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Dynamic Case Management — An Old Idea Catches New Fire

by Craig Le Clair and Connie Moore
for Business Process & Applications Professionals

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by **Craig Le Clair and Connie Moore**
with Ralph Vitti

EXECUTIVE SUMMARY

Interest in case management has climbed higher and higher throughout 2009. Drivers include: 1) an increased need to manage the costs and risks of servicing customer requests — like loans, claims, and benefits; 2) a greater emphasis on automating and tracking inconsistent “incidents” that do not follow a well-defined process; 3) new pressure on government agencies to respond to a higher number of citizen requests; 4) new demands that regulators, auditors, and litigants place on businesses to respond to external regulations; and 5) the increased use of collaboration and social media to support unstructured business processes. Business process management (BPM) and enterprise content management (ECM) suites alone are insufficient for dynamic case management, but the convergence of BPM, ECM, business analytics, and event processing will breathe new life into case management. Lean initiatives to improve business processes will also shine a spotlight on case management. These forces will push document-centric BPM suites toward packaged case management offerings, and this new category of software will emerge as a distinct market by 2013.

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Forrester spoke with five vendor companies and customers, including EMC, Global 360, IBM, Oracle, Pegasystems, and many end users through more than 25 inquiries.

Related Research Documents

[“Lean: The New Business Technology Imperative”](#)
September 29, 2009

[“Enterprise Content Management’s Next Step Forward”](#)
February 29, 2008

[“The Dynamic Business Applications Imperative”](#)
September 24, 2007

WORK EVOLVES TO FIT CASE MANAGEMENT — A TYPE OF DYNAMIC BUSINESS APPLICATION

Case management is either well understood or totally baffling to people, depending on the person's background. If you say "case management" to many business people, they incorrectly think about social workers' case files or attorneys' cases. If you say "case management" to someone who works in a government agency providing and processing information all day, he will most likely understand what you mean. And if you say "case management" to a business process professional who has done a lot of work with document management, document imaging, retention management, and other types of unstructured information, the person will nod in understanding and know exactly what you are talking about.

Forrester defines case management as:

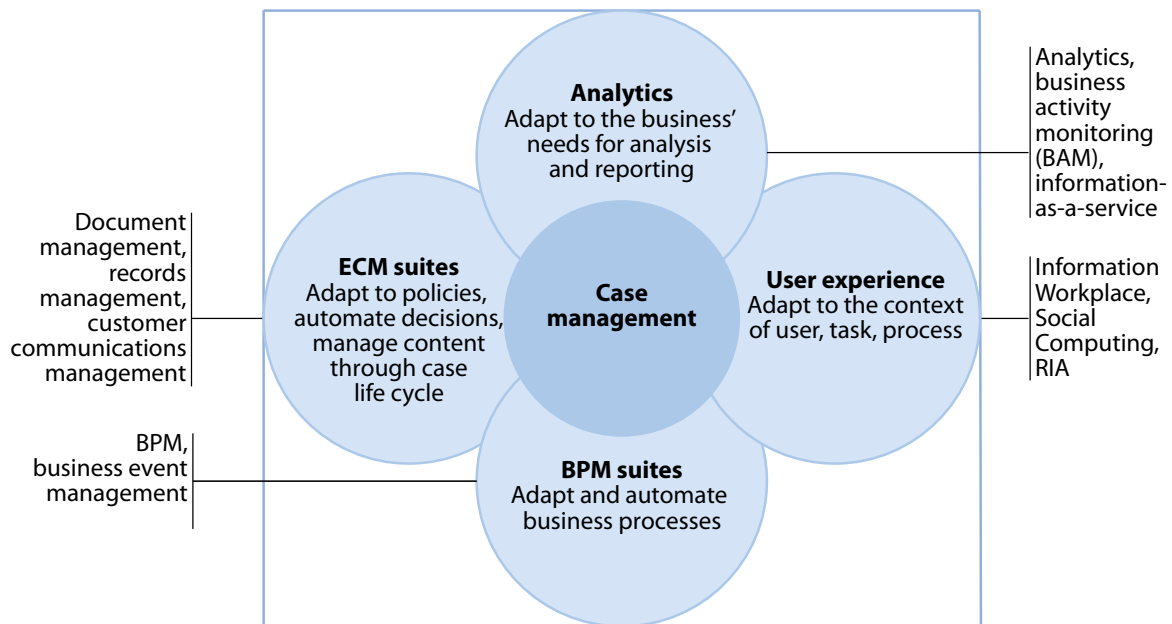
A highly structured, but also collaborative, dynamic, and information-intensive process that is driven by outside events and requires incremental and progressive responses from the business domain handling the case. Examples of case folders include a patient record, a lawsuit, an insurance claim, or a contract, and the case folder would include all the documents, data, collaboration artifacts, policies, rules, analytics, and other information needed to process and manage the case.

The concept behind case management is far from new. Vendors like FileNet, Global 360, IBM, and Pegasystems have been providing case-based solutions for several years, using combinations of workflow, imaging, and document management. But this group and others are taking a new look at case management to reflect today's business process challenges. Today's approach to business processes must support shifts in regulations, customer expectations, and worker demands that require a more ad hoc and collaborative exception management approach. For example, in the oil and gas industry, accidents and incidents can be captured in a case management system. Corrective and preventive actions are assigned and followed up on by the case management system until completion. This includes taking actions that ensure that such events and similar ones will not recur. Case data can be analyzed and used to create and update existing procedures. When implemented this way, case management leverages the core strengths of BPM, ECM, analytics, and modern enhancements to the user experience (see Figure 1).

