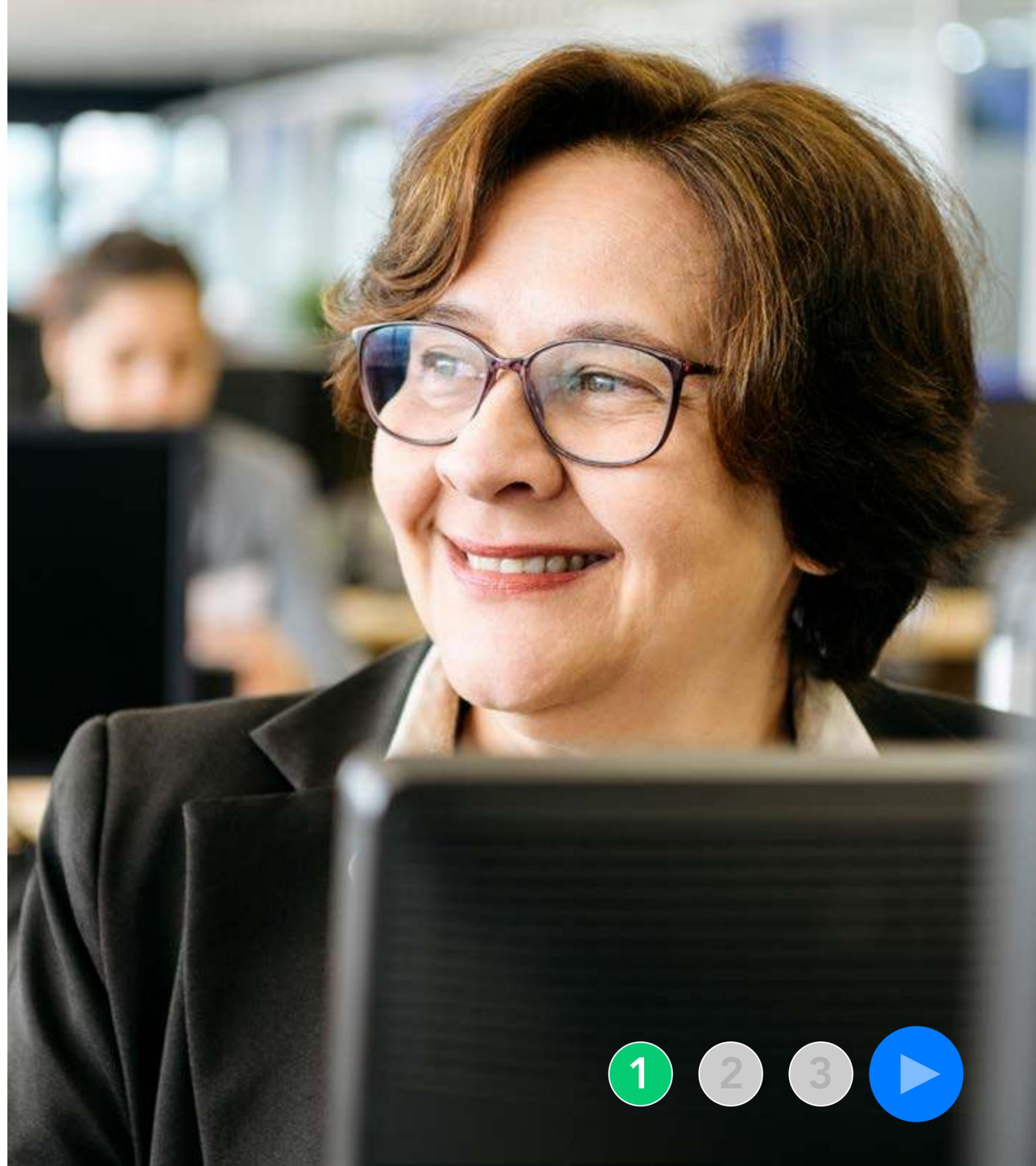# Case Management

VERINT

What if you could automate processes, empower employees and manage unpredictability?

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Your customers and business are unpredictable, yet you are responsible for delivering services to them within aggressive performance targets

What's your issue?

