Making Leaders Successful Every Day

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April 15, 2011

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

Getting work done is hard and getting harder.

A day in the life of a frustrated worker

What's the problem?

Software has
become bloated

92%
High cost of ownership

89%
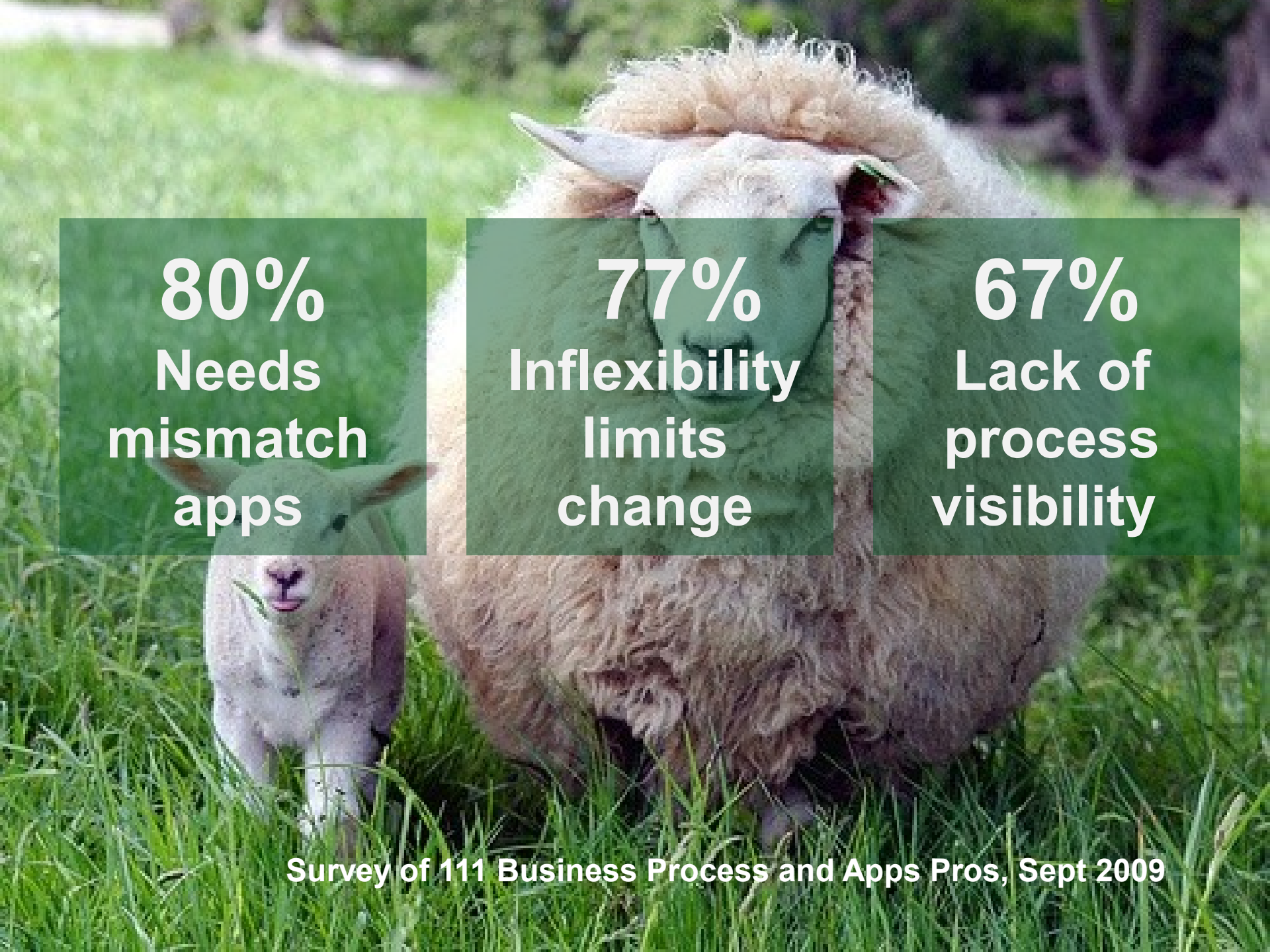Difficult to upgrade

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

Two ways of getting work done—and neither works very well

Frustrated knowledge worker
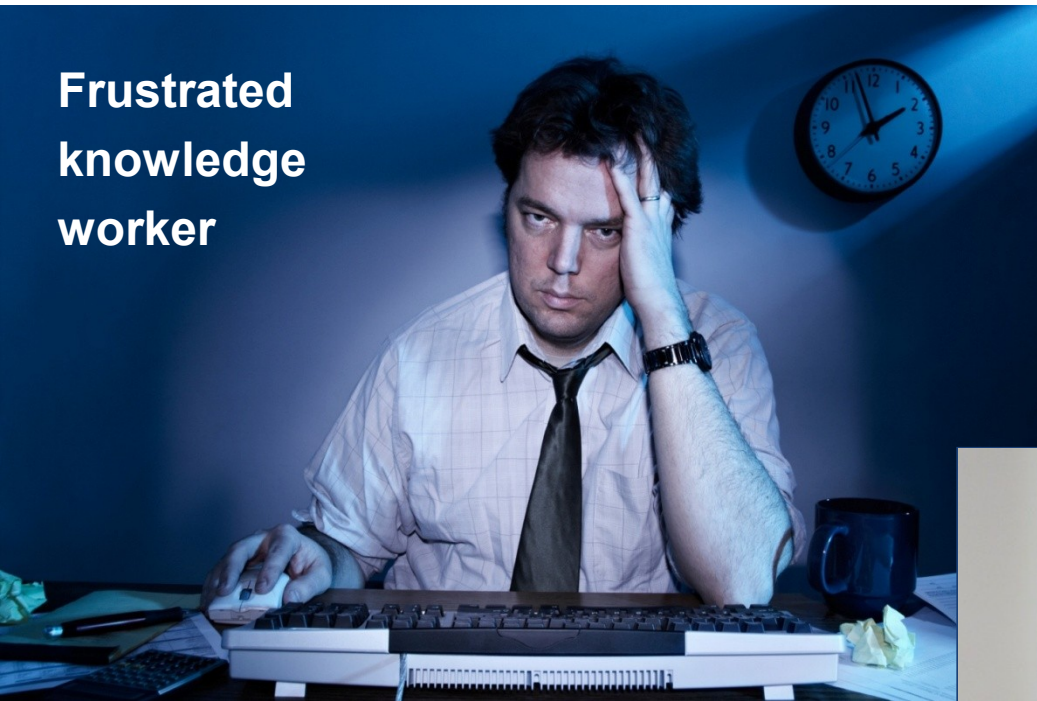