A New Generation Of People-Driven Processes

As everyone knows, developed countries are manufacturing less as factories get relocated to China and other lower-wage economies. Meanwhile, businesses in the developed world are busy applying Lean Six Sigma and BPM approaches that proved successful in their manufacturing production and supply chain processes to automate work in nonmanufacturing parts of the business. Companies in the services sector have caught onto this idea and are also applying proven methodologies, like Lean and Lean Six Sigma to back-office and front-office processes. As a result of these continuous improvement initiatives, more heads-down, mass-production-style clerical activities that have low value-add (or "waste," in Lean parlance) are being eliminated through automation, continuous improvement, or rethinking job assignments.

Figure 1 Case Management Combines ECM, BPMS, And Analytics With User Experience Advances



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Source: Forrester Research, Inc.

Business processes in the future will tackle smart jobs: encompassing more skilled workers who must accomplish a greater variety of tasks with relatively fewer resources. Instead of work being parceled out to a sequential progression of service workers on an imaginary assembly line (in homage to Henry Ford and mass production), workers in smart jobs will manage a “case” from start to finish. That case may be a loan request, a benefits claim, or a disability claim at the Social Security Administration, but the common thread across this work is that the case worker handles more of the work. This is in sharp contrast to an old and outdated mass-production approach where small pieces of the job are done by passing work “down the line” to a plethora of workers adding little value. This gradual shift in how work gets done paves the way for dynamic case management by moving the focus from the old style workflow to a more exception and event-based activity. Predictable, highly repetitive work will be handled as much as possible through straight-through processing that the worker doesn’t see or touch. As a result, information workers of all types will have:

- **An increased variety of tasks to handle.** The new generation of information workers must collaborate and juggle an ever-increasing set of tasks.¹ As the workforce has shrunk, the sheer amount of information handled by a single worker has increased. At the same time, social networks and tools have made their way into business usage, putting the burden for even more collaboration on workers who are already stressed out and juggling too many unintegrated tasks. Now that automation has chipped away at the mundane, repetitive work, today’s jobs are less-structured, more ad hoc, and require more skills and interaction with other specialists.

These refashioned, partially automated business activities resemble more of a case where the outcome is not known — and where either a process map can only be created after the fact or the prescribed process must be highly dynamic to changes in the work.

- **Ad hoc and less-scripted process flows.** Most successful insurance claims are handled as a straight-through process with limited human intervention. In most document-centric BPM solutions, the claims process map including typical exceptions is predefined. But in when a claim is denied, a case approach involving different roles, tasks, and documents, takes over. A key distinction between dynamic case management and conventional BPM is this required ad hoc element. For many cases, the process can only be visualized after it is completed. This goes far beyond supporting exceptions, because exception processing implies that exceptions are unusual. In smart work processes, exceptions are so much the norm that they aren't "exceptions" any more — they're just unpredictable.
- **Collaboration and social media tools added to their structured work processes.** Information workers have been bombarded with new tools to help them get their jobs done. Gone are the days when portals, collaboration tools, intranets, and even SharePoint were the cutting edge for collaborating with colleagues. Now workers may be expected to blog, tweet, and maintain social networks that reach outside the business. For example, customer service reps at a certain electronics warehouse routinely monitor Twitter to listen to and engage with customers. By its very nature, case work is collaborative and supports a dynamic work pattern that requires people to systematically collaborate — in both a structured and ad hoc manner — on a case folder. Ultimately, case management that incorporates both social/collaboration tools for ad hoc work and BPM, and business rules for structured work, will tackle and improve the full range of work an information worker is expected to handle.

An Emerging Regulatory Environment Will Ask More Questions

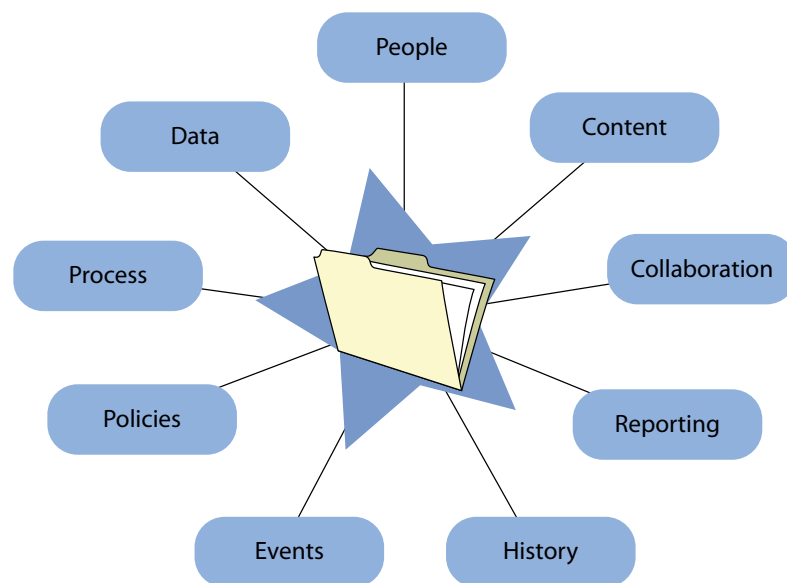
The current economic crisis requires even greater regulatory oversight, which increases pressure on business processes and process technologies and places a sharp focus on transparency.² Reacting to the poor decisions leading up to the credit and market crises, the emphasis going forward will be on process insight, predictive analytics, and control. Providing the right information, at the right time and in the right context — in time for business people to take preventive action — will be the hallmark of the next phase of compliance. Case management is suited to this new regulatory and business risk management environment because it:

