



Case management 2.0:

Transforming customer service

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Stop repetition in the contact center

Chances are you and your customer service agents have heard this phrase before: “But I already gave you my account number.” And as a customer yourself, you’ve probably uttered it once or twice. Repetition is a major friction point in the contact center. In fact, it’s the number one frustration point for both customers and employees.¹

When asked what frustrates them during typical customer service experiences, customers ranked “having to repeat information” as their number one answer. Likewise, when asked what was the main challenge their customer service departments face, business leaders and agents cited, “having to ask customers to repeat themselves.”

But repetition is just a symptom of a much larger service problem.

**What is the larger service problem?
Disconnected systems, channels, and work create inefficient service processes – breaking down customer and employee journeys.**

¹[Resolution Revolution, Pega, 2021, pages 6 and 8](#)

Improve process workflows with case management

Customer service is driven by a moment of need. Whether that's because customers have encountered an issue with a product or service, have a complaint, or need to update their information, they are always looking for the same thing: quick, convenient ways to resolve their problems. And ideally in the service channel they prefer, such as phone, email, or SMS. Sometimes customer inquiries are simple and can be resolved on the spot, such as providing the balance on a bill. Other times, inquiries are complex and require multiple steps and activities to resolve. To manage these more complex inquiries, businesses have specific processes that help resolve customer issues. The sum of multiple tasks and activities required to deliver a service resolution is called **case management**.

Common forms of software-based case management automate assigning work – that is the flow of work from one person to the next. They don't necessarily automate the work itself. While these solutions are good for assigning and routing work, they are essentially just ticketing. They still require agents to know what to do next and to perform repetitive, manual tasks often involving multiple systems and departments – leading to longer handle times and frustrating experiences for all.



Case management 1.0 is one-dimensional and has several shortcomings:

1. It doesn't orchestrate work across systems and channels.
2. It lacks automation and execution, leading to manual work and longer resolutions.
3. It doesn't intelligently guide agents or bots to make decisions or get work done more efficiently.
4. It leads to lengthy development backlogs of change requests that require extensive IT resources and increased costs.

Unfortunately, this form of case management is still the norm in many contact centers today.


In fact, contact centers using basic case management are feeling increased strain with higher inquiry volumes, disconnected channels, and increased customer expectations. They're looking for ways to provide faster resolutions and contain call volume by offering alternative digital routes and self-service options.

The challenges of a channel-led customer service architecture

Basic case management doesn't solve the number one problem that's holding contact centers back – the disconnected channels, systems, and processes they rely on to resolve issues. To compound matters, customers want quick and easy resolutions on the channel of their choice, leaving businesses compelled to offer service on a greater number of channels – even when it means having to create disconnected processes.

68% of organizations now claim to provide omni-channel service. And for 70% of businesses, that means providing service on four or more channels.² With the addition of each channel, organizations implement new processes and risk creating process silos that compromise the seamlessness of the customer service journey. These silos lead to common agent frustrations such as having limited historical context of a customer or having to ask the customer to repeat themselves – frustrating everyone involved.

In short, disconnected processes lead to dissatisfied customers and frustrated employees. Customers will walk away after a poor service experience, agents will eventually quit due to their increasing frustrations, and IT teams will struggle to keep up with lists of development change requests across siloed systems and channels.



**77% of customers
will walk away from a
business after a bad
service experience**

²[Resolution Revolution, Pega, 2021, page 3](#)

Welcome to customer service case management 2.0

Luckily, the future of seamless, effective, and faster customer service is here. Leading organizations have already realized the power of building their customer service strategy around the customer journey, rather than focusing on channels. Welcome to the next stage of customer service evolution – offering visibility of the entire case across all channels, as well as the ability to seamlessly automate and execute the actual work (both human- and machine-based). Welcome to case management 2.0.

This outcome-driven, customer-centric, and channel-less approach drives faster resolution, cuts across silos, and serves as the multidimensional foundation for simplifying customer and employee journeys. Additionally, customer service case management 2.0 is infused with best practices and is quick to deploy thanks to prebuilt, industry-specific case types and data models.



From channel-led to channel-less service architecture

Unlike channel-led case management, a channel-less approach allows businesses to build from the center out – focusing on the customer journey centrally, rather than building processes for each individual channel. By centralizing around customer outcomes, businesses can build case rules and logic in one central hub and then activate it in each channel they support to create a consistent experience across every interaction. This means that regardless of the channel a customer uses, they receive the same quality service.



