

# Verint Case Management Solution Brief

Overview of the Unique Capabilities and Benefits of  
Verint Case Management

December 2015





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## Introduction

Businesses struggling to improve their customer service are failing to recognize that three stakeholders exist within the customer service relationship—the customer, the business, and the employee. In particular, some organizations have failed to recognize the power of the employee in transforming customer experience, and attempts to automate the employee out of the customer service equation have backfired.

Traditional approaches to customer service using customer relationship management (CRM), enterprise resource planning (ERP), enterprise content management (ECM), and automated workflows often fail because they do not consider the importance of all three of the customer service stakeholders. Verint Engagement Management, however, is an industry-recognized leading case management application that is 100-percent focused on optimizing customer engagement and uniquely integrates customer channels, knowledge management, and case management to meet the demands of today's customers, businesses, and employees.

This document provides a short introduction to dynamic case management and discusses its importance within a customer service context before providing more details on the features that make Verint Engagement Management unique within the case management industry.

## What is Dynamic Case Management?

Case management is critical to the work of many organizations and is a common approach to supporting knowledge-intensive, unpredictable processes. Case management describes the way organizations, such as government agencies, banks, utilities, and insurance providers handle complex customer and service interactions.

When a customer initiates a request for service, the set of interactions with that customer and other relevant participants (including internal stakeholders) from initiation to completion is known as the case. In the past, cases would have been managed using a manila folder of documents and records, with the folder moving through a department or organization from one in-box to the next while the case was evaluated and progressed.

Evaluation of the case would involve correspondence, phone calls, meetings, and notes being appended to provide a record of the progress of the case. The staff working on the case, known as case workers, would be knowledgeable about their organization and how previous cases had progressed, and would be empowered to use their judgment and discretion when deciding how parts of the current case should be handled. Cases might follow a general pattern, but each particular case would take its own unique path from initiation to resolution depending on the circumstances of the individual whose case was being handled.

Industry	Examples
Insurance	Insurance claim management Customer onboarding Medical claims
Financial Services	Mortgage applications Fraud investigations Credit card applications Regulatory compliance
Utilities	Complaint resolutions Incident management
Communications	Billing disputes Phone activation Customer provisioning Fault reporting and resolution
Health Care	Patient self-care Referral requests
Retail	Merchandise returns Refund management
Government	Social welfare benefits applications Licensing and permits management Freedom of Information inquiries Planning applications Industrial health and safety enforcement Immigration applications Regulatory monitoring

*Case Examples*



## Verint Engagement Management Case Management Advantages

Verint Engagement Management Case Management was built specifically for the customer service industry. Traditional approaches to customer service using CRM, ECM, and automated workflows can fail because they do not consider the three customer service stakeholders—the customer, the business, and the employee. Uniquely, Verint Engagement Management Case Management has the ability to address the customer service concerns of all three of these stakeholders.

### *Customer Service Stakeholder Requirements*

Customer	Organization	Employee
<ul style="list-style-type: none"><li>• Speed</li><li>• Multichannel Access</li><li>• Single Point of Contact</li><li>• Accuracy</li><li>• Consistency</li><li>• Experience</li></ul>	<ul style="list-style-type: none"><li>• Customer Satisfaction</li><li>• Cost/Efficiency</li><li>• Upsell</li><li>• Business Agility</li><li>• Targets/Metrics/SLAs</li><li>• Compliance</li><li>• Reports</li></ul>	<ul style="list-style-type: none"><li>• Empowerment</li><li>• Application Integration</li><li>• Data Access</li><li>• Status Information</li><li>• Guidance and Support</li><li>• Collaboration</li></ul>

### *The Customer*

Increasingly, customers are looking to engage with organizations on their own terms and via their preferred device. They are looking for a consistent customer service experience no matter what channel they use. In many industries customers are content with self-service for routine issues and queries. However, when they have a complex inquiry or problem, they expect the issue to be handled quickly, efficiently, and ideally at the first point of contact by employees who have the appropriate skills and knowledge.

### *The Business*

Businesses have to strike a delicate balance between the needs of their customers for improved customer service and experience as well as the needs of their shareholders for improved productivity, business agility, and performance. Case management enables organizations to strike this balance. It supports increased productivity and cost reduction through the automation of repetitive customer service activities. Business agility is transformed through the ability to dynamically change processes in response to changing market and customer demands.

