

**Case management:**

# 10 pitfalls to avoid



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Case management brings maturity and sophistication to enterprise-class management and software. Because it's both goal- and detail-oriented, it encompasses both predictable and unpredictable tasks. In a world of increasing complexity, it provides simplicity. To set your case management initiative up for success, you'll want to develop a strategy that avoids these typical pitfalls.

## 1 Leaving business out of design

The success of your case management project depends on **effective collaboration among business leaders, subject-matter experts, and IT professionals**. If business people are not included in the work-design discussions, your case management initiative will most certainly flop.

Case management tools capture business requirements in a way that both business people and IT professionals can see and understand; it translates those requirements directly to implementation for rapid validation and iterative improvement. Because of this, you won't want to use traditional techniques to capture requirements and then later try to transfer them into the system. If you do, you'll miss out on one of case management's biggest benefits.



## 2 Not getting executive support

**Executive sponsors play a critical role in defining overall business objectives for projects.** When sponsors stay engaged, they can make sure that the right resources are applied, milestones are achieved, and midcourse corrections are implemented as necessary.

Often, however, an executive kicks off a project and disappears, not to be seen again until trouble occurs. To prevent failure, consistent involvement is critical.

Communicate exactly what you need and expect. Sponsors must be engaged, visible supporters of your initiatives, promoting its goals and successes at the executive level, and helping you handle the politics of change. With an active executive at the helm, your project has a much greater chance of success.



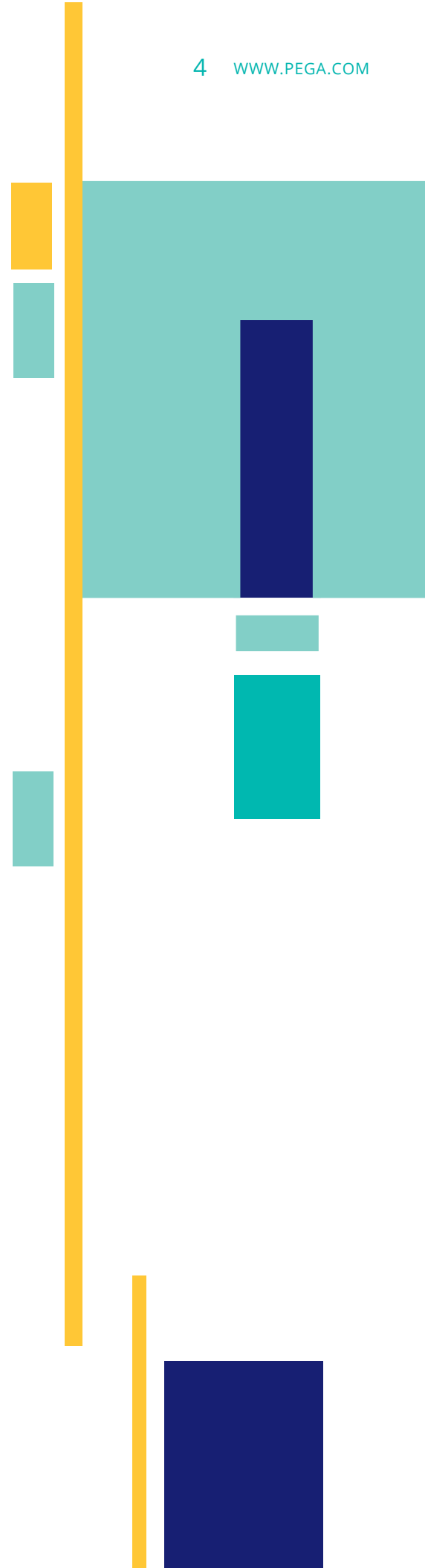
# 3 Taking on too much

The Chinese philosopher Lao-tzu wrote, “A journey of a thousand miles starts with one step.” With that in mind, you should envision your case management project as being a journey of many steps. Unlike legacy projects and systems, which have huge fixed costs and must be big enough to justify the investment, case management solutions can be implemented in Agile, digestible bites. With case management, you should start small, win fast, and grow for success. Projects should have simple, well-defined objectives that are important to business goals, with a clear and straight-forward path to achieving tangible benefits.

# 4 Getting stuck in the past

The twisty roads of downtown Boston are a legacy of our past. Boston literally paved its old cow paths. However, what worked in the past is hardly optimal for meeting today's needs.

Likewise, if you automate a process that was once sufficient but is no longer satisfactory, you'll have a bad automated process. Instead, use case management to measure the entire life cycle of work, and apply process improvement methodologies (such as Lean or Six Sigma) and tools (such as the 5 Whys) to isolate sources of waste and variation. Typically, business processes that have many touchpoints and handoffs represent low-hanging fruit and are good candidates for optimization.



## 5 Inviting analysis paralysis

Don't attempt to diagram all the detailed process flows of *as-is* and *to-be* operations and then define programs and projects to bridge the gaps. This wastes time in analysis paralysis – time that would be better spent implementing the next incremental improvement. First, use the outcome-driven and top-down approach of case management to capture objectives; then create the high-level milestones to achieve them. Establish metrics to guide work and then add rationalization, facilitation, and automation to improve customer experience and operational efficiency.

## 6 Losing control of change

Case management is best implemented in Agile change cycles, so be mindful of the importance of governance and change control. You must implement and change in an organized way. Think through the authorizations and responsibilities involved with changing business rules as well as other case management system elements. Use the case management system to control them. A case management center of excellence (COE) can be your clearinghouse for project governance issues.



# 7

## Not being Agile

If your case management project is your company's first exposure to Agile methodology, don't underestimate the operational and behavioral changes required by development teams and managers. Seek advice from, and enlist the help of, Agile experts from your case management vendor and service partners. These experts have guided many other companies through the Agile transition and can help you plan for success.

Plan how you'll integrate the new practices into your existing development culture. Otherwise, your Agile strategy will fail, and teams will revert to the waterfall model.

# 8

## Skimping on the skills budget

Unless you want to rely exclusively on the expertise of your case management vendor and its partners, don't skimp on training, mentoring, coaching, and hands-on experience for your teams. An in-house COE will ensure that you develop self-sufficiency and promote repeatable process and asset reuse.

# 9

## Underestimating data integration challenges

Data is everywhere – and if you haven't heard, it's getting bigger. Data integration is a discipline of its own. And if you underestimate it, you won't achieve the wrap-and-renew leverage that's at the core of case management. Consult your vendor so you understand the performance, scalability, integrity, and security implications. Prioritize your data needs, and don't minimize the potential complexity of data integration if you have multiple systems and data sources.

# 10

## Ignoring advice

Heed the advice of your case management provider and its certified partners. These people know the details of the methods and technology of case management – so they can help you find the projects that suit the solution, use the products properly, and have the resources you need to be successful.

## Conclusion

As enterprise organizations are faced with new realities and challenges every day, case management is now more critical than ever. See how the Pega Platform™ can help you scale smartly and prepare for whatever comes next.

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