Back office "factory" worker

The large majority of real work goes into handling exceptions

Opportunity for differentiation

1-2% ▲ **Unique problem, requiring supervision**

2-4% **Ad hoc** **Requires ad hoc interactions to resolve exceptions**

15-18% **Structured Collaboration** **Requires interaction with colleagues** | Custom Extensions |

Production

Limitation of packaged apps

The cost of doing business

75-80% **Straight through follows the happy path**
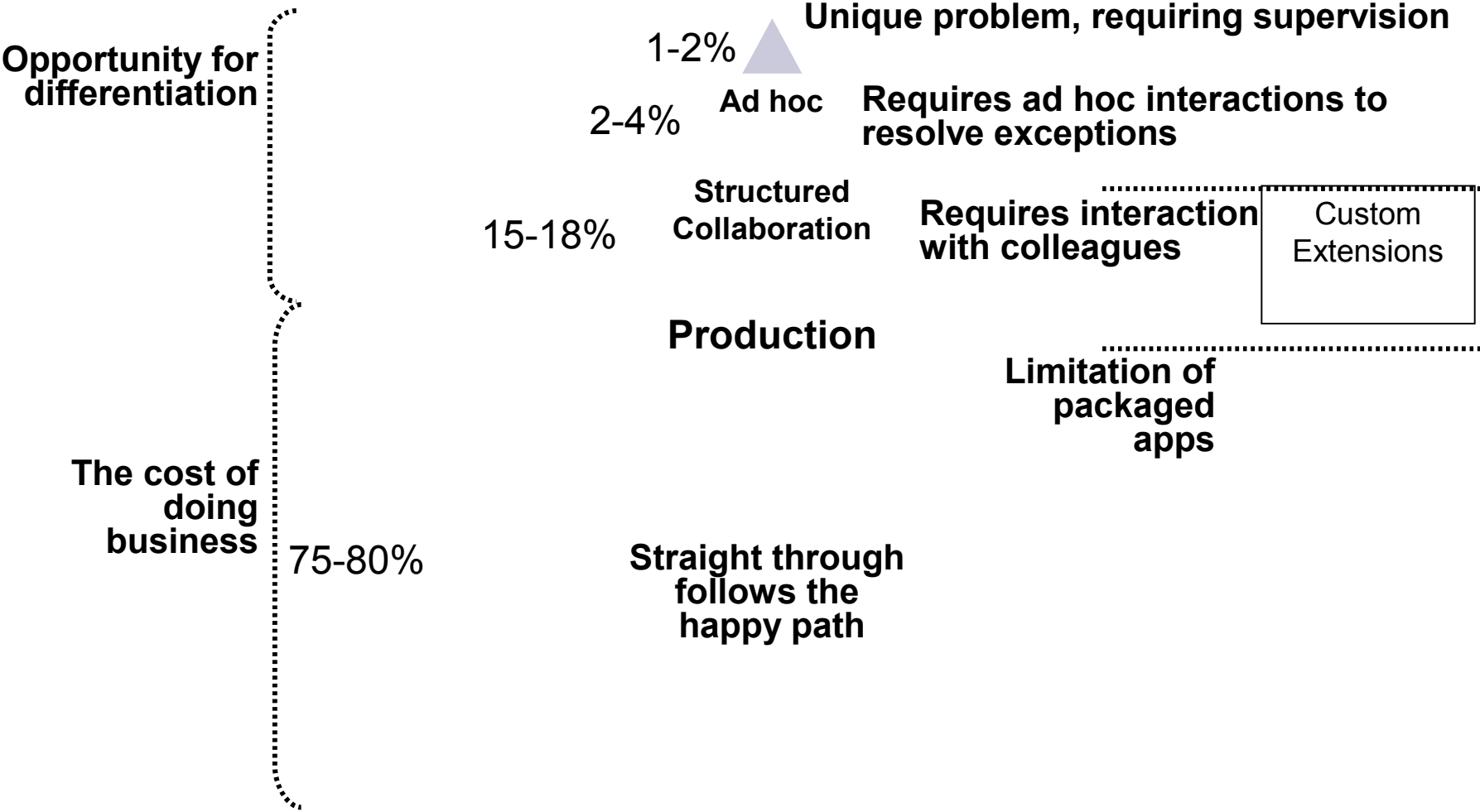
Dynamic case management deals with a different class of problem