Through the use of business rules and alerts, case management applications guide employees to ensure industry regulations are met and service-level agreements (SLAs) are achieved. Support for business process modeling ensures that cases can be rapidly adapted in response to changing market and business requirements.

### *The Employee*

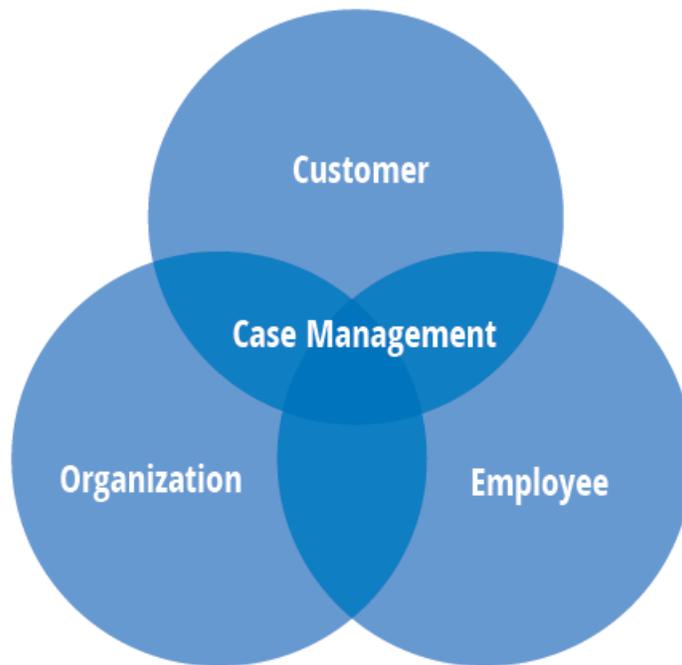
One of the consequences of the automation of customer service processes and the drive toward customer self-service is that when a customer call reaches the service desk, it is typically one that is unpredictable and not easy to solve. As a result, the employee serving the customer must have deeper knowledge, a wider skill set, and access to a wide variety of business applications to progress the customer issue. These workers are often referred to as knowledge or information workers, and to

successfully close the customer issue, they must be equipped to handle this unpredictability and complexity. To do this effectively, they must be empowered.

From the employee perspective, case management solutions deliver empowerment through support for decision making. Case management applications act as the consolidation point for the multiple business applications and data repositories used within the organization, allowing the employee or case worker to have a consolidated, holistic view of their assigned issue or case. Case management solutions support decision making by delivering information to the employee in context, delivering data to the right person, at right place, at the right time.

This is done through the orchestration of multiple front-office (email, voice, social, chat, web self-service, CRM) and back-office (ECM, ERP, billing, supply chain) business applications to deliver access to customer information wherever it resides in the organization. Decision making is further supported by providing employees with access to historical customer information (past behaviors, purchases, and patterns), real-time customer information (order status, inventory levels, SLA status), as well as external information (external data sets, weather, credit checks) and knowledge articles.

In addition, case management applications support employee decision making by giving them the flexibility to choose or define alternative paths towards the resolution of a case. For example, an employee can repeat steps in a process or create an ad-hoc one-off process during the execution of a case.



*Customer Service Stakeholders*



## Verint Engagement Management Case Management Features and Benefits

While case types vary between industries, they all share some common characteristics that are uniquely supported by Verint Engagement Management Case Management. Some of these characteristics are:

**Knowledge-Intensive:** Typically, case management processes require the intervention of skilled and knowledgeable personnel. Many cases can be ambiguous and unpredictable, and thus require judgment and creativity.

**Unpredictability:** While a particular type of case will share a general structure (e.g. an insurance claim), it is not possible to predetermine the path that a particular instance of a case will take. A case can change in unpredictable, dynamic, and ad-hoc ways as it progresses through an organization.

**Multiple Participants:** Cases often involve multiple participants during their life cycle. Medical claims, fraud investigations, and mortgage applications are often long running and involve multiple departments with a wide range of individuals and skills required to progress the case toward completion.

**Collaboration:** Long-running, multi-participant cases require frequent collaboration between case workers who rely on each other's advice and experience when making decisions on a case. Many cases require a team-based approach, with different specialists working on different aspects of a case or acting as consultants and providing guidance to their colleagues.

