

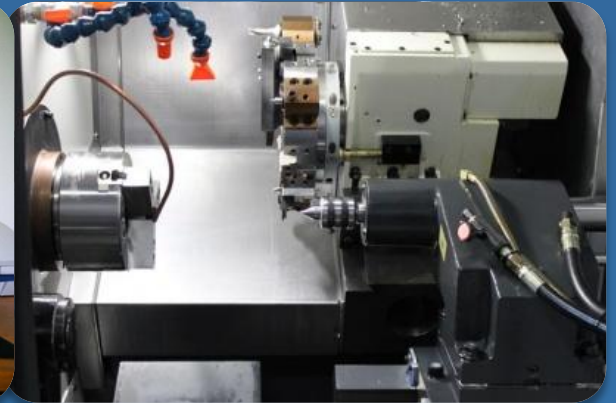
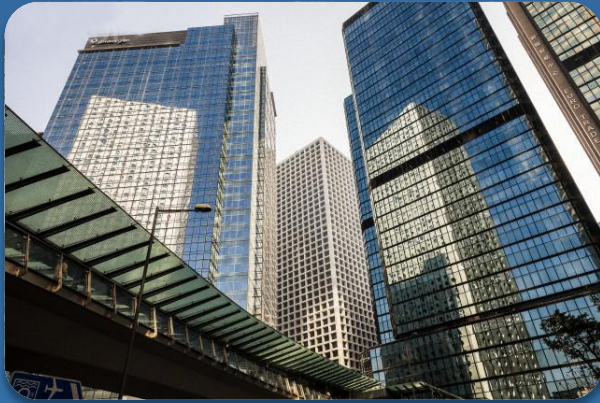
Adaptive Case Management (ACM)
as an instrument of social management
of business processes within a company

Victor Senkevich
PayDox Case Management

What is a company?

What is a modern company ?

✓ Define it in one word



✓ The correct answer is on the next slide



What is a company?

A company – is people

- ✓ To be more precise, it is people working together towards a common goal
- ✓ These people cooperate to support the functioning of multiple business processes within a company

In cooperating, employees of a company utilize elements of its infrastructure (or technosphere) – machinery, computers, telephones, desks, etc.



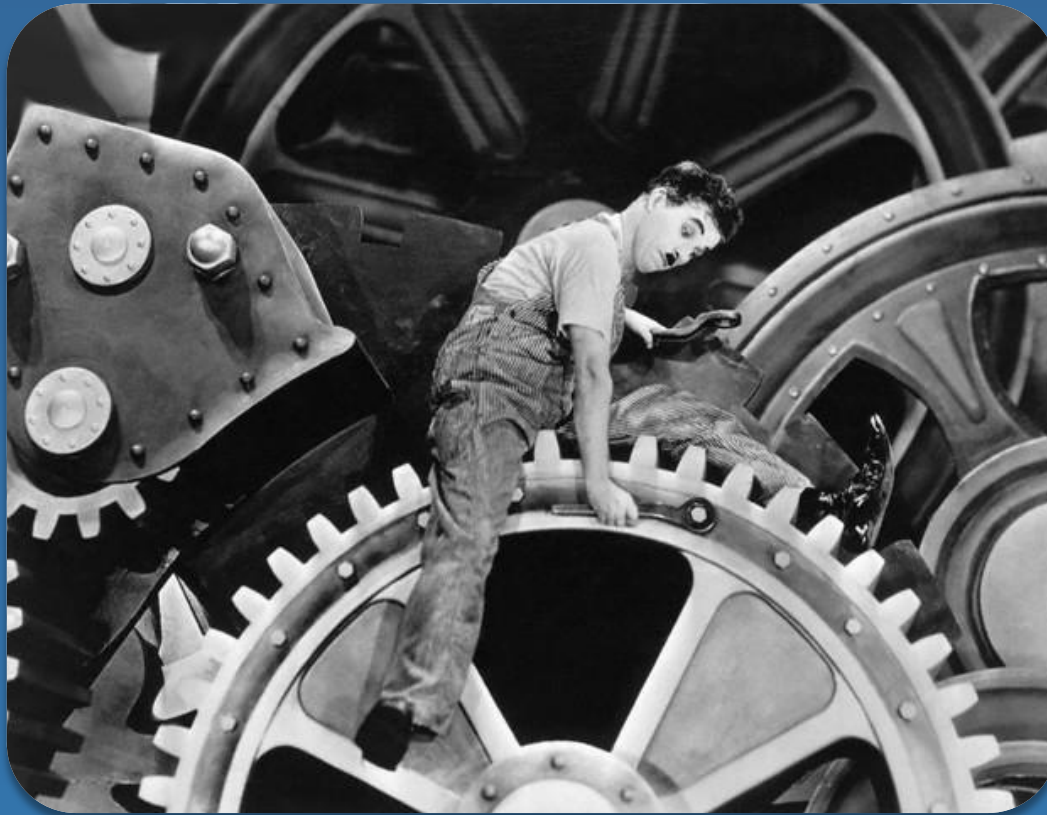
Business Processes (social aspect)

- ✓ Strongly structured, formalized, less social



Business Processes (social aspect)

✓ Up to anti-social



Business Processes (social aspect)

- ✓ Unstructured, informal, more social



Business Processes (social aspect)

- ✓ Up to chaotic and completely unpredictable



Corporate business processes

- ✓ Strictly defined business processes are easily automated by traditional information systems



- ✓ Social business processes, prevailing in a modern office, are often «automated» through any means at hand – e-mail, forums and blogs

Plugged in office workers, equipped with iPhones and iPads, are waiting for business-applications that provide familiar ease of use

