

6 ways to improve case-based processes

Abstract: Case-based processes, regardless of whether they are for social services, claims process, grants or another application, are inherently complex systems. We have six suggestions to optimize your management of any cased-based process.

1. Start with a holistic view.

A holistic view of your cases throughout the life cycle helps ensure you make better decisions, meet critical obligations and ensure compliance. Let's face it, not all the data you need is ever in one place and dozens of people may touch a case during its life. A collaborative environment allows you one view into all the processing steps and data elements. A secure interface and audit trails ensure data integrity and accountability. When it comes time to report on results, this visibility will make compliance much easier. Allowing individuals to manage their part of the process through a secure system improves productivity and processing time. Status updates are available in real-time, reducing the amount of "back and forth" calls and emails between people. The result is better visibility and more effective collaboration.



2. Leverage off-the-shelf technology to dramatically reduce cost and deployment time.

Today's technology offers sophistication and ease-of-use not available even three years ago. Today there is no need to develop an expensive custom solution or suffer through a product that forces you to adhere to a specific business process.

Look for tools that allow for business-user customization with drop down menus and wizard interfaces. Look for flexible solutions that will work across an agency or just in a single department. These will reduce your dependence upon IT for routine changes and support and will provide a low total cost of ownership.

3. Improve the approval and decision making process through the use of workflow and ad-hoc routing -- all managed through the use of built-in business rules.

An off-the-shelf solution should be robust and sophisticated, but still easy to use. Your solution should have best practices engineered into the product. Things change and there are times when an action needs to be taken that is outside process. That flexibility engineered into the product will dramatically reduce your cost of deployment and maintenance. A custom solution that locks you into an obsolete process will frustrate users and slow down processing. Choose a solution with scalability and flexibility to meet your needs now and well into the future. This will reduce total cost of ownership and make it easier to adopt.

4. Leverage systems already in place.

You've invested heavily in databases, servers, ERP systems, repositories and content management. A solution that requires a forklift upgrade of infrastructure is too risky and expensive to consider. Ensure your vendor of choice supports what you already have and can communicate with multiple systems simultaneously.

5. Capture metrics, trends and improve analysis with built-in and custom reporting.

Accountability is in fashion. When you have a single dashboard view into your full life cycle of cases you can easily spot trends and find opportunities to improve process, policies or productivity. Only a single view of your complex world turns data into actionable information. When called upon to justify budget and results, your work will be much easier since all the information you need will be at your fingertips. A management dashboard allows you to see all critical metrics at a glance.

6. Make it easy on your staff.

Don't overlook usability when choosing a system. A system that's easy to learn and navigate will be faster to adopt and reduce total cost of ownership. Involve users in the design of the workflow and keep key functionality to a minimum number of clicks. Use wizards for more complex processes such as starting a new case. Checklists and reminders will provide an easy and automatic way to ensure compliance and improve productivity.

We'd be honored to help you optimize your case-based processes. Our flexible solutions allow the same application to support any number of case-based processes like claims, benefits, investigations, social services and many more.

The Prodagio Business Suite.

Prodagio Case Management is part of the Prodagio Business Suite of off-the-shelf applications. The suite includes Prodagio's award-winning Prodagio A/P[™], Prodagio Contracts[™] and Prodagio Self-Serve[™].

If you're ready to learn more, contact sales@prodagio.com for a demo.