**Information-Rich:** Cases are often information-rich environments. Cases frequently require the collection of large amounts of information during the course of their execution. Emails, notes, contracts, and reports must be readily available and, if possible, presented in context to the case worker to improve efficiency.

**Long-Running:** Some cases, such as an insurance claim or a legal investigation, can run for months or years, and are generally much longer running than the shorter interaction cycles handled by standard CRM systems.

**Timescales, Service-Level Agreements, and Regulatory Requirements:** While cases can be unpredictable, many organizations still have to adhere to industry regulations and SLAs. Thus, cases cannot progress in isolation and must be executed within a framework that ensures compliance, control and adherence to SLAs and regulatory requirements.

## Customer Features

### *Omnichannel Integration*

Uniquely, Verint Engagement Management integrates customer channels directly to case management business processes. Verint Engagement Management supports a variety of channels—phone, mobile, email, chat, letters, and Internet. It supports the delivery of a consistent customer experience across different channels and allows customers to use different channels simultaneously. A customer can initiate a case or interaction from one channel but choose to continue it using another channel.

### *Mobile Case Management*

An out-of-the-box app, Verint Mobile Case Management is faster and more affordable to deploy than custom-developed apps. Deployed with the look and feel of your brand, it can be configured to list the issues, alerts, and information relevant to your business needs, customers, and processes. Verint Mobile Case Management enables any of your existing Verint process applications to be deployed as mobile apps. Integrated with your customer service infrastructure, the app enables you to provide automatic confirmations and updates to mobile customers as issues are handled. This reduces the number of



customer calls to check on the status of a claim or request—all while providing a more responsive customer experience.

### *SmartMatch™ (Omnichannel Routing and Workflow)*

Routing and queuing of work is a key component of any case management application. Verint SmartMatch Routing and Workflow provides a unified approach to managing and delivering work across email, letters, secure messages, live chat, case work, and social media. A robust rules engine analyzes incoming work based on any combination of conditions, such as customer profile information, message details, and current work volume. By matching the incoming work item characteristics with employee skills, capabilities, and availability, organizations are able to match the right work, with the right employee, at the right time.

The Actionable Dashboard allows administrators to monitor work activity in real time and see open work, SLA breaches, completed work, handle time, first contact resolution, and more. Supervisors can also take action directly from the dashboard, reassigning work and queue members to balance the workload as needed in real time.

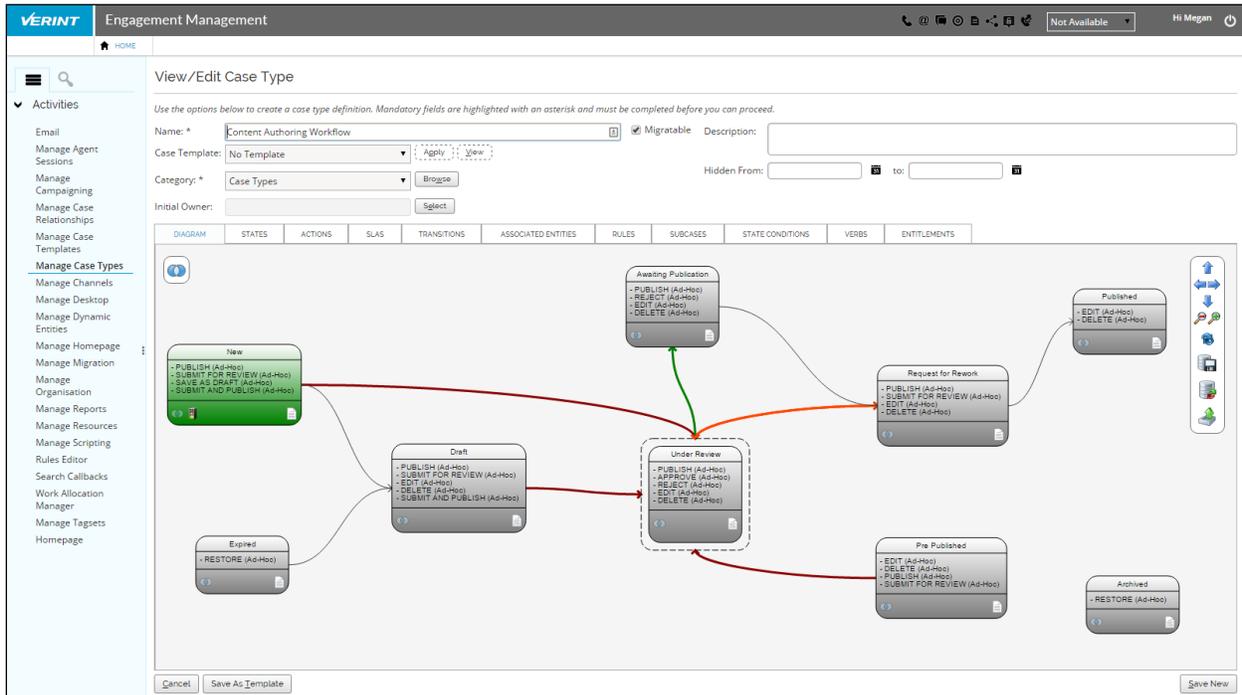
### *Feedback Management and Continuous Improvement*

