

Making the Case: Multi-Channel, Real-Time Case Management Solution

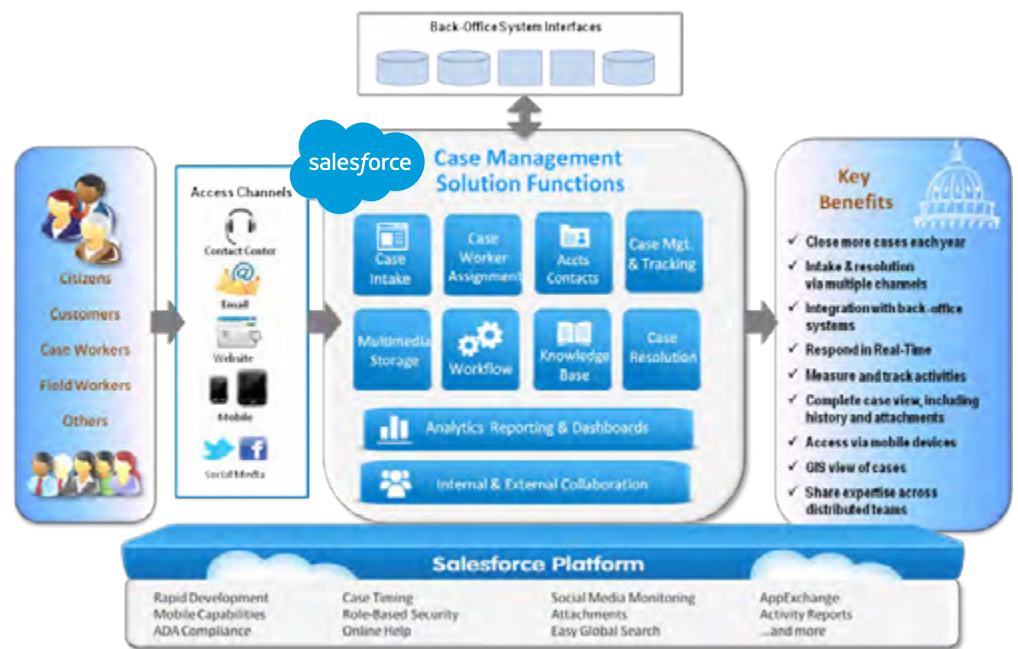
Government agencies are challenged to deliver personalized, effective, and timely case management and resolution for its citizens and customers. In many instances this is because the information needed to resolve cases is not connected and is across multiple, disparate data sources, application platforms, and resources with no ability to synchronize across government agencies and the public -- all of which causes extensive administrative workload. For example, the management of crime investigations involves many processes, information workflow and exchange, and multiple layers of case data and information. Government agencies are also strained to do more with limited staff resources and budgets.

Salesforce.com's industry leading, multi-channel, real-time case management Software-as-a-Service (SaaS) solution brings all of this together in one connected enterprise platform that supports the full case management lifecycle. Our solution is not a point solution. It is a proven and highly flexible solution that can be fully configured for any case management program, function, and case type, from fraud investigation, to health & human services, social services, housing management, and more.

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.

