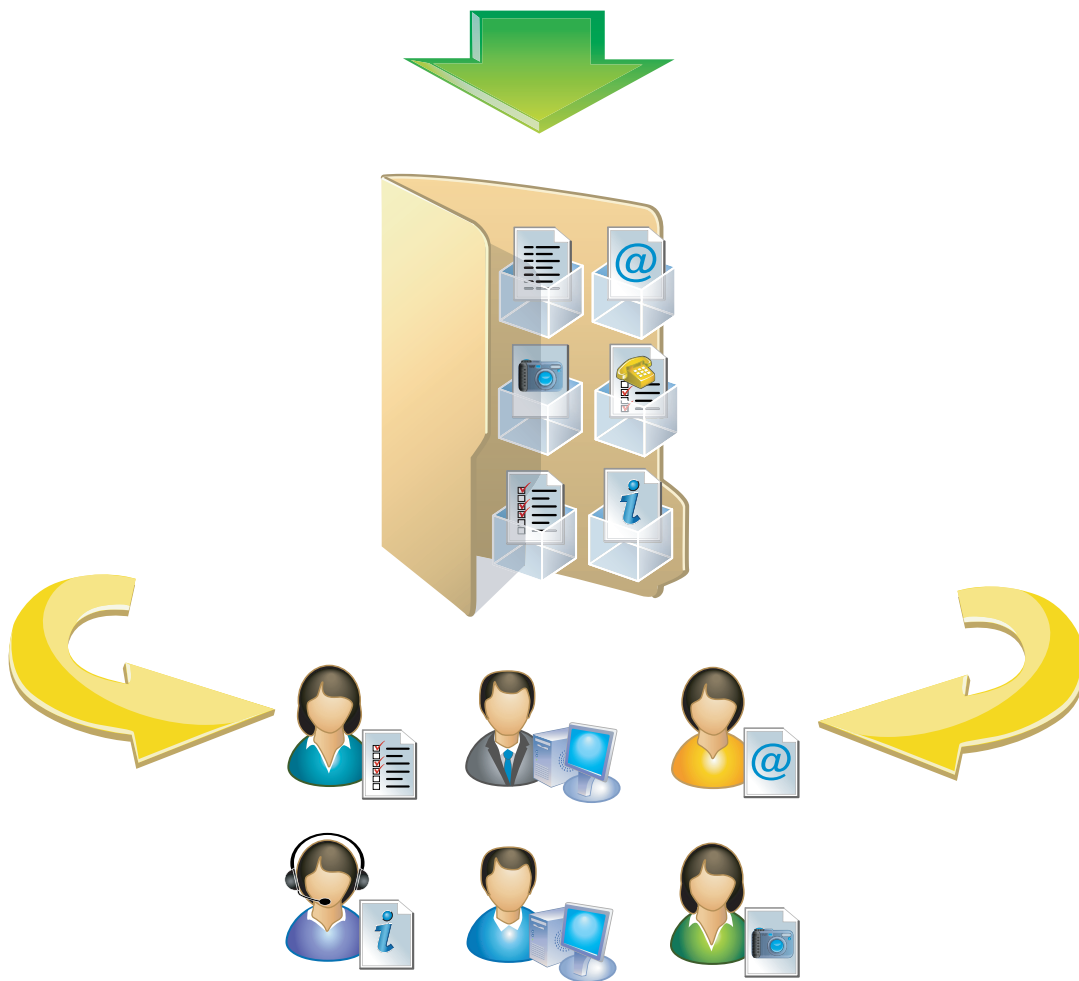


# Adaptive Case Management

- comparing document-centric and customer-centric approaches



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## About the White Paper

As the non-profit association dedicated to nurturing, growing and supporting the ECM (Enterprise Content Management) community, AIIM is proud to provide this research at no charge. In this way the education, thought- leadership and direction provided by our work can be leveraged by the entire community. Our objective is to present the “wisdom of the crowds” based on our 65,000-strong community.

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## Process used and survey demographics

The survey results quoted in this report are taken from a survey carried out between 15th April and 4th May 2010, with 290 responses from individual members of the AIIM community surveyed using a Web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 65,000 registered individuals. Respondents are predominantly from North America and cover a representative spread of industry and government sectors. Organizations of 10 employees or less and all ECM suppliers have been excluded from all of the results in this report.

## About AIIM

AIIM ([www.aiim.org](http://www.aiim.org)) is the community that provides education, research, and best practices to help organizations find, control and optimize their information. For more than 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records and business processes. Today, AIIM is international in scope, independent and implementation-focused, acting as the intermediary between ECM (Enterprise Content Management) users, vendors, and the channel.

## About the author

Doug Miles is Director of the AIIM Market Intelligence Division. He has over 25 years experience of working with users and vendors across a broad spectrum of IT applications. An early pioneer of document management systems, Doug has been involved in their evolution from technical solution to enterprise infrastructure platform. Most recently, Doug has produced a number of the AIIM survey reports on user issues and drivers for ECM, Email Management, Records Management, SharePoint and Enterprise 2.0. He has also worked closely with other enterprise-level IT systems such as ERP, CRM and BI, has an MSc in Communications Engineering and is a member in the UK of the Institute of Engineering and Technology.

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## Introduction

Businesses and agencies in long-term relationships with their customers, citizens or subscribers will be judged by the accuracy of the records they hold, the consistency of the communications that take place, and the speed, efficiency and fairness with which each case, claim or contract is processed.

Delivery of customer service against these priorities has never been more challenging. Customers are more mobile in their addresses, jobs and family relationships. Communications channels seem to multiply overnight, with customers switching between them at will. Corporate messaging demands multi-channel distribution with increasing amounts of personalization. Mergers and acquisitions create multiple silos of customer-related data to be seamlessly joined. And products, business rules and government regulations change with alarming frequency. Against this backdrop, the demands on the IT systems to support smooth, efficient and integrated delivery are considerable, particularly where case-orientated transactions are involved.

Customer interfaces may be dealt with in a CRM or help-desk system. Multiple relationships may be required, as any one case, contract or claim may involve more than one customer, knowledge worker or other contributor. These may be family members, professional practitioners, assessors, repair service providers, enforcement officers, etc.. Multiple communications channels between these participants may include web forms, letters, emails, faxes and outgoing print – and these days could extend to SMS messages, instant messages, social forums and even Tweets.

The case file itself will involve a collection of customer communications, forms, process documents, reports and supporting documentation, and will need to be managed for compliance and audit. This may best be handled by an Enterprise Content Management (ECM) or Document Management (DM) system, but the individual documents will need to be grouped together as part of the case file, and made accessible in a suitably controlled way to all who are involved in the case, including those at the customer interface.

Finally, a workflow or business process needs to take place to move the case to its outcome. Within CRM systems, an alerts-style functionality will frequently exist against a given customer log, whereas in traditional DM systems, workflow may involve moving a given document through each process stage – probably in a serial manner. Neither is appropriate to a case management scenario where the focus is “the case,” not a customer or a single document. The process outcome is the successful resolution of the case. The participants may need to respond against given deadlines, and those involved in managing the case need to see progress reporting and action monitoring against the case.

Looked at from this standpoint, a customer-centric CRM system may be at a disadvantage compared to a document-centric process management system. However, general purpose ECM and DM systems may lack the functionality and process flexibility needed to deal with case management, and integration with a CRM system may be needed to handle the communications aspects. Recent developments have introduced the concept of dynamic or adaptive case management within ECM systems, able to manage the case-process workflow in a flexible way, and able to link with multiple customer communications channels.

In this report, we survey how well the IT infrastructure currently used by customer-centric, process-driven suppliers matches the demands of case management, and we look at their planned strategies for the future.