Verint Engagement Management integrates with Verint Enterprise Feedback Management™ (EFM) to obtain feedback from customers following the resolution of a case. Together, Verint Engagement Management and Verint EFM can complete the customer service feedback loop, helping organizations validate how their customer service teams have performed, act on customer feedback from multiple channels to repair a poor customer experience, and deliver continuous agent and process improvement. Negative customer feedback can be used to trigger cases. Real-time analytics and reporting can help supervisors identify trends as well as agent and process-performance issues. Long-term customer relationships can be enhanced by making completed surveys available from the contact history, across all channels, so that agents are fully aware of all surveys taken by callers.

## Business Features

### *Model-Driven Case Definition*

The Customer Experience Designer is a highly customizable collection of development tools that work alongside the core process platform to develop business process applications. Because it is task-oriented, it facilitates the rapid development of robust and flexible systems. The customer experience designer includes an easy-to-use model-driven case definition, allowing business managers and analysts to define the customer experience flow in terminology appropriate for customer service managers. A rich, out-of-the-box set of flows and information objects allows for quick modeling. The web-based tool provides reusable components that enable solutions to be developed faster than traditional development utilities.



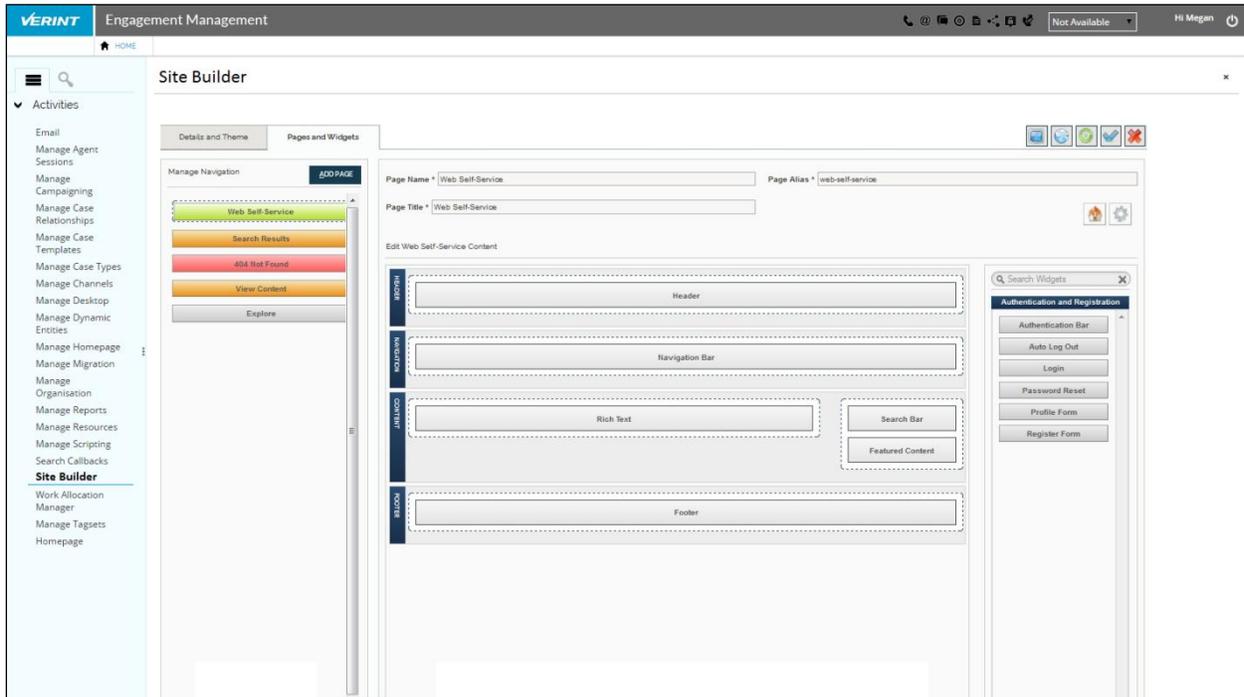
Verint Engagement Management Process Modeling