Corporate business processes

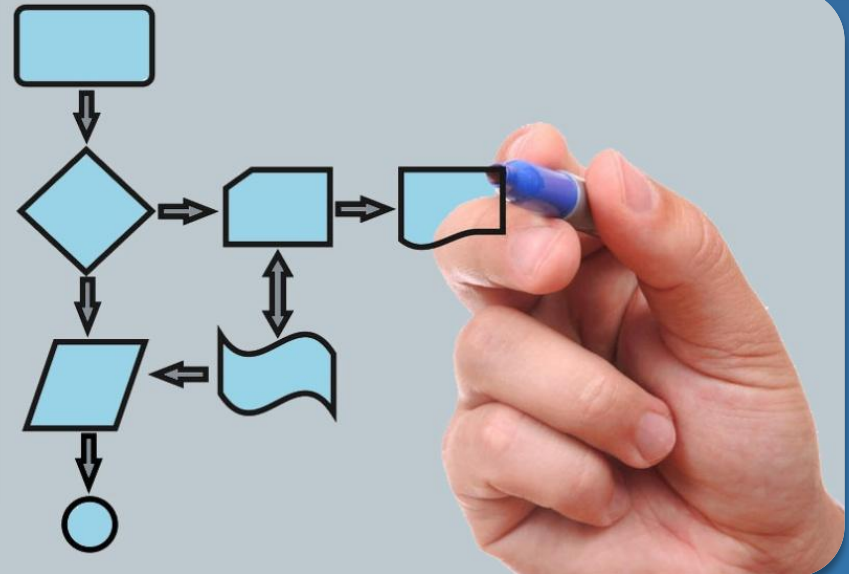
- ✓ Traditional systems for controlling business processes (Business Process Management, BPMS) support strictly defined sequences of actions
- ✓ BPMS allows for automation of structured and formalized lists of tasks completed within an organization: *processing of similar orders, standard formalizing of business trips, repeated purchasing of equipment and materials, etc.*



Corporate business processes

✓ Descriptions of business processes in traditional BPMS are compiled by a business analyst. To this end, studies of business processes within a company are conducted.

Configuration of the BPM-system for controlling real business processes are made by qualified programmers.



Corporate business processes

- ✓ In other words, descriptions of business processes and configuration of a traditional BPM-system require more time investment from qualified labour



Unfortunate shortcomings of traditional BPMS

- ✓ After launching a traditional BPMS, it becomes apparent after a short time that change is constant within an organization. *But who would have thought otherwise?*

And so descriptions of business processes and configurations of the BPMS already don't reflect the real processes used. Thus we are forced to start over. The BPMS does not have any adaptability to real life situations.

- ✓ Additionally, the BPMS does not reflect any of the social management aspects within an organization.



Unfortunate shortcomings of traditional BPMS

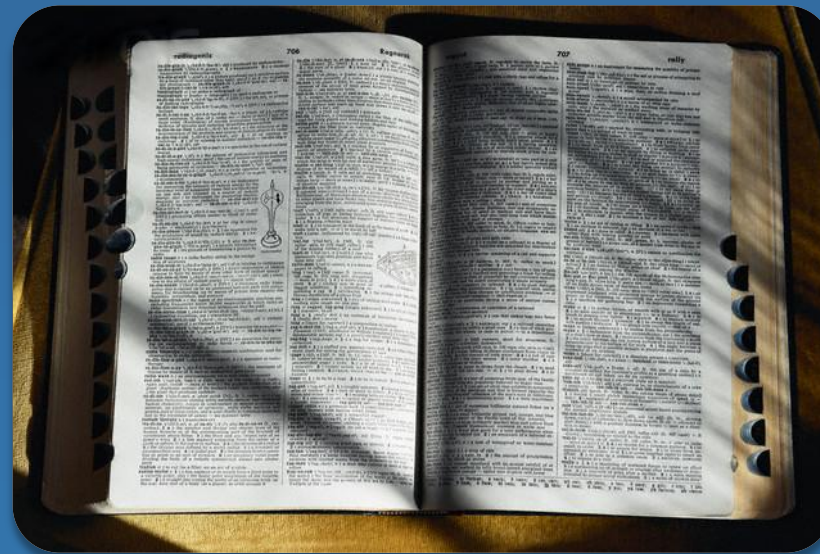
- ✓ A significantly large portion of work performed by teams of employees, in collaboration, is unstructured, requires discussion, assignment of tasks based on analysis of the current situation, and control of time lines in completion of tasks and assignments

Traditional BPMS are poorly, or not at all, suited to react to problems, which arise in the performance of a business process from changing circumstances or opinions of the participants within the business process. In BPMS, there is no support for social functions



Unfortunate shortcomings of traditional BPMS

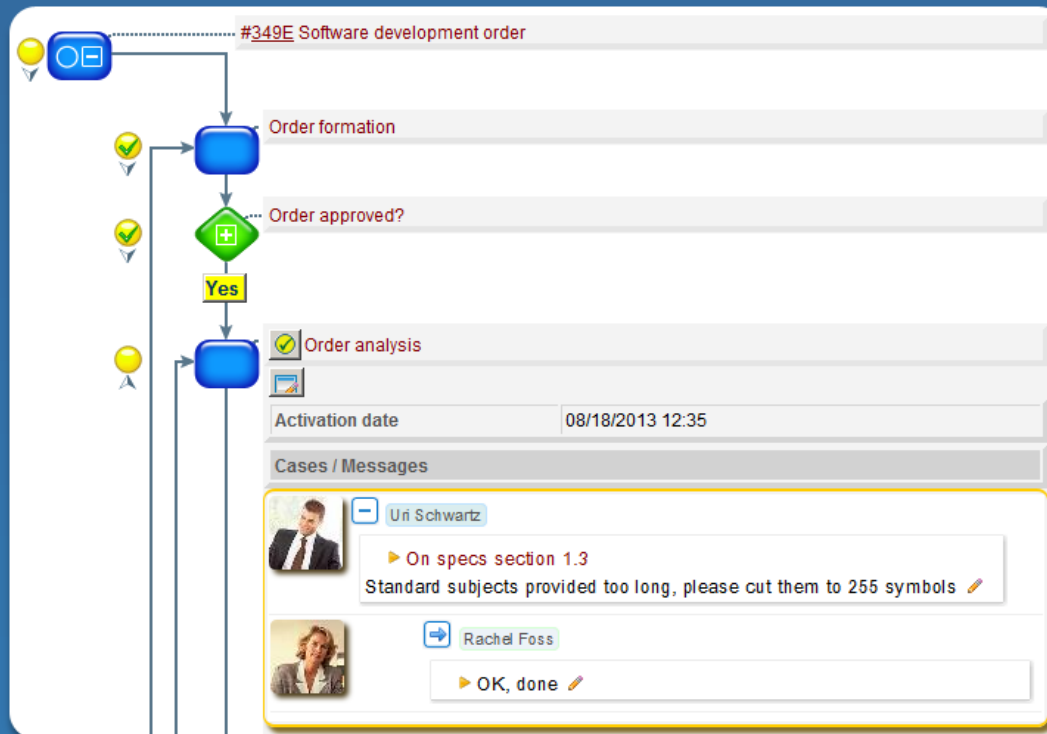
- ✓ A business process management system without social functions
«constitutes one of the main traits of the bourgeois world view – its inhumanity, endeavor to turn workers into a cogs, to replace a living, thinking, fighting for his own interest man with a machine» 📖🤖
(1954, USSR's Short Philosophical Dictionary of Cybernetics)



