Appian

CUSTOMER ENGAGEMENT
DYNAMIC CASE MANAGEMENT — A KEY CAPABILITY IN THE CONTACT CENTER

Dynamic Case Management helps simplify complex interactions so customer service agents can reach resolution faster, improving CX and making customers happier.

Your contact center workload is made up of cases. Questions about products, inquiries about services, and even complaints are all types of cases — the sum-total of a customer's experience across time with your organization. Case management is made of processes that are less structured, interactions are more ad hoc, events and milestones are hard to timeline. A variety of different data from different sources must be collected, parsed, summarized for decision-making, and acted upon — often in the absence of prescribed process steps.

Dynamic Case Management provides agents the data and capabilities needed to engage with customers and supports high-end problem solving for complex interactions. Unifying the interactions between people, process, data, and content, case management delivers a powerful solution that allows agents to reach resolution faster and improves CX.

EXCEED THE KPIs THAT MATTER MOST:

Increase	Improve	Reduce
Customer Satisfaction Scores Call Quality Scores Revenue	First Call Resolution Service Level Agent Productivity	Average Handle Time Cost Per Interaction Agent Turnover

APPIAN CUSTOMERS ARE REALIZING:

- **80%** reduction in processing time
- **60%** increase in customer satisfaction
- Over **40%** operational cost savings
- **9x** faster customer service

Gartner confirms that case management is essential, **"yet most customer service centers lack any form of advanced customer service case or problem resolution functionality."** Whether your contact center handles disputes, finance processing, service requests, incident management, client advisory, constituent response, or other case types, dynamic case management helps agents deliver the best CX possible, because they have the exact data they need.

APPIAN SUPPORTS DYNAMIC CASE MANAGEMENT ACROSS ALL CASE STYLES

Agents are almost entirely focused on handling cases. From clearly defined structured cases to ad-hoc investigations, Dynamic Case Management is critical to every contact center.

What case types do your agents handle?

PROCESS TO DECISION	SERVICE REQUESTS	INCIDENT MANAGEMENT	INVESTIGATIONS
• Rely heavily on structured rules and processes to coordinate case work.	• Revolves around making a decision on any particular type of service.	• Identifying and resolving adverse incidents (largely proactive, but can be reactive)	• Often a reaction to a specific event or circumstance; collecting and processing evidence to come to an informed decision.
• Informed decisions depend on completing a set known rules and processes.	• Relatively high degree of structure, tends to evolve as data is gathered.	• Proactive; High-level process in place with cross-team/organization collaboration.	• Little structured process; context must be built from data across many sources.
• Follows a predictable, reliable path.	• Examples – Customer Service (help desk, customer inquiries), Claims Management, Ongoing Maintenance	• Examples: Facility Management, Emergency Response, HR Grievances, Adverse Events	• Examples: Insurance Claims, Medical Claims, Disputes and Complaints Management
• Examples: Routine Patient Care, Pharmacovigilance, Contract and Lifecycle Management.	• Instant access to complete, current information boosts agent productivity and speeds time to resolution.	• Repeatable process and business rules drive a consistent approach to similar types of incidents for improved CX.	• All case information in a single location with access to the complete, contextual picture speeds time to resolution and improves CX.
• A single view into all tasks, actions, data, files, collaborations, and history improves customer satisfaction and first call resolution.			

ONE UNIFIED APPLICATION TO IMPROVE CUSTOMER EXPERIENCE

Unified Customer View
Unify data from across your organization to create one actionable customer view.

Universal Agents
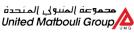Dynamic Case Management, AI, RPA, and intelligent processes help guide agents to handle any situation — fast.

Omni-channel Communications
Engage with customers on the channels of their choice for seamless customer experiences.

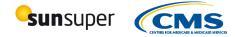## THE WORLD'S LEADING ORGANIZATIONS RELY ON APPIAN IN THEIR CONTACT CENTERS

BARCLAYS   AVIVA   United Matbouli Group U.M.G   Target   sunsuper   CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

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