Opportunity for differentiation

Variable Costs

Fixed Costs

Ad hoc customer interactions

Structured collaboration

Production

Distribution depends on nature of work and culture
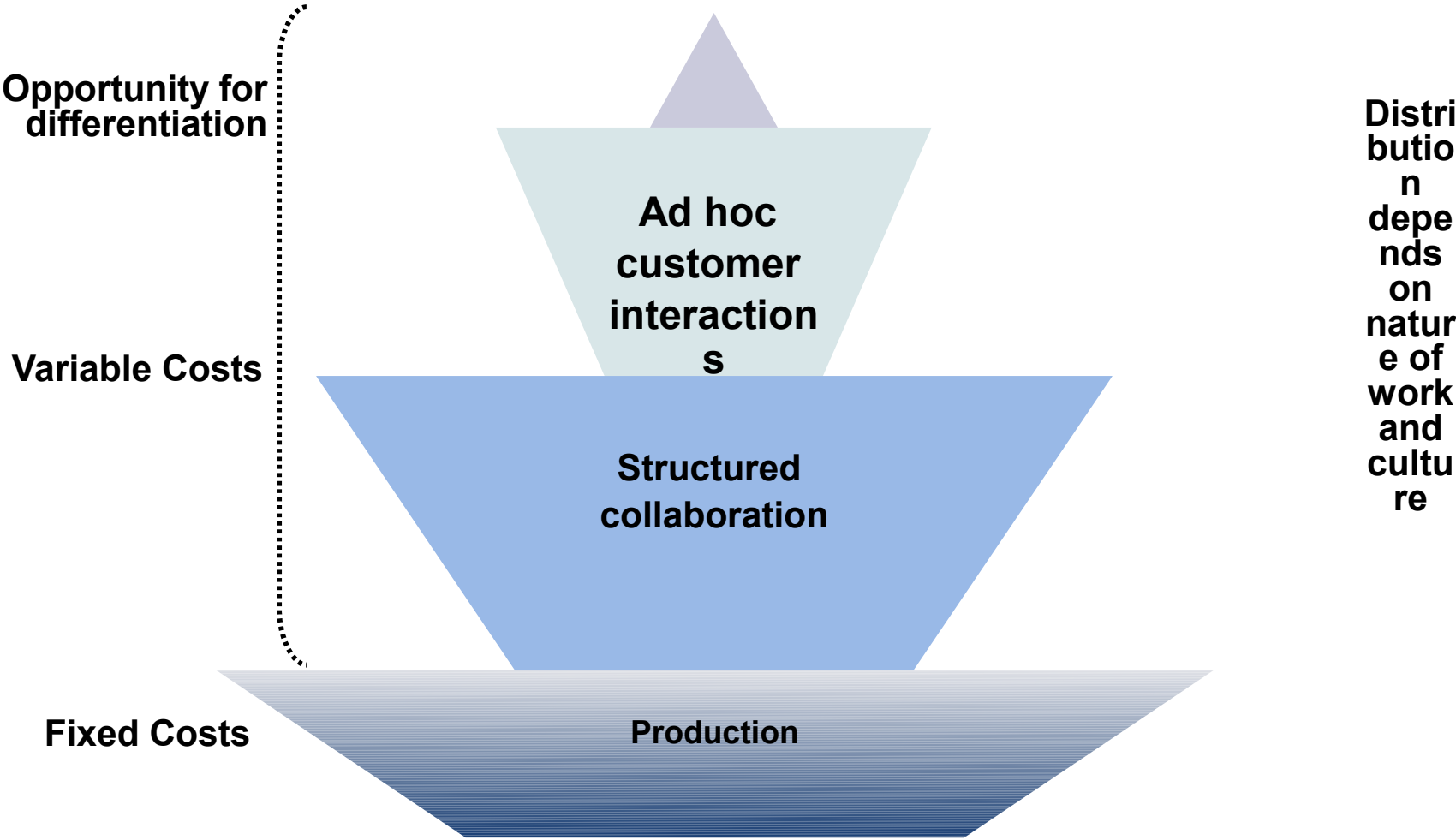
The case context reflects its history – shaped by information, tasks, milestones, discussions, events, behaviors, policies/rules, and processes

