Case management

Spreadsheets, departmental databases make way for a new technology trend

INTERVIEWED BY JAYNE GEST

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Case management might not sound like a technology buzzword, but the all-inclusive system brings together bundles of information relating to a single case — a client, project, etc. — rather than working with individual documents or files in silos.

"When I first got involved with case management, it was hard to wrap my head around it. I always thought of a case as something like a legal case," says Heather Stump, applications delivery manager at Blue Technologies.

But a case could be a sale from the start through to the delivery of that good or service, or a contract that goes back and forth, being revised, with all the associated information in a centralized system.

While case management solutions aren't new, previously they focused on specific industries. Now, Stump says providers of document management or enterprise content management solutions all offer case management as an add-on module.

"It's easily configured to your needs. There's not a lot of custom coding. It's easy to add or take away functionality," she says. "A case management system standardizes your approach to business, creating a flexible structure to manage different workloads."

Smart Business spoke with Stump about ensuring business scalability through case management solutions.

How can organizations benefit from this approach?

In any company, whether it's manufacturing, insurance, government, health care or financial services, it's not unusual for each employee to manage cases differently. One might use a spreadsheet, another just has a Word document and a third uses a departmental database. If the workload increases or an employee goes on medical leave, there is no standard way of doing something.
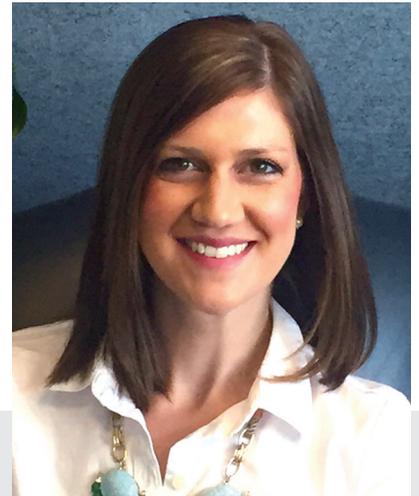
A case management solution improves communication and makes sure everyone has the information they need. It also can be accessed remotely through mobile devices.

It's similar to document management, but the difference is it's data driven; more like an enterprise resource planning, or ERP, solution, but much easier to customize. You can associate documents and files to the data, with checklists to see what is left to complete and the ability to run reports on any data point within the solution.

Case management solutions are particularly helpful in times of growth. With growth, comes volume, and volume without automation is very people driven. People manually drive that process, that volume, which turns into cost. It also takes them longer to process, without standardization or structure. The processes aren't repeatable.

What do employers need to know about setting up a case management solution?

The discovery and design stage is critical. You want to understand where you want to start and have an idea of how it will need to be grown. These case management systems are relational database applications that are built from the ground up. You need to engage the right expert who can lead that phase in order to gather the appropriate information, such as understanding what type of case you're managing, who touches those cases, who needs access to that information and what other areas of the business are related.

Before you call in that third-party expert, though, it's a good idea to lay the groundwork. As the C-level executive or owner who wants to add this efficiency, spend time internally with your team planning it out and educating them on the need.

The design and training phase take the longest, but the testing/pilot phase is what makes the technology adoption successful, to ultimately boost efficiency and productivity. For example, a children and family services agency is implementing a case management system that will start with the central office. Then the agency plans to add on the contractors who help with the cases, and later, the other government agencies that submit documents and data related to its cases.

A gradual rollout is best, where you give employees time to run cases, claims or data through the system. They can ask questions and submit suggestions for changes. Then, once you go live, everyone knows what they are doing. If you don't gain buy-in, the users will go right back to their Excel spreadsheet rather than use the system. ●