

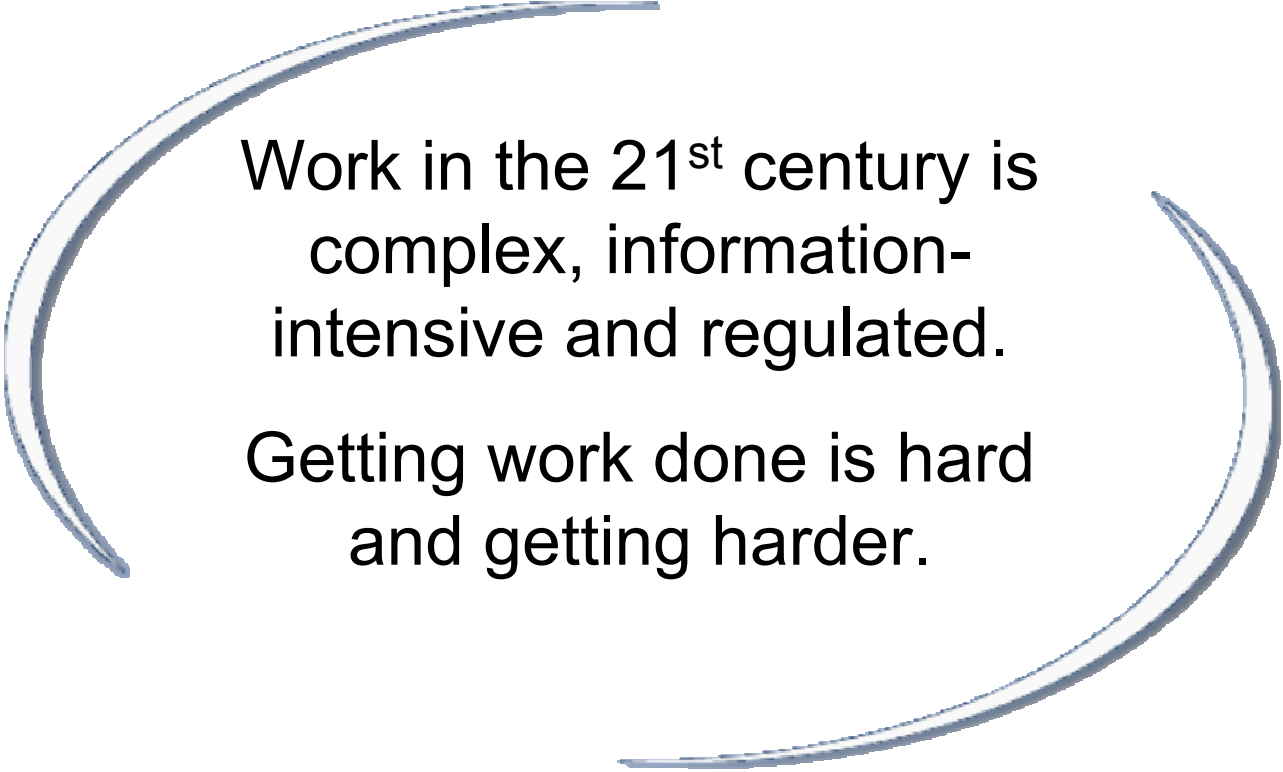

Use Dynamic Case Management – Change How Work Gets Done

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Forrester Research

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Work in the 21st century is
complex, information-
intensive and regulated.

Getting work done is hard
and getting harder.

**Software has
become bloated**





92%
High cost of
ownership

89%
Difficult to
upgrade

86%
Poor cross-
functional
support

Survey of 111 Business Process and Apps Pros, Sept 2009



80%
**Needs
mismatch
apps**

77%
**Inflexibility
limits change**

67%
**Lack of
process
visibility**

Survey of 111 Business Process and Apps Pros, Sept 2009

A day in the life of a frustrated worker



Untamed processes decrease productivity

“Give me the tools to stay in touch and be productive no matter where I am”