Loan origination – predetermined path

Level One Value Chain

Administer
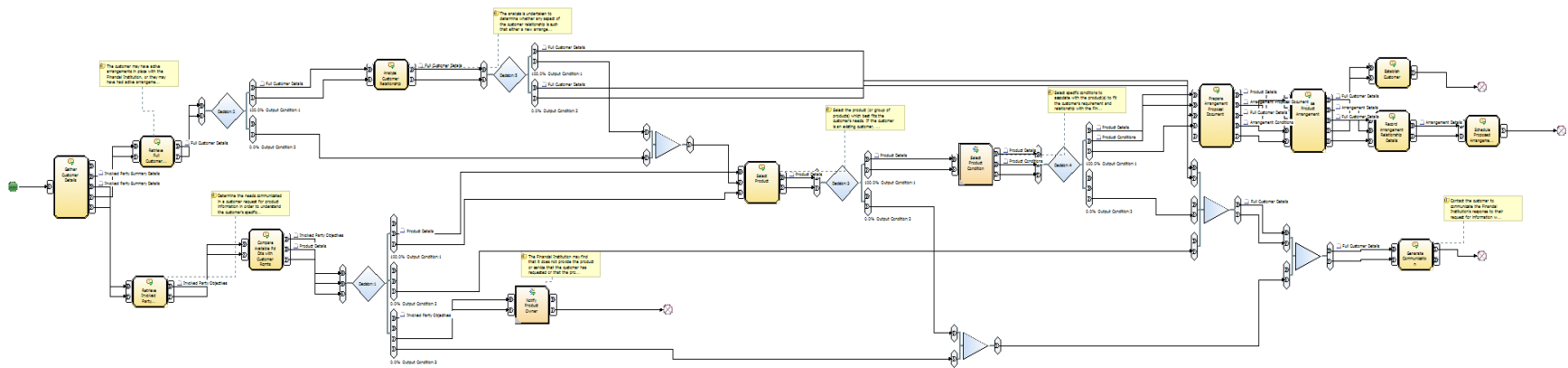
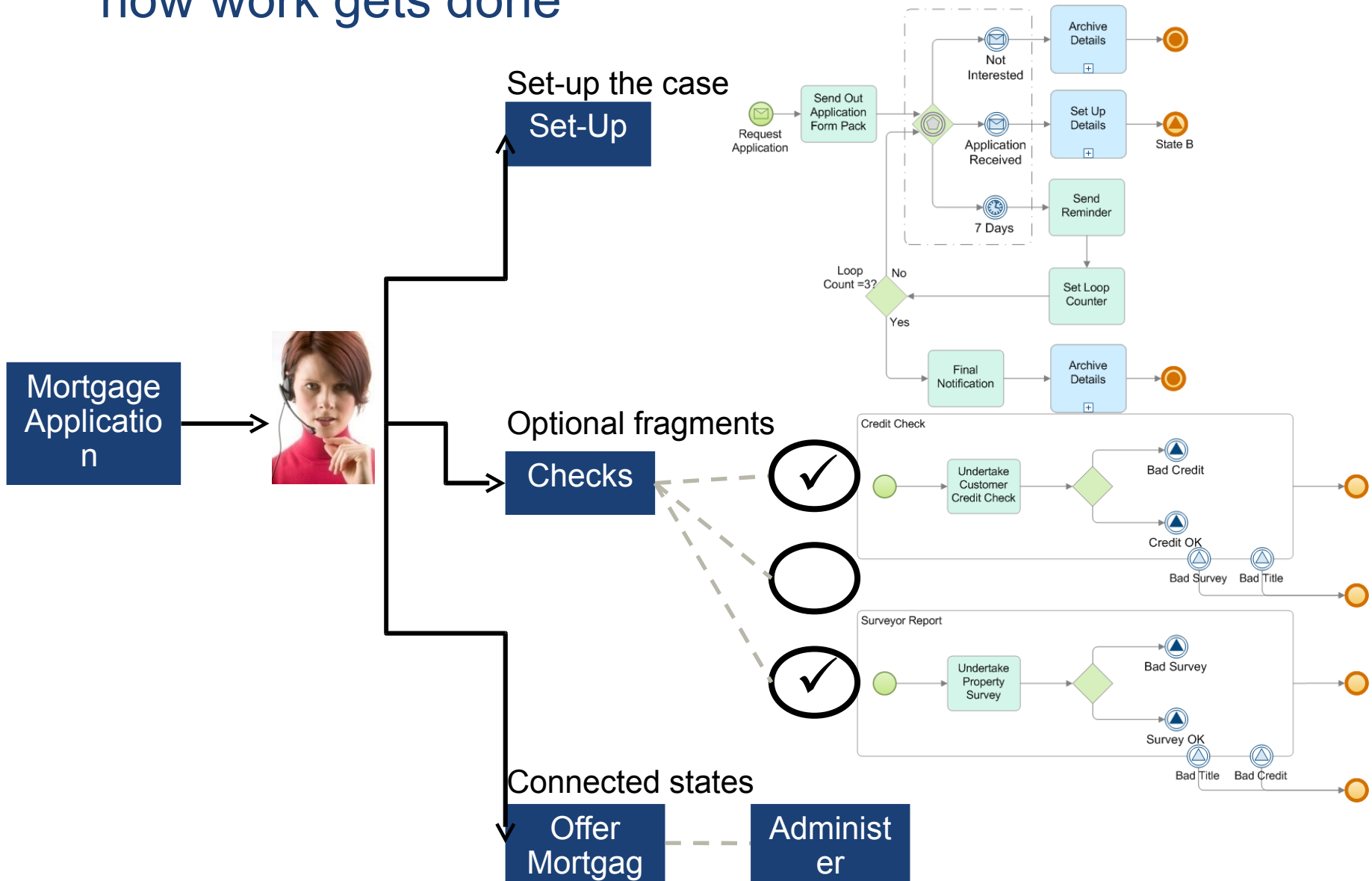**Detailed implementation**

