Orchestrating Actions For Better Outcomes

Like many organisations, defence has two types of work: predictable and unpredictable.

Highly predictable work can be scripted and programmed, but unpredictable work requires quick thinking and constant decision-making. For decades, managing these different types of work has been a difficult and confusing task – generally involving two different management approaches.

Case management brings together the people, information and systems needed to get work done completely and correctly the first time, effectively and on time, every time. It empowers people and systems to respond to events and make faster, better, more accurate decisions and orchestrates the resulting action – working more efficiently while delivering better business outcomes. Let's look at what case management can do for you.

Keeping defence personnel motivated

Efficient, optimised, and responsive services are at the heart of the transformation agenda for defence. Nobody likes ineffective service experiences, driven by dated requirements, cemented in a variety of legacy systems and incoherent system interfaces. Yet these are still common for the defence users and stand in stark contrast to their daily service experience as consumers and customers to industry. Winning the hearts and minds of users and evidencing progress is most visibly achieved by modernised service experiences, that resolve their questions and problems quickly and completely. By making every user interaction an opportunity to demonstrate service excellence, case management drives high levels of user satisfaction, increases motivation, and reduces the processing effort, freeing valuable time for more productive activities. Here's how:

Improving service experience

A case management system orchestrates work and collates all relevant information from the variety of defence information sources. This is then made available at the correct point of any user interaction.

The needs of both the operator and the requestor in any transaction are serviced with context-relevant information feeds to ease the required workflow and deliver a positive user experience.

Additionally, users are guided in their interactions to recommended best actions, derived either from a decision rule set or AI-generated based on previous user interactions.

In a personnel query with an HR expert, they would be serviced with all relevant data from the personnel and payment system, as well as supplementary information relevant to the interaction with the soldier. Suggestions for 'next best actions' guide towards a speedy and positive resolution of the query and offer suggestions for additional value-add interactions at this point of contact.

The same principle is applied to a self-service capability, allowing the soldier to see the relevant information to guide them to a positive resolution of the query, resulting in a positive user experience.

Connect across channels

With the rapid growth of accredited mobile devices, remote access to business functions through the Defence Gateway, and support for remote working, there are plenty of opportunities to empower service personnel wherever they are. However, most current business systems are designed for specific channels, typically a base MODNet UAD user and have disparate user interfaces. Extending the access to new, especially mobile, user communities creates technical and user experience challenges.

Case management is designed to give users the same experience across different channels, creating an intermediate layer between the user and the legacy system and process through a 'Wrap & Renew' approach. By organising disjointed systems and processes into a case, you provide a seamless user experience that guarantees good service no matter how users access the service. The same modernised process can radiate from the Center Out ™ to all communication channels. A user can start a case, such as demanding an item, on a disconnected mobile device and follow up later on a Common User Portal, via email, or even through an AI-powered chat function. The case centralises the communications into one record to ensure continuity of service and successful resolution of the original request.

Adapt to the situation

In many situations, blindly following out of date standardised processes isn't enough. It's frustrating and inefficient for users when the system is not easily adapted to changing requirements. Because so many user interactions require some exercise of judgment, rigid legacy systems and mechanical 'computer says no' organisation's responses do not meet the expectations of the digital-native defence user.

Case management doesn't force your users to follow a set script. Rather, it interprets the situation and intelligently guides flexible policy-compliant decision-making and action by asking and answering questions such as:

- Given the background and conversation, as well as your organization's goals, policies, and procedures, what are the user's options?
- Which actions would most likely produce the best business outcome (based on data on all past transactions) for the user and defence?
- If escalation is required, which option is best for this user?

As the transaction proceeds, the case management system evaluates the situation in real time and changes its recommendations so the user is actively guided to the optimal outcome.

Get work done

Users seeking a solution to their issues want more than just a response; they want a timely, complete resolution. Too often though, they are forced to manage the resolution of issues. They navigate the incoherent process manually across disparate systems, escalating issues, shepherding work and making repeated follow-up calls to ensure that their issue gets resolved.

Case management can help by:

- Allowing users to work efficiently and effectively by automatically pulling and displaying relevant information, such as product and service details. Users see the whole picture without having to switch between disparate applications to complete a task. This intelligent guidance from the case management application reduces the training effort and improves productivity.
- Ensuring that every case reaches resolution and nothing falls between the cracks, no matter how complicated the work becomes. It eliminates the overhead and anxiety of manually tracking work that has been handed off. Users can concentrate on getting the optimum business outcome. Management Information is readily available about the cases across the organisation to deal with rare exceptions.

> Water, water, everywhere, nor any drop to drink
>
> Ancient Mariner's lament.

Improving efficiency

Defence has many case management type challenges: recruitment, onboarding, training and resettlement; health and safety compliance including certifications; operational management of sites, bases and ranges; engineering and logistic support; veteran injury and medal claims; incident management and emergency response. Efficiently resolving them requires empowered users who can assess the problem quickly, access the right information and navigate the process easily. They must collaborate across multiple functions, teams, and geographies, all while following common policies and procedures.

