The case for case management

20 ways Workpro will transform your business

workpro

Is it time to update your case management system?

Many organisations we speak to are valiantly trying to keep track of caseload using spreadsheets and email, with documents stored in a variety of places. Others are using CRM or ticketing software out dated systems that are not fit for purpose.

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.

This guide summarises 20 typical challenges the businesses we work with were facing prior to adopting a new case management system, and the features that are helping them now.

"Workpro empowers us to do the things we need to do as an organisation and as individuals. It mirrors our approach to casework. You are free to use your own initiative, while keeping to the things that have to be done. It's so flexible but we can really funnel use of the system through validation and field labels. Workpro allows us to be as consistent and directive as we want"

Chris Harrison, Performance and Business Information Analyst, Housing Ombudsman.

Two trends impacting case handling

Hybrid working

Following the Covid-19 pandemic, 'hybrid working – a mixture of home and office working - has become more commonplace.

These 'new ways of working' often require significant process and system adjustments. Caseworkers need tools that enable them to overcome the challenges in communication and collaboration, data security and access that remote working brings.

Wellbeing and accessibility

Wellbeing came to the fore during Covid, with mental health cases soaring. Inequality issues have also been highlighted through recent events.

Access to good service, no matter your circumstance, is essential. The ability to flag vulnerable clients, ensure consistency or to escalate sensitive cases, helps caseworkers to 'put things right' fairly.

Tracking trends, monitoring case outcomes, and identifying root causes informs decisions that tackle systemic injustice.

Everything to do with
a case in one place

Case management software keeps all case information and activity in one centralised system.

	Challenges	Recomended feature/s	How this helps
1	**Case data held in multiple locations** (e.g., email, notes, spreadsheets, filing cabinets)	Store all case information and documents within an online case record.	Having all case information in one place ensures faster access and easier updates, improving response times.
2	**Duplication of effort** when adding case data, often requiring switching between systems.	Multiple case input methods: email, phone, letter, portal etc. Look up lists that aid data entry and categorisation Integration with other systems to share information, e.g. payroll for employee details, using scheduled imports/ exports and APIs.	Overcome barriers to case submission by offering choice of channel. Reduces admin burden and time spent on case, as well as lowering the risk of manual errors in data entry.
3	Takes **too long to pick up a colleague's case** or to provide case status updates	Case summaries with up-to-date case status, with drill-down to more detail if needed.	Everyone knows exactly what has been done, when, and by whom – improving the quality and speed of responses.
4	Difficult to **identify related cases** to understand the complete picture	Ability to link case records. Flexible search facilities.	Cases can be correctly assessed in the light of all relevant information. Get to the right information quickly.
5	**Risk of unauthorised access** to case information, especially if remote working	Ability to manage case permissions and restrict user access as appropriate.	Sensitive data is protected, and access restricted to authorised users.

Consistent
Case Handling

Case management software uses workflow to guide staff through the correct process.

	Challenges	Recomended feature/s	How this helps
6	**Compliance** with agreed process and risk that something could be forgotten or missed.	Workflow steps that guide staff through the agreed process for each case type. Configurable to match your specific policies.	Correct procedure is always followed and nothing missed. Removes over-reliance on experience and memory.
7	**Case handling may be inconsistent**, depending on who is doing the work.	Workflow validation to ensure mandatory data is recorded and key actions carried out, with notifications to alert staff to process requirements.	Policy is enforced, cases are dealt with consistently and fairly, essential data is captured for reporting and analysis.
8	**Response times** and the risk of missing an important deadline.	Ability to set manual or auto-generated tasks, with highly visual alerts and reminders	Action prompted to ensure deadlines and targets (KPIs) are met.
9	Time spent **creating documentation** & correspondence.	Email, letter and document templates auto-populated with case data. Ability to create and send correspondence within the system.	Clear, consistent communications and a faster, more professional response.
10	Difficulty collating case information and **sharing it securely**.	Store all correspondence in the case record and easily bundle case documents together as required.	Easily share case file with stakeholders, e.g. for presentation to a regulator or lawyer.

Better
Management Information

Case management software provides comprehensive reporting and performance monitoring.

		Challenges	Recomended feature/s	How this helps
	11	Time spent manually **producing monthly reports**	Library of standard reports with scheduling, for automatic creation and distribution	Produce routine reports at the click of a button, including regulatory reporting.
	12	**Collating data for analysis** from disparate systems is difficult & time consuming	Data collection and reporting within the same system. Categorisation and filtering to access right data quickly. Create ad hoc reports and export them for further analysis as needed.	With data now consistently captured and correctly categorised, you can 'slice and dice' case information any way you want. You can more easily analyse trends, spot recurring issues, get at root causes and monitor case outcomes.
	13	**Keeping track of team workload**, especially when dispersed geographically, e.g. remote working	Realtime dashboards with overviews of individual and team cases and tasks. Ability to assign and re-assign cases.	Managers have a clear overview of team activity and can re-assign cases easily, e.g. if a team member is off sick
	14	**Meeting SLAs** (Service Level Agreements)	Set targets in the workflow that match KPIs (Key Performance Indicators)	Monitor KPIs to ensure you are meeting agreed levels of service and performance.
	15	Spotting issues and **bottlenecks** for early intervention	Status indicators, with clear alerts when deadlines are approaching or cases and tasks are overdue.	Clear picture at a glance of what is going on and what needs attention.