Unfortunate shortcomings of traditional BPMS

What must be done?

- ✓ To enhance the BPMS with social functions: discussions, tasks, assignments, groups of users
- ✓ To create a new class of applications – Adaptive Case Management systems (ACM), realizing principles of social management and oriented not on the process, but on results
- ✓ To integrate BPMS and ACM



Adaptive Case Management (ACM)



ACM systems are intended for organization of teamwork, tasks and assignments, control over time frames and execution



Adaptive Case Management (ACM)

Cases – sequences of tasks and messages, containing:

Description
of tasks,
assignments,
events,
control points

Discussions

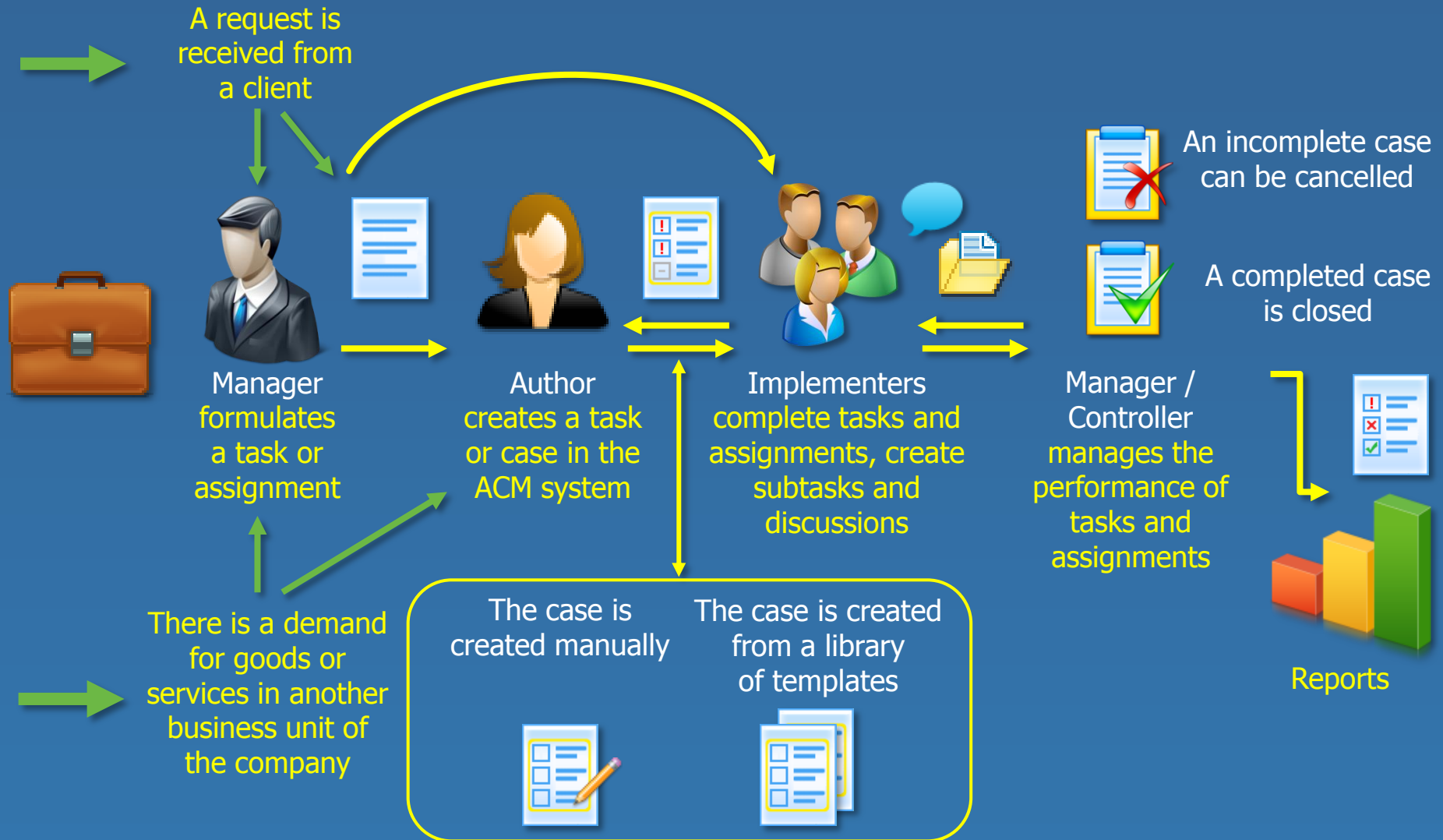
Lists of
implementers,
recipients,
participants,
controllers,
authors,
managers

Documents
and other
files

Tags and
other forms
of data

Business
rules

Case Management Organization Chart



What must an ACM system be like?