### Definition of a “Case”

In this survey, we defined a “case” as any project, transaction, service or response that is “opened” and “closed” over a period of time to achieve resolution of a problem, claim, request, proposal, development or other complex activity. It is likely to involve multiple persons inside and outside of the organization, with varying relationships to each other, as well as multiple documents and messages. The business process will drive towards an outcome, conclusion or result, but may involve a number of different routes, options and alternatives, many of which are not necessarily defined in advance.

## Key Findings

- “Case management” as a term is understood by 70% of respondents. They are much less familiar with the terms “Dynamic case management” (17%) and “Adaptive case management” (11%).
- 60% of the surveyed organizations are using case files for one-third or more of their business processes. 39% are very heavy users, with nearly two-thirds of processes being case-orientated.
- The biggest motivations to improve case management capabilities are better process productivity and more effective internal collaboration, followed by higher quality customer service and lower compliance risks – the latter being particularly the case in financial services.
- Email alerts are still a primary workflow driver for three-quarters of organizations surveyed. More specific workflows through the ECM/DM system, the Help Desk or dedicated line-of-business solutions are each used in a quarter of organizations, with 11% using CRM only. Only 10% use an integrated combination of ECM/DM and CRM.
- Only 10% have case management supplied as standard with their ECM or CRM system. 42% use customizations or workarounds. One third use a manual process
- Collecting content from multiple repositories into a case file is the biggest content problem, followed by the ability to provide access to the case content for all process and decision-making staff.
- Managing deadlines and presenting a single view of progress are the two biggest process issues.
- In nearly half of organizations, case-processing and customer communications teams are able to access less than 40% of customer interaction records.
- Nearly two-thirds of organizations rely on manual processes to capture the majority (75%) of their customer communications.
- The biggest technical issue with linking people, communications and documents to a case is automatic capture of inbound documents, and in particular, emails. Next comes the difficulty of driving “the case” as the focus for the workflow.
- 11% of respondents feel they have well defined processes, which their current system is able to map. A further 14% have very variable processes, but they have successfully mapped them in their current system. 25% have a workflow tool but feel their case management processes are either too variable or change too quickly to be able to map them. 29% manage the case process manually.
- The difficulty of adding and changing processes is cited by 40% as the biggest issue with their current case-handling mechanism. This is particularly true for finance and utility sectors, compared to government. The next problem cited is implementing across departmental and agency boundaries.
- Maintaining integrations between systems is a particular issue for the finance sector. The disconnect between communications, actions and decisions is a particular issue for utilities.
- There is a general view that it is both costly and time-consuming to achieve a working case-management system.
- Overall opinion is that case management fits better in an ECM/DM system than in a CRM system, although the alternative view partly reflects strong investment by some organizations in their CRM as the core business system. There is a strong view, however, that case management functions are insufficient in both ECM and CRM, requiring many tricks and workarounds to make them function.
- There is also a strong indication that up to a third of respondents are forced to use the corporate choice of ECM/DM system, despite its inadequacies in case management.
- For 40% of respondents, their chosen strategy for improvement would be the integration of CRM with ECM/DM.
- 28% would consider replacing, upgrading or reengineering their ECM/DM system to manage case-style workflows, and 21% would do the same to achieve better case-file content management.
- 32% are prepared to go further and implement either a dedicated ECM/DM system with case management capability (18%) or a line-of-business system with case management capability (14%)

## Product Evolution - the History of CRM and ECM Suites

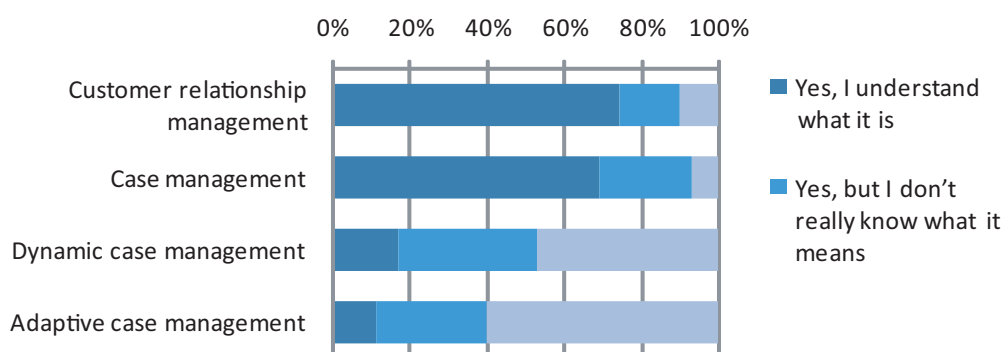
CRM systems have evolved from sales force automation and help desk management. Their driving force is the customer, and they are geared up to drive the next action or communication for that customer. Activity histories are stored against the customer, and incoming and outgoing emails, letters and documents are stored within the contact log, or anchored to it. Within help desk environments, customer enquiries may result in support “tickets” which can be investigated and escalated in the manner of mini- cases.

Second generation CRM systems are able to manage multiple connected relationships between customers, members, citizens, families, assessors, care professionals, etc, but are seldom able to group together such teams or participants on a case-by-case basis. The most recent developments in CRM have involved capturing and coordinating customer interactions across multiple communications channels, and linking up inbound response with outbound emails and customized print.

ECM and document management systems have their origin in business forms processing, where a claims form or application form is scanned, and the image file becomes the focus of a step-by-step business process. Historically, these processes have been largely clerical, with some flexibility for management intervention based on claims limits or decision trees. The evolution from simple imaging to more general document and content management has brought the concept of a central content store, dealing with scanned documents and forms, faxes, electronic documents, and more recently, emails, messages, photos and sound files. Such a repository forms the central record for all non-transactional company data, and is accessible to all knowledge workers as a shared information pool. Alternatively, it may include an information portal, which is linked by customer number or transaction number to other document repositories within CRM, ERP or HR systems. Business process management (BPM) tools within ECM suites provide a common platform to manage and monitor various document-centric workflows within and across departments.

The forms-orientation of these BPM systems, particularly with industry sector customizations, may make them difficult to adapt to changing processes, and it may be impossible to incorporate any degree of parallel or ad-hoc processing, or to include participants in the workflow from outside organizations or agencies. In addition, case management requires the ability to group documents together into a case, and apply the workflow to the case itself, rather than to any one document. The new functional capabilities of “adaptive case management” or “dynamic case management” overcome these limitations, although as we can see from Figure 1, the terms are not yet widely understood.

Figure 1: Prior to this survey, were you familiar with these terms? (N=244, 10+ employees, no trade)