Daniel – 24% Deskbound Contributor

ERP, CRM, SCM, PLM suites address only structured, predictable types of work

“Forgotten” work is often manual or un-integrated



Michael – 28% Mobile Professional

- 74% use laptop
- 31% use smart phone
- 5 locations on average

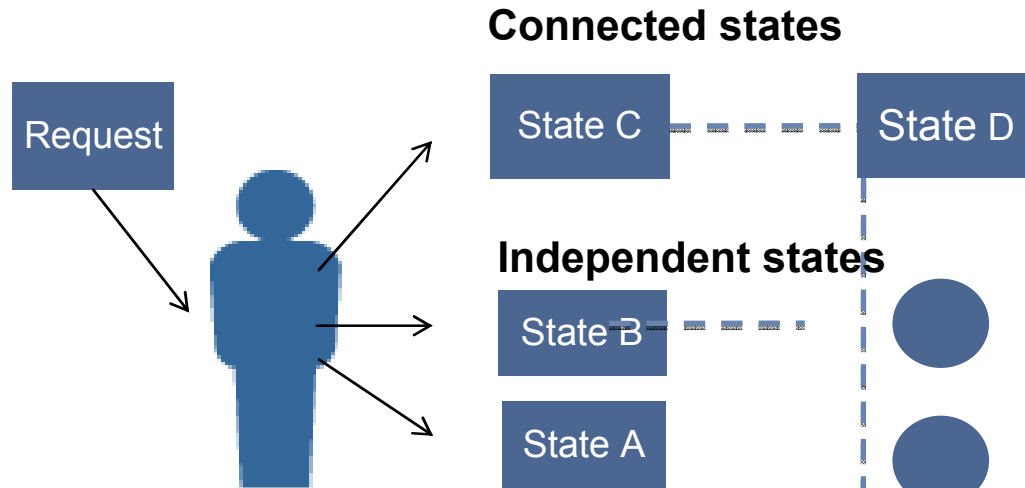
Oliver – 13% Offline Practitioner

- 51% use laptop, 14% use smart phone
- Use 5 apps per day
- 3 locations on average

A case contains information, tasks, milestones, discussions, events, behaviors, policies/rules, and processes