Just one part of the many elements that make up the process end-to-end

All options built into a single process description

Dynamic case management rethinks how work gets done

Set-up the case

Set-Up

Optional fragments

Checks

Connected states

Mortgage Application

Offer Mortgag

Administer

Whether it is healthcare or government service, the design pattern is still the same

Set-Up

Medical Assessment

Admit Patient

Testing

Assess Tests

- ✓ X-Ray
- ○ Ultrasound scan
- ✓ MRI scan
- ○ Blood test A
- ✓ Blood test B
- ○ Blood test C
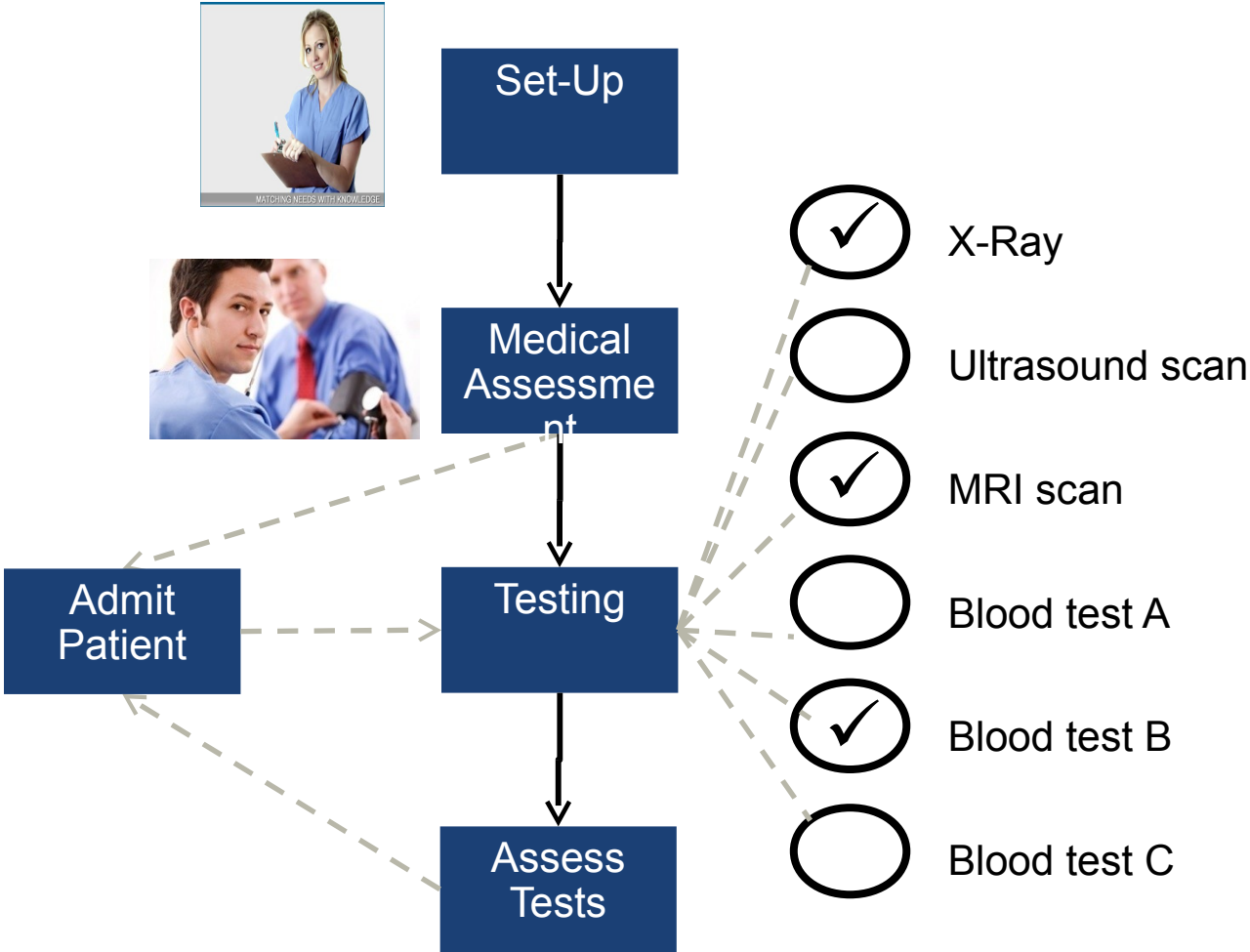
Capture all the related processes, artifacts and costs related to the case.