- **Documents how and why a decision is made.** An easy way to think of case management is to envision any process or activity that had a folder in the paper world that accumulated more paper over time. But today's case folder contains more than case folders of the past. For example, in addition to electronic versions of the old paper documents, forms, photos, notes of phone conversations, and other memos, today's case file also includes videos, sound clips, chat streams, telephone recordings, graphics, and other new electronic formats (see Figure 2). For example, a large corrections facility uses case management to track 172,000 prisoners and parolees in

33 prison locations with 8,000 prisoner and “folder” moves a day. Now decisions to move a prisoner or to parole a prisoner are fully documented.³ Plus, in addition to all this electronic information, a case contains all the tasks, milestones, discussions, events, behaviors, policies/rules, and process fragments for how each case is resolved.

- **Allows organizations to handle a greater number of seemingly random requests.** Regulations and watchdog activities have never been more pervasive. Authority is being enhanced and decentralized. For example, investigation into the SEC’s Bernard Madoff debacle concluded that field investigators would benefit from fewer management layers and more autonomous inquiry powers.⁴ With this trend, businesses of all sizes will have to respond to more frequent requests of a wider variety, and they may follow increasingly random patterns. Few argue that the next wave of regulation will require more external insight and transparency. Without case management, this new round of compliance will be hard to tackle on a large-scale basis.

Figure 2 Case Management Allows Audit Of The Decision-Making Process



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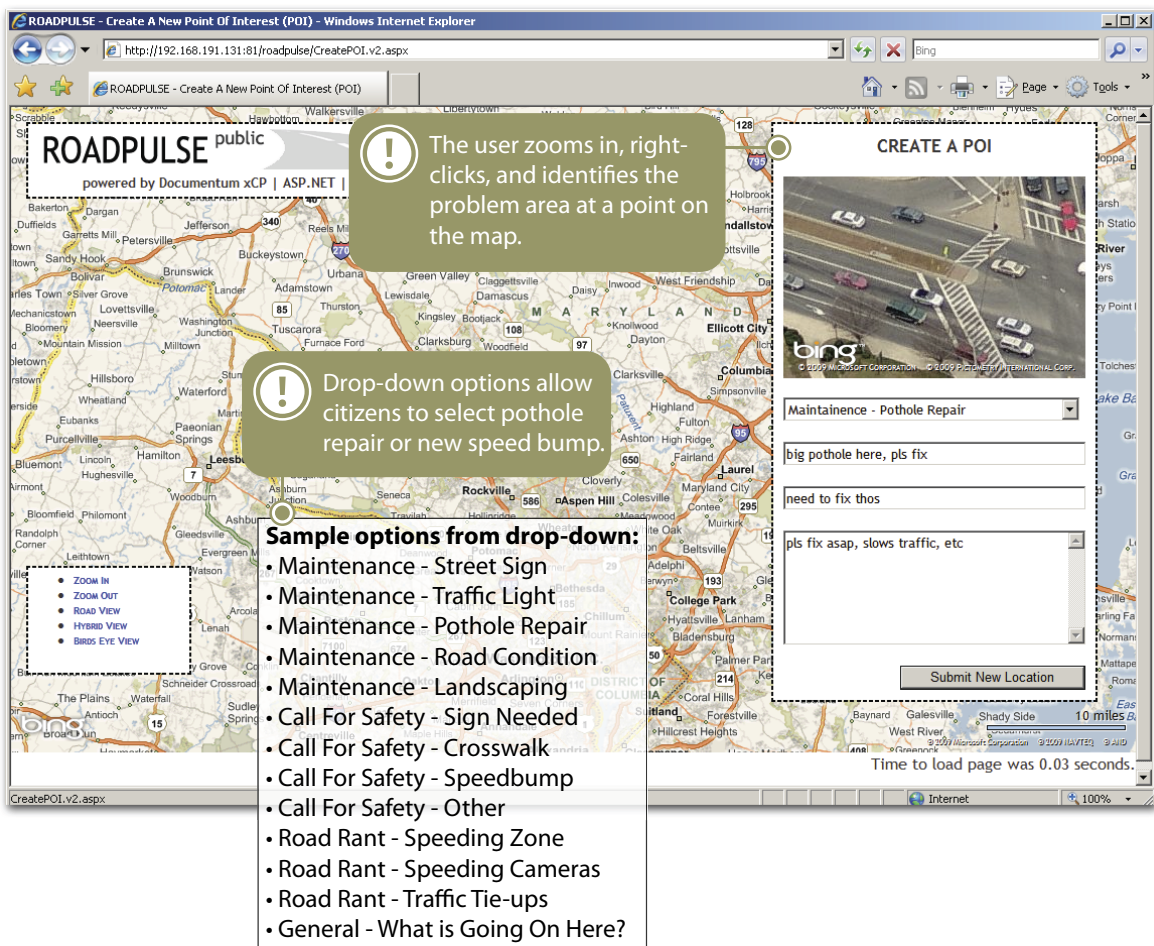
Source: Forrester Research, Inc.