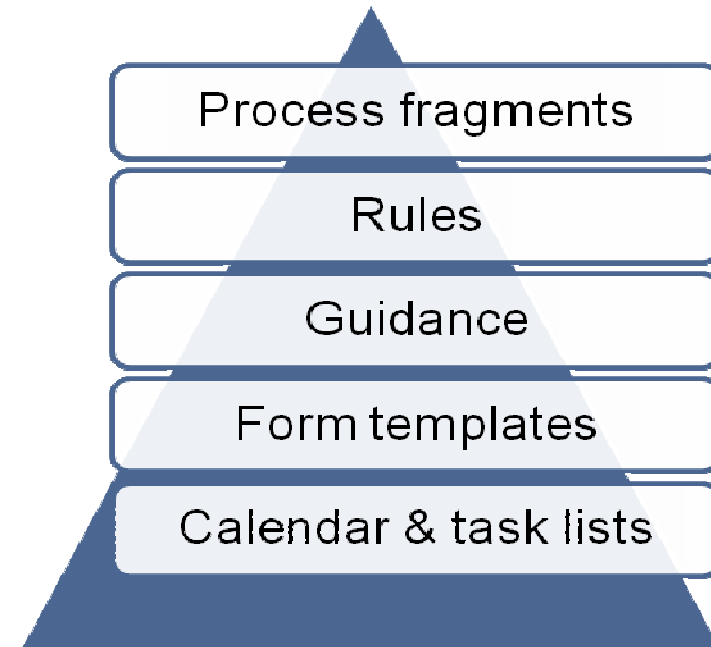


Dynamic allocation of work tackles untamed processes

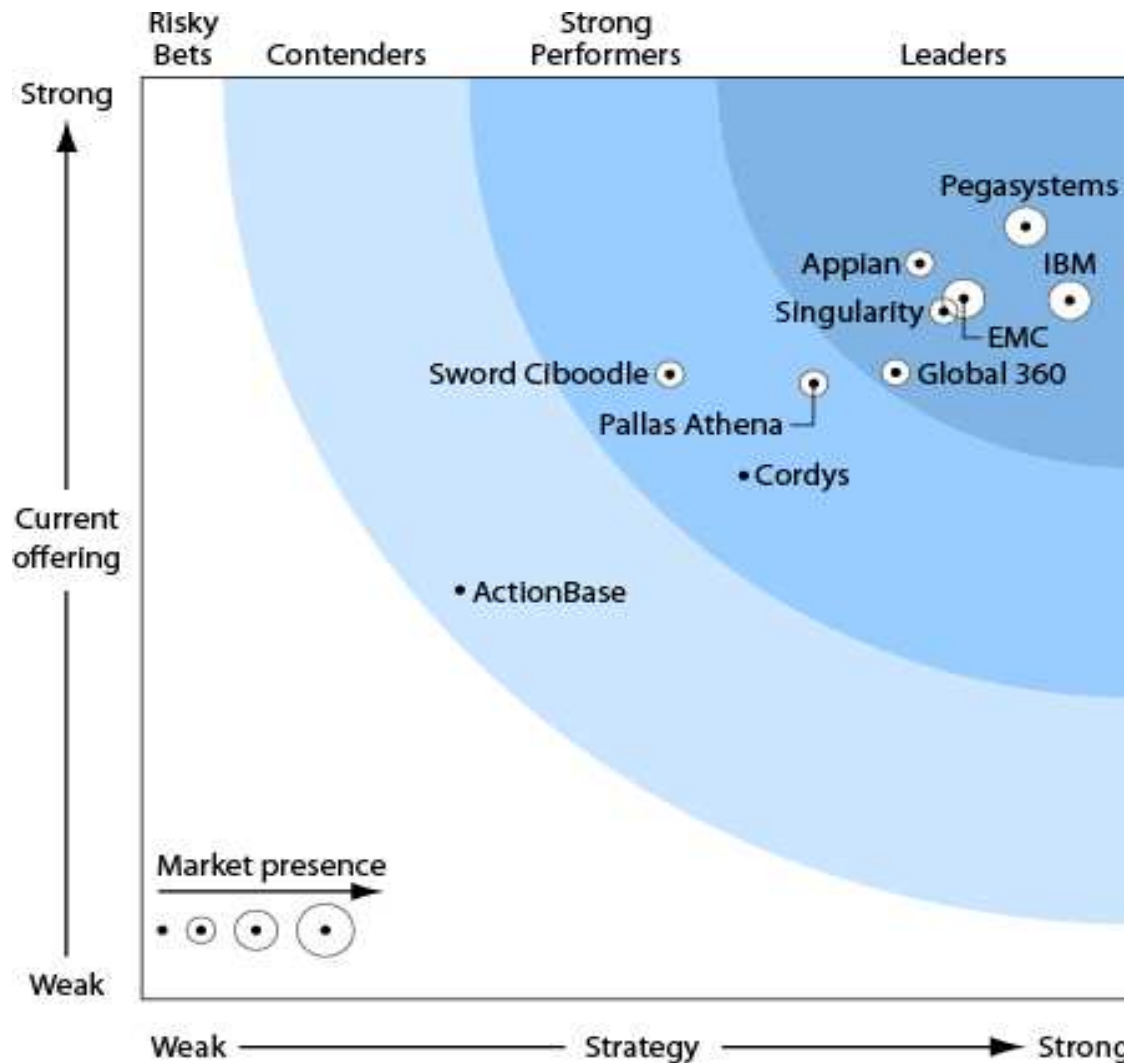


- Dynamic binding of process fragments, with a parent process instance defined
- A repository for storing documents
- A way to handle individual variation (task reassignment)
- A way to selectively restrict changes