- ✓ To manage not separate tasks and assignments, but cases – collections of tasks and assignments, connected with the execution of an entire business process

The screenshot displays a web-based interface for an Adaptive Case Management (ACM) system. At the top, a folder icon is labeled 'New employees'. Below this, a header bar shows a profile picture of Rachel Foss, a minus icon, a warning icon, a folder icon, a 'FORM' icon, and the name 'Rachel Foss'. A search bar contains the text 'Tom Smith job application. Position: Sales Representative' with an edit icon. To the right of the search bar is a yellow tag labeled 'HR Department'. Further right is a row of icons including a folder, a warning icon, a speech bubble, a document, a green arrow, and a number '2443'. Below the header, a list of tasks is shown, each with a profile picture of Rachel Foss and a task description. The tasks are: 'Job application approval', 'Job record completion', 'Employment contract signing' (with a sub-task 'Colleagues, please read and reconcile the contract' and 'Agree'/'Refuse' buttons), 'Providing job site', 'Connecting the employee's computer to the corporate network', and 'Issuing the corporate pass for the employee'. Each task has a status icon (plus, warning, or checkmark) and an edit icon.

New employees

Rachel Foss

Tom Smith job application. Position: Sales Representative

HR Department

2443

Rachel Foss

Job application approval

Patricia Stone

Job record completion

Rachel Foss

Employment contract signing.

Colleagues, please read and reconcile the contract

Agree Refuse

Rachel Foss

Providing job site

Rachel Foss

Connecting the employee's computer to the corporate network

Rachel Foss

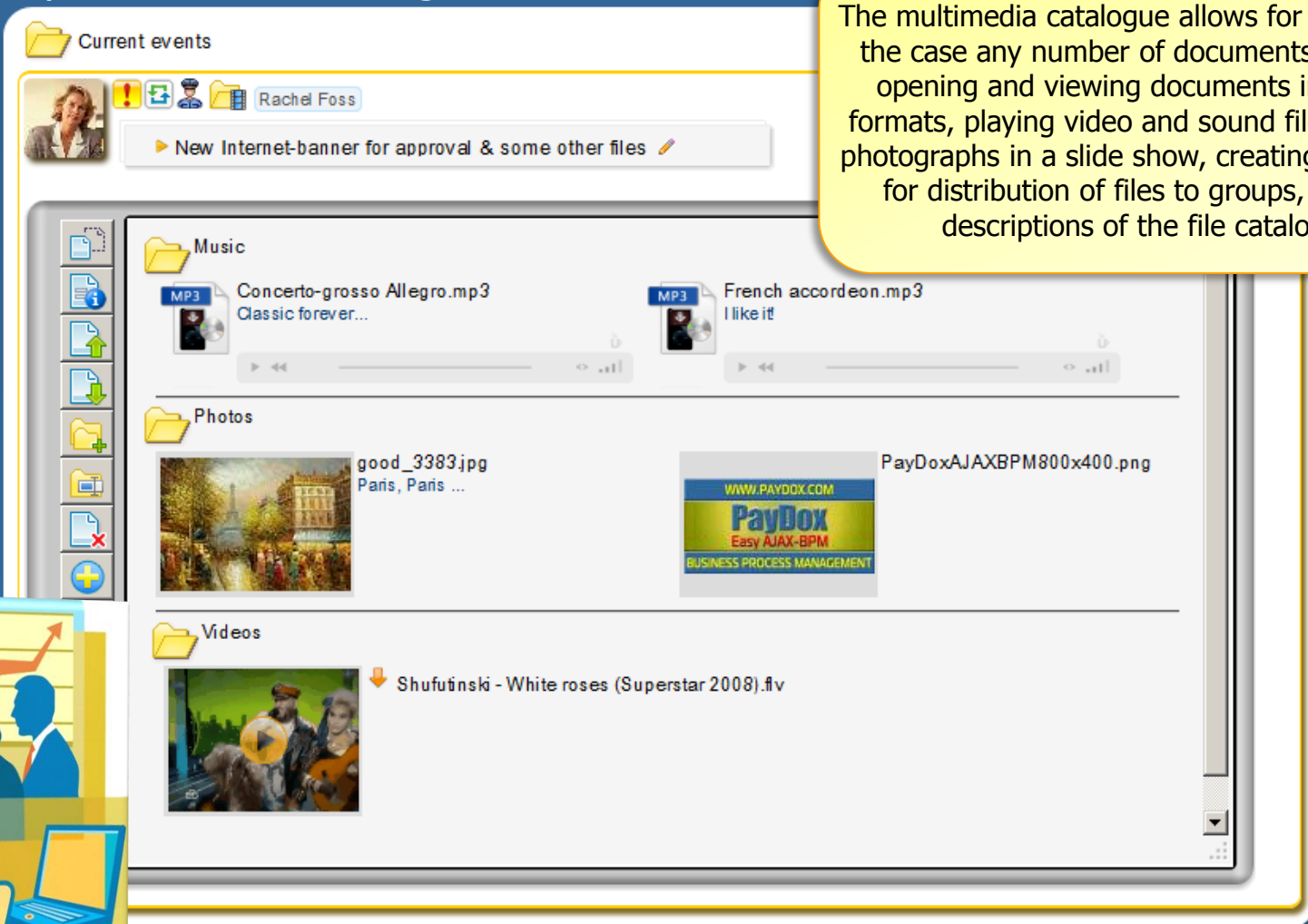
Issuing the corporate pass for the employee

Tasks, assignments, discussions may be presented as a case – a sequence of messages, that may be entered in the correct order and containing descriptions of tasks, recipients, completion time frames, files



What must an ACM system be like?