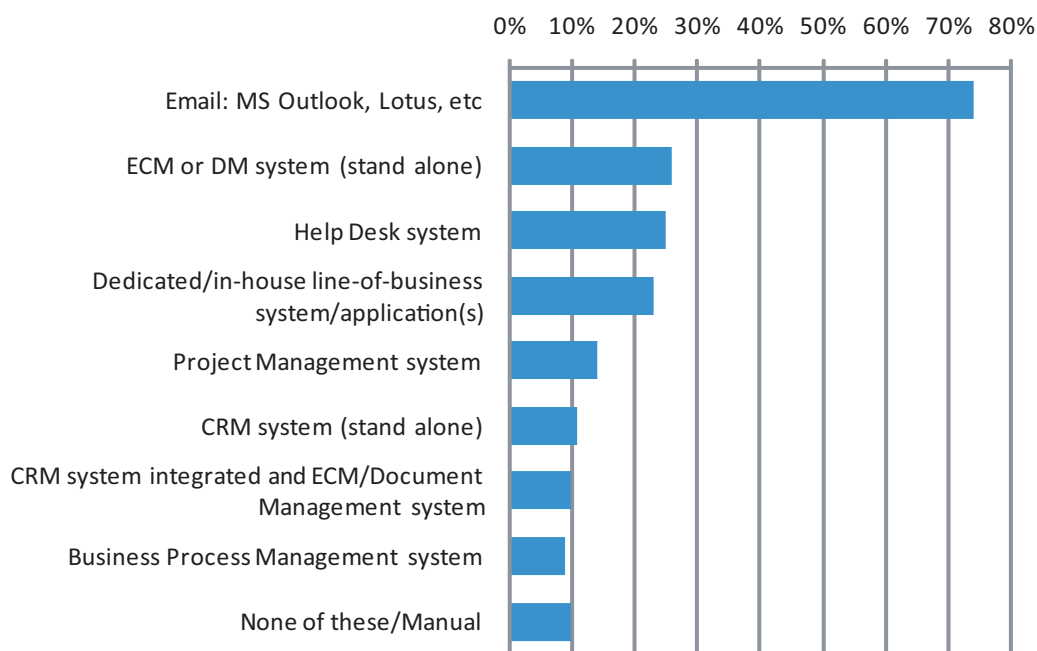


Of course, other IT structures can be used. Project management systems may provide a degree of case-management functionality, either as stand-alone systems, or as project management modules within ERP. Industry-specific line-of-business systems, particularly in finance and insurance, may also be able to focus on a case as the key transaction.

## Current Infrastructures

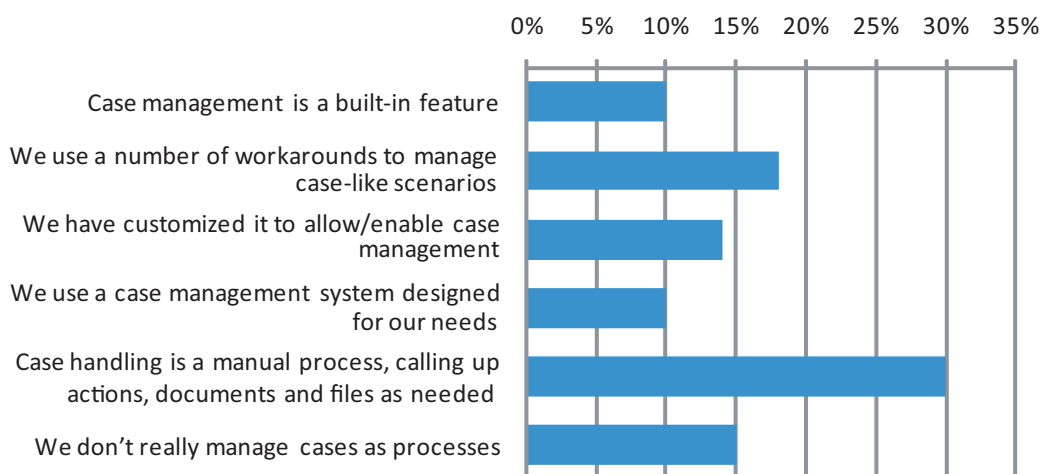
As might be expected, email is the most pervasive mechanism for driving a case management workflow, even where more formal systems are available. After that, our respondents are more equally split at 25% each between ECM/DM systems, help desk systems and dedicated line-of-business applications. CRM systems make a lower showing at just 11%, but a further 10% use CRM integrated with their ECM/DM system. As suggested above, project management systems are also represented, along with stand-alone BPM systems.

Figure 2: Which of the following systems do you generally use for action-prompting, workflow or process management of cases? (Maximum 2)



Bearing in mind the historical case-management shortcomings described earlier for any of these systems, we can see in Figure 3 that only 10% are ready-equipped from day one, although 18% of users have found workarounds to accommodate their requirements. To overcome this, 14% have invested in customization to improve things, and an additional 10% have designed a complete system dedicated to their needs. Nearly a third of respondents rely on manual processing.

Figure 3: How would you best describe the ability of your current ECM, CRM or line-of-business system to deal with case processing and associated documents? (N=240)

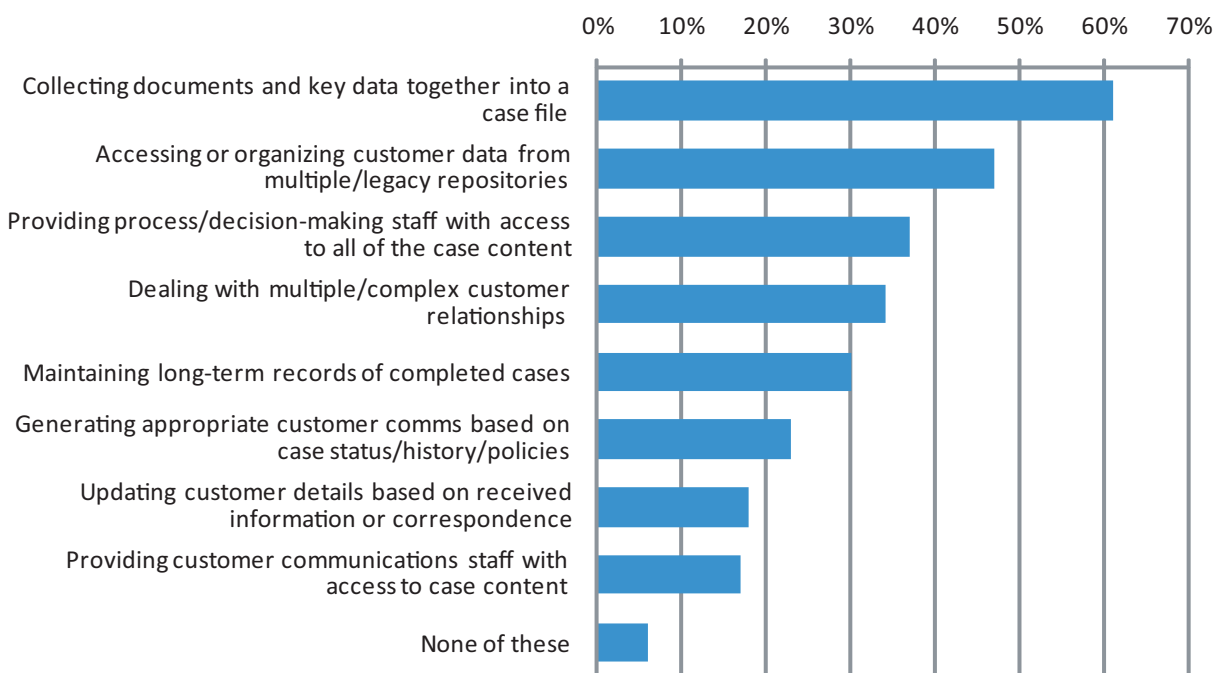


## Business Issues

Collecting documents together into a case file is the single biggest business issue, reported by 61% of respondents. This is compounded for 47% by the difficulty of accessing customer data from multiple repositories and legacy systems. One important aspect of case management is ensuring that CRM-related data from the customer is fed into the case management process, and we see here that 37% of users report difficulties in this area. Next is dealing with complex customer relationships.