## Case Templates

Verint Engagement Management Case Management supports case templates. Case templates are reusable case models that can be used to speed up the creation of entirely new case types or can be used to create simple case types that inherit the properties of the case template. The inheritance model between the case template and simple cases allows the administrator to edit the template and automatically update every simple case type associated to that template. This feature is particularly relevant for local governments as well as multinational and business process outsourcing (BPO) organizations that have a large number of case types that follow a very similar pattern. Rather than having to spend a significant period of time updating or modifying multiple business processes, changes can instead be implemented in seconds by modifying only the case template.

## Web Form Design

The Verint Engagement Management Web Form Designer enables administrators to design forms that display data to the user and allow the user to manipulate data. A web form is the basic interface component of a core process platform application. A form can contain one or more panes, and those panes, in turn, contain form components, such as buttons, text fields, and combo boxes.



Web Form Designer – Site Builder

### Legacy System Integration

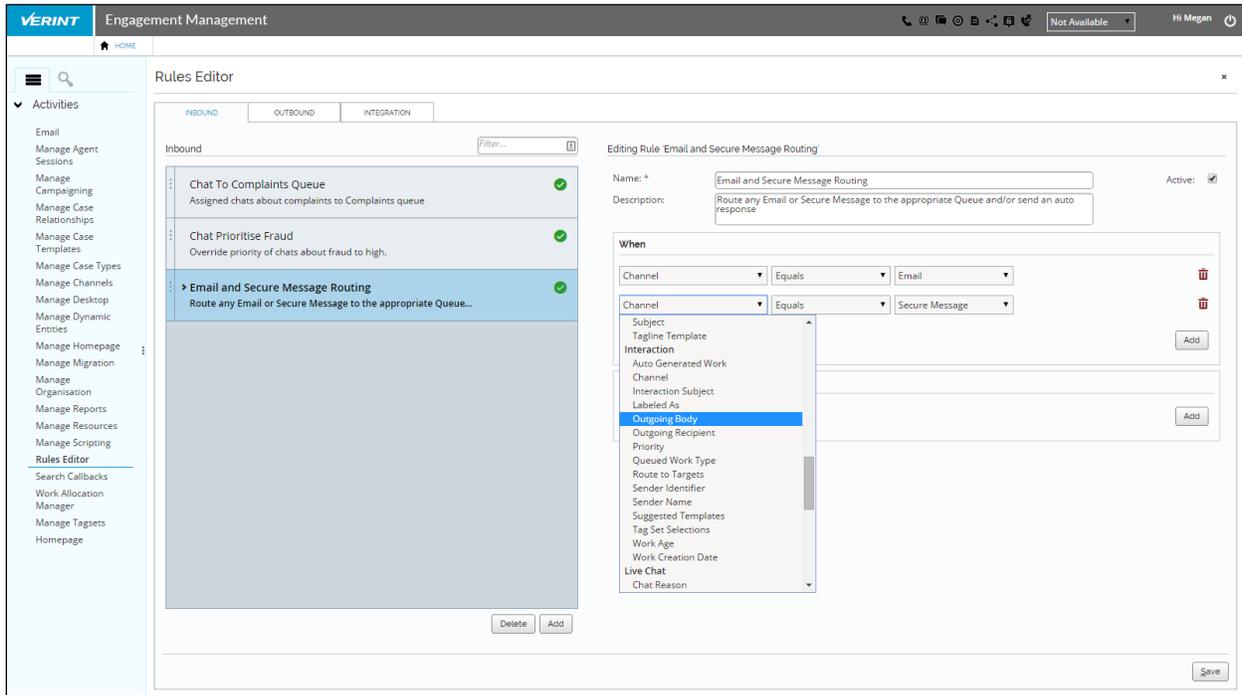
Customer service processes frequently cut horizontally across multiple departments and require the utilization of business data from multiple business applications. Integrating with legacy system is a key requirement of any case management system. Verint Engagement Management provides a very rich integration framework to integrate your customer service case management processes to legacy systems, such as CRM, ERP, ECM, billing, and ordering.