- ✓ Store all information on a business process in a virtual folder – all documents, photographs, videos, drawings and other files



The multimedia catalogue allows for loading into the case any number of documents and files, opening and viewing documents in various formats, playing video and sound files, viewing photographs in a slide show, creating subfolders for distribution of files to groups, creating descriptions of the file catalogue

What must an ACM system be like?

- ✓ Manage users within the case project team, give or revoke access to case tasks, files and messages, inform users of the need to begin work on a new task within the project

It is possible to allow access to all tasks and discussions of a particular theme to only one specific group of users, participating in the realization of the project or case.

It is possible to define users, roles, as well as whole subdivisions, or access groups (groups of users, which are formed for the realization of the project or case)

Create task / assignment

Subject / Activity type Management

Task / Assignment

Please provide me the latest information

I'll do it tomorrow

Just do it!

Please do it...

Please provide me the latest information

What do you think about?

What's up?

Addressees, Assignees list

☐ Addressees can close assignment

☐ Response

☒ Patricia Stone ☐ Nat Stewart ☐ Jill Julien ☐ Alex Sicorski ☐ Andrew Stanley

☐ Amir Friedman ☐ Xu Lee ☒ Uri Schwartz ☐ Rachel Foss ☐ Samuel Groffen

More

Patricia Stone <Patricia>;
 Uri Schwartz <Uri>;
 <#Administrators#>

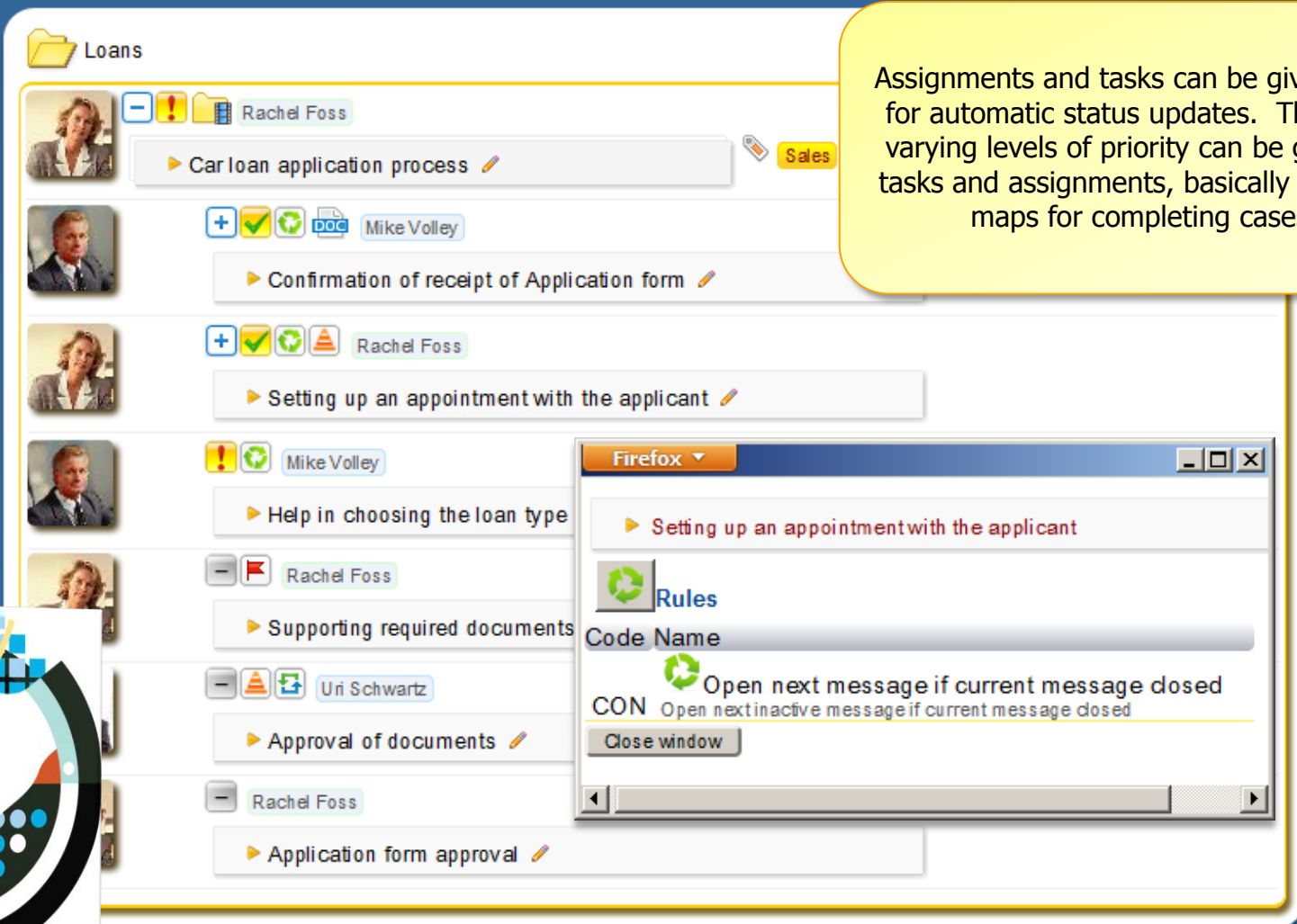
Due date 7/17/2013

Save information



What must an ACM system be like?

- ✓ Maintain control over rules, allowing for automatic activation of the case's next task once a task has been completed, send users reminders, etc.



The screenshot displays an ACM system interface with a list of tasks assigned to users. The tasks include:

- Car loan application process (assigned to Rachel Foss)
- Confirmation of receipt of Application form (assigned to Mike Volley)
- Setting up an appointment with the applicant (assigned to Rachel Foss)
- Help in choosing the loan type (assigned to Mike Volley)
- Supporting required documents (assigned to Rachel Foss)
- Approval of documents (assigned to Uri Schwartz)
- Application form approval (assigned to Rachel Foss)

A pop-up window titled "Firefox" shows a "Rules" configuration for automatic task activation. The rule is defined as:

```

Code Name
Open next message if current message closed
CON Open next inactive message if current message closed
Close window
  
```

Assignments and tasks can be given rules for automatic status updates. This way, varying levels of priority can be given to tasks and assignments, basically creating maps for completing cases



What must an ACM system be like?

