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What is Dynamic Case Management?

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Is it just me, or does Case Management seem to be suffering from an identity crisis? It doesn't seem like anyone can properly articulate to me what it is, what it does, and how it can help organizations.

Like any internet savvy consumer, I took to Google and searched for "Case Management Solutions." Well, that wasn't much help as it returned 47 million results (go ahead, try it yourself). Beyond the mass of web pages talking about Case Management, you start seeing a number of industry specific solutions. I quickly saw products for law firms, healthcare, and government entities, all pitching to manage "cases" within those industries. I understand what a "case" means to these industries, but what does it mean to the rest of us? That's where things begin to drop off.

So I took to AIIM.org, the Association for Information and Image Management, a great resource for anything relating to Enterprise Content Management, which is the industry where this Case Management buzzword has been growing. Their definition of Case Management is:

A "case" is any project, transaction, service or response that is "opened" and "closed" over a period of time to achieve resolution of a problem, claim, request, proposal, development or other complex activity. It is likely to involve multiple persons inside and outside the organization, with varying relationships to each other, as well as multiple documents and messages.

Hmm. Good information, but this still is not resonating for me. So begins my quest to attempt to educate the world on what Case Management really is.

The Basics – What Data Does it Manage?

Let's begin with some of the basics. Every organization has at least one primary line-of-business (LOB) application that manages their corporate data. These systems are designed to manage data within their domain. Whether this is an Enterprise Resource Planning (ERP) system, Human Capital Management (HCM) system, or something more specific to an industry, such as a Policy Management tool for insurance, or an Electronic Medical Record system for healthcare, these systems do an incredible job at managing the core data within their domain.

The reality is that each of these different LOB systems have gaps. There is some critical data that, for one reason or another, cannot be stored or managed within these systems, but is still relevant. Hence, the advent of spreadsheets or Microsoft Access databases, to manage the data that doesn't have a proper home. It doesn't stop there. Enter the email pack rat who effectively uses their email folders as a means to hoard this data. Lotus Notes is another good example where developers put together Notes applications to help fill these gaps.

This is really what we're talking about. All of this "other relevant data" that is kept somewhere. Most often, this data is not accessible unless a) you know where you stored it, b) you know where someone else stored it, and c) you have access to it. Going back to the theme of "hoarders", we're all pack rats in some form. We create

A "Yes" answer to any of these questions should be a sign that Dyanmic Case Management can be a benefit to your organization.

Does your organization have a plethora of spreadsheets in use, or other databases attempting to manage the "gaps" of your line of business applications?

Are there problems with sharing spreadsheets and databases?

Do you have a variety of exceptions to your processes that need to be managed and resolved in non-linear ways?

Do you have people-driven processes?

Do you spend an inordinate amount of time looking for data across multiple systems as you're solving your cases?

data, oftentimes duplicating it, and we store it somewhere because we all know, some day we may need it again.

The Challenge – Why Do I Need Case Management?

Here is my first key point relating to Case Management. It is a data management system that is shared by those individuals within the organization to supplement existing LOB applications. Let's retire most of those spreadsheets. Put Access and Notes to rest. And configure the Case Management solution to maintain and share that "other relevant data" that your LOB systems can't.

You may now be saying, "Great, another database." That's what takes me to my next point. You're keeping this data for a reason. Hopefully, you're keeping it for a good business reason, oftentimes to manage some sort of process. That's where the name "Case Management" comes into play.

Individual data elements don't mean much. But put all of the "other relevant data" together, and then define the process surrounding this data and you can put the generic label of "case" around it. Frankly, a "case" can be anything you need to manage. Call it a unit of work. You have an issue, a variety of actions, stuff you need to manage to make sure the job is done properly. This becomes more of a holistic view of Case Management. But now think of things that your LOB applications cannot do. There are thousands of examples, but think of things like complaints from your employees, the steps that need to be followed when vetting out a new vendor, or just documenting and ensuring any incidents or issues are properly resolved.

Is this painting a clearer picture of what Case Management is?

The Solution – 360° Information View + Workflow = Case Management

A good Case Management solution can bring all the data you need to resolve the case into a single user interface. Now, add in all the documents and content along with the data, that are oftentimes integral to your ability to resolve the case.

All of this "information" (aka data, content, and documents) is what the enterprise content management focuses on.

Now, think of all the other things that come into play when you're dealing with your "case." Think of how much time you can save if the data is all in one place instead of logging into multiple systems to look up a few pieces of information, multiple times a day. A good Case Management solution can bring all the data you need to resolve the case into a single user interface. Now, add in all the documents and content, along with that data, that are oftentimes integral to your ability to resolve the case. All of this "information" (aka data, content, and documents) is what the **enterprise content management** community focuses on, and that challenge has created the Case Management tidal wave.

We've dealt with the data, content and documents that make up the "case;" how are we going to automate the approval process to get it to resolution.

In the concept of Case Management, there are "normal transactions" and "exceptions." The way Case Management works is to let workflow handle all the normal transactions, and when an exception is identified in the workflow process, allow Case Management to manage the exception (aka "the case"). The case is automatically created when the exception is identified in the workflow, and the case brings together all the relevant information (system data, content, documents) into a 360° view that your knowledge worker needs to resolve the case in expedited fashion. Case Management documents the steps taken, sets reminders to ensure the case is worked in a timely manner, allows for a platform to share and reassign the case as appropriate, and provides reporting to measure individual performance.

So do you have a case for Case Management?

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