

AN EFFECTIVE SYSTEM FOR ALL YOUR CASEWORK

The Case for Case Management Software



Spreadsheets have many strengths – but handling complex casework isn't one of them.

Replacing your separate, unconnected systems with a single view of your entire caseload will deliver consistent, transparent results. Solid workflows, clear templates and powerful reporting will put you in charge of every part of every process.



Benefits at a glance:

1. Store all case information in a single, secure location
2. Improve productivity with lean, repeatable processes
3. Confidence and control, from a dedicated casework system
4. Identify non-conformance and root causes



1. Everything In One Place

Are you finding it time-consuming to record and collate case information?

A case management system keeps all information in one centralised system. Securely record, access & progress all case activity from within the case record.

| The problem with a spreadsheet or manual system | The benefit of a case management system |
|---|---|
| Case data is held in multiple locations (email, notes, spreadsheets, filing cabinets etc.). | Reduces time to record & access case information, and removes need for paper archiving. |
| Case data has to be manually added, sometimes switching between systems. | Quickly add data from look up lists (that you can maintain), ensuring consistency and accuracy. |
| Collating information from disparate systems is difficult & time consuming. | Easily bundle the whole case file up, e.g. for presentation to a regulator or lawyer. |
| Unable to link cases to present a complete picture, e.g. a case cluster on same issue. | Link cases & tag precedent cases. Cases can be correctly assessed in the light of all relevant information. |
| Risk that data is misplaced or accessed by unauthorised person. | Everything is securely backed up. Access is restricted to authorised users. |

“DE&S has an HR team of 17 caseworkers supporting 12,000 employees. Their Workpro system enables them to multi-task across a number of cases, working on what needs their attention now, with an overview of what’s coming up next and when.”



2. Lean, Repeatable Processes

Are you worried someone might “drop the ball”?

A case management system uses workflow to guide staff through the correct process. Everyone knows exactly what they need to do, when.

| The problem with a spreadsheet or manual system | The benefit of a case management system |
|---|--|
| No procedural guidance. Something important could be forgotten and case handling may be inconsistent. | Policy is enforced, and cases are dealt with consistently & transparently. Increased confidence in process. |
| Cases left unmanaged or not handled in a timely manner. | Managers have a clear overview of team activity and can re-assign cases easily, e.g. if a team member is off sick. |
| No ability to set or monitor tasks. No flagging system to ensure deadlines are met. | Automatic & user generated tasks within system. Alerts & reminders prompt action in line with targets and KPIs. |
| Time spent creating documentation & correspondence. Hoping you have correct version! | Clear, consistent communications aided by auto-populated correspondence templates. Faster, professional response. |
| Hard to tell who did what, when. Difficulty collating information for compliance or legal purposes. | Full chronological audit trail of action taken. Proof of how case was handled and that due process was followed. |



3. Confidence and Control

Is it a struggle every time you need to produce a report?

A dedicated casework system provides comprehensive reporting and real-time performance monitoring, so you can provide the updates and insights management need.

| The problem with a spreadsheet or manual system | The benefit of a case management system |
|---|--|
| Too much time spent manually producing reports every month. | Reports can be scheduled to be produced automatically as required, including any regulatory or compliance reporting. |
| Time spent manually collating data from variety of sources for ad hoc reports. | All data is held in the one system. Categorisation and filtering features speed-up report creation time. |
| Time business managers and clients spend chasing cases. | Comprehensive information can be provided to interested parties on case status, even if the case handler is absent. |
| Difficult for managers to monitor caseload progress and spot potential bottlenecks. | Real time dashboard and case views provide clear picture at a glance of what is going on and what needs attention. |
| Keeping track of KPIs and whether business SLAs are being met. | KPIs can be reflected in the workflow targets, and then monitored and reported on. |

“Hastings has a reputation for excellent customer service and supporting staff is essential to this. Management sought better reporting of employee relations, so that potential issues and trends could be spotted early & rectified. Their Workpro system provides root cause & trend analysis to inform business improvement initiatives.”