Dynamic Processes Improve The Customer Experience

It’s difficult to change the mindset of business and IT about how processes should execute. Skill sets are limited and in high demand, and resources are constrained due to downsizing. Yet forces continue to push businesses toward new process thinking that is more dynamic, more predictive, with a greater customer focus, and that includes:

- **An increased focus on problem resolution and complaint management.** All businesses make mistakes, but it's how they are handled that will increasingly differentiate companies. Basic service levels have become commoditized, and it's increasingly about the exceptions or problems. Case management software, for example, captures complaints and automatically schedules and prompts concerned departments, reports on complaint details, and fully manages related content. In a public sector example, if an individual feels that she needs a speed bump on her street, she could register the problem on Roadpulse.⁵ The request is then seen by other neighbors who can add their comments and rate the proposal via the community site. Over time the proposed speed bump project becomes active, and it rises to the top. Once triggers are reached, the issue is automatically routed to the local government, which then starts an internal process for funding. The process goes through review, budget, road crew and management, and then completion. All along the way, the public is kept in the loop (see Figure 3).

Figure 3 Case Management Helps Citizens Manage Problems



- **The need for dynamic business apps.** Case management is an example of a dynamic business application that embodies the business process, is built for continuous change, and is designed for people.⁶ Today's process applications that are built on custom code with long deployment and maintenance times are unable to support new business frameworks that must support information-rich and people intensive work patterns. These old approaches do not adapt well to the variable conditions required in case management. Organizations can build or buy apps to automate sales, qualification, and fulfillment processes, and use business rules to let the app itself make decisions and adapt to variable conditions. For example, at Harrah's Entertainment, marketing pros determine the rules for new customer promotions, building on a foundation of accounting and policy rules managed by IT.⁷

THREE TYPES OF CASE MANAGEMENT USE CASES WILL EMERGE

Case management is not just limited to legal, social work, and government cases — case management is for many types of business processes. A case starts with content such as an image, email, e-form, data, or an event from a transaction system, and it alters the presentation and rules based on the case life-cycle stage and context. Case management always involves human judgment; the amount depends on the degree of structure and predefinition for the case type. In all types, the process and associated content evolves to meet the requirements of the case. Case management will emerge to support three primary use cases types over the next three years: investigative, incident management, and service requests (see Figure 4).

Investigative Is Driven By Greater Transparency Needs

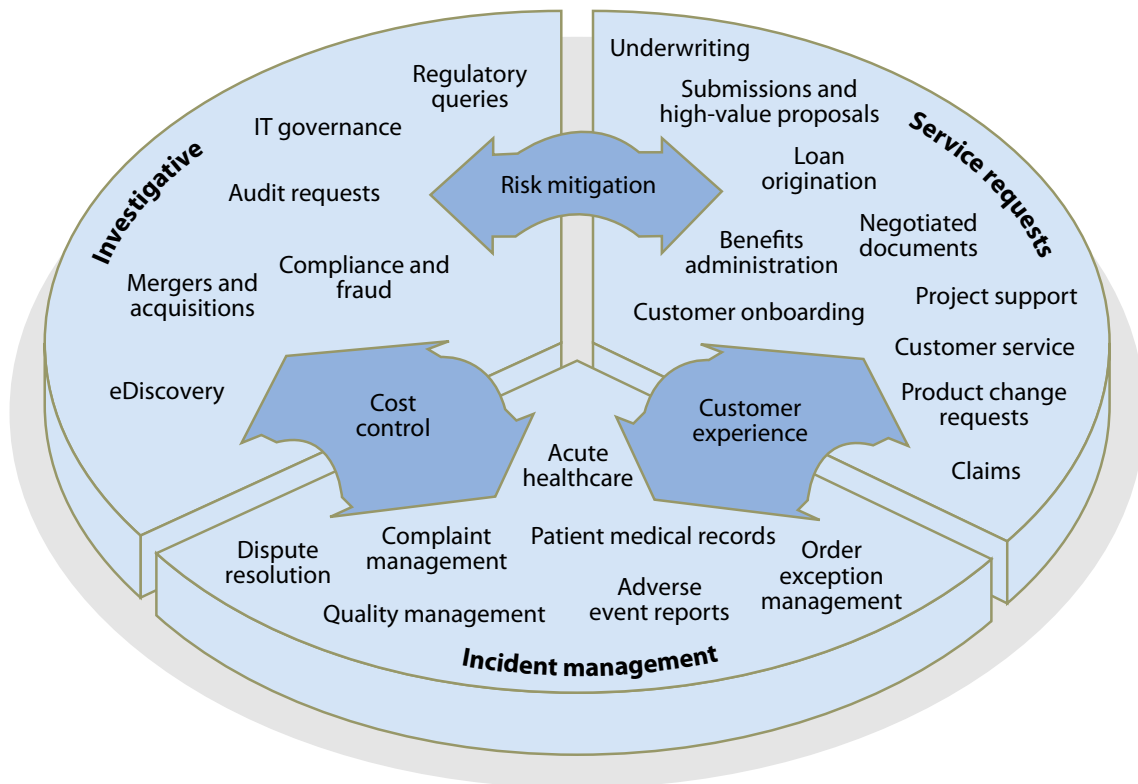
Within these categories, there are hundreds of unique processes. Investigative bodies — both business and government — know that they will receive hundreds of requests a year to provide information to citizens, regulators, board members, and outside auditors. Yet the exact nature and timing of the requests will be unknown. The ad hoc and unstructured aspect of investigations lends itself to case handling, and a wide range of use cases fall into this realm. eDiscovery — while a large and specialized area — is one use case among a variety in this category that are unpredictable but require well thought-out process support. Investigative cases will accelerate over the next three years, particularly in these areas:

