

A guide to successful case management using SharePoint and Outlook

How to succeed in case management

Case management involves a lot of moving parts and many continuous or long-running business processes – from information gathering to collaboration between teams and communication with clients. Data and information need to be collected and stored correctly for a case to be viewed in its entirety and worked on effectively by all involved.

Case management presents many challenges, including the following:

- managing the mass of communications that flow back and forth between the various people working on cases
- making sure all the information, as well as the tasks and processes involved, are dealt with efficiently and accurately

Organizations require a solution that can manage this – a solution that:

- makes their jobs easier
- is based on the ways they work and how they like to work, which is invariably reliant on email and communicating within their email client

These business requirements dictate the following technology directives:

- a simple user experience for employees
- seamless integration of email clients like Outlook and document management spaces like SharePoint

SharePoint is often the tool of choice for storing case-related content and documentation. But if you treat emails separate from documents, you will find yourself confronted with large-scale problems that affect your employees' ability to efficiently manage cases. This is because people often use email to manage cases and they tend to spend most of their day in their email client.



This eBook is for organizations that are either already using, or are planning on using, SharePoint for case management and want to ensure high levels of user adoption. We will highlight the main challenges of case management and explain how SharePoint can be a viable and practical solution, as long as one crucial ingredient is added: intelligent integration with Outlook, which would make it possible for people to manage email and documents as well and complete tasks and processes related to cases in their Outlook client.



“**SharePoint can be a viable and practical solution**”

The main challenges facing case managers

What is case management?

Case management is a term used to cover several scenarios found across industries. A good place to look for examples is in professional services – e.g. legal, insurance and accountancy firms that work with and on behalf of other organizations. These cases involve many employees and their client all working together.

To successfully complete their work, a case is opened to achieve an objective and when that objective is accomplished the case is closed. Cases vary in length. They can be open for a short duration, for instance, dealing with a customer complaint, or a long and even unspecified duration, such as managing employee pension plans for corporate entities.

What do these instances of case management have in common?

- They contain lots of information, records, emails, and documents
- On-going communication is required
- Documentation must be accessed quickly when required
- There are often lots of people working on a case – stakeholders, case managers, colleagues responsible for inputting data, clients and their employees, and third parties
- People will often need to access the information later



What are the main challenges of case management?

Case management can be a difficult and ongoing challenge for organizations for the following reasons:

Communication

Case management typically involves a lot of communication between colleagues and clients (and sometimes third parties), which is largely carried out by email. With the rise of instant chat, many people predicted the death of email. But email remains absolutely essential for formal and external communications. As case management involves a lot of this type of communication, email is especially important. For instance, it would be strange to receive important documents from your legal advisor via WhatsApp or SMS. Email is therefore (still) a fundamental part of case management and is why employees working on cases will spend large parts (if not the majority) of their day in their email clients. Sorting, storing, and accessing the information contained in emails, whether in written communication or document attachments, is critical for their work.

Information needs to be stored correctly

Case information needs to be recorded and documented. All the information related to a case has to be stored somewhere, so that it can be found when required. This is essential for the smooth running of the case, but also for compliance. Organizations need a standardized method for saving emails, documents and a shared place to store case information.

Versioning

With various members of the team working on documents at different times, collaboration is also a large part of case management. Externally, documents get sent out for clients to contribute to (e.g. the signing of a work order) or you may work closely with third parties to bring in their expertise on a case. Case managers need to be able to manage different versions of documents and email threads, internally and externally – and know which version is the latest one, what changes have been made and by whom. As a case develops over time, you need to keep a clear history of the various versions of documents.

Multiple cases

To add to the complexity of case management, users tend to be working on more than one case at a time.

Intelligent email integration is the missing ingredient

Having looked at the challenges facing case management in the previous section, let's now look at how organizations can overcome them.

Using SharePoint for case management

Many organizations have decided to use SharePoint to solve the case management problem. SharePoint gives case managers a place to store all information for multiple cases. As a space to manage emails, documents and reduce document chaos, it is an effective solution. With SharePoint, you can:

- store and manage information in a central location
- store different versions of documents and maintain a document history
- organize and categorize case information using metadata
- quickly and easily search for documents

But there are some issues, especially with email integration and its effect on user experience. Most importantly, SharePoint doesn't integrate with Outlook. For instance, confronted with long email chains, case managers can find it difficult to save the information they need to in the right places.

This can affect their ability to manage cases and lead to poor user adoption of SharePoint for case management. Users are constantly having to switch back and forth between the Outlook client and SharePoint in a browser window – getting distracted, losing information, losing emails and their attachments and saving documents in the wrong places.



As people working on cases will spend most of their day in their email clients, there must be a better solution for organizations using SharePoint to solve the case management problem. They need to be able to save information about cases with greater ease, speed and accuracy.

In the next section, we will explain how [harmon.ie](http://www.harmon.ie) can help your organization achieve this.



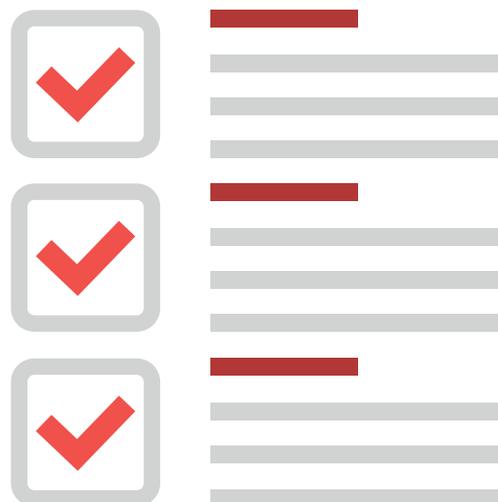
Making SharePoint a viable and practical solution

SharePoint can prove to be an effective solution for case management. All that is needed is a few tweaks to improve Outlook integration with SharePoint.

harmon.ie integrates with SharePoint to make it easy for you to easily drag and drop important information from Outlook into SharePoint, saving emails and attachments in the correct places with all the relevant metadata. This can help you eliminate information siloes and reduce context switching between Outlook and SharePoint.

Where SharePoint provides the shared space to manage documents; harmon.ie provides the adoption, organization and integration with Outlook that makes SharePoint viable and practical as a solution for case management.

With all your documents and emails in one place, accessible using one simple user interface, it becomes much easier to manage cases. Without having to leave Outlook, users can instantly connect to SharePoint sites, lists and libraries.



With harmon.ie users can:

- Auto-capture emails and documents from Outlook into SharePoint
- Intelligently classify emails and documents in SharePoint
- Easily retrieve emails, documents and records from SharePoint
- Maintain accurate version history of emails and documents
- Quickly access libraries, lists and sites used frequently

Case management is an ongoing process and with the right tools you can make sure it's always a consistent success.

For more information about case management or harmon.ie, get in contact with us today.



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