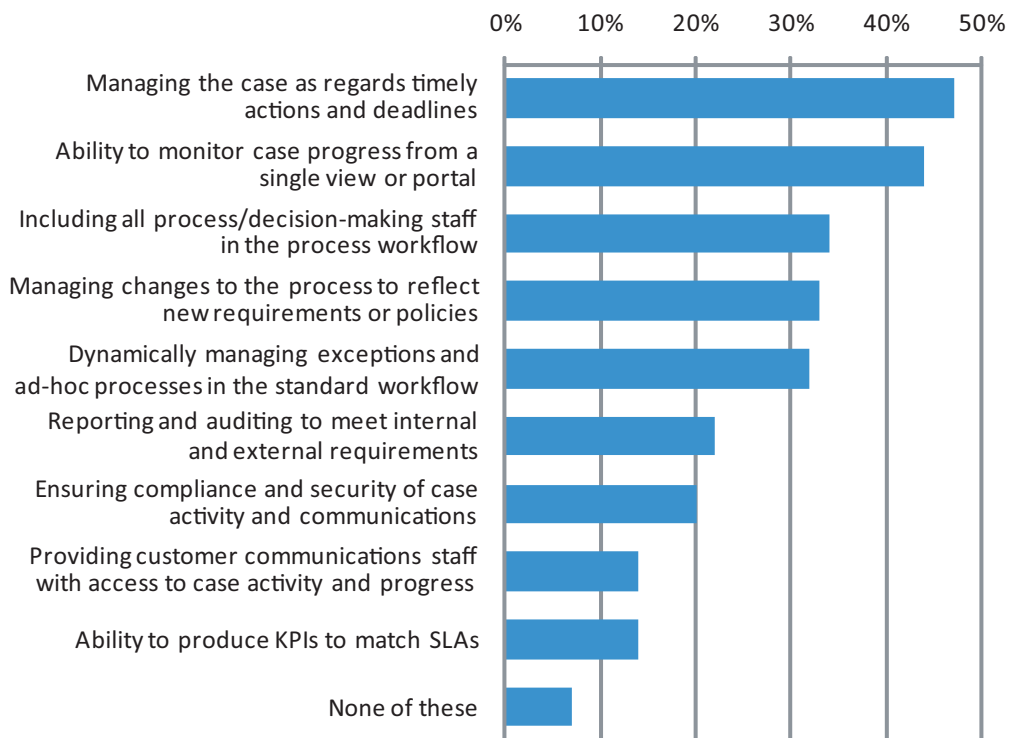
Splitting the data by industry segments of Government, Finance & Insurance, and Utilities & Telecom, we found some differences. The Finance & Insurance sector has particular difficulty accessing customer data from multiple repositories and dealing with complex relationships, but seems further ahead on maintaining long term records, whereas Utilities & Telecom struggle to collect case documents together but have less difficulty with complex relationships.

Figure 4: Which THREE of the following business issues do you most have in managing case content?



When it comes to more specific process issues, as we might expect, managing actions and deadlines is the biggest problem, but 44% of process managers are also seeking a better view or portal through which to monitor case progress. A third of managers find it difficult to include process and decision-making staff in the process workflow, and a third report difficulties with managing process changes to reflect new requirements and policies, or dynamically managing exceptions and ad hoc processes. These are areas addressed by dynamic or adaptive case management.

Figure 5: Which THREE of the following business process issues do you most have in managing case content?

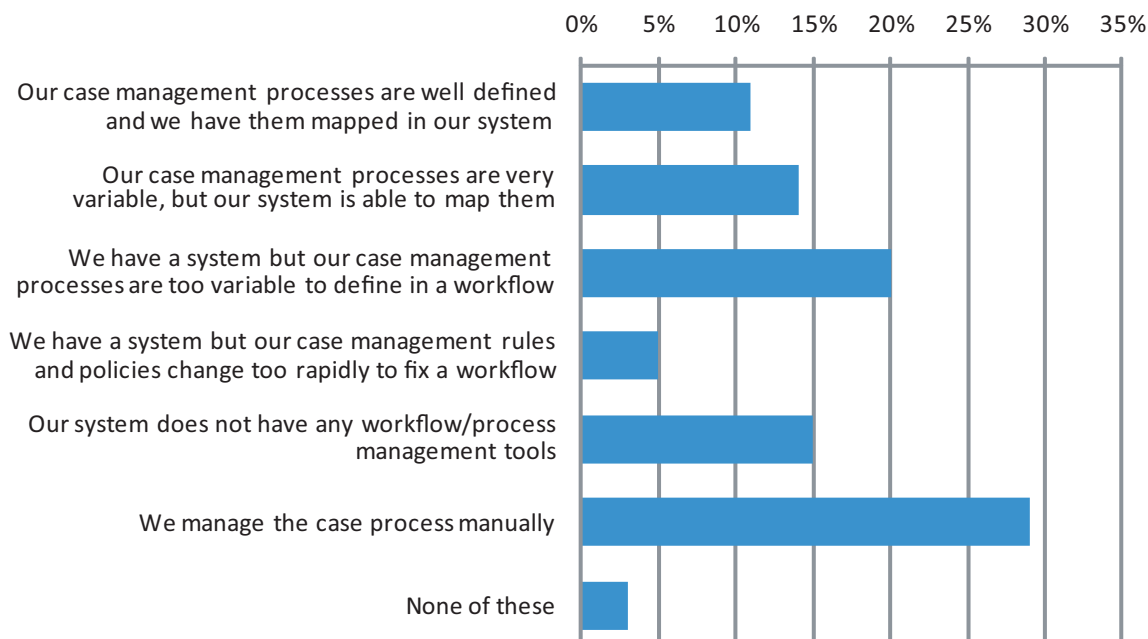


These findings are consistent across industry sectors, although dynamic case management would seem to be particularly important for finance organizations.

## Driving the Business Process

Looking at how well existing systems cope with the demands of variable processes, we see that only 25% of respondents have a system that could be described as appropriate for case management, although this rises to 32% in the finance sector. A further 25% have process tools, but find their processes too variable or too rapidly changing to be viable.

Figure 6: Expanding on the issue of process definition, which of the following could be best used to describe your case-management mechanism? (N=221)



## Content Accessibility

Despite the mantra of CRM to be a “single view of the customer,” it seems from Figure 7 that in nearly half of the organizations surveyed, only 40% or less of communication transactions with the customer are available to the whole of the case handling team, and nearly two thirds are relying on manual processes to capture the majority (75%) of communications. Only 7% of organizations could claim to have universal access to the complete case file by the case-processing and customer communications teams.

Figure 7a: What proportion of useful customer (client/citizen/patient) communications — inbound and outbound — would you say is readily retrievable by authorized members of the case-processing & related customer communications teams.

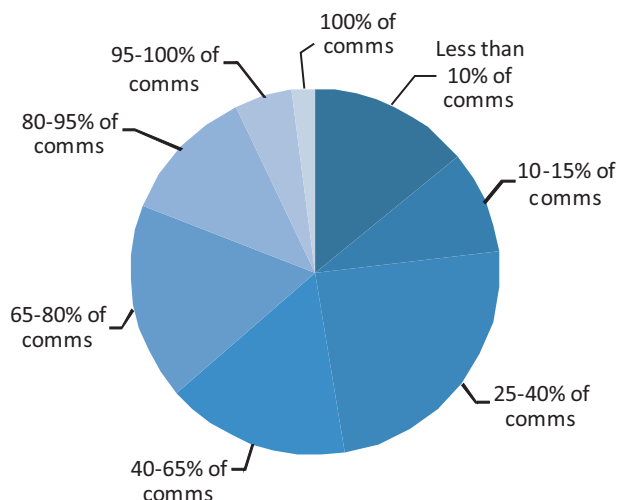


Figure 7b: What proportion of useful customer (client/citizen/patient) communications — inbound and outbound — would you say is automated to facilitate case-processing.

