An Introduction to **Dynamic Case Management** and the AgileApps Cloud™

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Overview

"Case Management" turns out to be a nearly-ubiquitous description of people doing things in the real world. Case Management systems can help to automate such practices, but they require a number of capabilities including business process models, deadlined tasks with automated reminders and escalations, rule-driven processing, and integrated email, as well as the ability to create procedures "on the fly" to handle exceptional situations.

In addition, such systems need to be *dynamic*. At the same time that the system automates the handling of *cases*, *incidents*, or *investigations* that follow standard patterns, it needs to allow for process variations that are constructed interactively (dynamically) as a case is handled.

Such systems used to be very difficult to build. But not anymore! The AgileApps Cloud case management platform provides the tooling needed to create such systems readily. In addition, it provides extensive capabilities, so a system can be created by starting from an initial application template to minimize the work involved. This paper shows what goes into a case management application and shows how easily one can be built using the AgileApps Cloud platform. Follow the process it describes to develop your own, fully custom systems.

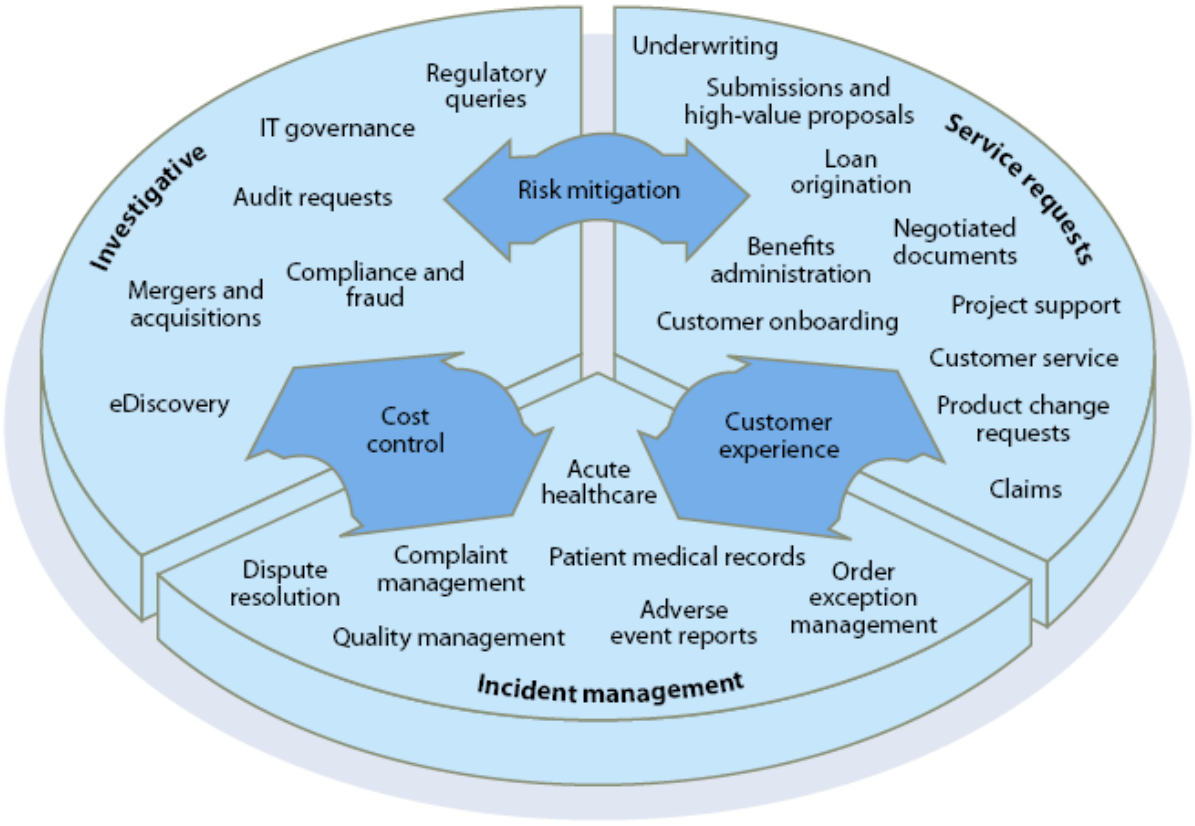
The World is Teeming with "Dynamic Case Management" Opportunities

They used to be problems. But no more! Today, they represent a huge opportunity to improve the bottom line, with minimal investment and development time.

ServiceDesk is a prime example of a Dynamic Case Management application. But there are quite literally hundreds more, from systems that manage other kinds of customer and in-house requests to systems that manage a wide variety of incidents and investigations. Such systems help to improve the customer experience, manage costs, and mitigate organizational risk—or all three. They all fall under the banner of dynamic case management.

The Forrester Research Report on Dynamic Case Management includes a chart that portrays the scope of the opportunities:

Figure 4 Three Case Management Categories Will Emerge



55755 Source: Forrester Research, Inc.

Any of the examples above could be chosen for a Dynamic Case Management system. Here are the characteristics that make the system an ideal candidate for the dynamic case management approach:

- Each time an individual joins the company, it represents a new *case*.
- For each case, multiple *tasks* must be accomplished.
- The tasks tend to occur in a defined sequence, possibly with variations, that can be captured in a *process model*.

- Often, tasks must be carried out within a defined timeframe, to meet *service level objectives*.
- Automatic r*eminders* and *escalation procedures* are needed to keep things from falling through the cracks.
- The tasks are often carried out by people acting in different *roles*, or in different organizational *teams*.
- Some people need the information developed in earlier parts of the process, and their tasks begin only when previous steps are completed. Other tasks, meanwhile, may occur in parallel.
- Different processes are needed for different kinds of cases — so the system must be able to handle different *case types*.
- Automated *rules* are needed to ensure that the correct process is applied, both to prevent manual error and to minimize processing time.
- Each organization has unique requirements, which creates the need for extensive *customization* of the basic application, in order for it to be generally usable.
- It must be possible to define *Ad Hoc procedures* for the idiosyncratic cases that always crop up, no matter how well defined the system is initially.
- Above all the system needs to be *easy to use*. It must integrate effectively with email, make it easy for users to see their tasks, giving them the information they need to carry out those tasks.

The case management features, application development tools, and customization capabilities of the AgileApps Cloud platform combine to make it possible to develop such an application with greater ease than ever before in history.

The remaining papers in this series detail the design and development process. Use them as a template for applications you can build, and be sure to consult the Support Wiki whenever you need more information.

Next Steps

The remaining papers in this series guide you through the design and construction of Dynamic Case Management applications. Depending on your needs, you may want to customize *ServiceDesk*—a DCM system optimized for handling trouble tickets and customer requests. Or you may want to build *a new Dynamic Case Management system*—something you may find easier to do that you ever expected.

Learn more:

- What kind of application do you need?
- Building a Dynamic Case Management Application in the AgileApps Cloud™
- Customizing the ServiceDesk application in the AgileApps Cloud™

Links to those articles and other useful pages can be found in the support wiki's Article Index at http://agileappslive.info/wiki/Article_Index.