

Improving Service Delivery with Real-Time Omni-Channel Case Management



All Federal Agencies have a singular desire; to successfully and consistently meet service delivery expectations that are core elements of the mission of their program(s). However, for years, agencies have been hampered in their ability to deliver personalized, effective, and timely case management and case resolution for its citizens and customers due to the limitations of legacy systems and processes. In many instances, this is because the information needed to resolve cases is spread across multiple data sources, application platforms, and resources that do not have the ability to synthesize critical information that should be shared between agencies and, in some cases, the general public.

In addition to the challenges faced in trying to manipulate legacy systems to carry out tasks they are not designed to handle, shrinking development budgets and limited resources leave little room for development and modernization efforts.

Salesforce Solution for Federal Case Management

1 Access Critical Data

Federal Case Management provides complete visibility into all case interactions and activities. Agencies can move away from email and disparate systems and manage workflows through a single, secure, hosted, and scalable platform that is fully integrated with back-office systems.

2 Deliver Better Service

A dynamic, intuitive case management system increases employees' ability to effectively streamline and manage resolution. Create custom, automated workflows that make information more readily available.

3 Innovate Quickly

Salesforce cloud-based solutions can be rapidly deployed and scaled at will to support current & future needs. Customers can deploy applications that achieve a 70% accelerated time to value, rapidly implementing solutions at approximately half the cost of traditional, on-premise systems.

Agencies can shift their approach to delivering better service, reduce costs, and accelerate time-to-resolution for cases by implementing a single system of record, or a front-end engagement solution that fully integrates data from existing systems. ¹

¹ Source: Hilwa, AI, Randy Perry, and Robert P. Mahowald. "Salesforce1 Platform: Accelerate App Dev with Huge ROI,." Feb. 2014. Web. Sponsored by: [Salesforce.com](https://www.salesforce.com)

Focus on Metrics that Support the Mission:



Increased customer satisfaction ratings, both at the customer and departmental levels

Increase in customer satisfaction (CSAT) scores



Significantly accelerated case resolution times, delivering success that much faster