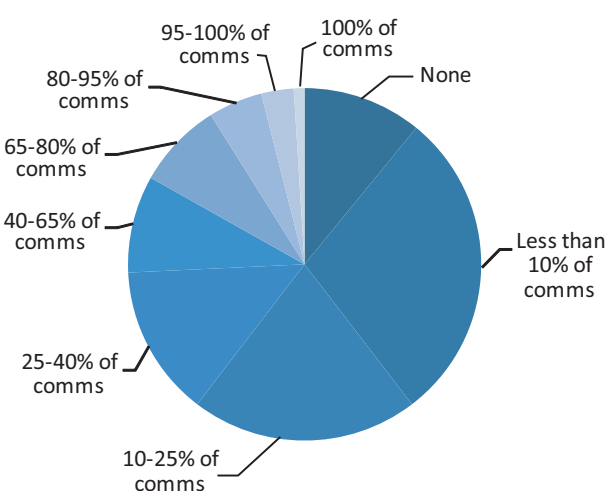
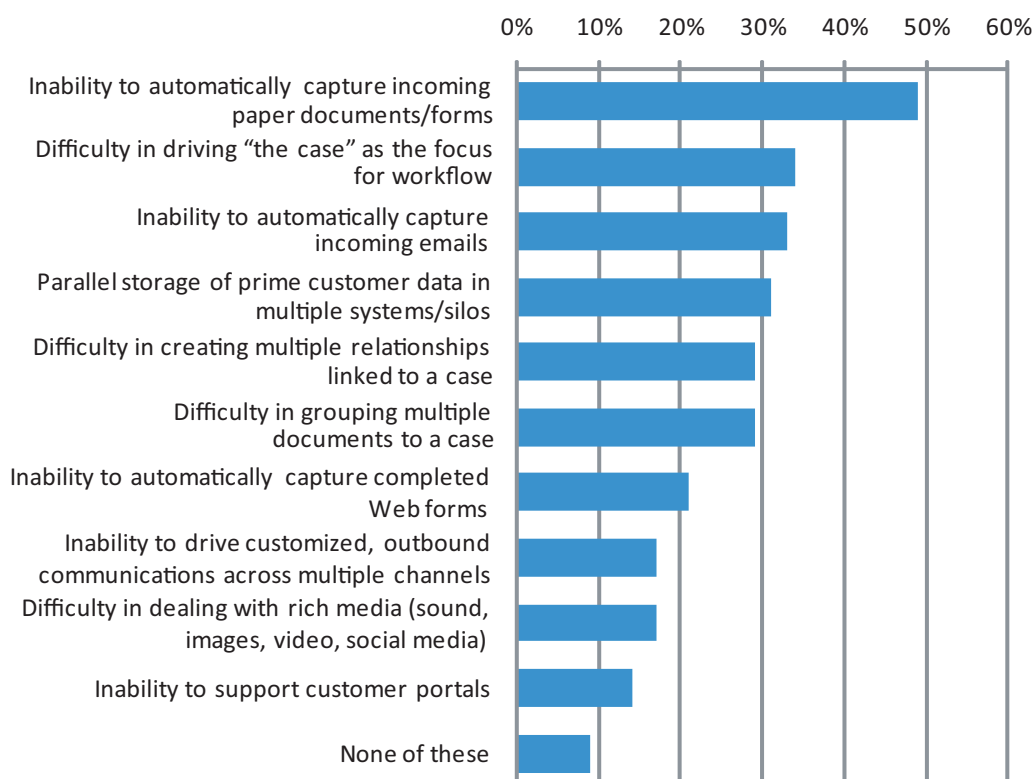


Figure 8: Which of the following technical issues do you have in linking people, communications and documents to a case?



Somewhat surprisingly, given the maturity of document scanning systems, from Figure 8 we see that 49% of respondents are unable to automatically capture incoming documents and forms into the case file. Solutions exist here, whether for low volume scanning through distributed capture systems and MFPs, or high volume capture through digital mailrooms. Perhaps less of a surprise is that 33% struggle to capture emails automatically, given the difficulties of filtering and indexing.

A third of organizations have difficulty driving “the case” as the focus of their workflow. A similar proportion struggle with creating multiple relationships linked to a case, and grouping multiple documents to a case. A further difficulty in 31% of organizations is that the parallel storage of prime customer data in multiple systems or silos creates inevitable dispersion of case-related documents.

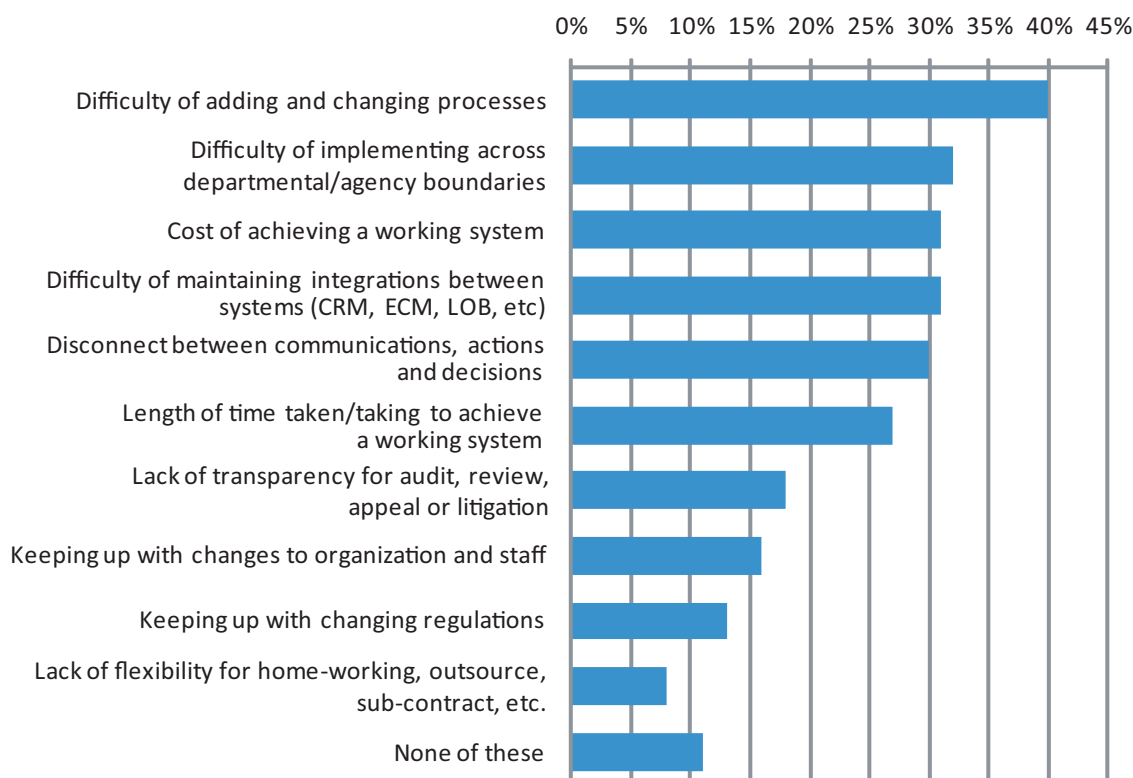
## IT Issues

Most of the technical issues with existing systems revolve around the ability to manage change, both within the process and across the IT infrastructure. One of the differentiating factors between alternative ECM products is the ease of making changes – can it be done by process staff or does it need internal IT or external consultants?

Compared to most ECM and CRM implementations, case management is more likely to require extension across departmental and agency boundaries, causing communications and security issues.

The cost of a suitable system implementation is cited by 31% as an issue, and the time taken by 27%, although Utilities & Telecom tend to have less issues with this and more with the disconnect between communications, actions and decisions.