Perhaps your fulfilment department is missing service level agreements impacting on customer satisfaction and internal confidence in your abilities? Perhaps your back-office department is responsible for handling large volumes of cases but is doing this inefficiently resulting in escalations and increased operating costs? Perhaps you are responsible for the resolution of issues or fulfilment of services that require co-operation across multiple departments, and you have limited control and visibility? Or perhaps your organization is losing records of complaints or GDPR requests, resulting in organizational damage.

You might have previously attempted toto address these issues using customer relationship management tools or workflow applications, but have found them inadequate.

How Case Management will help

Case management solutions are applications designed to address these issues, simplifying and automating the execution of processes and so enabling organizations to transform how they support unpredictable demand from their stakeholders. They support both simple and complex processes that might require a combination of human tasks and electronic workflow.

Without a case management solution, cases are often managed using a series of manual processes which might include email, the use of a spreadsheets or paper folders of documents, with a folder being moved through an organization from one in-box to the next while the case is being progressed. It's therefore easy to see why progress is difficult to track, cases get lost, and service level agreements get missed.

With a case management solution, case progression is fully audited and tracked. Correspondence, phone calls, meetings can all be documented and appended to the case to provide a record of progress. The staff working on the case, sometimes referred to as case workers, are knowledgeable about their organization and how previous cases have progressed. Case workflow can either be rigidly enforced, or else staff can be empowered to use their judgement and discretion when deciding on the progression of the case. 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 case being handled.

Examples of business processes supported by case management solutions include:
Allegation Management, Background investigation, IT Help Desk, Dispute resolution, Freedom of Information (FoI) request, GDPR requests, Complaints management, Compliance & audit related processes.

How could you simplify and automate the execution of your business processes, enabling you to support unpredictable demand from your customers and your organisation, for both simple and complex processes?

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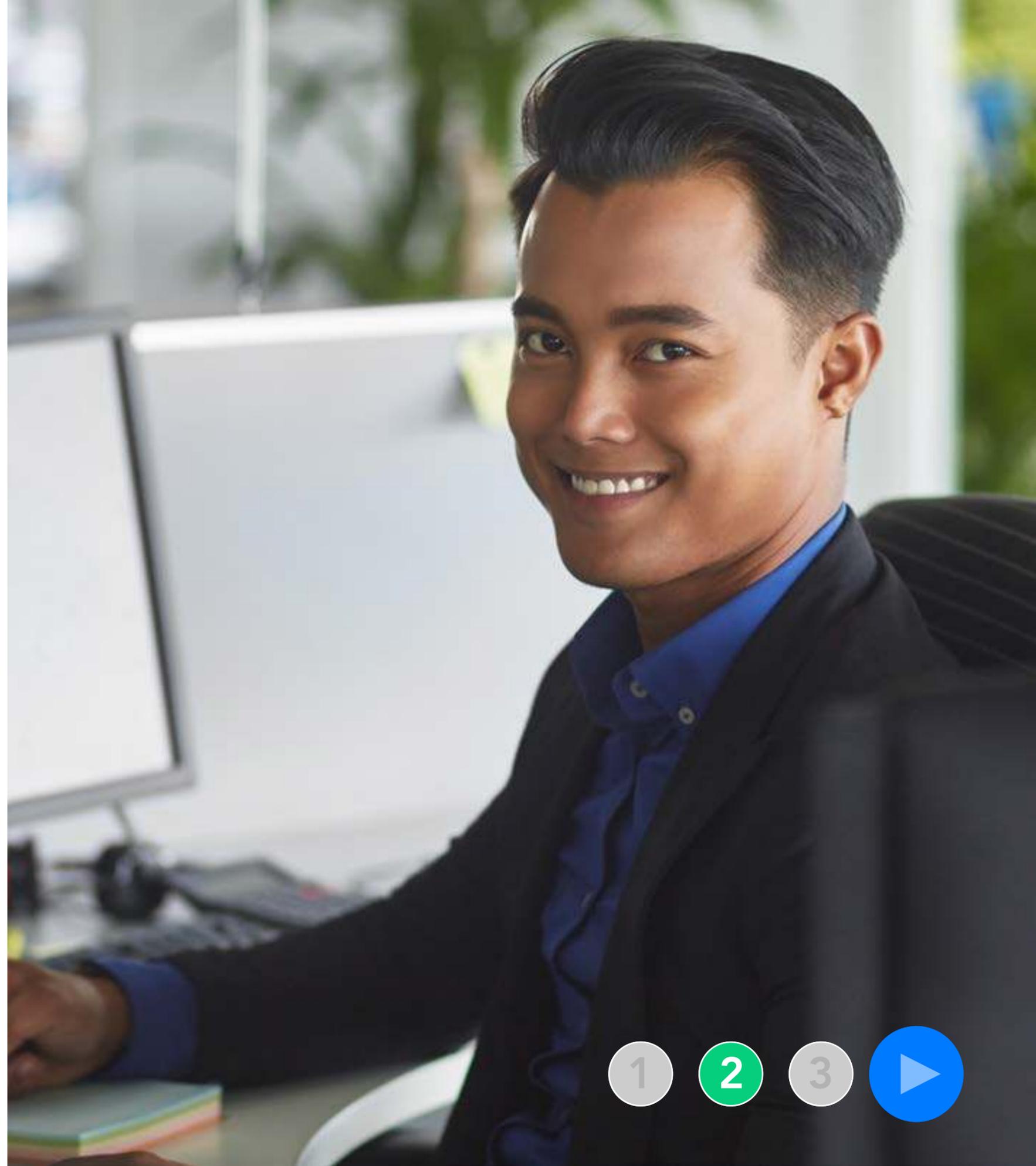
Verint's case management solution enables you to simplify and automate the execution of your business processes, enabling you to support unpredictable demand from your customers and your organization, for both simple and complex processes