4. Identify Root Causes

Can you spot non-conformance, developing trends and recurring issues?

A case management system collects a wealth of data on so you can learn from casework and take preventive action. The system will also help you meet regulatory obligations.

| The problem with a spreadsheet or manual system | The benefit of a case management system |
|--|---|
| Risk that essential data is missing or categorised incorrectly. | Good data in equals good data out. Essential data is collected and categorised throughout the process. |
| Trends and root causes are not highlighted. | Root cause data allows you to analyse developing trends & areas of weakness. |
| Reputational, litigation and/or financial risk from incorrect handling of case. | Relevant law and business process is always followed, with any deviations justified - reducing risk of fines etc. |
| Compliance with data protection rules (GDPR) is harder across spreadsheet/paper based systems. | File management tools apply case retention and deletion rules, and encryption of data keeps personal data secure. |
| Challenging to manage data access requests (GDPR) when data is held across disparate systems. | Record & track information requests within the system, reducing response times & cost, reducing risk of fines. |

“Workpro is at the core of our Casework Operation. Having everything in one place and being able to retrieve information easily makes it very effective. The reporting provides valuable Management Information to the wider business.”

Craig Haskins

Casework Operations Partner DE&S MOD

Workpro Case Management Software

Workpro is designed for casework from the ground up. Everything is in one place – easy to track, report and improve. Duplicate effort is a thing of the past. And you're now completely in control of every part of every process.

Included as standard

- Pre-configured case types, adaptable to your process
- Targets and alerts adjusted to match your KPIs
- Templates starter pack for creating letters and emails
- Standard reports library
- GDPR-compliant information requests (FOI, EIR and SAR)
- ...all customisable and extendable



Workpro Top Features



Case Capture

Everything is in one place, from emails and letters to web forms and social media. Your customer details can be pulled in directly, completely avoiding keying errors and duplicate effort.



Configurable Workflow

Workpro may slot straight into your workflow, with almost no configuration. However, it's also highly adaptable. You can make some changes yourselves, or ask us to support you.



Alerts, Reminders and Alarms

Put targets and deadlines at the heart of your process. Flag vulnerable customers. See which projects are sitting at green, amber or red. And instantly know if a deadline is looming.



Document Management

Create and edit Word documents and emails directly from Workpro, including full document auditing, filtering and searching. Need a summary of every document? Hit 'Bundle PDF'.



Templates

Every case worker using the same high quality tools. And every letter or email personalised from a preapproved outline – designed to make sure you stay compliant, and your customers stay fully informed.



Case Ownership

Set a named case worker for every case in your workflow, then assign manual and process-generated tasks to progress each case to conclusion. Everyone knows exactly who is doing what, when.



Performance Monitoring

Everything is there: your performance against KPIs, your team allocations, your 'done today' and your 'what's next'. With complete visibility, you gain complete control.



Reports and Analysis

If it's in Workpro, it can be analysed, instantly and in-depth. Choose from a library of powerful reports, write your own, or let us build one to precisely fit your needs – from trend analysis to 'cases by category'.



Search

A phrase in a Word document. A name or number in a message. A keyword in a web form. Search for anything, and find the information you want – including links to exemplars and precedent cases.



Security and Audit

Restrict precisely who sees exactly what. Track every action, from initial call through to deletions, additions and delegations. Protect everything in the system, encrypted at rest or in transit. GDPR compliant.



Admin Tools

Workpro lets you manage your own lookup lists, KPIs, users, file management, templates and more – we'll show you how. Or simply ask us to do it for you.



System Integration

Pull in payroll data, HR details or scanned documents. Integrate with single sign-on or two-factor authentication. Workpro works alongside your existing systems using standard API tools.

For more information or to arrange a free demo contact us on:

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