### Analytics

Verint Engagement Management provides a very flexible information store to capture the data and events of customer service processes. This information store is then used to create real-time dashboards or reports to monitor the performance of customer service centers. You can monitor the performance of support teams or service delivery to a particular customer. Managers can monitor the SLA or the metrics that are important to their customers and the business. If the metrics are not achieving their targets, managers can take corrective action to adjust or change the process design to meet those objectives

### Business Rules

Verint Engagement Management includes a very powerful rules engine that provides control over how work items are routed and how that case is executed. Rules can be configured to ensure the right work is assigned to the right agent and to trigger alerts and escalations that ensure regulatory compliance and maximize the likelihood of achieving SLAs.



Business Rules Editor

### Parent-and-Child Case Support

Case management business processes often have multiple activities that must be completed, sometime in parallel during the execution of a case. Verint Engagement Management supports parent-and-child case functionality, sometimes referred to as master and sub-cases, which allows a case to be managed as a holistic body of work. A master case can have multiple sub-cases associated with it and additional sub cases can be added at any stage during the life cycle of a case.

### Alerts

In addition to the configuration of SLA actions, Verint Engagement Management supports a variety of alerts to prompt agents and customers and to ensure a case remains on track. Visual flags can be used to highlight key events in the case life cycle and are supported within the employee desktop. The knowledge alerts widget lists the 20 most recently published knowledge alert content items.

### SLA Management

Verint Engagement Management case SLAs determine how long it should take for case execution. When a case SLA is created, you can specify a list of SLA actions to be performed at specified times before and after the SLA expires. You can also create a list of states and specify how the SLA clock behaves during each of these states. It is possible to define the behavior of case SLAs (started, paused, or stopped) during each of the states.

## Employee Features

### Unified Adaptive Employee Desktop

The Verint Engagement Management unified and adaptive Employee Desktop is an out-of-the-box, intuitive web-based user interface that lets agents deal with all manner of customer interactions. It transforms case-handling speed by providing omnichannel, context-driven access to all of the knowledge, applications, and tools needed to resolve a customer inquiry from the same screen. Agents don't need to move between different screens or applications to access relevant customer information—it comes to them.

The Employee Desktop can be styled dynamically depending on the customer account, ensuring each interaction is appropriately personalized. Employee Desktop is role-based solution, with the actions and permissions available to the agent dependent on his or her role. The Employee Desktop also supports the use of profiles, allowing the user to see different layouts depending on the chosen profile.

The screenshot displays the Verint Engagement Management interface for a case titled "Broadband Issue". The interface includes a navigation sidebar on the left with sections for "Activities" and "Information". The main content area shows case details such as ID, Due Date (Fri 06 Nov 2015), Current State (Processing), and Assigned By (Christine Swan-Eglington). A central "Status" section features a flow diagram with nodes for "New", "Processing", "Escalated to Level 2", "Hardware Sent", "Engineer Dispatched", "Closed Customer Charged", and "Closed". Below the flow diagram is a table of actions:

Actions	Assignee	Completed/Due
SLA Breach	System	19 Aug, 17:01
Email customer for details	ccagent	19 Aug, 17:00
Change case owner	System	19 Aug, 16:56

Additional sections include "Notes" with a table of entries and "Recent Contacts" with a table of entries.

Unified Adaptive Employee Desktop

### Desktop Integration

From an employee perspective, integration to multiple legacy systems and the presentation of data at the employee desktop eliminates the headache of application switching, which causes frustration for the agent and delays for the customer.