- ✓ Have a developed subsystem of filters, obtaining information on various segments in one click – «open assignments», «overdue», «assignments for current user», «assignments for subordinate employees», «outstanding department assignments», etc.

One click of the mouse on a point or icon in the left menu allows you to obtain various lists of tasks and assignments, meant for the current user, as well as subordinate users or a whole department

The screenshot shows a web-based ACM system interface. On the left, a vertical menu titled 'Cases / Messages' contains various filter icons and a list of filters: 'For me', 'Response required', 'Responded', 'Created by me', 'Reconciliations', 'Open' (highlighted in yellow), 'Milestones', 'Events', 'Deals', 'Expired', 'Expiring', 'Short-list', and 'Informational'. Below the menu is a search bar and a list of users. The main content area displays three sections: 'Accounts Receivable' with messages from Rachel Foss and Jeff Robinson; 'Business processes' with a message from Rachel Foss about a new internet banner; and 'HelpDesk' with messages from Rachel Foss requesting MS Office and Windows installations. Each message includes a user profile picture, a timestamp, and a '211T' or '5110' indicator.

What must an ACM system be like?

- ✓ Keep a log of all user actions

Task authors and administrator can see a short history of the work completed on a task by users (who created the task, when it was created, any edits to discussions and changes to status)

Original assignment

Assignment / Task

Subject / Activity type	Loans
Message	Setting up an appointment with the applicant
From	Rachel Foss
To	*All*
Status	<input checked="" type="checkbox"/> Closed
Due date	09/24/2013
Creation date / Activation date	09/19/2013 14:49
Closing date	09/24/2013 15:22

Additional information

Short history	09/24/2013 15:22 *Rachel Foss* <Admin> Status: Closed 09/19/2013 15:02 *Rachel Foss* <Admin> Seen: Admin 09/19/2013 14:49 *Rachel Foss* <Admin> Status: Open 09/19/2013 14:49 *Mike Volley* <Demo>; Information created
Full ID	KBUK253874/KBUL35274Y
GUID	{76372406-B96E-43B7-A8D4-7FFA3052ABFA}

Response messages or dependent assignments



What must an ACM system be like?

- ✓ Support discussions for any task in the case

The screenshot displays a web-based interface for an Adaptive Case Management (ACM) system, specifically for a 'Loans' case. The interface is organized into a series of task steps, each associated with a user and a task description. The users involved are Rachel Foss, Mike Volley, and Mike Toledano. The tasks include 'Car loan application process', 'Confirmation of receipt of Application form', 'Application form is received and recorded in the system', 'Setting up an appointment with the applicant', 'Peter, please have the applicant call to schedule an appointment', 'The appointment is sheduled at 1:15 pm tomorrow', and 'OK, thanks'. The interface also shows a 'Sales' tag and a '3874' value. A sidebar on the left contains icons for various functions, including a globe, a coffee cup, and a document.

Loans

Task 1: Rachel Foss
Car loan application process

Task 2: Mike Volley
Confirmation of receipt of Application form

Task 3: Rachel Foss
Application form is received and recorded in the system

Task 4: Rachel Foss
Setting up an appointment with the applicant

Task 5: Mike Volley
Peter, please have the applicant call to schedule an appointment

Task 6: Mike Toledano
The appointment is sheduled at 1:15 pm tomorrow

Task 7: Mike Volley
OK, thanks

What must an ACM system be like?

- ✓ Support a library of templates, where you can successfully drop completed cases in one click, so that later you can create a whole case on any topic based on the template, already containing all tasks, all implementers, and all samples of documents and other files

The screenshot displays a user interface for an Adaptive Case Management (ACM) system. It features a hierarchical folder structure on the left with three main categories: 'Human Resources', 'Loans', and 'Sales'. Each category contains a list of templates, each represented by a card. Each card includes a profile picture, a name, a set of control buttons (+, -, and a document icon), a title, and a numerical ID with expand/collapse arrows. The 'Human Resources' section shows a template for 'Rachel Foss' with the title '#Tom Smith# job application. Position: #Sales Representative#'. The 'Loans' section shows a template for 'Mary Volley' with the title 'Car loan application process'. The 'Sales' section shows a template for 'Uri Schwartz' with the title 'Order management'.

Category	Name	Template Title	ID
Human Resources	Rachel Foss	#Tom Smith# job application. Position: #Sales Representative#	2443
Loans	Mary Volley	Car loan application process	3874
Sales	Uri Schwartz	Order management	1262



What must an ACM system be like?

- ✓ Easy to understand and attractive – present lists of tasks in cases as «checklists» – lists of tasks, in which checkmarks indicate completion and icons show all current statuses of tasks and assignments

The screenshot displays a user interface for managing new employee cases. At the top, a folder icon is labeled 'New employees'. Below this, a header bar includes a user profile for Rachel Foss, a 'FORM' icon, and a '2443' status indicator. The main content area lists tasks for three employees: Tom Smith, Patricia Stone, and Rachel Foss. Each task is represented by a row with a status icon (plus, warning, or checkmark), the user's name, and a task description. The task for Rachel Foss includes a sub-task 'Employment contract signing' with a text prompt 'Colleagues, please read and reconcile the contract' and 'Agree'/'Refuse' buttons. The tasks are: 'Job application approval', 'Job record completion', 'Employment contract signing', 'Providing job site', 'Connecting the employee's computer to the corporate network', and 'Issuing the corporate pass for the employee'. A sidebar on the left shows a graphic of two people shaking hands and a clipboard with a checklist.

