3 steps toward case management success

Case management. The concept is all the rage in the IT industry – extending beyond the courthouse or social services agency. And whether you realize it or not, your organization is already tackling this type of unpredictable work. Work driven by information that requires human decisions. The kind of work that directly affects your customers, constituents, students and employees. This includes everything from the IT help desk to incident tracking to contract management to customer service and more.

A case management solution empowers your organization by providing a complete view of all the data, documents, notes, events and other information surrounding a case, customer, incident or relationship. Effectively managing this information-centric work keeps your customers happy, your employees productive and your organization healthy and profitable.

OnBase®
by Hyland

One platform **Unlimited potential**

Before you dive head–first into a case management approach, consider these three keys to success:

1 Identify opportunities for case management

To get the most benefit from a case management approach, target:

- Areas in your organization that depend heavily on knowledge worker involvement – including things like investigations, service requests and issue resolution
- Work currently managed in scattered spreadsheets, paper files or siloed departmental databases
- Processes and departments that are customer-, employee- and constituent-facing
- Gaps that exist in day-to-day work that major line-of-business applications don't fully support

Once you've identified opportunities for case management, determine where you experience the biggest pain – whether it be cost, time or quality of service – and start there.

2 Evaluate your case management options

When it comes to case management solutions, you have several options. You could have your developers build applications from scratch with custom coding or purchase multiple point solutions specific to one process. Another option is to configure case management business applications on a point-and-click platform.

Keep in mind the IT support and involvement required for each of these initiatives:

- **Build:** Custom-coded applications – while they can be tailored to your exact needs – take longer to create and are more difficult to change with shifting requirements
- **Buy:** Point solutions, while effective for a specific use, can't be easily extended or connected to other areas of your organization
- **Configure:** A point-and-click configuration tool saves development time and costs and allows IT to rapidly respond to needs by quickly creating business applications

By configuring case management applications on one flexible, scalable platform, you realize a lower total cost of ownership while providing IT with one place to manage updates, security and maintenance.

3 Look toward the future

The right case management solution should be useful beyond your immediate needs and the right vendor will become a longtime strategic partner. When choosing a solution, look for one that:

- Easily scales and shifts with changing business needs and extends to other processes, departments and users
- Is delivered by a vendor who has experience with data-driven applications and proven implementations in the case management space
- Provides an intuitive interface with access via email inboxes and line-of-business applications so your users have a complete view of all the information they need to provide customer service, resolve issues, track information and manage relationships

Learn more about what to look for when evaluating a case management solution at **OnBase.com/ForresterCaseManagement »**

OnBase®
by Hyland