### Knowledge-Infused Processes

The native knowledge management capabilities of Verint Engagement Management help guide agents to significantly speed up how customer cases are handled and deliver a personalized service to the customer. During the execution of a case, context-based search can be triggered automatically to offer the user the right information at the right time, often without even typing a search query. Agents can access knowledge-base content, community forums, and external indexed content. Agents can search for



content in multiple languages or can switch languages midway through a process. Contextual information about the user, such as customer type, location, products owned, and more, can be used to filter the search and provide personalized results.

*Activity Streams*

Activity streams is a notification and discussion feature within the Verint Employee Desktop that facilitates enhanced collaboration between agents and supervisors, and allows organizations to address the limitations of email-only employee communications, while also addressing the collaboration needs of today’s contact center workforce. The activity stream viewer is located within the Employee Desktop, and users can subscribe to objects, such as cases, notifications, user posts and more. Verint Engagement Management will auto-subscribe the user to some items, while a user can manually subscribe to others. In addition, team leaders or supervisors can post important notifications to employees on the activity stream, such as information on a key product issue. To ensure employee awareness, these notifications can be pinned to the top of the stream for a set period of time.

*Case Handling and Guidance*

Some issues are too complex to be answered by a single knowledge-based solution. The Verint Engagement Management dynamic scripts help guide users through complex issues by asking a series of questions to narrow the issue. A rich, interactive script designer allows business users to create these script flows visually.

*Ad-Hoc Process Support*

Verint Engagement Management allows agents to invoke ad-hoc processes from the main process. Agents can also go back and forth during a process. This helps agents work with the customer as the interaction progresses rather than force the customer’s interaction to adhere to a rigid process.

*Verint Engagement Management – Stakeholder Features*

Customer	Organization	Employee
<ul style="list-style-type: none"> <li>• Omnichannel Integration</li> <li>• SmartMatch Routing and Workflow</li> <li>• Mobile Case Management</li> <li>• Feedback Management and Continuous Improvement</li> </ul>	<ul style="list-style-type: none"> <li>• Case Modelling</li> <li>• Case Templates</li> <li>• Web Form Design</li> <li>• Legacy Integration</li> <li>• Analytics</li> <li>• Business Rules</li> <li>• Alerts</li> <li>• SLA Management</li> </ul>	<ul style="list-style-type: none"> <li>• Adaptive Employee Desktop</li> <li>• Desktop Integration</li> <li>• Activity Streams</li> <li>• Case Handling and Guidance</li> <li>• Ad-Hoc Process Support</li> </ul>
<b>Verint Engagement Management</b>		



## Other Features

### *Version Control*

Verint Engagement Management supports version control on all processes, forms, scripts, steps, and screens. Version control is also supported within the Verint Engagement Management Knowledge Management solution.

### *Drag-and-Drop Design*

Verint Engagement Management supports drag-and-drop steps, forms, and scripts to assemble the customer service application.

### *ECM Integration*

Verint Engagement Management supports for documents in process and integration with document management systems.

### *Audit Trail*

Verint Engagement Management logs all case interactions, which can be retrieved at any time.

## Transform Your Customer Service

Organizations are under enormous pressure to retain current customers and attract new ones. Good customer service differentiates your brand in the market. Innovative customer service organizations that take a holistic approach across all channels and leverage technologies to provide differentiated customer service ensure their customers' loyalty and build a leading brand.

As a recognized leader in customer service and customer experience management solutions, Verint has leveraged years of experience with more than 900 clients globally to build Verint Engagement Management for organizations desiring innovative solutions for customer service. Verint Engagement Management helps you transform your customer service, deliver personalized customer experiences that differentiate your brand, and help you stand out from the crowd.

Verint Engagement Management provides an end-to-end solution for customer service. It delivers a unique blend of knowledge, process, data, and channels—each with deep capabilities all working seamlessly for you and your customers. It gives strength and depth to your customer service capabilities and helps you to deliver the best experience to all customers, on all channels, at all times.

## Verint. Powering Actionable Intelligence<sup>®</sup>.

Verint<sup>®</sup> is a global leader in Actionable Intelligence<sup>®</sup> solutions for customer engagement, security intelligence, and fraud, risk, and compliance. Today, more than 10,000 organizations in over 180 countries use Verint solutions to improve enterprise performance and make the world a safer place.