*Figure 9: Which THREE of the following are the biggest issues with your current case management mechanism?*



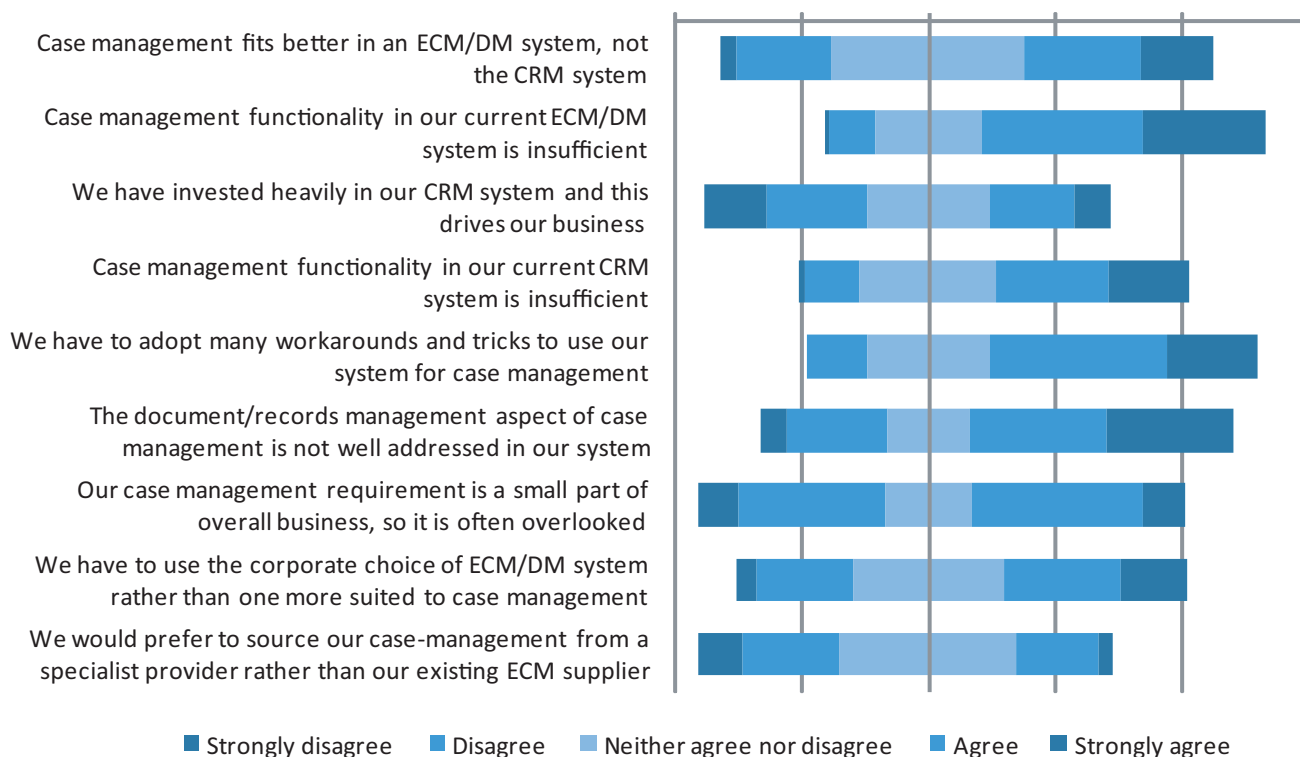
## System Strategies

As we have seen, past strategies for case management have been somewhat variable as to where the core case process is managed. Looking at the views of our respondents, there is a little more support for the view that case management belongs in the ECM/DM system rather than the CRM system, but in either case, there is a strong view that the features provided in current systems are inadequate. Having said that, overall, 24% have invested heavily in a CRM system that drives their business - more so in Finance (33%), and less so in Utilities (11%).

As we saw before, 53% have to use tricks and workarounds for case management, particularly the 42% where case management is a small part of their overall business. In these situations, 36% begrudge the fact that they have to use the corporate choice of ECM/DM system rather than one more suited to case management.

Despite these shortcomings, there is an overall preference to stay with an existing ECM supplier, rather than use a specialist case-management vendor.

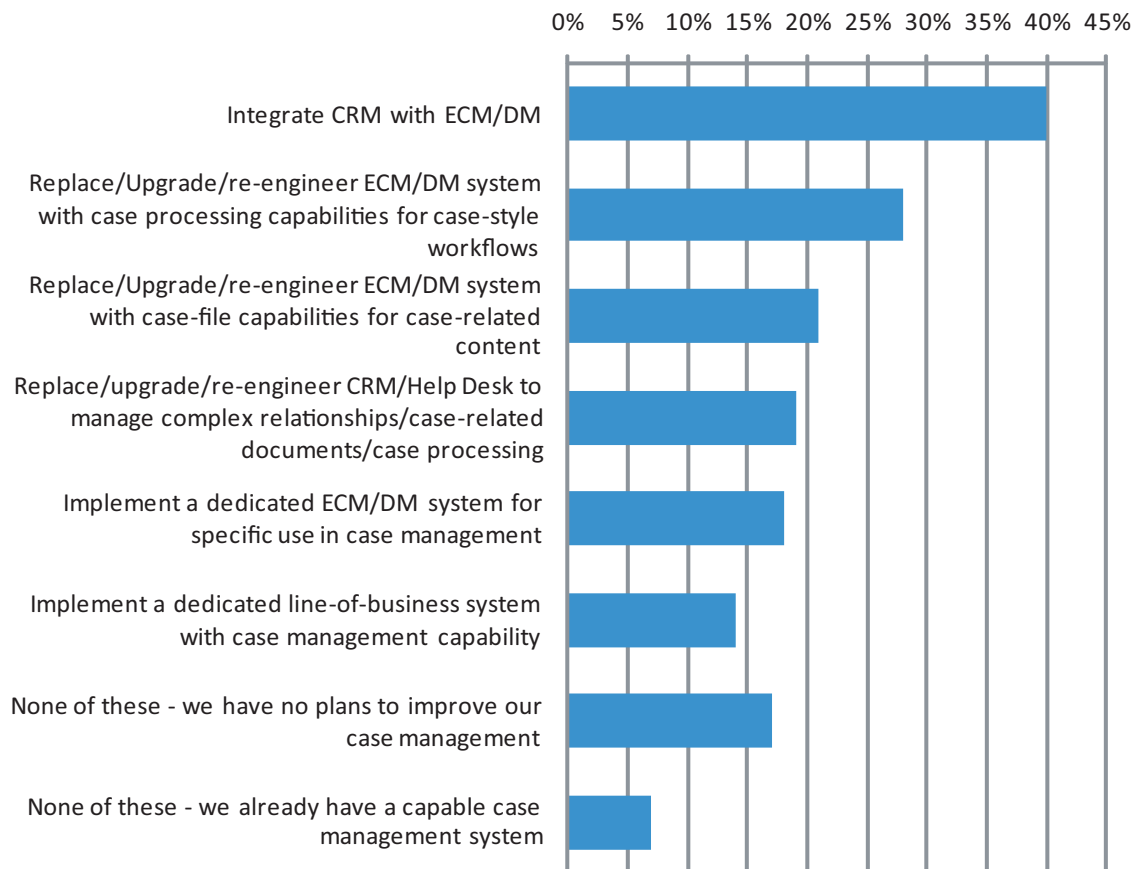
Figure 10: How do you feel about the following statements regarding case management?



Reflecting these preferences into future strategies, in Figure 11 we see a strong will (40%) to better integrate CRM with ECM, generally in association with the 28% who would like to upgrade their ECM system to improve its capabilities for case-style workflows and 21% who would like to improve the case-file capabilities.

A surprisingly high 18% indicated that they would consider implementing a dedicated ECM/DM system for specific use in case management, with 14% looking more towards a dedicated line-of-business system. 19% will stick with their CRM or help desk system, but look to improve case handling capabilities.

