Standard

- Case involves:
  - A subject
  - A desired result
  - Human-determined actions performed relative to subject to achieve result
  - Rules for guidance, constraints and support

- Case file tracks history of case, including documents and records
# BPM Versus CM

<table>
<thead>
<tr>
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<th>BPM</th>
<th>CM</th>
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<tbody>
<tr>
<td>Repeatability of process instances</td>
<td>Highly repeatable</td>
<td>Unpredictable</td>
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<tr>
<td>Focus of process</td>
<td>Transactions</td>
<td>Knowledge</td>
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<td>Goal of system</td>
<td>Efficiency: replace human steps where possible</td>
<td>Problem resolution: assist /support case worker</td>
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<td>Example</td>
<td>Straight through processing of financial transactions</td>
<td>Manage chronic patient care</td>
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Few processes are completely structured or completely dynamic:

- Structured process may spawn collaborative case for exception handling
- Dynamic case may invoke structured process fragments for standard procedures
Structured Process
Step Spawns Exception Handling Case
Case
Case Invokes Structured Process Fragments
Benefits of CM

- Control/visibility over previously manual processes
- Complete view of content and actions
  - Allows tracking end-to-end process
  - All information available in one place to respond to customer inquiries
- Allows easy reassignment of subtasks