



# Metastorm Enterprise for Case Management

Some processes are more complex, but less structured than others. Take for example case management. Case management work presents difficult challenges across industries such as financial services, government, legal, and telecommunications. From complaints and issues tracking to appeals resolution and call centers to claims management, these fluid, collaborative, unstructured processes often involve multiple knowledge workers and human decision making – and can be time-consuming and unpredictable. Increasing productivity and reducing the costs associated with case management requires effective, dynamic solutions for gathering, organizing, and analyzing information for each situation, determining the best course of action, and delivering measurable results.

Metastorm addresses your case management challenges with Metastorm Enterprise, an integrated portfolio of fast and flexible enterprise and business architecture, business process analysis, business process management and integration software to help you visualize, analyze, improve, and execute your case management processes.

## Metastorm ProVision®: Understand the Process

As an end-to-end solution for enterprise architecture and business process analysis, Metastorm ProVision enables you to create a holistic picture of your case management processes, make better decisions about how they should work, and continually improve operational performance.

By documenting strategies and processes in Metastorm ProVision, you ensure information consistency, visibility, and transparency in your programs. It allows you to easily define the elements of a case management process, as well as collaboratively model, analyze and understand the relationships to other key elements, such as business goals, strategies, problems, impacts, organizational participants, and related business and enterprise architectures.

For example, Metastorm ProVision can be used to model an organization's call center or claims processes, defining the complex series of interactions and deliverables among people and systems. Metastorm ProVision allows you to understand the cascading effects of handling large numbers of those and other types of cases,

## Highlights

### Benefits

- Provide structure to fluid case management processes
- Dynamically gather, associate, correlate and analyze pieces of case information
- Model, analyze and improve complex, cross organizational case management processes

- Increase administrative service quality and consistency and promote greater accountability
- Improve investigative processes and increase inter-agency collaboration without sacrificing quality or security
- Evaluate potential litigation and take a consistent, compliant approach to case building
- Collaborate to deliver adaptable, best-of-breed processes across the organization

### Customer Success

- Linklaters
- Louisiana Department of Social Services (DSS)
- U.S. Department of Justice, Office of the Federal Detention Trustee

*Learn about these and other Metastorm customer successes at [www.metastorm.com](http://www.metastorm.com)*

create visibility and enable collaboration. You can analyze as-is processes and create improved ones that ensure your caseworkers are sharing the right case information with each other, while at the same time maintaining the proper level of compartmentalization and data security. As a result, you can deliver greater value and better business resource optimization.

### *Economic and Effective Data Collection*

As part of the Metastorm ProVision offering, Metastorm Discovery™ is an interactive process discovery tool designed to enable faster and more accurate collection of data, process understanding, and process metrics that can be used to drive business process modeling, improvement, and optimization as part of your case management initiatives. This solution allows you to easily and economically collect actual experiential data on case management processes to determine areas where opportunities exist for continuous process improvement. For example, Metastorm Discovery can be used to enable organizations to identify best practice procedures of case managers who handle their work most efficiently. With this process insight, you'll be able to adapt, more efficiently assign and process case work, and establish better procedures based on your most successful team members.

Metastorm Discovery can capture information about all steps in a process. This data can be used as input for modeling an "as is" process and analyzing potential improvements using Metastorm ProVision – optimizing each process to meet specific strategic objectives such as minimizing costs, accelerating response time, or improving productivity. The optimized processes can then be deployed and automated through the Metastorm BPM® suite.

## Metastorm BPM®: Deliver Adaptable, Best-of-Breed Processes

The Metastorm BPM Suite enables you to create consistent, repeatable processes that can enforce process adherence, ensure authorization and security, and maintain an audit trail of both content and actions for your case management processes. At the same time, Metastorm BPM offers the flexibility to provide structure to unstructured case management processes – effectively managing case exceptions and providing a platform for collaboration among your caseworkers. For example, it provides capabilities that enable you to dynamically gather, associate, correlate and analyze pieces of case information, while still tying that information to a single, structured case report. And with its comprehensive support for full life-cycle business process management, Metastorm BPM allows you to improve human- and system-centric processes based on real-time execution data and provide ongoing management, control, and monitoring.

Using Metastorm BPM, you can:

- *Increase service quality and consistency and promote greater accountability.* Metastorm BPM enables higher quality and consistency of service by providing standard processes for applicants, case workers, and other administrative employees. You can deploy your case management processes to all channels, from your web site to telephone service centers to branch offices, and replace paper forms with online versions that are automatically checked for completion and routed to the appropriate parties for action. With Metastorm BPM, your knowledge workers can use e-mail, enterprise portals, and Microsoft Office applications – the tools they already work with every day – to perform their roles in your processes. This will enable you to manage hundreds of thousands of cases simultaneously, whether they take hours or years to complete. And every case action is documented, guaranteeing compliance and promoting accountability.
- *Improve investigative processes and increase inter-organizational collaboration without sacrificing quality or security.* Metastorm BPM improves collaboration and

encourages innovative approaches to investigation while insuring that proper protocols are followed and that data is secured. It makes your investigative processes available for mobile field investigators through PDA devices and secure web sites, enabling them to file reports from the field. You can change investigative procedures rapidly as missions or objectives change. In addition, you can automate repetitive, system-intensive tasks like background and credit checks, freeing knowledge workers to concentrate on more critical jobs. Metastorm BPM also helps you establish secure, role-based access to your case information, enabling better information sharing within and outside your organization. And the integrity of your case data will never be compromised – Metastorm BPM complies with all of the latest encryption and security standards.

- *Evaluate potential litigation and take a consistent, compliant approach to case building.* Sometimes investigative or administrative case work results in the need for legal action. Metastorm BPM can bring the structure and definition to the chaotic case building activities litigators often struggle with. It helps you manage the organization of physical evidence, depositions, and other case components. And you can automate much of the production and submission of standard court filings and documents. As an added benefit, you can integrate your case building processes with your billing system, enabling accurate billing and improved resource planning. Because Metastorm BPM can deploy functionality to the web and to PDA devices, litigators and support staff are enabled to update case information from virtually anywhere.

## MIM: Achieve Rapid and Cost-Effective Integration

Metastorm Integration Manager (MIM) can help you integrate and leverage your existing applications, databases, file systems, and mainframe programs. Whether deployed as part of the Metastorm Enterprise suite or on its own, MIM provides a robust platform for case management by enabling:

- Data governance and process integrity of integrated systems
- Complex system-to-system process management
- Guaranteed secure file transfer and legacy system support
- Rapid integration with legacy applications

With MIM, you have visibility into and can control even the most minute system tasks within the construct of a business process and can capture an automatic audit trail of system activities for case management purposes.

## The Value of Metastorm for Case Management

Metastorm enables you to better collaborate to deliver dynamic, best-of-breed case management functionality across the organization. Metastorm ProVision, Metastorm BPM and Metastorm Integration Manager combine to allow you to understand and improve your case management processes and align administrative, investigative, and litigation objectives – for a complete case management solution.

For more information on how Metastorm can help you, contact us at 1 877-321-META or [sales@metastorm.com](mailto:sales@metastorm.com).

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