Verint supports a range of case management use cases including complaint management, IT Help Desk, Dispute Resolution, Freedom of Information (FoI) requests and General Data Protection Regulation (GDPR) requests.

Issues or requests are modelled using a 'case', with its default attributes (including due date) and default process determined by the 'type' of case. For example, a complaint case should follow a different process to a GDPR case.

Different types of information can be linked to a case, and carried with it through its progression, including documents, tasks, videos and forms. The forms capability enables both simple and complex data to be captured upfront and made available through the case progression.

While default behavior is suitable for simple processes, more complex behavior can be modelled, with the system supporting rules to determine the due date, priority and workflow, for example.

Workflow determines who is responsible for working on a case at any given point in time. This can be defined to allow case progression to follow a general pattern but also to allow individual cases to take their own unique path where applicable.

The solution can be configured to either give users choice over the cases they work on - or not - depending on your business requirements. Where they do not have a choice, the system chooses for them, based on what the type of cases they have been assigned to work on. Where they do have a choice, they are only able to choose from cases they have been assigned permission for. Once they select a case, other users with similar permissions are unable to work on it.

When working a case, users have access to all the case information, including description, type, due date and form data. In addition, where configured, they have access to systems available through integration that will enable them to complete their task without having to leave the solution. They are also able to correspond with people relevant to the case, including customers for example, from within the application. Correspondence, such as email, is then automatically associated with the case.

Once complete, they can then close the case or manually move it to the next person/team responsible for working on it. Or, processes can be configured to automatically workflow it according to configured rules.

Finally, reporting and analytics capabilities provide visibility on performance against targets and workforce efficiency.

Why Verint Case Management?

Designed for self-sufficiency. Whether you are a partner or a customer, the Verint solution is designed to be easy to configure so that you can easily add new types of cases, modify assignment rules or workflows.

Designed for integration. Case management use cases often require integration, whether that to empower the case worker to progress a case without needing to access other systems or for other solutions, like contact center desktop applications, to be able to access cases. The Verint solution is designed to support complex integration scenarios including the two listed here.

Flexible deployment. The Verint solution can be deployed in the cloud or on-premise depending on customer or partner preference.

Simple to use, even when managing sophisticated case types. Forms limit the information and data capture to what is relevant to the use at a given point in time and automation ensures cases are sent to the right people at the right time.

Thank you for reading

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