Each state has unique guidance



The Forrester Wave™: Dynamic Case Management, Q1 2011



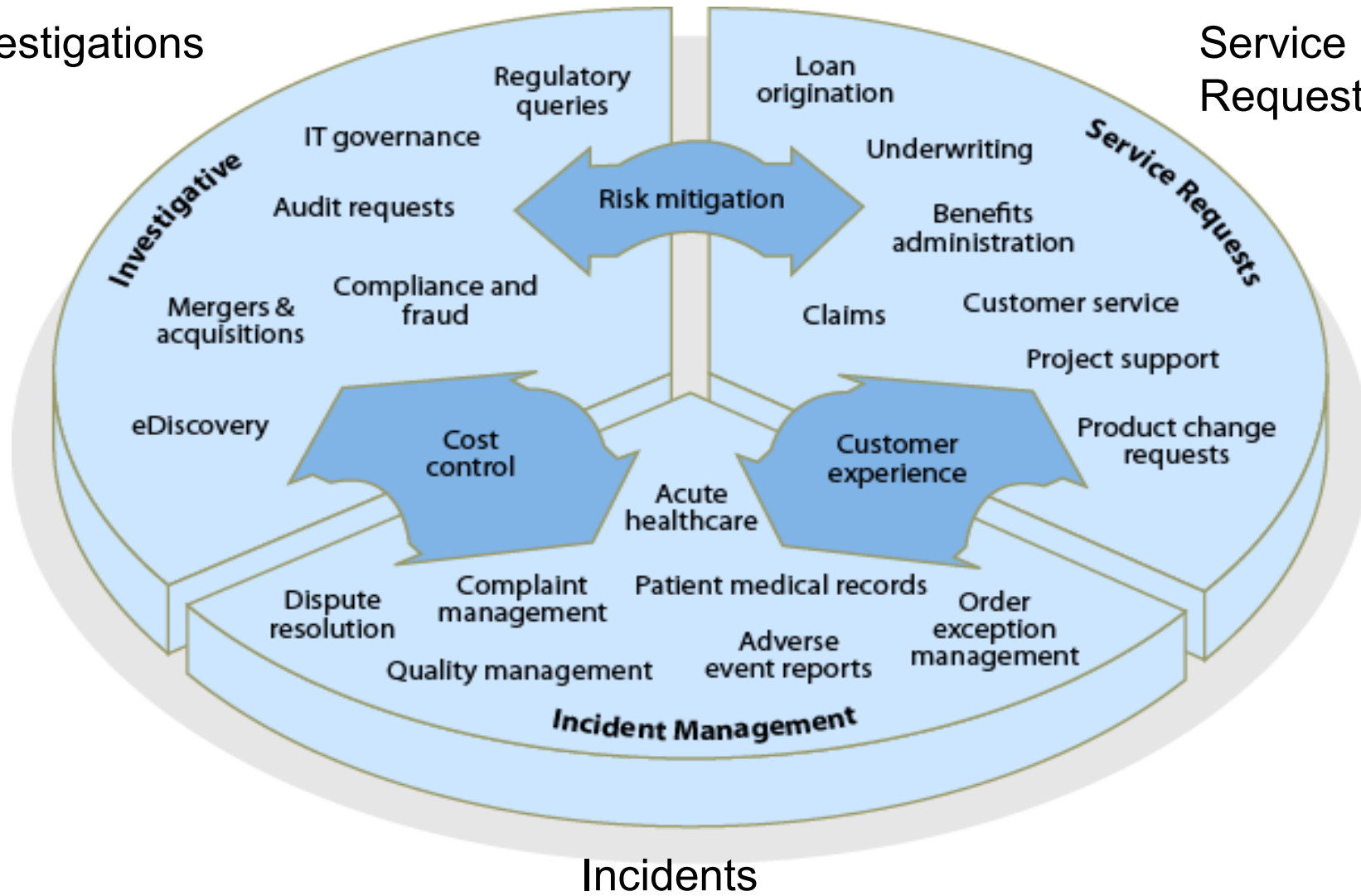
The Forrester Wave™
Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Three case categories will emerge by 2013

