

Dynamic Case Management Framework

EXPERTLY CONNECTING PEOPLE, PROCESS AND DATA

Case management supports complex interactions between people, data and business processes. Combining human tasks with technological workflow, case management solutions address processes such as complaint handling, compliance, service requests, claims and application management.

Since this broad technology solution addresses such a diverse set of use cases, organisations mired in manual processes often struggle to find software that meets their precise needs. Procensol's Dynamic Case Management Framework resolves this challenge by being configurable enough to meet almost any case management requirement. Drawing on experience implementing multiple systems for clients around the world, Procensol's framework enables a unique case management solution for every client.

THE CHALLENGE

Manual Process Management Means Delays and Poor Decisions

Many organisations rely on paper-based or manual processes to handle cases such as complaints or applications, resulting in several issues:

- Backlogs are caused by manual processes, or by data residing in several systems, if the organisation has started to move beyond paper. The resulting delays lead to customer and staff dissatisfaction
- Manual processes make it difficult to collaborate on and resolve a case
- With data held on paper, in spreadsheets or in multiple systems, it is nearly impossible to achieve a unified view, leading to poor decision making
- Lack of shared, accessible data is particularly challenging for field workers

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The single biggest problem in communication is the illusion that it has taken place.¹

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THE SOLUTION

Solution Benefits

Procensol's Dynamic Case Management Framework helps to manage and resolve cases for a wide variety of organisations and use cases.

Customisable framework: rapidly implement any case management process by leveraging inbuilt workflows, business rules, case records and reports, and then configuring them to specific needs

Unified data: all case-related information – including data stored in external systems – is accessible from a single source so that case workers get the complete picture, quickly and easily

Reporting and analytics: real-time dashboards and reports display case milestones, statuses and other data to deliver insights and informed decision-making

Notes, reminders and alerts: automated workflow and ad hoc contributions facilitate greatly improved collaboration between case workers

Work anywhere: work on any device online or offline, making case workers as effective in the field as in the office

Solution Features

Procensol's Dynamic Case Management Framework enables any organisation to create and manage a wide variety of case types efficiently.

Some key features are:

Prebuilt case workflows and rules: based on Procensol's extensive experience in implementing case management solutions, the Framework includes case workflows and rules that can be readily used with or without additional configuration. The ability to create a case, assign tasks, configure system tasks, assess the case, view case information and report is delivered out of the box

Ease of customisation: a data maintenance tool enables configuration of case types, status and priority, custom activities, activity assignment, case order, and names

Collaboration enablers: features such as case notes, reminders and case alerts increase collaboration amongst case workers

Advanced document management: manage and view documents associated with a case with capabilities such as uploading and managing documents, including version control; and configuring document type, sub-type and visibility

User roles and security: configure out-of-the-box security with additional options

¹ George Bernard Shaw