



Case Management Opportunity Assessment Services from Image Process Design (IPD)

Highlights

- Obtain insights about the concepts, technologies, and benefits of Case Management
- Determine the applicability of Case Management and its use case applications in your organization
- Recognize opportunities to transform operational performance using Case Management
- Accelerate the analysis of use case candidates for Case Management
- Begin strategizing and laying the foundation for future strategic plans
- Benefit from the insights of IPD, a highly experienced, Case Management Pioneer award winning organization.

What's New about Case Management? Its Applicability

At the highest level, case management describes any pattern of work in which knowledge workers are involved. For example, a single instance of routine work that exists for a relatively brief duration but that must nevertheless be addressed by a knowledge worker represents one kind of case management. At the other end of the spectrum, complex work of long duration that requires collaborative decisions among multiple domain experts is another kind of case management.

In certain industries, the term case management generates questions about its applicability. The new reality of case management is that it bundles together all the capabilities needed to support knowledge work – and knowledge workers – of all kinds. For example, today's case management supports knowledge workers that:

- Handle requests for most types of services (e.g., benefits, claims, contact centers, loans, contracts, underwriting, onboarding)

- Manage exceptions and other business incidents (e.g., complaints, disputes, appeals, grievances, pre-authorizations)
- Perform investigations (e.g., fraud identification, audit queries, compliance reviews)

What Case Management Provides

Today's case management unites multiple technology disciplines under a single umbrella to provide a broad range of capabilities:

- **Information Management** (content, data, analytics)
- **Process Management** (workflows, events, tasks, rules)
- **Human Interactions** (decisions, exceptions, collaborations)

From work inception through completion, appropriate **Information, Processes, and Human Interactions** are then brought together for timely and accurate knowledge worker consideration, with all the case components uniquely expressed at the level of each individual case file and within each user interface presentation.

Recognizing Case Opportunities: IPD Assessment Services

Due to case management's broad industry and use case applicability and the breadth of the capabilities it supplies, many organizations struggle to identify the best opportunities for its application.

IPD's Case Management Opportunity Assessment Services assist with this identification. Led by IPD staff members who have successfully delivered case management solutions since 1991, the Opportunity Assessment rapidly identifies candidate business processes and assesses the potential value of case management solutions.

Opportunity Assessment Approach

A workshop-based exercise conducted in partnership with our clients, IPD's Case Management Opportunity Assessment consists of high-level process analysis for one or more candidate business processes. This analysis provides an understanding of current performance and opportunities for improvement, as well as a near-term action plan and, depending upon the level of analysis, a conceptual case management solution roadmap for moving forward. The activities commonly performed to conduct the Opportunity Assessment include:

- Briefing on case management concepts and technologies
- Discovery and observation of key business needs and challenges
- High-level documentation of the current state and its performance
- Identification of performance gaps and opportunities for improvement

- Brief inventory of current-state **Information, Process, and Human** assets and interactions
- Initial conceptualization of a case management-based solution
- Identification of potential future-state benefits
- Presentation of findings and development of next steps

Levels of Opportunity Assessment

With advanced preparation, the Case Management Opportunity Assessment is tailored to the unique objectives and use case requirements of IPD's clients. This preparation enables the duration and deliverables of the Opportunity Assessment to be personalized for each organization.

Introductory Level

Conducted at a fairly high level, a two to three day Opportunity Assessment will culminate in a PowerPoint-based deliverable that includes:

- Executive Summary
- Current State Overview
 - Business objectives
 - High-level process flow
 - Process assets and resources
 - Key Performance Indicators
 - Improvement opportunities
- Future State Overview
 - High-level conceptual solution
 - Expected future-state benefits
- Near-term action plan

Certain IBM customers can qualify for credits that can reduce the cost of the assessment by as much as 100%.

Comprehensive Levels

As a paid engagement of variable duration, IPD also performs in depth

Opportunity Assessments based upon a pre-defined scope of services. Providing a more detailed level of analysis, a comprehensive assessment will often lay the foundation for a Proof of Concept and its deliverable may additionally include:

- Future State Specifics
 - Scope definition
 - Detailed conceptual solution
 - Software prototype of select features and functionality
 - Detailed cost/benefit estimates (including Proof of Concept)
- Longer-term Solution Roadmap
 - Initial implementation strategy
 - Change management considerations
 - Enterprise considerations

Opportunity Assessment Value

The benefits of an Opportunity Assessment are many, including:

- Case Management education
- Current state understanding
- Identification of opportunities
- Early visualization of potential solutions, benefits, and costs
- Initial strategic planning

Image Process Design, Inc. (IPD)

IPD, a 20-year IBM business partner, delivers highly responsive case-based solutions for the mission-critical processes of leading organizations across the United States and Canada.

For More Information

To learn more, please contact us at info@ipdsolution.com or call 248.723.9733, ext. 8030.