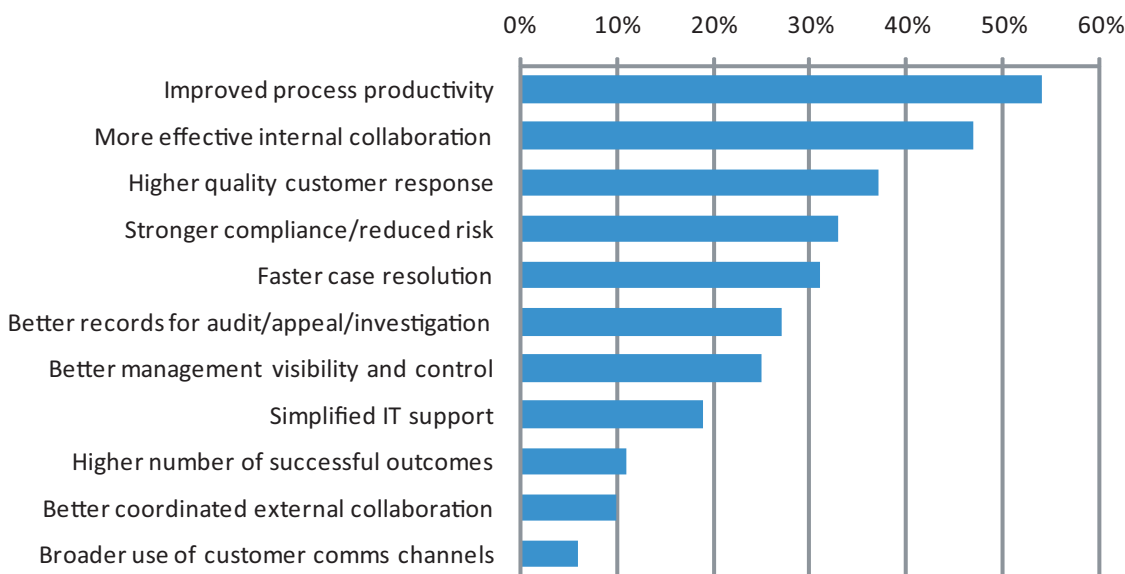
Figure 11: Which of the following future strategies would you consider to improve your case management support?



## The Benefits of Improved Case Management

According to our survey respondents, the two biggest motivations to improve case management capabilities are better process productivity and more effective internal collaboration, Next come higher quality customer service and lower compliance risks.

Figure 12: Which THREE of the following are the biggest business drivers for improving your case management capabilities?



The Finance sector would consider compliance to be number two after improved productivity, whilst Utilities & Telecom would prefer more effective collaboration and better record keeping.

<b>Table 1: Top Business Drivers by Industry Sector</b>	<b>Government</b>	<b>Finance &amp; Insurance</b>	<b>Utilities &amp; Telecom</b>
Improved process productivity	#1	#1	#2
More effective internal collaboration	#2	#3	#1
Higher quality customer response	#3	#4	#4
Faster case resolution	#4	#6	#7
Stronger compliance/reduced risk	#5	#2	#5
Better records for audit/appeal/investigation	#6	#7	#3
Better management visibility and control	#7	#5	#6

## Conclusion and Recommendations

Management of case-based tasks can put considerable stress on IT systems and, ultimately, the entire business. Legacy CRM and help desk systems that do not support complex relationships, modern communications channels, rich media, and comprehensive management of inbound and outbound documents, will struggle to meet the demands of today’s customer-centric or citizen-centric businesses. However, even with these capabilities, CRM systems are struggling to manage case-files and case-based processes.

Document management repositories provide a more secure and compliant method of managing case documents. However, systems taking a single-document view, rather than focussing on a case file, frequently require customization or procedural acrobatics to manage case-based scenarios. Case processing has very specific needs in terms of adaptive or dynamic workflows able to accommodate ad hoc routings and rapid process change. Cases may involve collaboration with others outside the organization, and these relationships may vary case-by-case. Above all, case managers need to be able to monitor and manage progress.

In our survey, we have found that users are struggling to achieve case management within existing systems, requiring heavy customization in some cases. There is a strong demand for better case management functionality, primarily within the ECM system, or alternatively within CRM, but also with a strong level of integration between them. The demands for flexible workflows within the case management application suggest that the recent developments of dynamic or adaptive case management are well overdue, and users are looking to these improvements to boost process productivity and enhance collaboration.

Based on the shortcomings described in this report, we would suggest that organizations who require case management capabilities, even if only for a proportion of their processes, take due consideration of the very specific requirements of case management when selecting a new or replacement ECM system. Creating a case file from multiple elements of content, linking case participants, flexible management of the workflow process and integrating with CRM or help-desk systems are important requirements if expected productivity gains are to be achieved.

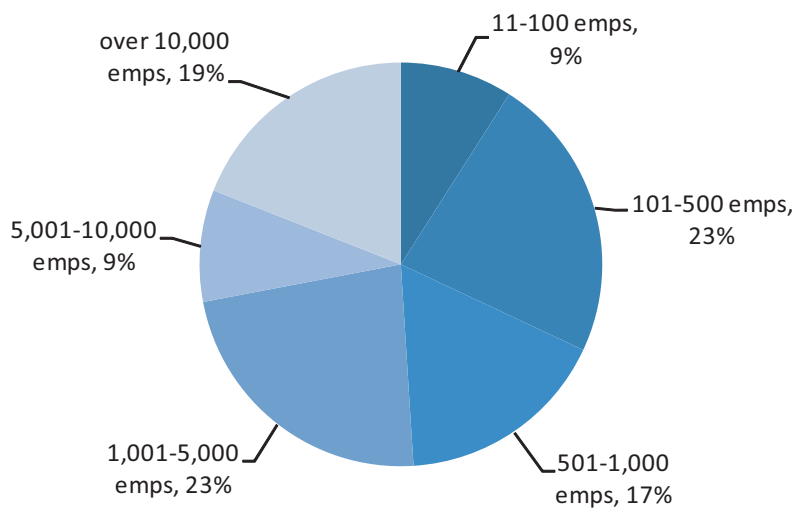
# Appendix 1 - Survey Demographics

## Survey Background

The survey was taken by 290 individual members of the AIIM community between 15th April and 4th May 2010, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members

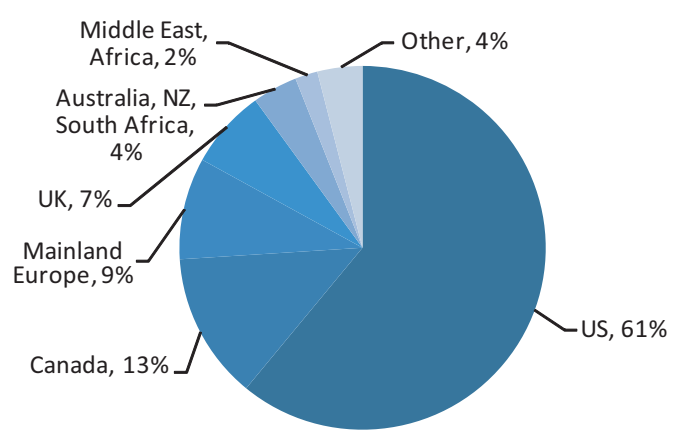
## Organizational Size

ECM suppliers and organizations of 10 employees or less have been excluded from all of the results in this report. On this basis, larger organizations (over 5,000 employees) represent 28%, with mid-sized organizations (500 to 5,000 employees) at 40%. Small-to-mid sized (10 to 500 employees) are 32%.