- **Audit tracking — driven by stronger internal controls.** Audit tracking case management monitors the process from planning to audit review and gives visibility to the audit committee.⁸ The emerging regulatory environment that focuses on transparency and increased business insight will pressure corporations to provide rapid response to inquiries that provide insight into operations.
- **Fraud — unfortunately — will remain a popular area.** Case management can help prevent and detect fraud. One example is the Investigative Services Information System used by the Georgia Department of Human Resources. The case management system tracks and investigates fraud

by employees and contractors in public assistance and child care. HCL Technologies, a global systems integrator, built the case management application using BizFlow, a BPM solution from HandySoft.⁹ In other areas, case management is used to augment fraud prevention systems by completing the case. Anti-money-laundering systems, for example, trap suspicious transactions, but case management is needed to complete the investigation. Similarly, fraudulent use of credit cards will be identified by a risk management system that will create an event that starts the case management app to resolve the incident.

- **Electronic Freedom of Information Act (eFOIA) — needs careful handling.** Government entities must release sensitive information in a timely manner, with proper approvals to citizens. The eFOIA process contains human checks and balances and has to be simple to execute yet scalable and adaptable to each government entity’s specific requirements. Using customer relationship management (CRM) or enterprise resource planning (ERP) solutions to meet this requirement may be too expensive; building a point application loses coordination, communication, content management, and reporting that case management applications can provide. Instead, using a BPM case management solution integrated with underlying document and records management for tracking original and redacted content can provide visibility and audit control with DoD 5015.2/4 certifications if required.¹⁰

Figure 4 Three Case Management Categories Will Emerge



Incident Management Is Triggered By Events

The event can be the simple submission of a complaint or an unexpected accident. Recent events that recall manufactured products and particularly pending food product identification legislation will drive this category of case management.¹¹ Independent of the incident type, the process that responds must keep track of actions, coordinate people, use rules for escalation, and document the process. Problem tracking and complaint systems are a strong example of incident management, but some that stand out include:

- **Biotechnology regulatory events that can be automated.** For example, a \$15 billion multinational biotechnology company develops human therapeutics and uses case management built on BPM to manage adverse event reports (AERs) and process them compliantly within increasingly stringent FDA 21CFR312.32 and similar worldwide guidelines. Safety in communication (email, fax, and phone) is managed based on keyword rules. Unimportant events are automatically identified and eliminated. Notifications to regulatory submitters include correct electronic submission forms. Location routing numbers are used to categorize, identify, track, and action all items.¹²
- **Homeland security that can benefit us all.** Incident awareness reporting is a key focus for defense agencies. In one particular example, as soon as the analyst detects an incident, the case application first serves to maximize communication. Real-time data streams are supported by instant message communication and creation of an incident-tracking wiki. Tasks — based on predefined rules — are presented and checked off to ensure that proper procedures are followed. The system captures a full reprint and audit trail of the incident (see Figure 5).

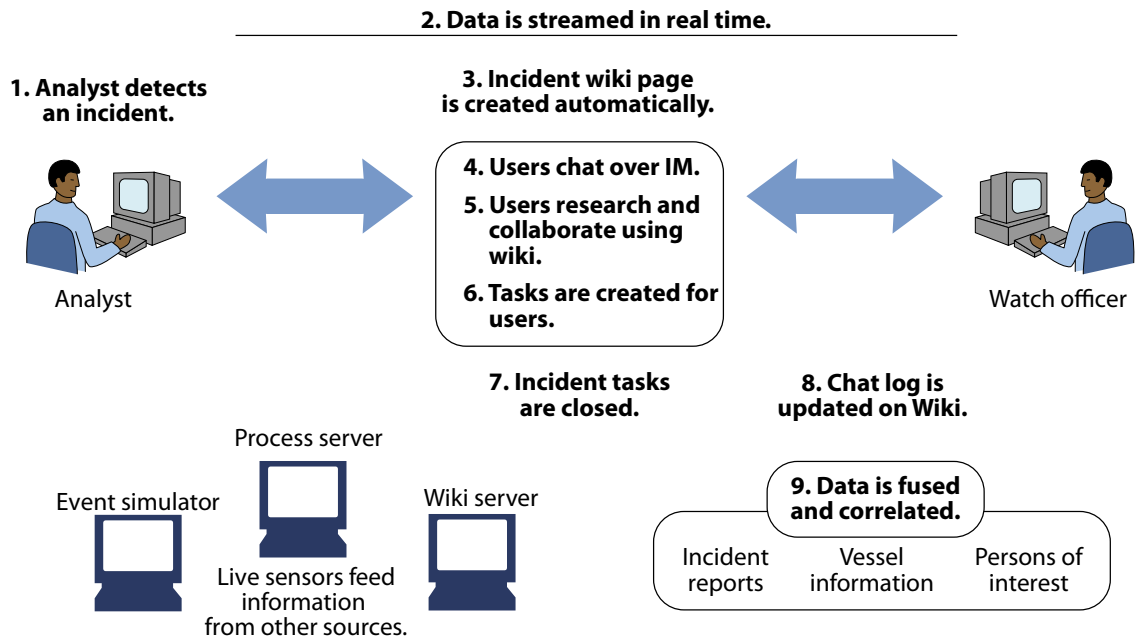
Service Requests Focus On Human Communications

Service request processes extend traditional BPM by revolving around structured processes that can be visually mapped but also allow case-based progressions and variations to be added within the flow of the case. Unlike incident management and investigative cases, these use cases are more predictable. Insurance companies know how many claims they will receive, and banks can forecast the number of loan originations. Most BPM solutions today — and in particular, document-centric BPM — possess a more rigid straight-through process flow with well-defined exceptions that are not ideal for service request processes. Case management can improve communication around a service encounter by:

- **Reducing customer frustration over the phone and Web site.** Customer service representatives (CSRs) for an electronics catalog company struggled to respond to customer inquiries and complaints and to stay on top of new product details. SmartBPM from Pegasystems was used to provide an online, self-service FAQ that provided a more reliable information source. A collaborative framework was used for merchandisers to update product and service information. Context-driven training, used in this example, is a critical need to support greater task diversity of the evolving process worker — and one that case management addresses.