Case management brings together all the people and information needed to get work done and deliver optimum business outcomes. With case management, jobs are done faster and right the first time.

Additionally, it captures the essence of management guru Peter Drucker's concept of "management by objective," which states that people are more inventive and engaged when they work together to reach well-defined goals. According to Drucker, too many rigidly defined workflows and rules smother an organisation's ability to innovate. Instead, the organisation should give workers the information and the people they need to get the job done, so they can concentrate more on higher-value work.

Give just enough information

"Water, water, everywhere, nor any drop to drink" was the Ancient Mariner's lament. You too may feel thirsty – for useful, actionable information in a sea of data. But you have to work hard to find what you need and avoid distractions.

Case management applications radically improve worker efficiency by automatically fetching and presenting the information users need at particular process points. Case management puts all the information – about assets, staff or even ISTAR derived mission data – in one place and organises it for rapid review. Workers no longer have to consult multiple computer screens or rule books. The history of the case is immediately visible.

Because case management is sensitive to the context of the work being done, only the information relevant to the job at hand is displayed. Simpler screens are easier to read and less likely to create distractions and confusion.

Set priorities

A case management system optimises team productivity by assigning the highest-priority work to the right people at the right time. Typically, work rosters made by traditional systems are delivered to teams in daily batches. Savvy workers cherry-pick easy items that will improve their metrics, leaving harder items to collect dust. Case management systems intelligently route priority tasks to the staff who have the specific skills, ensuring that they're continuously engaged with the correct prioritisation of work.

These systems also derive dynamic priorities, and work-queues are constantly updated as inputs change and target dates mature. Our intelligent work routing and automatic case escalation ensures that the highest priority work is actioned accordingly by the best placed staff.

Collaborate

According to Gartner, "The general market for social software and collaboration in the workplace has fractured into many separate collaboration capabilities that are often bundled into other products."

Informal use of collaboration tools can be problematic as it bypasses enterprise security, control, and auditing of managed business processes. And when collaboration tools are disconnected from the work you're trying to manage, you can't manage risk or trust that the work is done.

As a result, the firm estimates that by 2023, "nearly 60% of enterprise application software providers alone will have included some form of social software and collaboration functionalities in their software product portfolios."

This is exactly where case management comes in. It solves this problem by incorporating social collaboration into the case system itself. Users have tools to find and chat with colleagues who can answer their questions, advance or resolve a case directly, and even incorporate MoD conversations from external social media networks, where relevant. Because this activity occurs inside the case management application, these discussions become part of the case history. Everything is in one place for later review or audit.

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Automate work

A case management system goes beyond optimising workflow (the management of the receipt, routing, and reporting on work) to automate the response and resolution of the work itself. Automation can drive tremendous productivity gains by allowing the system to handle decisions that don't require human judgment. Automation achieved through the application of policy (business rules) can make decisions based on the situation and its context. It can make simple decisions like approving a demand based on the order quantity, the user's authority, and previously identified behaviour. This offers an opportunity for creative human-machine teaming to release staff for value-adding tasks.

Gaining operational visibility and control

You can't improve what you can't see. Undocumented manual processes run in the dark, which makes it hard to measure and manage both individual and team performance. With undocumented manual processes, bottlenecks and inefficiencies can fester until users complain or the system fails to deliver the desired outcome. If you don't have visibility into the work, it's impossible to be proactive.

Case management gives you real-time views of work, as well as insight into trends and emerging problems, so you can take immediate action. The key to hitting service-level agreements (SLAs) is keeping an eye on milestones. A missed or risky milestone means that the time must be made up later through reprioritising or temporarily assigning more resources. Early warning actions, for example system driven prompts and pushes across the correct channels act as an easy and swift action which are critical to meeting SLAs and mission objectives

Establish guardrails

If case management gives people leeway to exercise their judgment, how can you be confident that they'll do the right thing? Without a doubt, policies and regulations must be followed. These exist for good reasons and must be applied consistently.

Case management uses rules to automatically constrain options and drive outcomes. These rules are a representation of your policies, statutory and legal obligations. The value of this capability has grown with the increasing reach and complexity of regulations.

Audit

Every action in a case management system – automated or human – is recorded for audit. You can review everything that's happened in a case and find out who did what and when. Documentation, logs, and data can be produced and tailored to meet compliance requests and regulations.

A case management system also keeps an audit trail of system changes so that all changes in business rules are fully transparent. The operational and system change history are kept together – you can even replay actions from systems that have been updated in the past. Compliance officers can review actions and results from old system configurations without needing to rebuild or restore the old systems.

Changing at the pace of business demands

Business history is littered with cautionary tales of companies that lost customer focus as they grew, and firms that couldn't keep pace with nimbler competitors. Were these companies blindsided by change? Some were; others knew what they had to do but couldn't pivot. Similarly, defence through the ages has suffered from an ability to rapidly change and respond to changing requirements of warfare.

