Case Management and Process Automation

Case management and process automation are complementary approaches to improve the efficiency of high-volume, repetitive business processes.

Case management involves managing exceptions and non-standard transactions as unique cases with customized handling, rather than as standardized process flows. Key enablers include:

- Identifying exceptions and extracting them from standard workflows
- Intelligent triage and routing of cases to appropriate agents
- Providing agents with an optimized workspace to resolve cases
- Automating repetitive tasks within case resolution
- Using knowledge management to improve case diagnosis and problem-solving

Process automation focuses on standardizing and digitizing high-volume, repetitive tasks to minimize manual work. Key enablers include:

- Simplifying and standardizing processes to maximize straight-through processing
- Digitizing manual activities through RPA and AI/ML agents
- Orchestrating activities seamlessly across systems
- Embedding automated business rules and decision-making
- Continual analysis of processes for further automation opportunities

Together, case management and process automation maximize productivity. Case management resolves exceptions needing human judgment efficiently, while process automation handles high-volume routine transactions without human involvement.

The goal is to digitize and automate as much of the end-to-end process as possible. This increases the rate of straight-through processing. Case management provides flexibility to handle transactions that cannot be fully automated requiring some human intervention. The combination yields optimized outcomes.