

ICM™

Intelligent Case Management

Organisations are under constant pressure to improve service delivery while simultaneously having to manage tight or reduced budgets. Improving efficiency and reducing operational costs have never been more important. All this is happening in a world where customer expectations are always growing.

ICM is a web-based application that enables organisations to optimize their case management processes, collaborate with multiple users (other case managers plus third party service providers) in a highly efficient manner at less cost.

ICM is an enterprise case management system that can be used to manage any type of case. The system can be configured to optimize the outcomes achieved for any case management scenario (e.g. complaints, claims, customer care, incidents, referrals, health care delivery) in any industry sector (public sector, insurance, utilities, health, telecommunications). Even where an organisation has an existing case management tool, ICM can provide further value by extending the collaboration to include third party suppliers and stakeholders.

ICM is a fully scalable, easily implemented software solution designed for use in any industry.



Improving case management processes

Many organisations collect a lot of information managing cases during interactions with clients, business partners and other stakeholders. Unfortunately much of this information may be dispersed in multiple locations making it difficult to manage the case optimally. Suitable automated workflow alerts may not be available due to a lack of accessible data. Documentation supporting the case may be held in paper files and only available to staff in the same physical location.

Interactions between the different participants in a case may not operate smoothly or efficiently. Very often key suppliers in the business process are excluded from accessing internal workflow applications. The same is often true for customers who should be central to the case being managed.

The result is a fragmented solution that does not deliver according to service standards or requires significant manual intervention. As a result, the case management processes often perform at a level which just reaches the organisation's minimum standard. More often than not however, the cases that attract the most publicity are those that fall short of such standards.

A solution which integrated all participants in the case management process in a cohesive, information rich workflow enabled solution would have enormous benefits to the organisation.

ICM allows organisations to implement their unique workflows quickly and inexpensively. It exposes the case management process to all participants in the process. And it provides comprehensive management reporting to monitor performance against required service standards.

ICM can also track the performance of external third party service providers against agreed key performance indicators without the need for them to submit manual reports. Typically, performance measures are in the areas of quality, timeliness, cost effectiveness, estimating accuracy, and the impact of a supplier on case outcomes.

With ICM, organisations know that their role in the case management process is being closely monitored. Case managers are able to manage cases more efficiently and proactively. External suppliers can be rewarded for performing better than their competitors by receiving relatively more work. The end result is that all stakeholders will receive a higher level of service.

Enhancing process efficiency and controlling costs

ICM is a highly secure web-based system that connects case managers, customers and external service providers. The entire business process, from creation of a new case, to allocation of referrals to external suppliers, to interaction with the customer, can be conducted online.

ICM significantly reduces administration costs associated with case management and ensures compliance with your organisation's processes.

ICM System Features

Virtual Case Folder

A significant amount of information is collected in the life cycle of a case. All this information is logically organised within a virtual case folder to ensure that all users with visibility of the case can quickly and efficiently navigate the case to locate the information they need. The display and content of the virtual case folder can be tailored by user role to ensure users only see the information required by their role.

Task based workflow

User tasks drive the business process for your staff, 3rd party suppliers and customers, informing them when actions are due. The system will automatically refresh the set of active tasks for a case whenever the case information changes. Users can also create ad-hoc tasks for themselves or other participants linked to the case as required. Users can subscribe to receive email alerts when specified system events occur or when the due date for an active task is approaching.

Document management

The virtual case folder contains a list of all files, documents and correspondence linked to the case. Users simply click on a document to view any historical correspondence and the system will launch the appropriate viewer program. New documents can be generated from templates manually or automatically created by the system based on system events. Users can upload new documents to the virtual case folder as required. Users typically receive an email alert whenever a new document is added to a case for their review.

Messaging

A messaging system allows secure messaging between users linked to the virtual case folder. Users typically receive an email alert whenever a new message is added to a case that requires their review. File notes can also be added to the case as required.

Reporting

A sophisticated parameter driven reporting system provides excellent visibility of all data relating to case management and user performance. Reporting categories include operational, staff performance, supplier performance, red flag reports and summary reports.

Collaboration with 3rd parties

The system can also be used to provide case and job visibility to external parties such as 3rd party suppliers, stakeholders and customers linked to the case. For example, work can be assigned to a panel legal supplier to provide a legal opinion on some aspect of the case. The reports and invoices of the 3rd party suppliers are loaded into the system by the 3rd party suppliers when their work is complete. Customers could securely access the system and view relevant case details and status information. This might include the key activities that have been completed, the estimated completion date/time of incomplete activities, and the contact details of users and suppliers linked to the case. Additionally, the customer could communicate with the case manager via the system's messaging system, opt to receive electronic notifications when key activities have been completed, and complete online quality reviews.

Involved Parties

All parties involved with the case will be linked to the case with their roles and responsibilities clearly defined.

Search

A high-performance and easy to use Google-like text searching tool allows users to quickly locate any case in their portfolio.