- Taking a multichannel view of support.** Customer experience expectations rise each year as customers want faster responses to requests, more conversational interactions, and more relevant content. Enterprises are under pressure to better manage processes associated with their outbound (whether interactive or print) and inbound customer interactions (whether received online, via the call center, or through an unstructured format such as a form). Channels remain largely disconnected creating inconsistent, expensive, and poor customer experiences. Case management can tap into the broader set of systems, data, and content and serve context-based instructions to improve a service experience.¹³

Figure 5 Government Incident Management



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Source: Forrester Research, Inc.

A LOOK INTO THE FUTURE: ADVANCED CASE MANAGEMENT

Case management will benefit from the convergence of many information management technologies and the maturity of BPM overall. Over the next year, new integrated BPM platforms that draw from human- and document-centric BPM suites (BPMS) that combine best practice with advanced analytics will emerge and target case management use cases (see Figure 6). Within three to five years, a new market for case management— that is separate from ECM, BPM, and analytics, but built on all — will evolve. From a technical perspective, advanced case management includes a portal, mashups, process engine, business rules, event management, ECM, and analytics within a collaborative and social framework to access, implement, coordinate, monitor, and report on an end-to-end business process. In short, it will include:

- **An integrated case management platform.** Advanced case management platforms are built on BPM and ECM, and they also incorporate collaboration with social features. They feature predictive analytics, business activity monitoring, complex event processing and business rules, and they use the power of BPM/SOA to support agile development, rapid deployment, and continuous improvement. Case folder templates or business process frameworks — designed for a domain (e.g., insurance and underwriting) will become a critical provider distinction and may even become the basis for a packaged solution. Ad hoc task capability — to add new tasks and document placeholders — can be defined on the fly (see Figure 7).
- **Analytics, predefined case templates, and KPIs.** Predictive analytics to improve a process and anticipate business changes will be a hallmark for advanced case management with visibility and optimization tools front and center. Dashboards consisting of KPI charts, tables, and alerts will track events and tasks. Supervisors will monitor case workers and teams and create priority and escalation thresholds. Case management will evolve to include text mining and data mining, decision support and decision automation, and descriptive and predictive analytics. For example, one financial services company installed BPM for auto loan contracts to revise an old process that was extremely manual and took days to process contracts. The new case management process coordinates straight-through and human work and uses BPMS to determine which contracts need employment verification. Content analytics look for patterns of incomplete documentation from dealers, and this information is then used to target those dealers for education.
- **Improved composite design capability.** Composite design in BPM allows a business analyst to combine prebuilt process models with other prebuilt process models and process fragments to quickly create new processes. The ability to leverage “widgets” and allow mashups will be a boon for case management applications that can reuse and snap in capabilities. Maturity in process design will bring the field of vendors closer to providing packaged dynamic business apps. Portions of many case management processes have a similar sequence (i.e., process snippets or process fragments) that can be leveraged.¹⁴

Figure 6 Case Management Draws Power From Each Area Of Business Process Management