From operational tweaks to profound enterprise transformations, case management provides excellent change management capability. Case management is outcome-oriented, keeping business goals front and centre throughout the initiative. Equally important, the technology involves and empowers the people closest to the business to change the way the business works.

Align business and IT

The success of your case management project depends on effective collaboration across this digital divide among commanders, subject-matter experts, and information technology professionals. If you don't include empowered business representatives and subject-matter experts in your case system design plan, your initiative will fail.

The good news is that case management systems inherently facilitate the necessary collaboration. And case management vendors provide methodologies, such as design-thinking and agile to ensure that the right people are involved throughout the process.

Model work visually

It's much easier to collaborate when everyone is working from the same playbook. Case management design tools capture business requirements in a way that both business and IT can easily understand. It visually models all aspects of the system, including high-level process case flow, detailed processes, the appearance of user screens, user personas and data access.

At any time, you can demonstrate and verify a case system, even in skeletal form, so that everyone can see that it accurately models the work you want to be done.

Case management's visually modelled WYSIWYG (what you see is what you get) approach eliminates the misunderstandings that plague teams who construct applications with traditional, especially waterfall, methods. These traditional methods require business analysts to document requirements in painstaking detail; IT analysts to translate the requirements into IT designs; and programmers to implement the designs into finished applications. Too often, however, the results don't match expectations. The entire process can take so long that the system is obsolete before it's even delivered.

Although it's possible to build a case management system by using traditional waterfall development methods, in which all requirements are defined before any functional systems are delivered, most case management systems are built with Agile development methods, in which systems are delivered in a phased approach. Each phase (called a sprint) introduces additional value-adding functionality and builds on what came before. An Agile approach not only delivers valuable functionality to the business faster, but also enables participants to review and refine requirements throughout the project.

Leverage business rules

Business rules are policies that govern how work gets done. Through these rules, authorised business users can change the way a case management system works without running change cycles with the technical team. This procedure radically reduces the time it takes to update business policy in a fast-changing environment, as this example illustrates:

- A business rule states that all demands of a value greater than £10,000 must be reviewed by a Quartermaster. It turns out, this rule generates many more reviews than necessary – a more appropriate value would be £20,000. With case management, an authorised business user is empowered to make that change directly – no programming required.

Design by doing

For many kinds of work, it's impossible to predict every situation. Staff may encounter circumstances that you didn't account for in your original case definitions. That's okay. Case management frees workers to perform ad hoc work as long as it complies with the policies that govern the work. Design by doing refers to case management's ability to define new case types based on ad hoc work that was actually done. These new case types can then be used by many people to do that kind of work in the future. Design by doing, like any other type of change management, requires thoughtful governance. Just because operational workers can change the way that work is done for the team doesn't mean that they should. Use design by doing to capture great ideas that feed into your structured change management discipline.

Repeat and scale

Standardisation and economies of scale drive cost reduction and efficiency gains. It's also a key principle in simplifying and improving user experience, from always-on global service to reducing costs by centralising functions, such as:

- Offering global, around-the-clock service experiences
- Introducing global self-service
- Reducing operational costs and head count by centralising functions

However, almost every process improvement and simplification initiative present a conundrum. To get more consistent user experiences and more efficient processes, you need to standardise policies and practices across defence, channels, and global deployments. But, a one-size-fits-all approach is impossible to achieve as different TLB's, channels, and regions have distinct needs and legitimate reasons to resist standardisation.

Railroading them won't work. What can you do?

Large organisation use case management to solve this problem with a layered business architecture that establishes common policies and procedures that apply everywhere. Then, these organisations can customise these common policies and procedures by specifying how particular groups' requirements depart from the standard, but only where a genuine business reason for divergence has been established. These departures from the standard (specialisations) can themselves be layered. For example, defence should embed mandated GDS-compliant User Interface standards and Cyber tradecraft at the enterprise layer, deliver a centralised application based on these standards, but allow the TLB's process variations to reflect their specific requirements, or respond to the needs of the bandwidth-disadvantaged users with disconnected mobile capability.

The efficiencies produced by this layered approach can be enormous.

Imagine a joint solution for the global demand of common items. Whilst building on a common process, the multi-layered architecture approach allows for specific single service exceptions, for example to reflect the different command and approval structures of the services or the need for data from different legacy systems to facilitate the process. Additionally, another layer caters for the bandwidth challenges of the deployed user and offers a simplified user experience and disconnected functionality.

Rapid transformation starts with case management

Case management provides that single golden thread or fabric across both the enterprise and operational space enabling you to be ready for whatever is next, helping to keep the UK safe in an ever-changing world – new policies and regulations, changing organisational structures, new requirements of global deployments, reducing costs significantly and always taking care of your personnel and users.

To see it in action, learn how the US Marine Corps or the US Airforce use case management uses case management to achieve end-to-end process consistency in their digital transformation initiatives.

MOD has a similar opportunity to benefit from this capability to bring people, information and systems together in a well orchestrated process. Pega's MOD account team is ready to support you too in your business and operational challenges, contact us to start the discussion today.

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