New employees

Rachel Foss

2443

HR Department

Tom Smith job application. Position: Sales Representative

Rachel Foss

Job application approval

Patricia Stone

Job record completion

Rachel Foss

Employment contract signing.
Colleagues, please read and reconcile the contract

Agree Refuse

Rachel Foss

Providing job site

Rachel Foss

Connecting the employee's computer to the corporate network

Rachel Foss

Issuing the corporate pass for the employee

What must an ACM system be like?

- ✓ Full functionality on desktop computers, laptops, and tablets (iPad and others)



What must an ACM system be like?

- ✓ And the main requirement for ACM – adaptability. The system must not require detailed inspection of business processes and programming with configurations for new business processes. **New cases are formed by users** as lists of tasks, which require completion, and are corrected and added to in the course of performance of the process

The screenshot displays a web-based interface for managing loan cases. At the top, a folder icon labeled 'Loans' is visible. Below it, a horizontal bar shows a user profile for 'Mike Volley' and a 'Sales' button. A search bar contains the text 'Car loan application process'. The main area lists several tasks, each associated with a user profile and a status icon (plus, checkmark, or warning triangle). The tasks are: 'Confirmation of receipt of Application form' (Mike Volley), 'Setting up an appointment with the applicant' (Rachel Foss), 'Help in choosing the loan type and terms' (Mike Volley), 'Supporting required documents collection & check' (Rachel Foss), and 'Approval of documents' (Uri Schwartz). The 'Approval of documents' task includes 'Agree' and 'Refuse' buttons. A sidebar on the right shows a list of icons and a numeric value '3874'. A bottom right corner shows a row of four small user profile icons.

Loans

Mike Volley

Car loan application process

Sales

3874

Mike Volley

Confirmation of receipt of Application form

Rachel Foss

Setting up an appointment with the applicant

Mike Volley

Help in choosing the loan type and terms

Rachel Foss

Supporting required documents collection & check

Uri Schwartz

Approval of documents

Agree Refuse



Important advantages of ACM

- ✓ The ACM system – a tool for creation of corporate knowledge base. All knowledge, which is created in «office» business processes, may and must be separated from its bearers and saved for enterprise wide use to avoid creation of narrow or «unique», «irreplaceable» employees
- ✓ Adaptive Case Management (ACM) is a tool for this separation which provides for timely and stable performance of work by employees

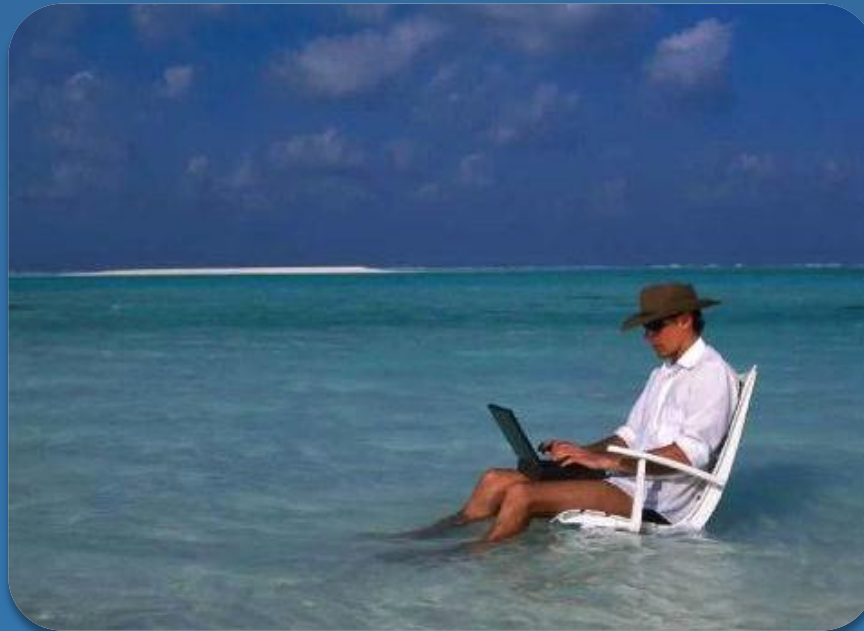


Important advantages of ACM

- ✓ Equally important is Adaptive Case Management's ability to accumulate corporate knowledge for future use.
- ✓ Successfully completed cases, containing valuable information on collective work performed by employees, are stored in a library of templates, slightly adjusted and cleaned up for universal application (all non-essential discussions and comments are deleted, only important tasks, assignments and milestones are kept). After this is done, a new case on the similar business process can be created with a single click. The process is then repeated.
- ✓ As a result, for each subsequent project there is a convenient template with a list of tasks, assignments, a collection of forms, lists of implementers and document templates. The ever increasing library of case templates composes corporate knowledge, separated from concrete employees and stored in a digital format for corporate use.

Important advantages of ACM

- ✓ Use of an Adaptive Case Management system helps avoid the creation of bottlenecks, unique or irreplaceable employees, whose vacations in the Caribbean, prior to the implementation of the system, would result in significant strain and work stoppages for remaining colleagues, but can now relax in peace during their vacations – current results of their corporate activities (tasks, contacts, documents, discussions) are stored in ACM.



Important advantages of ACM

«It's impossible to automate chaos!»

«Automated chaos does not stop being chaotic!»

Common misconceptions

✓ The adaptability and flexibility of ACM allows a company to automate its business processes «as is», in a fashion that is familiar to employees, without engaging in a risky implementation process, without stressing staff, or breaking existing business processes to achieve a theoretically correct condition «to be».

Possible «chaos», which in this case is automated, becomes qualitatively different – measurable and controlled.

After implementation of ACM, business processes become transparent, it becomes possible to perfect them in practice, and not on paper – easily adjusting and improving case templates.



Advantages of ACM for business

ACM – is it Versace jeans
or jeans from a flea-market?

✓ What percentage of large companies use
BPM systems?

