



9 best practices of case management

If you're new to case management, you probably have a lot of questions. Exactly what is a case? How is it different from workflow or business process software? We have the answers to those questions – and more.

How does case management get work done?

Case management is about getting business work done. In this context, work means the tasks and activities people perform every day at organizations large and small. It can be releasing a new product, setting up a new customer account, or helping a customer with a request. It's dynamic, driven by new situations, stimulated by new opportunities, and initiated by smart people who invent better ways to accomplish it all.

Ultimately, case management is a software-based approach to managing, improving, and automating work. It allows business people to collaborate in real time with information technologists, which provides several benefits:

- Business leaders gain more visibility into their operations, giving them the insights they need to adapt, increase productivity, and respond to distress, market changes, and scalability.
- Technologists and developers collaborate directly with business experts to deliver applications that enable their businesses to meet changing market demands.
- Customers and employees are better engaged and more empowered by systems that perform the heavy lifting without boxing them into rigid processes that don't meet their needs.
- The enterprise can quickly scale through the reuse of technology assets and best practices.

The journey is well worth the time and effort. Case management truly is a better way to get work done.

How does case management utilize intelligence and agility?

Customers are demanding that service be seamless and easy. When they don't get the service they want or need, they'll broadcast their opinions on social media. And as technologies create new ways to communicate and get work done, customers can bounce between different channels to contact you.

While organizations try to deliver on customer promises, they have important needs to balance too:

- Maintaining business continuity and getting visibility across distributed teams
- Reducing costs and empowering employees by removing manual work
- Responding to customer requests – quickly and efficiently to ensure requests never fall through the cracks
- Pivoting with agility for a rapidly changing world

We've learned a few tricks while working on change management projects. Here are some simple best practices to help ensure the success of your case management projects.

1

Review past work

The best way to understand a case is to look at a piece of work that has already been completed. Completed work shows you the data that needs to be collected, questions that need to be answered, and tasks that need to be performed. Take a look at finished forms, records in legacy systems, and the notes of case workers. Records from previously completed work are your clues to what your case types need to look like.

2

Get the decision makers in the room

Defining a case management application is an exercise in collaboration using visual tools to bring IT and business teams together to define the solution. That's living the Agile dream. However, for this method to work you must assemble all the decision makers in one room during your requirements gathering. That way, questions about how a case should be processed or where a piece of data should live can be answered right then and there. If you don't have decision makers in the room when defining your case management application, you'll be waiting for approvals and your agility will be compromised.

3 Look at work through your customers' eyes



Your case management system must reflect your customers' experience. To ensure that it does, look at work from your customers' perspective. See how they perceive the outcome you're trying to achieve, as well as the results they're trying to achieve. This method is often called taking an outside-in or end-to-end view. In some circles, it's known as listening to the voice of the customer.

By taking an end-to-end, customer-centric perspective, you ensure that you aren't rebuilding silos into the case management application. Instead, you're putting forth the best possible customer experience.

4 Report on your goals

An enterprise-class case management system automatically generates key metrics and reports while orchestrating processes and resolving cases. You should refine these reports during your project so you can see your progress towards achieving your goals. Whether your goal is better throughput or improved customer satisfaction score, report on that. Your case management application should include trending information reports.

5 Start small, think big

Each case management project should deliver meaningful results quickly. Limit your scope, start small, and tie your actions and builds to the specific goals of your project. Each project implementation should reflect the context of the broader program or higher-level program initiative.

Take advantage of the power of case management by building and leveraging reuse. Perhaps the case types, integration points, and business rules you're building could be reused in other parts of your organization for other work types and with other product lines. Or maybe you can reuse rules and services created by other projects. By thinking about the long term and your organization at-large, you can clear the path to scale from project to business transformation.

6 Avoid jargon

Business solutions implemented in software often degrade into IT jargon, which is great for techies, but lost on everyone else. Because case management is business-facing, business-friendly, and business-accessible – it's important to use business language.

Make sure you define your case types with language that your users and your customers can understand. Use real names – such as insurance quote, order fulfillment, and resolution – that are clear and devoid of technical and process jargon.



7

Wrap and renew

Think about how case management can extend your existing systems and how you can leverage the investment and intellectual capital in your existing environment. A quality case management platform enables you to wrap around existing systems and provides case-based constructs without duplicating or disposing of what you already have.

Most legacy systems are called Systems of Record (SORs). These systems transact and record base information, but are too constrained or complex to extend to case-type systems. Case management solutions are designed to help you create new capabilities, known as systems of innovation or systems of differentiation, in conjunction with your existing systems. Focus on opportunities to wrap the legacy systems and renew your business with the capabilities of case management.

8

Think digitally

Digital technology is changing how employees and customers engage with your business. To truly meet them where they are, your case management application must engage with cases via social media and collaboration, feed and learn from big data systems, and operate in the cloud. If you don't incorporate new technologies into your applications, you may find your projects becoming outdated before they even start.

9

Learn by doing

You can't become a case management expert just by reading a book – you have to do the work. Make mistakes. Learn from them. Try again.

To try case management right now, take a piece of work you do every day and break it into case types, stages, and processes. (One product manager sat down with his daughter and diagrammed the life cycle of *The Very Hungry Caterpillar*.) Find opportunities in the world you live in and the work you do and put them into case management metaphors of cases, stages, and milestones. Start thinking like a case management expert – and soon you'll become one.



Conclusion

These nine tips will help you achieve success in all your case management projects. By bringing intelligence and automation together, you can get work done faster and scale your solutions for new market demands no matter what challenges you may face.

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