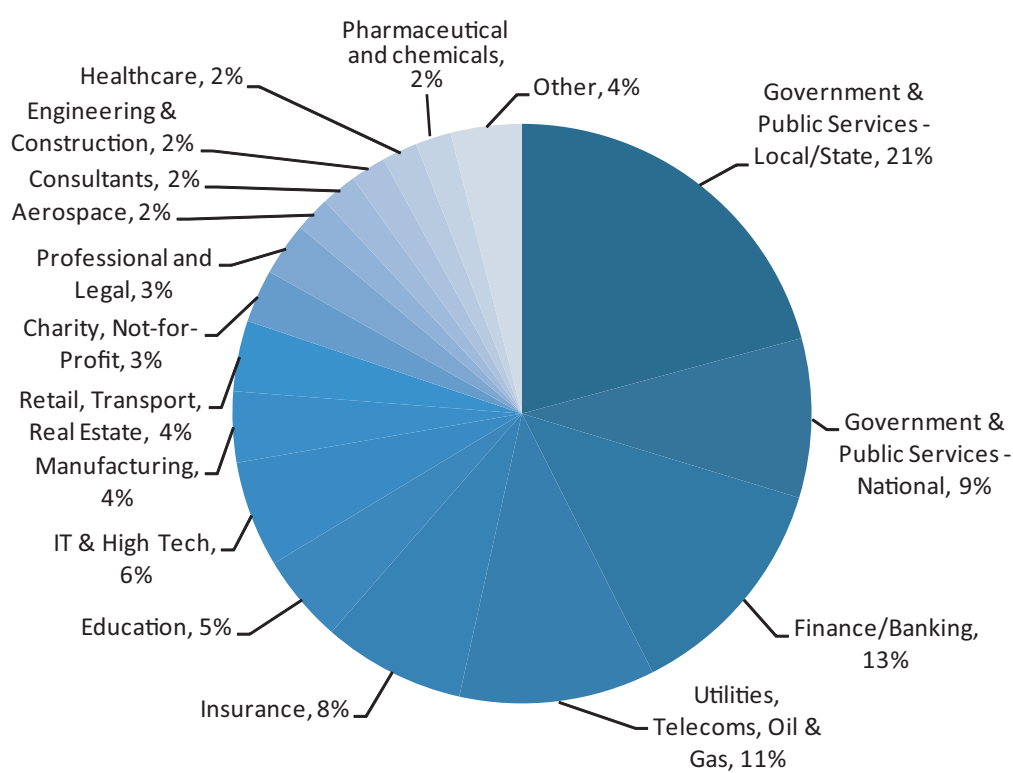
## Geography

US and Canada make up 74% of respondents, with 22% from EMEA.



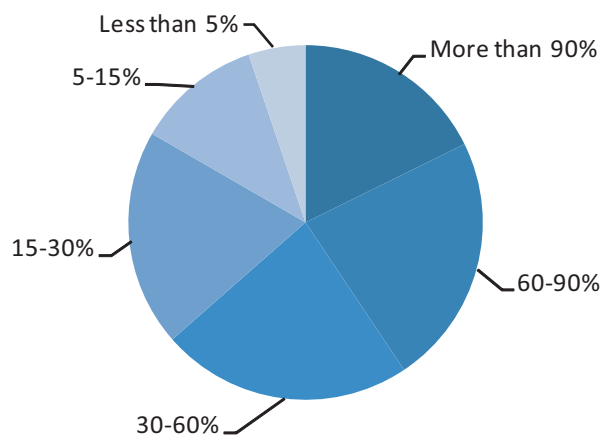
## Industry Sector

Local government takes up a significant proportion of the survey at 21%, with a further 9% from national government. Next comes Finance & Banking at 13%, with a further 8% in Insurance. Utilities & Telecom is 11%. The remaining sectors are evenly split.



## Level of Case Management

The proportion of main line-of-business processes involving a case file, claim file, proposal, bid, incident report, service ticket, etc.



## Appendix 2 - Open-ended comments:

“Do you have any further comments to make about your case-management capabilities and plans?”

- Our stand-alone systems manage cases just fine, but the lack of integration between the systems is the problem.
- The concept of case management per se is a new one to our company - we do it on an ad hoc basis at present, but structure and auditability would be an asset, given that we operate in a heavily regulated environment.
- I would like our company to consider out of the box systems as opposed to IS writing everything internally. I feel that IS does not totally understand all the complexities and legal needs.
- I just don't understand why BPM/ECM systems don't have better case management tools. I cannot imagine one without the other. When dealing with document and human centric processes, you HAVE to have Case Management. And the User Interface MUST be process-aware.
- Case Management and ECM/EDRMS only linked by recording existence of case number in EDRMS. Case workers on record as believing entry of case notes into CRM is too time consuming.
- We consider both ECM/DM and CRM to be an inappropriate approach to case management. Process management systems are our primary engine for case management, with integrated content management.
- Our case management processes are driven by the method of submission. Paper and web forms have a well-defined, automated workflow system. Calls and emails go through our CRM system, which is less robust in terms of workflow, reporting, etc.

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Papyrus Platform for Business Communications offers an end-to-end software platform solution for consolidation of inbound and outbound communications with real-time process, document and case management.

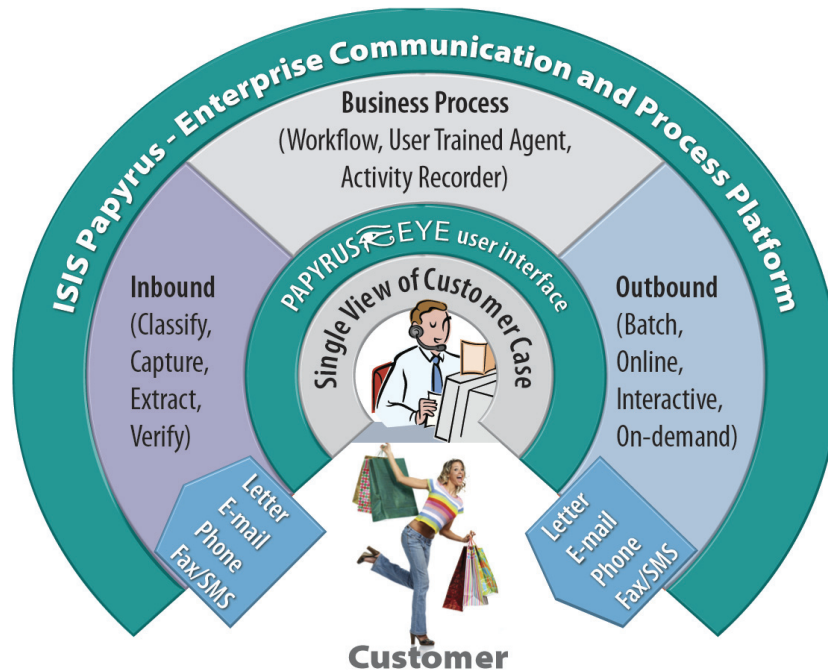
Papyrus Case Management allows knowledge workers, customer care managers and executives to respond, review, react and adapt efficiently to meet customer needs without sacrificing quality, speed or compliance. The case folder presents a unified and customized view that summarizes status and provides managed, shared access to key activity and content.

Adaptive Case Management (ACM) further enables exception handling for decision-based applications such as claims management, contract management, account opening, purchase-to-pay and fraud investigations.

ACM with Papyrus combines enterprise data, business rules, document creation, capture, production, reporting and output management with business process management and learning. The Papyrus consolidated view ensures that documents, next steps and process variations are visible to all key players.

More than 2,000 enterprise customers worldwide use Papyrus standard software for business applications to manage correspondence and document design, adaptive case management, inbound capture, claims administration, billing, contracts, campaigns, ADF, interactive reporting and archiving with multichannel capabilities.

Founded in 1988, ISIS Papyrus maintains a global commitment to bringing substantial benefits to the enterprise business user and knowledge worker with 16 offices, 14 subsidiaries and three development centers across North America, Europe and Asia Pacific and support for the adoption and development of the global Content Management Interoperability Standard (CMIS).



*Consolidating inbound and outbound information, Papyrus Case Management allows knowledge workers to collaboratively respond, react and adapt efficiently to customers – for the right information to the right person at the right time, for the right result.*



AIIM ([www.aiim.org](http://www.aiim.org)) is the community that provides education, research, and best practices to help organizations find, control, and optimize their information.

For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire ECM industry - including users, suppliers, and the channel—acts as the industry's intermediary.

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