Each state/phase has unique guidance

Dynamic case management needs four things

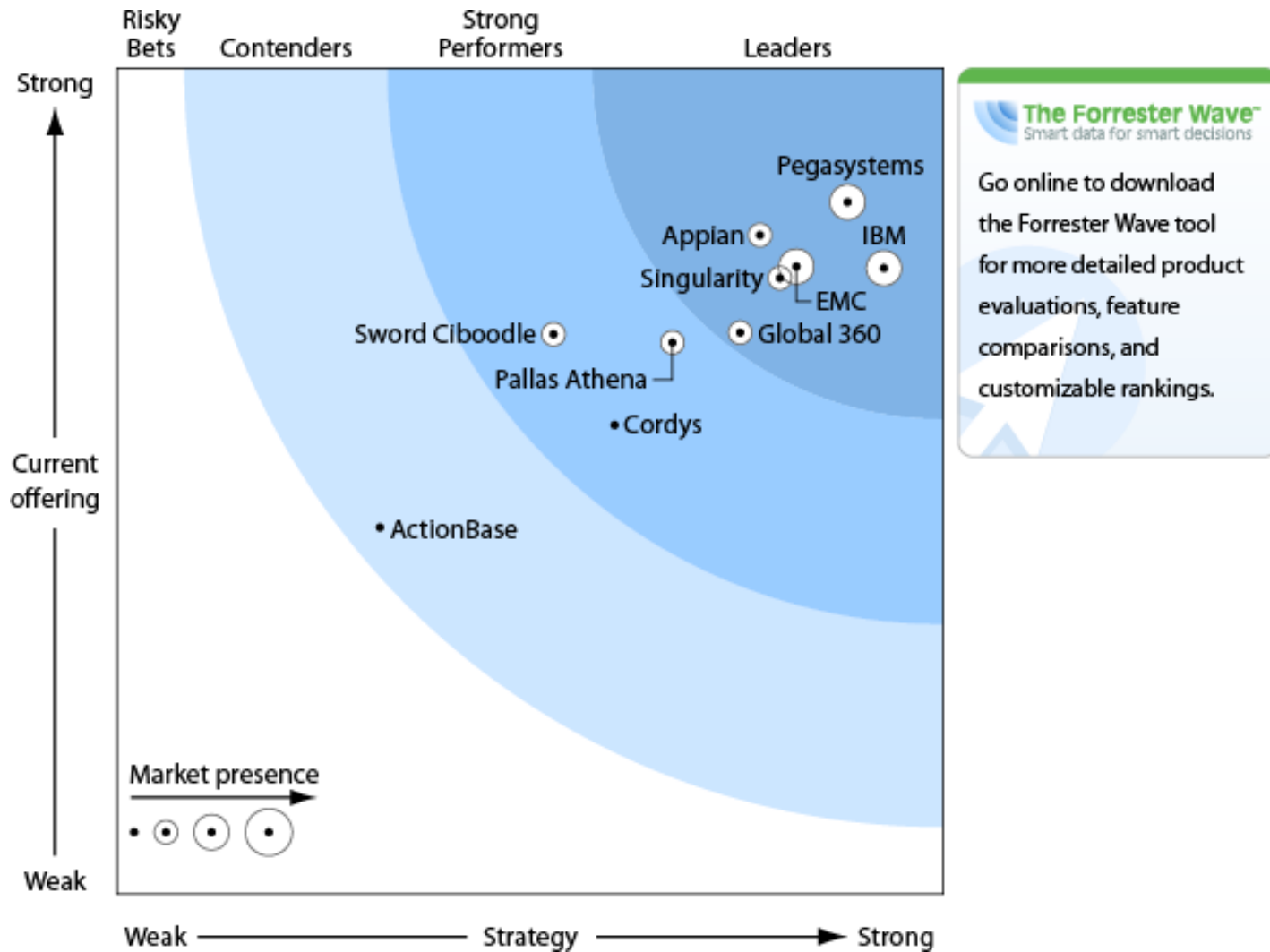1. Dynamic binding of process fragments, with a parent process instance defined.

2. A repository for storing documents (context).

3. A way to handle individual variation (task reassignment).

4. A way to selectively restrict changes (balancing control with worker flexibility).

Four good reasons why dynamic case management makes sound business sense

- Empowers workers to deal with customer needs
  - Workers exercise their judgment while the system automates mundane actions.

