

Powering people and processes for change

CASE MANAGEMENT 102

A PEGA
WHITEPAPER



Change is challenging. And delivering strategic and far-reaching business transformation is especially difficult. In order to achieve quick, meaningful wins that build to deliver on a bigger vision, you need powerful and intuitive tools, process optimization, and a nimble team that can adapt to complex, changing needs. You can get there with case management.

Case management changes how work gets done. But in order to embrace, onboard, and manage it, you'll first need to assemble a team that knows how the business operates, has skill in case management technology, and experience in change management. Several groups – business, IT, and program/project management – are crucial to these efforts.

Here's how to build out your team to successfully transform work with case management solutions:

Business

Your business team must have insight into how work gets done today, as well as a vision of the business outcomes that the initiative should deliver. It should have the following members:

- **Project sponsor:** The project sponsor states goals and champions the initiative from start to finish. This person helps manage politics at the executive level, commits to visible and continual engagement, ensures that resources are made available, and resolves blocking issues.
For an initiative that focuses on a single business function, the project sponsor can be that function's owner – such as the vice president of marketing or customer service. For an enterprise-wide transformation initiative, the project sponsor is typically the executive who has direct responsibility for the outcome.
- **Subject-matter experts (SMEs):** SMEs have detailed knowledge of how work gets done and value the goals of the initiative. Engage one SME for each major area of the business that's involved in the initiative.

IT

Your IT team provides expertise on the technology. Its members can be in-house staff or a combination of your people with your vendor, consultants, system integrators, or other third parties. Team members should have a spectrum of skills and backgrounds in business, technology, and application design.

- **Business architect:** The business architect manages the collection of business requirements, regularly meets with business SMEs, and collaboratively captures needs directly in the case management system. A business architect should have vendor certification in these practices and may also be skilled in Lean and Six Sigma methodologies. Business architects often come from business operations groups.
- **System architect:** The system architect configures the application and integrates it with other IT systems. Like the business architect, your system architect should be vendor certified.
- **User experience architect:** This person applies human-factor design expertise to ensure that solutions are easy to understand and use.
- **IT representatives:** These team members represent your IT organization's release management, support, infrastructure, training, testing, and architecture teams.

Governance

Good governance begins with strong sponsorship. The project sponsor should not only be the project's champion – they should be the final escalation point to resolve project issues.

Usually, enterprise-scope initiatives should have at least two project managers: one to manage the overall initiative and one to manage the day-to-day tasks of the technical team.

- **Project manager:** The project manager defines the project scope and takes responsibility for on-time, on-budget delivery by managing the relationships of all project contributors.
- **Technical engagement lead:** This role supports the project manager by managing project work and schedules for the business and system teams.

After you establish sponsorship and clearly define roles and responsibilities, ensure issues and risks are raised and resolved as they arise or can be escalated as needed. The most successful programs rely on three levels of oversight:

- **Project governance:** A bimonthly or monthly review is set to validate the integrity of the solution and raise any issues that threaten success. Project stakeholders must attend and be ready to take responsibility for removing roadblocks. The agenda and key materials should be published in advance for participants to review.
- **Weekly project update:** Led by the project manager, this meeting keeps the project sponsor up to date on the project's progress and gives the team a chance to raise and resolve issues before they develop into risks that might impact the overall project. It's also the right place to keep a tight rein on project scope.
- **Daily standup meeting:** This 15-minute daily meeting allows the project team to report on goals for the day. It's an opportunity for the project manager to keep people on schedule, on task, and to unearth any dependencies and clear obstacles.

Lead with transparency

Clarity around everyone's roles and responsibilities will go a long way toward managing your transformation. Your teams will know when to escalate issues to the next level – if you just give them the power to act.

As the scope of your initiative grows, the people on your team will become increasingly important – whether they're formally part of your organization or a combination of vendor-consultants or third-party, vendor-certified consultants. Over time, you can nurture your in-house capabilities by working with both vendor groups.

Often, organizations start with informal communities of practice – groups of people who use case management and voluntarily set up the infrastructure needed to share ideas and materials. As your case management adoption use grows, you should set up a formal center of excellence (COE) to ensure that necessary resources for large-scale use are available.

If you're rolling out case management across an organization with distinct needs that vary by line of business or geography, you should also establish a federated COE model – with a central COE supporting local COEs inside those groups. Local COEs own the assets specific to their lines of business, as well as manage local programs and their rollouts.

Conclusion

When your people, processes, and technologies are in harmony, you'll gain the agility, speed, and flexibility to scale big and bold.

Case can help you capture and manage work across apps and people, while artificial intelligence and robotic process automation can automate decisions and eliminate tedious manual slog. And with the power of low code, you can deliver applications and better business outcomes – fast.

Discover how case management, a Center-out™ approach to business architecture, and intelligent automation can help you safeguard your business, reduce cost, and quash complexity. Visit us at pegacom to learn more.



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