Competitive tendering

Where external suppliers are involved in the business process, the system can be configured to select the most appropriate supplier via competitive tendering to ensure you get the greatest value from your procurement decisions. Multiple supplier jobs can be allocated concurrently under a case so that suppliers can submit a tender for the work being allocated. The system allows side-by-side comparison of tenders, their approval or rejection, and the continuation of the business process with the successful supplier.

Intelligent allocation

New cases are assigned to case managers using intelligent case allocation. The system can utilize a range of variables (e.g. previous performance ratings for similar cases, qualifications, current workload, case complexity, etc) to automatically assign the case to the most efficient and effective case manager.

In a similar vein, if work is to be allocated to external suppliers as part of the case management process, then the system can present the case manager with a performance ranked view of potential suppliers who are able to do the type of work required. The suppliers can be ranked based on any combination of their recent performance against the weighted KPIs, their current workload, and any discounts that they are currently offering for the job type being allocated. The system can also assist the allocation decision by displaying data such as the suppliers closest bill-out location relative to where the work needs to be performed.

Data Security and Integrity

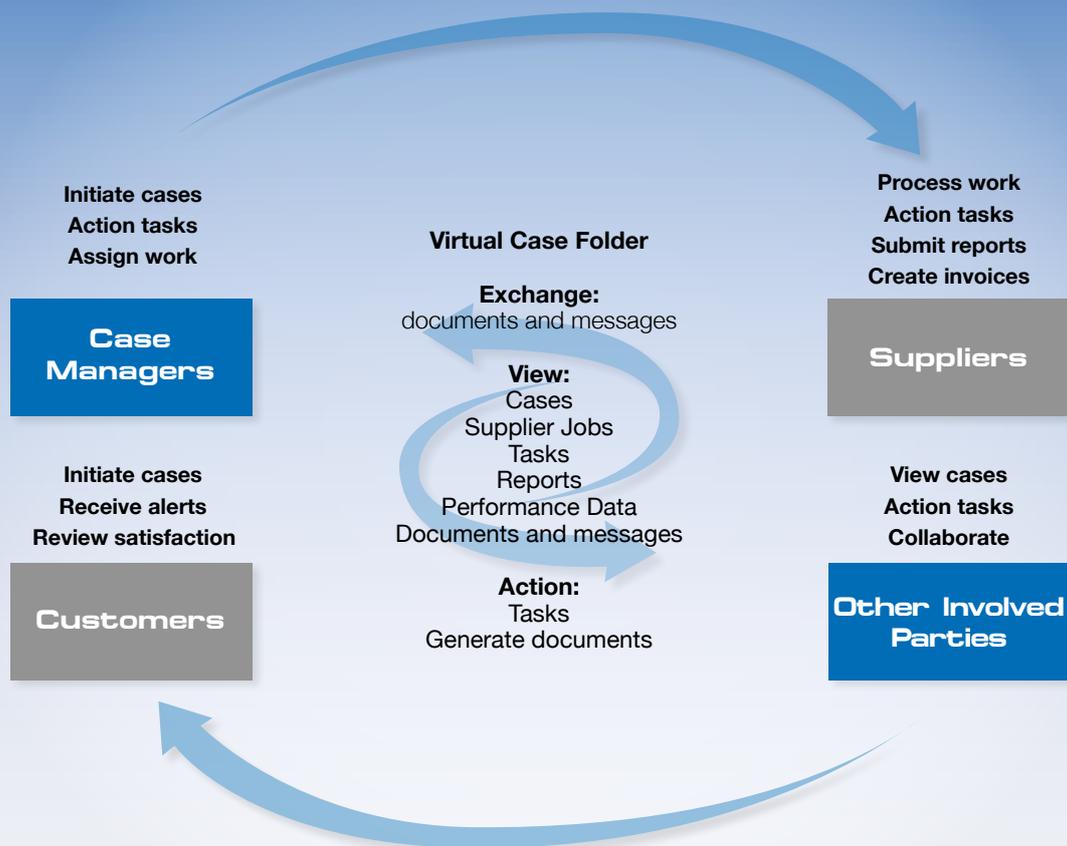
Users are grouped into teams which the system uses to dynamically determine the case portfolio for an individual user. So if you are a senior manager you will be able to view more cases than a regular case manager. The system also tracks the details of all completed tasks by case and user so at any time you can audit the workflow history of the case.

Personalised Roles and Views

Based on the roles linked to your user profile, the system will determine exactly how much information you are able to view and update. All the navigation menus and screens in the system are configurable by user role.

System administration

A complete set of configuration tools allows users to maintain the system once implemented. For example, a business super-user can maintain supplier panels, billing rates, users, document templates etc. Whilst most of the system's functions and pages are common across different user types, the system allows additional pages to be configured quickly when required.



Implementing ICM

ICM is entirely web-based, and no software other than a web browser is required on a user's desktop.

The system can be hosted, or deployed within your data center. Typically, a new client's system can be configured and implemented within 4 to 6 weeks.

Integration with your existing computer system(s) is normally straight forward, with a secure real time or batch file transfer process passing data to and from ICM so that case and invoice data can be synchronized with other systems where required.

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