- Compliance
  - Enables control over critical aspects, ensuring compliance, etc.

- Agility
  - Evolutionary process discovery – design by doing. New functionality added without retesting the entire process.
  - Enables controlled testing of new ideas.

- Much lower cost
  - Componentization reduces complexity and facilitates easier adaptation (post implementation). .
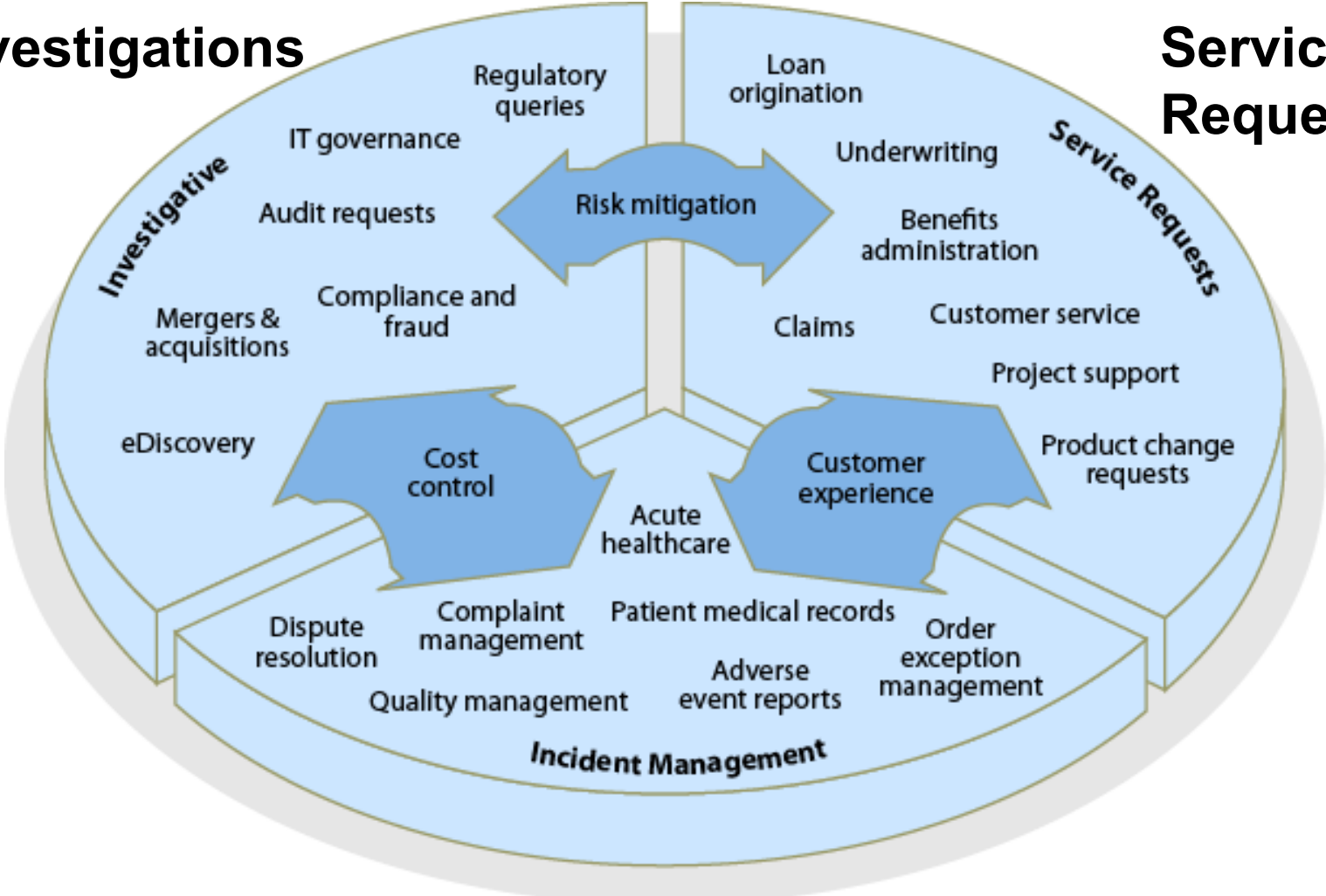 - Much lower Total Cost of Ownership (TCO).

The Forrester Wave™: Dynamic Case Management, Q1 2011

Three case management categories will emerge by 2013

Source: December 28, 2009, "Dynamic Case Management — An Old Idea Catches New Fire" Forrester report.