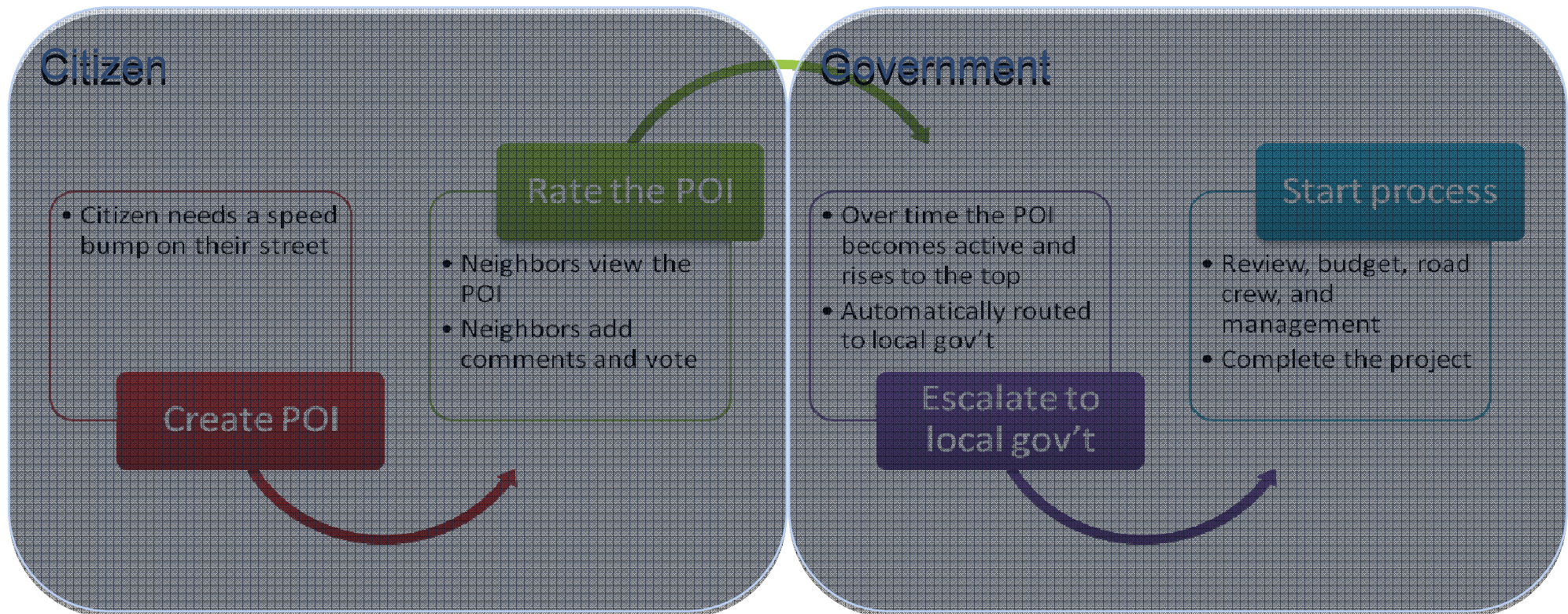
Investigations

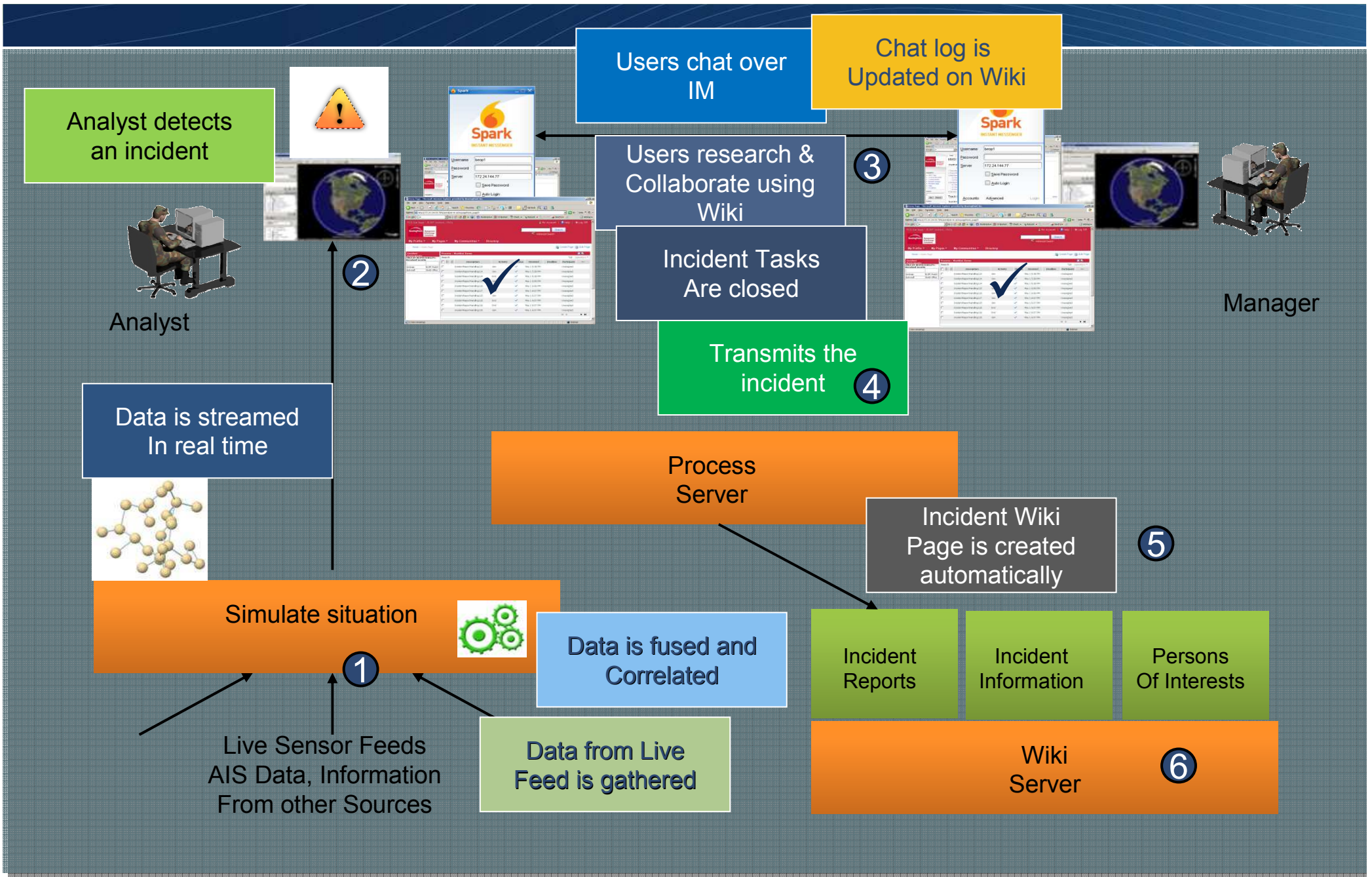
Service Requests



Incidents

Roadpulse – road repair requests





UK financial services group & insurer

“The most important piece of the solution is case management .

We expect a reduction in claims processing times and that will translate directly into reduced cost ”



- Structured process for handling claims in Italian operations
 - process was highly manual
 - information spread across different systems and apps
 - adjusters couldn't easily identify claims and tasks by priority or deadline

Solution

- tracks the progress and resolution of each claim
- consolidates information
- identifies any case nearing the deadline
- allows staff to confirm the company meets applicable laws

Service request

UK Insolvency Service debt relief in England and Wales

- System to investigate and manage bankruptcy appeals
 - flexibility, efficiency, and accessibility
 - “It’s debt relief for those who need it but rigorous automated checks so if people are not entitled, we will soon spot them.”
- 2000 orders/month with 16 specific case processes
- Goals: meet new regulations, provide a platform for change, and support mobility
- Wanted IT to be more responsive
- Deployed in 9-12 months

“We could never have met new regulatory orders without a case management process view and platform.” — Senior architect in IT

How to get started

- Identify which processes need case management
- Look at processes holistically—not just the structured part
 - Add collaboration, social and content into your strategy
 - Look broadly at how information is used
 - Determine if content repositories need consolidating
- Start with a major process that is causing pain
 - Resistance to change goes away
 - Look for processes with “lost” information, long processing times, multiple handoffs

So much of what we take for granted can be better

1866

Sherwin Williams formed

1877

1st reseal-able paint can patent issued



125 years later: An outside-in design!



2002
The Twist and Pour paint can

Thank you!



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