IBM Software
Advanced Case Management

A smarter way to manage information in a more complex world.

Using advanced case management solutions from IBM

Contents

Executive summary

How much would productivity increase and costs decrease if you could automate routine claims and focus on efficiently handling exceptions?

What if you could improve customer service, cross-selling and up-selling with a single view of all of a customer's transactions—from across different locations and departments?

How much time and money would you save if you were able to audit only those parties that actually needed to be audited?

Advanced case management can make all of the above scenarios—and many more—a reality. It's a new and better way of handling cases, whether your cases are contracts, lawsuits, incidents, social cases or applications.

In this executive brief, you'll read about case management and how its traditional approach is no longer meeting the needs of organizations faced with today's challenges. It will also explain the concept of advanced case management and address the IBM strategy for using it to optimize case outcomes.

Acknowledging case management as part of your organization

Whether you're processing claims, loans, contracts, audits or benefits or you're managing complex projects, some form of case management is present in processes across nearly every organization. However, different organizations refer to these processes in different ways: claims management, member enrollment, contract management, customer dispute resolution, loan origination and review, patient or customer onboarding, social service administration, project management, fraud investigation and more.

Organizations that process cases collect a tremendous amount of information over a case's life span. All of this content needs to be organized and made accessible, so a knowledge worker or case handler can quickly determine the best resolution for the case, as well as for future cases. To best use the information, knowledge workers need appropriate tools and real-time access to expertise, so they can make quick—but, more importantly, right—decisions. As a result, organizations are increasingly looking to adopt formal case-oriented approaches and solutions to resolve cases and solve business problems.

Adopting a new approach to meet changing business needs

There are many reasons why now is a good time to evolve your case management processes.

Higher customer expectations

Organizations that want to remain competitive must deliver quality customer service to attract and retain customers. Great customer service increases loyalty and revenue. And properly managing incidents—such as customer complaints or disputes—provides exceptional service to the customer and protects the business should escalations occur.

Knowledge workers must manage paper-based documents— such as letters, faxes and contracts—as well as e-mail, instant messages and other electronic communications to obtain a comprehensive, 360-degree view of a customer's case. As caseloads become increasingly information intensive, organizations should consider a case management approach that helps connect the right people at the right time to enhance service.

Increasing number of exceptions

Automation has reduced repetitive work, so some knowledge workers consistently handle cases that are less structured, are more ad hoc and require more skills and interaction with specialists and subject matter experts (SMEs). Often, the handling process can be visualized only after it is completed, requiring a dynamic way to handle the case while it's still in

process. A flexible and dynamic case management strategy can enable organizations to handle more cases and exceptions, without growing headcounts, by better managing the processes associated with case management.

Rapidly changing regulations

For some organizations, there is an increasing need to manage important case information—and associated processes, decisions and other artifacts—for legal or compliance reasons. Regulations, set forth by government or governing bodies, may demand that both current and archived case information be readily available to auditors or the public. Because information is often contained in multiple formats—including letters, faxes, contracts, e-mails and instant messages—making it available can prove difficult and costly as well as expose companies to risk. Also, this process is often inefficient, time consuming and costly.

To better manage risk and help address compliance, organizations should leverage a case management solution or strategy that automates regulation management processes and handles the entire case life cycle, from opening to archival and records management.

Closing cases faster with better results

To meet the challenges of today's case management organizations, IBM offers a strategy that extends the concepts of case management by adding capabilities designed to help you close cases faster, with better results. The advanced case management strategy from IBM unifies information, processes and people to provide a 360-degree view of the case. It relies on information, processes, advanced analytics, business rules, collaboration and social computing to help drive more successful, optimized case outcomes. Moreover, advanced case management solutions help capture industry best practices in frameworks and templates to empower business users and accelerate return on investment.

The advanced case management strategy and solutions from IBM are designed to help deliver key case management improvements: insight, responsiveness, flexibility, better customer service and regulatory compliance.

Insight

Advanced case management solutions from IBM provide deep insight from all sides of a case, which can provide both micro- and macro-optimization of casework.

At a micro level, advanced case management can help caseworkers prioritize cases and make decisions based on real-time information and key performance indicators (KPIs). The right information is available for case progression and resolution, which, in turn, will enable optimization of case outcomes. For example, by developing insight from the documents associated with a claim, a claims manager could progress the claims that have the highest probability of meeting service delivery KPIs.

At a macro level, advanced case management helps you take advantage of the wealth of information available from multiple sources to make better choices for future cases. It can provide insight across an entire caseload and identify patterns that could affect outcomes across departments. Content analytics may even deliver insight into specific products or services that are frequently the subject of case exceptions. As a result, organizations can improve case outcomes, as well as business performance, by taking proactive measures—such as reallocating work, involving more SMEs, providing better support information and improving training.

Responsiveness

Casework is collaborative and demands a dynamic work pattern, one that requires people to systematically collaborate on a case folder. Advanced case management solutions from IBM support ad hoc collaboration, enabling knowledge workers to connect in real time with SMEs and other people with critical domain expertise. This strategy helps workers resolve cases quickly and efficiently by leveraging enterprise knowledge and experience, while helping control costs and improve decision making.

Advanced case management supports all interactions through a customer-oriented approach. Involving the customer through multichannel interaction points helps ensure a successful outcome, which is why advanced case management

from IBM supports practically all information sources, providing a 360-degree view of the case. This approach captures all necessary information, while improving customer service and optimizing case outcomes.

Flexibility

Advanced case management enables organizations to modify business rules, which can be authored and abstracted to create a powerful mechanism for implementing rule-based criteria in a case. By extracting and managing business rules, you can enable flexible, automated content-based decision making in systems that are subject to complex, variable and evolving rules. As a result, you can improve process efficiency and lower system maintenance costs.

Advanced case management helps you work smarter by enabling business experts to manage and validate decision logic, without help from IT, which will determine the way cases need to be handled. As a result, companies can respond quickly to internal and external changes—such as those in regulations or other driving forces—and facilitate compliance.

Advanced case management in the real world: A success story

Juggling frequently changing regulations, as well as terms and conditions for eligibility, a social benefits administration agency struggled with quickly and consistently delivering benefits to those who qualified. Plus, citizen eligibility information was kept in different offices, making it nearly impossible to properly and accurately determine which individuals were truly eligible.

The benefits administration agency implemented a case management solution from IBM so that it could change its business rules as quickly as the regulations changed. The solution made citizen data available in a single location, helping the agency ensure the delivery of equal and timely services to all eligible citizens.

Applying advanced case management for optimized outcomes

IBM created its advanced case management strategy in response to industries in need of a smarter, more integrated way to handle their growing, increasingly complex caseloads and shrinking resources. Using leading solutions and proven best practices, IBM is equipped to assist organizations with practically any case management scenario, in nearly any domain.

Because software is helping make the planet smarter, organizations have more opportunities to realize their potential. To do so, they need software that is fueled by expertise, built for change and ready for work. IBM can help.

For more information

To learn more about advanced case management, please contact your IBM sales representative or IBM Business Partner, or visit the following Web site:
ibm.com/software/data/advanced-case-management

Join the conversation at: **ibm.com**/blogs/acm