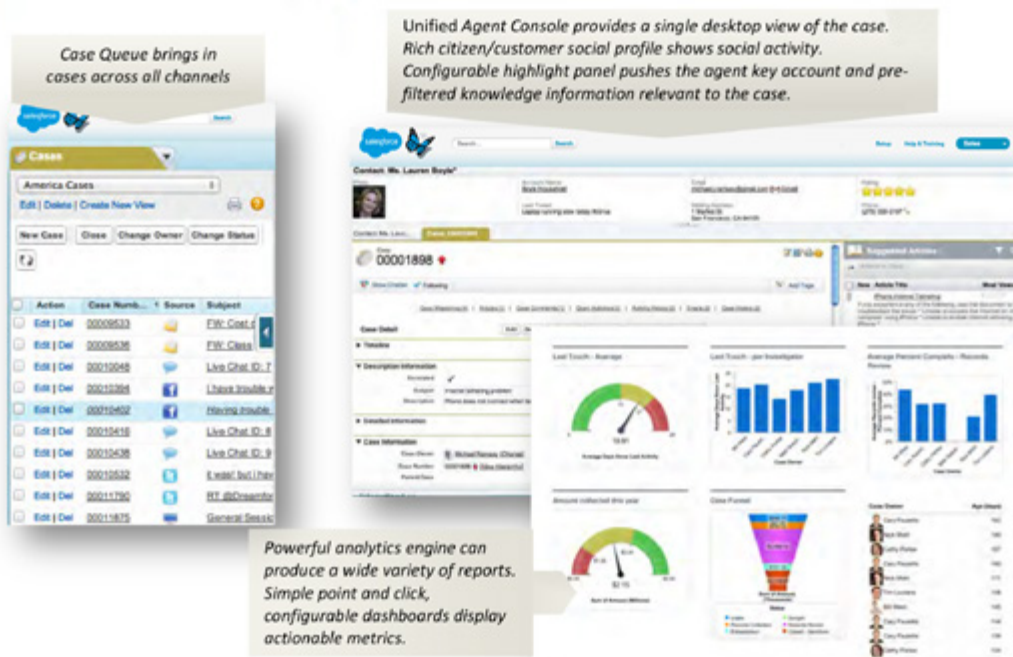
Agencies can move away from email and disparate systems and interact through a highly secure, globally trusted cloud based network that is integrated with back-office systems, multi-channel, and mobile. This allows for phone, in-person interactions, and real-time updates via mobile devices, as well as integration with existing systems. Accounts, contacts, case notes, intelligence, evidence, associated assets, and digital content are all interconnected and easily to access. Case Workers across divisions can ask each other for help with cases and easily share information securely.

Our solution provides for a 360 degree view of all interactions and conversations (i.e., citizen, case worker, field investigator, etc.) and case data in a single, searchable, scalable platform. Data can be accessed via any mobile device as well as in the office providing for quick and easy access to information required and keeps field workers connected to record real-time updates. Additionally, our solution has a built in, comprehensive analytics engine, integrated GIS, and the ability to associate related cases.



Case workers can work faster and more efficiently by streamlining intelligence gathering and automating mundane and time consuming case management and workflow resolution processes. Collaboration functionality can be tightly integrated into workflows with more flexible processes and information being shared more readily and less hierarchically, collaborating across divisions and user groups, sharing tasks in a more project-based fashion.

Additionally, our solution can be rapidly deployed and scaled at will to support current and future needs.



Making a Difference

Below are just a few customer use case examples that demonstrate the power of Salesforce case management solutions and how they have helped these organizations attain greater efficiencies, improve collaboration, comply with evolving requirements, automate case management program and administrative processes, and improve citizen and customer services and engagement – all at lower costs than traditional, on-premise solution models.

Family Services Agency

created San Francisco's first automated human services client case management system. The Salesforce solution captures and tracks contacts, assessment for care planning, episodes, client diagnosis, client progress notes, and case documentation. The solution was deployed to 215 users across all organizational functions, including 120 case workers, spread among four major service sites. Salesforce automates key functions including pre-populating forms to save administrative time. All documentation is stored eliminating the need for paper forms and files and making it easy to share information. Clinicians and support personnel can easily share diagnoses, objectives, progress notes, and plans of care.

State Department Bureau of Consular Affairs

developed a custom Salesforce case management solution for their global End-to-End Visa Process. A foreign immigrant goes to a Consular Affairs website to complete visa and personal background information. This submission triggers a workflow that assigns a case worker 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. Real-time reporting of all activity helps manage thousands of applicants every month and adhere to required SLAs.

The Chicago Housing Authority

is responsible for managing the needs of residents, partners and third-party providers. The agency implemented a custom configured case management system. The agency's complex security needs were met with Salesforce's comprehensive and flexible data sharing model, ensuring that the right users have access to the right information. The agency leverages the Salesforce platform agency-wide, utilizing reports, dashboards, and case functionality. Salesforce's standard Account and Contact business objects are configured to track housing residents. The agency built custom applications on the platform to manage referrals, goals, outcomes, and events.