Faster case resolution

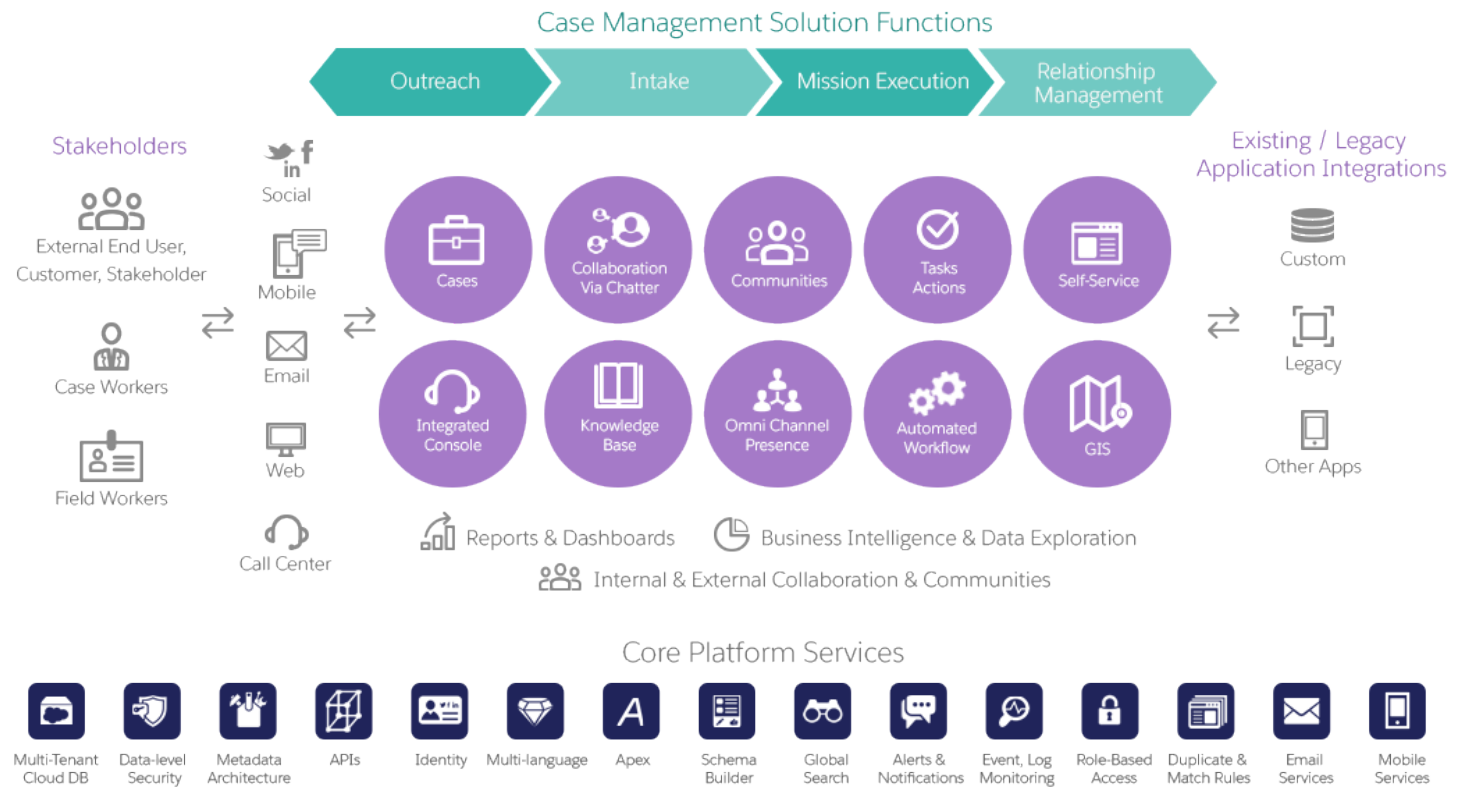


Increased employee productivity levels as a result of improved systems & processes

Increase in agent productivity

How Federal Case Management Brings This To Life

Salesforce's industry leading, multi-channel, real-time case management Software-as-a-Service (SaaS) solution is an enterprise platform that supports the full case management lifecycle and brings all of your data sources together in one connected experience.



Our solution is not a point solution; it is a proven and highly flexible platform that can be fully configured for any case management program, function, or case type. The platform has built-in tools to address every component area of service that is relevant to all case management scenarios and is built on a foundation of powerful analytics that can be used for business intelligence and data investigation.

The Federal Case Management solution is flexible enough to address any type of case management scenario (from low complexity to high complexity) and the needs of corresponding end users, customers, and other stakeholders:

Low Complexity Case Management

- › Correspondence Management
- › Complaint Management
- › Facilities Management
- › HR Service Desk
- › and many more...

High Complexity Case Management

- › Fraud Management
- › Loans Management
- › Grants Management
- › Investigative Case Management
- › Disaster Management
- › Inspection Management
- › Program Management
- › and many more...

For any mission application, there are 5 Core Service Elements that you have to get right in order to foster innovation & deliver great service. These elements form the basis for a complete service delivery model.

Outreach

Create fully branded public and private community portals that connect customers to mission services and information.

Send and manage personalized email messages to segmented, targeted contact lists. Analyze and optimize outreach efforts and improve external & internal communication.

Intake

Empower customers with a self-service portal that allows them to search knowledge base FAQs and past community discussions. Customers can complete online forms, applications, and requests, which are automatically routed to agents for resolution.

Streamline intake by providing a consistent experience across any channel. Agents can answer questions via mobile, web, phone, email, social, community, or live chat.

Manage agent availability in real-time with an omni-channel presence and dynamically route the right cases to the right agents at the right time.

Mission Execution

Bring all necessary information together in a consolidated view with an integrated service console that accelerates the resolution process.

Configure automated workflows for business process review and approval.

Enable contextual collaboration amongst mission stakeholders to improve outcomes and provide a complete audit trail of the mission delivery process.

Relationship Management

Track and maintain a 360° view of all customer and stakeholder interactions. Mitigate the risks associated with staff turnover by providing new staff members access to all historical information, which subsequently improves the customer experience.

Establish customer-to-customer relationships enabling them to self-solve their support questions as a cost effective approach to mission delivery.

Community functionality curates the collective expertise of agency employees and other community members, which gives agencies insight into trending customer issues that may be an opportunity for improvements to service delivery methods.