Improved
Business Outcomes

Case management software collects data on every case so you can learn from them and take action.

	Challenges	Recomended feature/s	How this helps
16	Compliance with **data protection** laws (GDPR)	Record GDPR compliance, such as date contact details last checked. File management tools that allow you to anonymise or delete case data.	Personal data is managed and retained in accordance with your policy and relevant law.
17	**Keeping data secure** and preventing data loss	Robust data backup and security management, including encryption and multi-factor authentication.	Mitigates risk from unauthorised access or data loss.
18	Reputational, litigation and/or **financial risk** from incorrect handling of case	Full chronological audit trail of all action taken for monitoring and proof - should it be needed	Regulations and business process are always followed, with any deviations justified - reducing risk of fines etc.
19	**Nipping issues** in the bud and ensuring recurring problems don't happen again	Ability to categorise and analyse root causes and case outcomes.	Spot developing trends so they can be proactively addressed. Apply learnings from case data to improvement initiatives.
20	**Accommodating future changes** in process, policy, legislation etc. in the system.	Ability to manage lookup lists, categorisations, KPIs, user permissions, field names, templates etc. yourself	System can be easily maintained and adapted over time, ensuring investment protection.

Workpro Case Management Software

Workpro is a better way to manage your customer issues. It's easy to use, easy to integrate, cost-effective and has been developed to meet the needs of busy caseworkers and their managers.

Available as a Cloud-based or On Premise solution, it helps you efficiently manage and report all casework. Workpro will help your team provide a better service, while mitigating risk, increasing productivity and reducing costs.

It's time to take back control.

Workpro is designed to work alongside your existing systems as a dedicated case management system. We are experienced at integrating Workpro, for example with employee records in payroll systems.

"Our business is looking into complaints and the vast majority of our staff rely on an effective case management system every day. The Workpro team supported us to make our system as straightforward and simple to use as it can be, yet flexible enough to adapt to our changing business needs."

Nigel Ellis, CEO Local Government and Social Care Ombudsman

Workpro supports the entire case management process

- From recording and progressing a case to resolution.
- To flexible, robust reporting and management control.
- Leading to improvements for your whole organisation.

Progress   **Resolve**

Record Issue

Monitor   **Report**   **Learn**   **Improve**
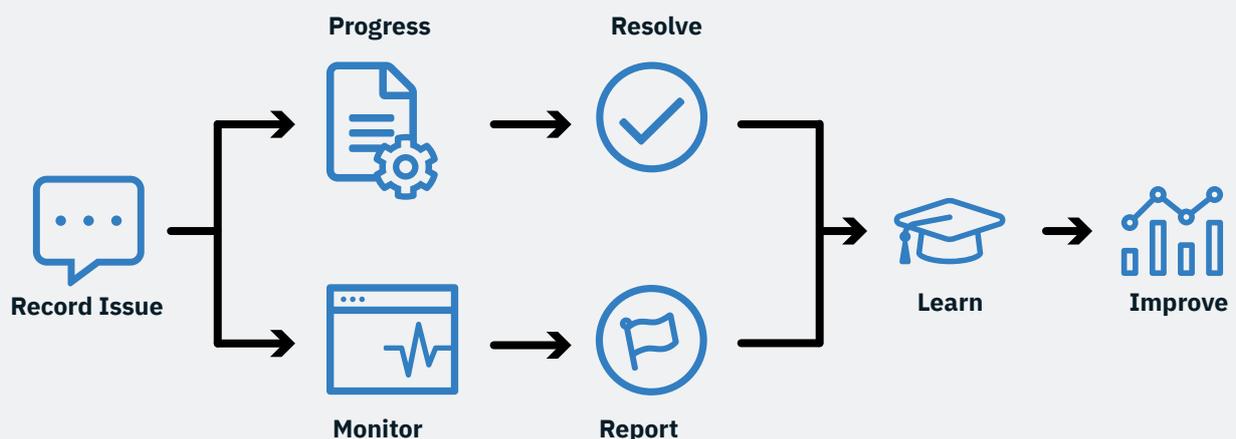
Ready for a more flexible case handling process?

Contact us for a free Workpro demo.

✉ info@casltd.com

📞 +44 (0)131 449 7071

🌐 workpro.com

work‹pro›

Workpro case management system is developed by CAS
- an employee-owned technology company.
www.workpro.com

Computer Application Services Ltd
Quantum Court, Heriot-Watt Research Park South,
Edinburgh EH14 4AP

VAT: 634 9697 88
Company No: SC102278