Service request: Roadpulse for road repair requests

Citizen needs a speed bump

Create POI

Neighbours view the POI

Add comments

Rate POI

Over time the POI becomes active and rises to the top

Automaticall

Escalate to local gov't

Review and Budget

Schedule road Crew

Project management

Start Processes
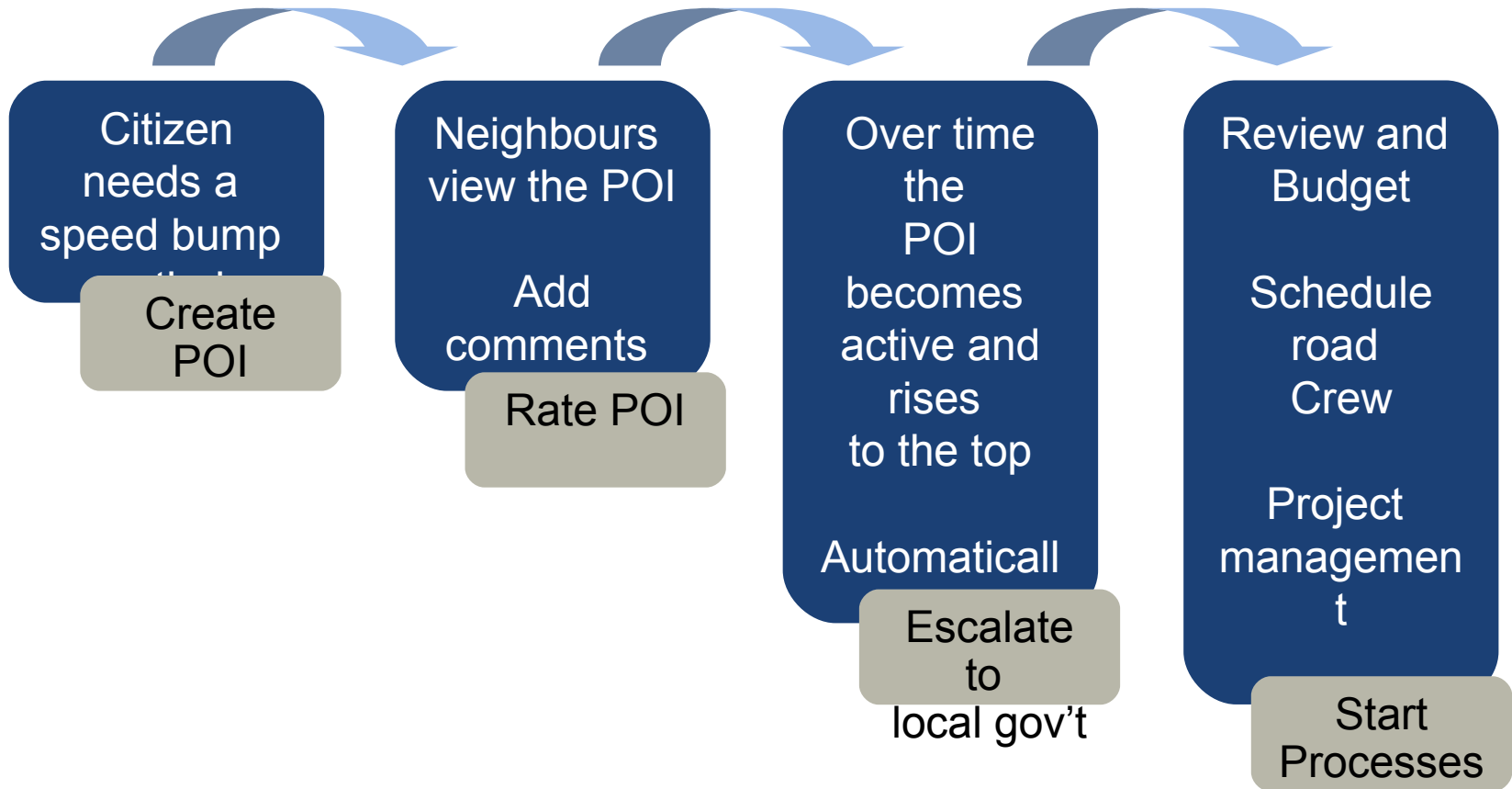
Service request: Financial services insurer

"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

  - Highly manual.

  - Information spread across different systems and applications.

  - Adjusters couldn't easily identify claims and tasks by priority or deadline.

- Solution

  - Tracks the resolution of each claim.

  - Consolidates information.

  - Identifies any case nearing the deadline.

  - Allows staff to confirm the company meets applicable laws and regulations.

Investigation: UK Insolvency Service

- Investigate and manage bankruptcy appeals

  - Volume

    - 2000 orders/month.

    - 16 different case types.

- Goals

  - Flexibility, efficiency, and accessibility.

  - Meet new regulations, provide a platform for change, and support mobility.

  - Wanted IT to be more responsive.

- Deployed in 9-12 months

"Debt relief for those who need it but rigorous automated checks so if people are not entitled, we will soon spot them."

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

Get started now

- Identify which processes need case management
    - Customer facing scenarios are a good place to start.

- Start with the customer/citizen experience and work backwards
    - Engage those involved in service delivery to design the improved experience.
    - Helps breaks the links with past working practices.

- Look at processes holistically
    - Tease the problem apart – think about a set of processes rather than one!
    - Identify the major states/phases and pre-conditions to move ahead.

- It's much easier than you think
    - Consider the adaptability required in each phase.
    - Look for optional process fragments that apply.
    - Consider how information is used; How roles collaborate.

So how will you stand out from the crowd?

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