Typical CS desktop
Focus: Ticketing
(Assigning the work)




Pega Case Management
Focus: Outcomes
(The work itself)

The multidimensional approach to case management


Ensuring consistency across channels is just part of the puzzle. Geographies, business units, departments, or teams can operate differently for certain channels or segments. Despite all these variations, there are often common elements across the business. By factoring in the many dimensions of an organization, businesses can reuse common service process and logic, leaving configuration for variations and unique scenarios.

Case management 2.0, or **multidimensional case management**, is an approach to orchestrating end-to-end service processes in one central hub. It enables businesses to achieve faster outcomes across all channels, including self-service and assisted service, as well as proactive and preemptive service.

Multidimensional customer service case management blends artificial intelligence and process automation to empower contact centers to make decisions and get work done efficiently. It manages the work from the moment an inquiry is initiated through to resolution – guiding each step and stage of the relevant customer journey as well as carrying the full context of the customer’s need along the way.



Why is multidimensional case management more effective?

- 1 By automating the work itself, multidimensional case management cuts out mundane tasks and allows staff to focus on higher value activities.
 - 2 In addition to saving time, removing these manual tasks helps reduce costs and risk, and improves accuracy across the business.
 - 3 With multidimensional case management, businesses can optimize across all channels in a timely, scalable fashion.
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Simplify service with multidimensional case management – in every case

Multidimensional case management helps to:

- **Clear the way:** Multidimensional case management doesn't just assign work – it gets work done with intelligent automation. It clears the way for agents by eliminating repetitive, manual processes, while also removing obstacles from a customer's path – allowing for more autonomy and self-service.
- **Improve visibility:** With its ability to focus on individual customer journeys, this redefined case management enables businesses to activate, track, and audit service cases across any and every touchpoint – be it an agent desktop, mobile application, self-service, or interactive voice response.
- **Reduce costs:** Multidimensional case management pulls relevant customer background information from across all service systems, including historical background, product, or service information, making it easier for agents to understand the full picture without toggling back and forth. This boosts efficiency and reduces the cost to serve.
- **Contain more inquiries:** Rather than simply automating the flow of work, multidimensional case management makes every channel your best channel and every agent your best agent – just by automating the work itself. This helps contain more inquiries and increase first contact resolution. Customers get the same quality resolution across digital channels and through self-service, leaving fewer inquiries that require an agent's touch – once again reducing cost and letting agents focus on delivering an excellent customer experience.
- **Increase system value:** One of the greatest benefits of multidimensional case management is that it helps drive value to existing systems. All the benefits above are possible without ripping and replacing your legacy desktop tools.



It's time to upgrade your customer service

Customer and employee demands of service will continue to evolve. But the future of service is all about simplicity. Faster resolutions, personalized experiences, and minimal effort from customers and employees are driving the future of the contact center. Businesses need more from their customer service ecosystems – they need the ability to design once and deploy across all service channels. They need a way to account for all dimensions of their business and the unique scenarios within each service process. This requires rethinking how they deploy and use case management. Multidimensional case management starts with the customer journey, allowing businesses to optimize their workflows, automate responses and resolutions, and drive down costs. Multidimensional case management blends artificial intelligence and process automation to empower contact centers to make decisions and get work done efficiently, simplifying service for agents and customers.

Power your multidimensional case management with Pega

To enable the kind of customer journeys that lead to better business outcomes, Pega's multidimensional customer service case management blends centralized artificial intelligence, robotic process automation, and low-code software development – all to empower contact centers to make servicing decisions and get the work done quickly and effectively. Pega's customer service case management is built on our Center-out™ business architecture that puts the customer journey at the heart of all service processes.

Pega Microjourneys® – the lifecycle of work necessary to deliver a specific, meaningful outcome – allow your organization to build a single journey at a time, quickly automating the most frequent journeys for your agents. Better yet, **Pega Customer Service™** contains dozens of predefined Microjourneys out of the box. From address changes to transaction disputes to scheduling activities, these microjourney case types drive the workflows that power multidimensional case management. And that means better outcomes, fast.



About Pegasystems

Pega delivers innovative software that crushes business complexity. From maximizing customer lifetime value to streamlining service to boosting efficiency, we help the world's leading brands solve problems fast and transform for tomorrow. Pega clients make better decisions and get work done with real-time AI and intelligent automation. And, since 1983, we've built our scalable architecture and low-code platform to stay ahead of rapid change. Our solutions save people time, so our clients' employees and customers can get back to what matters most.

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