Analytics & Reporting

Improve decision-making and resource management across all areas of service. Spot trends, visualize key performance indicators and take action on your data.

Benefits

Comprehensive Case Management for any Need:

Agencies have responsibility for managing numerous types of cases from low complexity/low risk cases like conference room scheduling & parking space management, to high complexity / high risk cases like call center solutions and fraud & investigative case management. Federal Case Management is an answer to all elements of service delivery and levels of complexity.

Complete, 360-Degree View:

Our solution provides for a more comprehensive picture of all case-related interactions (i.e. citizen, caseworker, field investigator, etc.) and case data in a single, searchable, scalable platform. Agencies have complete visibility into all case interactions and activities to more efficiently manage cases, investigations and associated outcomes, and are ultimately enabled to close more cases per year.

Mobile Enabled Out of the Box:

Responsive interface maintains a user-friendly flow on mobile devices. Mobile-ready technology gives end-users quick and easy access to real-time updates on the most recent activity and allows them to access records of all case-related interactions. Place the citizen at the center of the interaction by giving them more control of the experience and put the power to proactively initiate interaction anytime, anywhere.

Makes Collaboration Easy:

Collaborative functionality can be tightly integrated into workflows; agency employees can work together more efficiently by streamlining intelligence gathering and automating time-consuming case resolution processes. In addition to optimizing internal business processes, integration of data and the development of consistent data standards can potentially improve interagency operations where process and needs overlap.

Powerful, Real-time Analytics:

Solution provides comprehensive reporting and analysis. Unlike traditional one-dimensional reports, analytics empower you to turn your insight into action faster. Connect and query multiple data sources with a robust analytics engine, which gives you new ways to visualize your data and KPIs, so that you can anticipate needed adjustments in mission delivery.

Robust APIs and Seamless Integration:

Solution has the ability to interface with external systems using powerful, flexible, standards-based APIs that enable agencies to create real-time, bidirectional channels of communication between the case management solution and legacy ERPs, Accounting systems, existing case-relevant GIS data, etc.



The Salesforce Case Management solution is available on our **FedRAMP** certified Government Cloud, providing the additional security accreditation required by our government customers.

Customer Successes

U.S. State Department Bureau of Consular Affairs



Challenge

The U.S. State Dept deployed a support services case management solution (ATLAS) to assist in the management and delivery of overseas Consular Support Services. ATLAS supports DOS's efforts to migrate from paper-based services to Web-based, online processes by offering self-service appointment scheduling for applicants and the ability to use e-mail to collect supporting documentation, which is permanently stored with an applicant's record. Atlas also reduces informational transactions for posts, enabling them to focus on the adjudication of visas.



Solution

A foreign immigrant goes to a Consular Affairs website to complete visa and personal background information. This submission triggers a workflow that assigns a caseworker to track the applicant through the entire application process. Throughout the process, data and information on the Visa application case is tracked, updated, and reported against. The process end step involves the workflow driven scheduling of an interview, recording of that interview and file case disposition resulting in the issuing of the Visa, or a denial and restart of the process.



Results

Real-time reporting of all activity helps manage thousands of applicants every month and adheres to required SLAs. Real time visibility, tracking, and transparency for the entire Visa application process is provided to the Department of State through reports and dashboards tailored for each mission. ATLAS is currently supporting 60 countries across 5 continents in 35 languages.

VA Center for Innovation (VACI)



Challenge

VACI solicits and funds pilot projects from private sector organizations to address specific issues related to Veterans health. Successful pilots are considered for additional funding from the VA line of business responsible for the specific issue being addressed. The organization was struggling to effectively utilize their available funding, due to several system limitations. Projects, funding and spend plans were tracked in Excel Spreadsheets, Outlook and several other tools causing a variety of problems.



Solution

VACI decided to procure Salesforce to give them a single secure system to manage their mission and completed initial roll out in 3 months. Salesforce was selected due to several factors, including cost, technical fit, the fact that the platform is cloud-based, and VACI's ability to manage the implementation without outside contractors.



Results

With Salesforce, VACI now reaches their objective of graduating quality pilots faster with fewer costs and greater visibility and success. As a result of the Salesforce implementation, VACI has improved decision-making, accelerated innovation and now has complete visibility across their entire portfolio of projects.