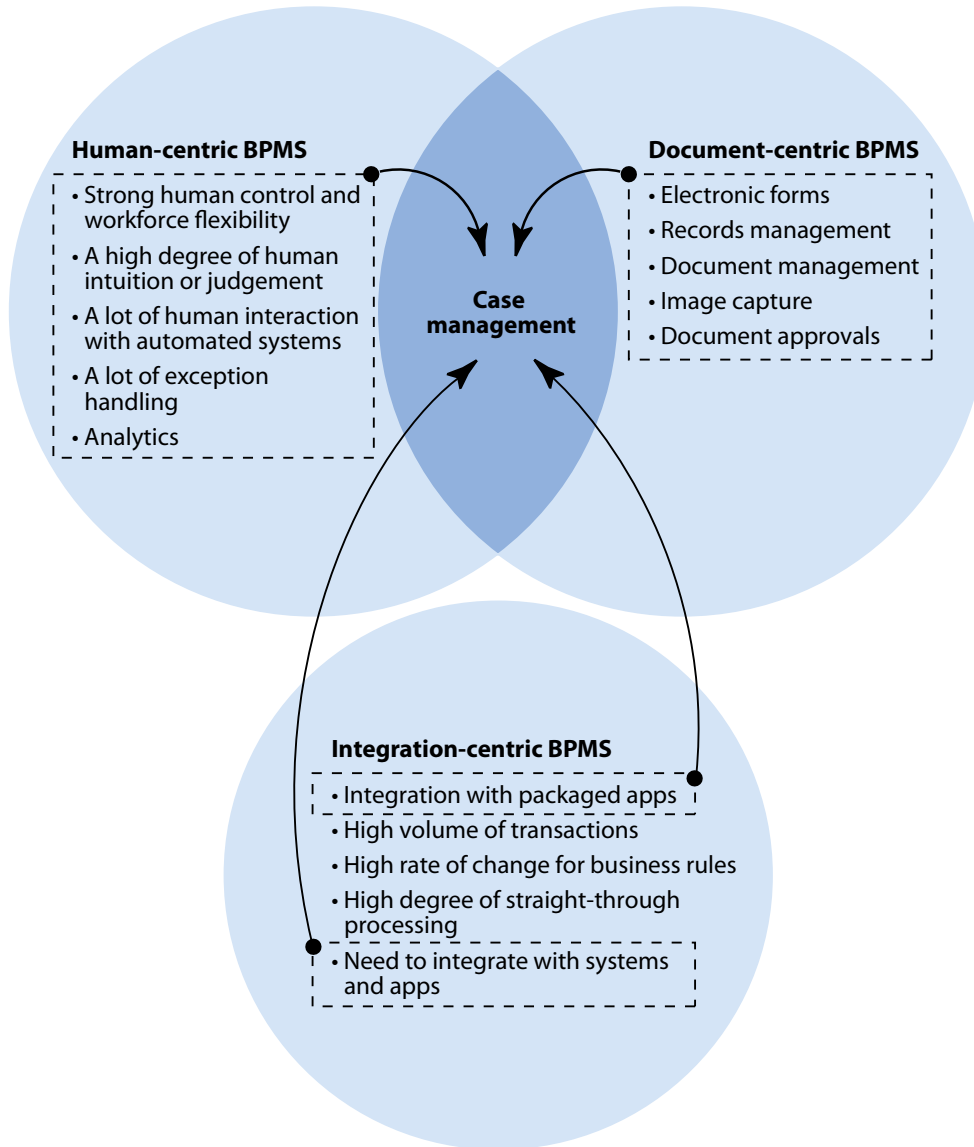
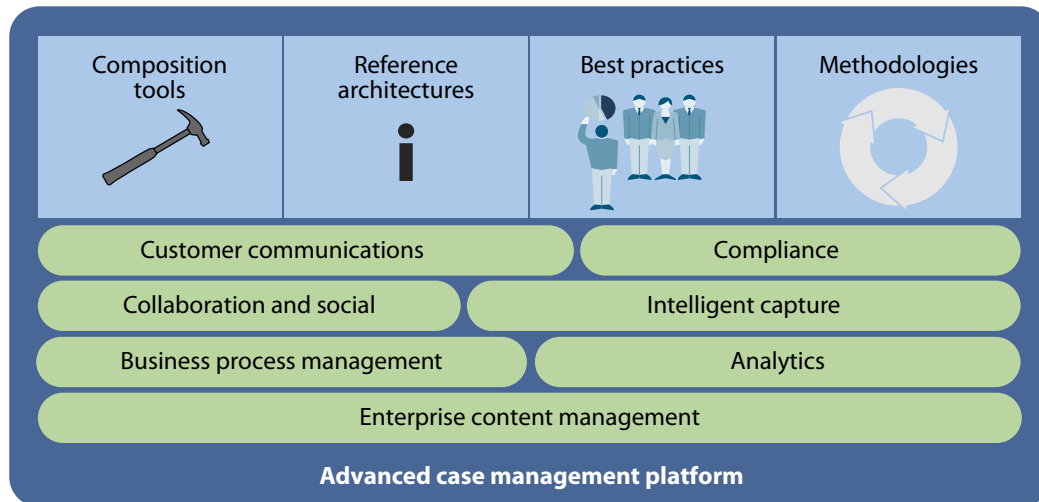


Figure 7 Advanced Case Management Platform



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Source: Forrester Research, Inc.

WHAT IT MEANS

NEXT-GENERATION CASE MANAGEMENT REQUIRES A DIFFERENT MINDSET

The renewed interest in case management results from a recognition that older process automation approaches based on old mass-production concepts are no longer adequate in an era of people-driven processes that benefit from autonomous decision-making and highly social collaborative tools. As organizations continue to improve their processes using Lean, Lean Six Sigma, and BPM approaches, more organizations will renew their interest in case management. But this new case management will be a huge departure from the workflow/imaging solutions of old and will be based on predictive analytics, business rules, and social collaboration, in addition to core BPM and ECM functionality. Advanced case management will evolve over the next three years into a separate market, where providers will tune offerings to three distinct categories of use cases. The document-centric BPM vendors — EMC, Global 360, IBM, and Open Text — are in the strongest position to grab this market, but Pegasystems is also a strong player with its build for change platform and depth in CRM and “service request” processes, and Oracle could be a player given its ECM, BPM, assets, and alignment with enterprise apps. Industry-specific providers of case-based processes will broaden offerings, and human-centric providers like HandySoft and Action-Base will look to focus on one of the three emerging use case areas. Global systems integrators will look to leverage best-of-breed platforms to augment and replace legacy systems. The new land grab for case management could spark another round of ECM acquisitions, particularly by the pure-play BPM vendors.

