

## **To Succeed with Case Management- You Need Intelligent BPM**

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Today's businesses are scrambling to keep up with the rapid increase in the rate they need to make changes to their operations. Gartner's prescription for success in these volatile times is a phase shift in focus towards Digital Business.

Digital Business is the confluence and synergy of people, things and business for creating new models and value in handling constantly changing business activities. However, not all areas of business are created equal. Some areas of operation require more attention and quicker changes. One of these Digital Business "hotspots" is the field of Case Management.

### **Why Case Management?**

As we enter the age of Digital Business, organizations are changing the way they work. Less serial, "unskilled" processes are being performed by people, as systems take over automated tasks. According to the U.S. Census Bureau's 2015 Current Population Survey, 60 percent of occupations are classified as Non-routine as opposed to 40 percent as Routine, a complete reversal from the status in 1975.

As human work becomes more specialized, experts are required to make knowledge-based decisions in an ad-hoc manner based on moment-to-moment conditions. Increasingly, teams are adopting Case Management techniques which provide better business outcomes for such scenarios. Case Management puts the focus on an entity called a "Case," a logically connected construct which can be brought to a successful conclusion based on a set of goals. Examples include a bank investigating a client, a highway maintenance job or remediation of a stuck order.

In Case Management, it is a Knowledge Worker who handles each case. The Knowledge Worker is an intelligent subject matter expert who can make dynamic decisions based on his judgment and experience. These decisions cannot be predicted beforehand and vary with each case, and thus, the Knowledge Worker requires a system which assists and facilitates his decision-making in the handling of each Case.

### **Why is Case Management "Hot"?**

Case Management, by definition, is the unstructured handling of Cases by Knowledge Workers. Such cases are never the same, and expert, intelligent workers need to make on-the-spot decisions on how to deal with each Case optimally. A Case Management solution is one that provides such workers with the best tools and assistance to successfully achieve their objectives.

In such a dynamic system, the interaction between people, systems, smart devices and environment is critical. If information is missing or faulty, if the knowledge

worker isn't connected with the correct systems and people, or if analytics and Case documents are not available — the chances of success drop dramatically.

## The Three Factors of Case Management Solutions

Case Management solutions should strive to become the hub of improved interaction between human and non-human stakeholders within the realm of the Case. They should be aware of three factors which will determine if the solution is a success:

1. **Flexibility** - A flexible system is one that can be adapted by both its designers and by its end users to achieve constantly improving outcomes. This is of vital importance to Case Management.
2. **Communication** - Communication between all stakeholders (humans, systems and smart devices) is also of utmost importance; otherwise any one of these key bodies can find itself in an information blackout, which will render it to the sidelines.
3. **Guided interactions** - Guided interactions are often overlooked. In such a chaotic environment of change, if there is no direction, each player (person, device or system) can roam erratically, not sure what its goal or job is. An overarching strategy must be employed and built into the system, to give each player the guidance it needs to reach its objective according to the goals of the business as a whole. There needs to be some order in this chaos.

Today, we're seeing more and more organizations realizing that Case Management is a make-or-break factor in the success of the business. They should be searching for Case Management solutions which enable synergy between all the elements of the Digital Business.

## Elements of a Case Management Solution

A Case Management solution provides Knowledge Workers with the following elements to facilitate work:

- Case data and metadata
- Sub-processes, Tasks or Actions that can be applied ad hoc
- Case dashboards and analytics
- Communications with teams on case work
- Documentation related to the Case

An effective Case Management solution surfaces the relevant Case data, and gives the Knowledge Worker the ability to manage the Case smoothly, using the elements described above.

## Why an Intelligent BPM Platform?

According to [Gartner](#), a CMF (Case Management Framework) based on an intelligent business process management software (iBPMS) platform can provide an organization with a solution to maximize the potential of Case Management because iBPMS-based CMFs enable frequent changes to the system.

One of the core reasons an iBPMS is ideally suited for Case Management, is that business process management software is focused on moving processes forward.

There is no static “wait until something happens” attitude. The system is constantly pushing team members toward the next step in achieving their goal. If someone falls behind, they get reminders or notifications. If they’re still not moving forward, the system escalates the issue to their manager, and makes sure that the work gets done promptly.

Additionally, iBPMS enables you to create Case Management solutions that can be modified over time. This is possible due to iBPMS’ architecture and technology, which provide a platform for citizen developers and IT teams to build and change Case Management applications on-the-go.

iBPMS-driven Case Management solutions give your team the best chance of success on the field, powering them forward toward goal after goal. You’ll be well-equipped to optimize business outcomes, which will assist you in outpacing your competition and staying ahead of the market.

## **Author**

Gal Horvitz is the CEO of PNMsoft, a Microsoft Gold Partner and global provider of BPM, Case Management and Work Optimization software. With more than 20 years of experience in the IT industry, Horvitz founded PNMsoft on the principle that IT people could and should be the driving force in any organization’s success if they have the technology to consistently adapt their companies’ business processes to changing market conditions.