RECOMMENDATIONS

BUSINESS PROCESS PROS: GET SMART ABOUT CASE MANAGEMENT PROCESSES

Dynamic case management is a fresh way to look at automating business processes. Instead of trying to structure and control processes with a traditional mindset and BPM tools, consider designing the process for the creative and human factor. In particular:

- **Set the tools aside during initial phases of the project.** The greatest value comes from thinking about the business process. Don't focus too much on the old manual system; focus on the new process. Reengineer the process first, then pick the tool. Focusing on the tool too early is a huge pitfall — avoid it.
- **Look at case management as a Lean approach for automating processes.** Processes modeled on mass production typically chunk segments of work and the flow the chunks of work down a real or imagined assembly line. Case management turns that idea upside down by giving much more power and control to the worker to complete either the entire case or major sections of the case from end to end. Dynamic case management using “design for people, build for change” principles is a more Lean approach than the structured, predictable, mass-production approaches often automated with BPM suites.
- **View case management as a dynamic business application.** Key requirements for case management should be rooted in dynamic business apps. The application should be designed for continuous improvement, include flexi-points in the design, and be capable of evolving at the pace required for the business. The application should also be designed for people by supporting the seven tenets of the information workplace, building applications that are contextualized, individualized, seamless, visual, multimodal, social, and quick.¹⁵
- **Take a “design for people” approach.** Identify which processes and people should use a case management approach. Inventory key workplaces required for types of workers and options for construction. Let usability and design skills drive process design and look broadly at how information is used to support workers. Last, incorporate Web 2.0 and content initiatives into your case management strategy.
- **Leverage competency centers.** Centers of excellence (COE) help when expanding BPM to new areas. A BPM COE includes developers, business analysts, and enterprise architects, and can be an important catalyst for looking at processes in a new light, for helping evangelize business process improvement within the organization, and in helping the organization scale to deploy case solutions.¹⁶

ENDNOTES

- ¹ Clients Forrester speaks with report that jobs are often restructured after an employee is displaced rather than have a one-to-one replacement. Often this means that tasks of a former employee are spread among many employees and the original position is left unfilled or restructured.
- ² While legislation is still pending to increase regulations and revive the financial services sector, other examples include the US Senate voting to nearly double the Consumer Product Safety Commission budget in response to waves of product recalls; the US Environmental Protection Agency setting tighter emission restrictions after accusations of lax control; and the UK's Medicines and Healthcare products Regulatory Agency cracking down on transparency of drug trial results after cases where potential side effects were not properly disclosed. See the November 3, 2008, "[Inquiry Spotlight: Governance, Risk, And Compliance, Q4 2008](#)" report.
- ³ The large corrections facility used the EMC Documentum xCelerated Composition Platform (xCP) case management solution to build case-based applications. Documentum xCP combines development and deployment tools and best practices into a single composition platform that emphasizes configuration versus coding.
- ⁴ The SEC last month announced the unit's biggest reorganization in at least three decades, aimed at speeding investigations and honing expertise. The overhaul will leave fewer management layers, more front-line investigators, and at least five specialist teams focused on emerging and complex areas of the market. The SEC is also taking steps to make it easier for investigators to issue subpoenas and reward people for aiding probes. Source: David Scheer, "SEC Never Did 'Competent' Madoff Probe, Report Finds (Update2)," Bloomberg.com, September 2, 2009 (<http://www.bloomberg.com/apps/news?pid=20601087&sid=agBw9n2hZi5U>).
- ⁵ This is a system built on EMC's Documentum xCP case management platform.
- ⁶ IT's primary goal during the next five years should be to invent a new generation of enterprise software that adapts to the business and its work and evolve with it. The principles of "design for people, build for change" will anchor a new generation of business applications. See the September 24, 2007, "[The Dynamic Business Applications Imperative](#)" report.
- ⁷ For a more complete description of this case study, please see the September 24, 2007, "[The Dynamic Business Applications Imperative](#)" report.
- ⁸ Audit tracking is a cross-vertical case management solution of interest to financial services, utility, oil & gas, and telecommunications enterprises. ActionBase is a case management provider specializing in audit tracking processes.
- ⁹ Key features of the HCL Technologies case management solution include managing hotline referral transcriptions; investigation, adjudication, and recouping of monies; and issuance of civil fines and income calculator for overpayment/over-issuance of public assistance funds. And an EBT fraudulent data miner has the unique functionality for mining all the fraudulent transaction from gigs to Citibank transactions. This

has built-in business logic. Source: “Investigative Services Information System (ISIS), Georgia Department of Human Resources (DHR)”, HCL Technologies Success Stories (<http://www.hcltech.com/government/success-stories/6/>)

- ¹⁰ An example of the eFOIA process steps would be the review and removal or redaction of personal identity information, such as Social Security numbers or classified information. Case study provided by Oracle and supported with Oracle’s BPM solution.
- ¹¹ The federal government is expected to require a food processing company to be able to identify all supply sources for its final product. Driven by the 2006 peanut butter scare, all manufacturers must have specific identifiers to track food sources.
- ¹² This system is based on Pegasystems’ SmartBPM. The system is currently used in 14 offices by 28 teams and three external companies in 24 different countries, processing 35,000 AERs per month, with two-thirds straight-through processing (STP). Paper tracking and manual faxing have been eliminated, and the system gives internal investigators enhanced visibility into local safety metrics and an improved product safety profile.
- ¹³ Inbound and outbound channels are largely siloed in organizations today. For a review of these processes and how they affect customer experience, please see the July 2, 2008, “[The Persuasive Content Architecture](#)” report.
- ¹⁴ IBM has produced a site with more than 100 iWidgets that can be used to combine or mash up business processes for case management. Other providers like EMC are also developing this capability.
- ¹⁵ The importance of each of these tenets varies from one enterprise to the next and from one information worker to the next. For more information, see the November 26, 2007, “[The Seven Tenets Of The Information Workplace](#)” report.
- ¹⁶ A BPM COE shows measurable results and involves roles and tasks that cross organizational boundaries. For a description of these roles, please see the June 20, 2008, “[The BPM COE Is Here: Now What?](#)” report.

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