5%? 15%?

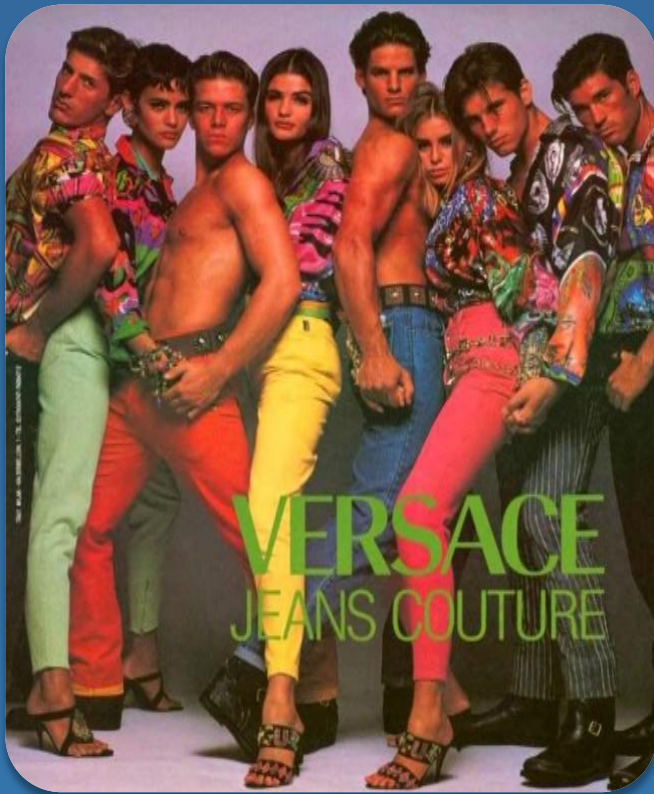
This means there is room to grow.

Additionally, this means that not everything is
well with the use of these systems even in places
where there are sufficient resources.

✓ And what percentage of small companies use
BPM systems?

0,01%?

In this case, «traditional» BPM systems do not
stand a chance.



Advantages of ACM for business

✓ «Pure» BPMS are elitist, much like Versace jeans, and small business can never use them.





However, ACM systems, due to their ease of use and availability can be used by 90% of small enterprises – an easy to use system for managing tasks, where you can indicate completed work with a checkmark, is needed by practically everyone.



Systems like ACM will, like jeans from a flea-market – be a cheap and accessible good of mass consumption.




























A red toy car is parked on a black calculator. The car is positioned over the numeric keypad, specifically between the '4' and '5' keys. The calculator has a digital display at the top showing '0.00'. The car is a small, red, open-top model with black wheels and a black interior. The calculator is a standard desktop model with various function keys like 'MU', 'sqrt', '+/-', 'CE', 'C', 'MC', 'M+', 'M-', and 'Mx' visible.

 Loans




 Mike Volley


 Sales

Examples of ACM business processes

Processing of a new hire



New employees

Rachel Foss

Tom Smith job application. Position: Sales Representative

HR Department

Rachel Foss

Job application approval

Patricia Stone

Job record completion

Rachel Foss

Employment contract signing.
Colleagues, please read and reconcile the contract

Rachel Foss

Providing job site

Rachel Foss

Connecting the employee's computer to the corporate network

Rachel Foss

Issuing the corporate pass for the employee



Examples of ACM business processes

Processing an order



The screenshot displays an ACM interface for 'Processing an order'. At the top, there is a toolbar with icons for communication, document management, and workflow. Below this, a 'Sales' folder icon is visible. The main interface is divided into several sections:

- Top Section:** Features a profile picture of Rachel Foss, a minus icon, a warning icon, and a folder icon labeled 'Rachel Foss'. Below this is a task bar with 'Order management' and a 'Polar Star' icon. To the right, there are several folder icons and a counter showing '1262'.
- Task List:** A series of tasks are listed, each with a status icon (plus, checkmark, warning, or error) and a name:
 - Uri Schwartz:** 'Approval of the customer order' with 'Agree' and 'Refuse' buttons.
 - Rachel Foss:** 'Check stock pls'.
 - Uri Schwartz:** 'Generation of an invoice'.
 - Rachel Foss:** 'Sending an invoice to the customer'.
 - Rachel Foss:** 'Order picking'.
- Right Side:** A row of five small profile pictures of team members, with a dropdown arrow next to the last one. Below this, two more profile pictures are shown with a dropdown arrow.

A group of six business professionals are seated around a large, light-colored wooden conference table in a modern office setting. They are all dressed in business attire. Several documents and papers are spread out on the table. One man at the top of the frame is talking on a mobile phone. The room has large windows in the background, letting in bright light. The overall atmosphere is professional and collaborative.

Meetings

Rachel Foss

3482

The meeting of the management Board

Meetings

Rachel Foss

Preparation of the meeting agenda

Rachel Foss

Approval of the meeting agenda

Rachel Foss

Preparation of premises and equipment

Rachel Foss

Meeting

Rachel Foss

Approval of the minutes of meeting

Rachel Foss

Distribution of assignments of employees on the results of the meeting

The current world trend in the IT field

Trend of the new millennium: **NO FRILLS NEEDED!**
Simplicity is more important than functionality

✓ Present world trends of leading software developers can be expressed with the phrase «*Novelty replaced with complexity*». When there is nothing to say, there are no new ideas, but a new version needs to be launched to continue generating profits, the market is flooded with software monsters.

✓ Users are prepared to sacrifice functionality in favor of simplicity. Progress in the IT field is strongly tied to this – small companies with simple applications often successfully compete with software monsters and their products that have consumed millions of programming hours.

A majority of users are already searching the market for inexpensive and easy to use mobile phones – that only support phone calls and SMS service as well as basic corporate applications – no more complex than email.



The current world trend in the IT field

Everything genius becomes simple only with time,
initially it seems primitive

«Grandma phone» with only one button



Influence of corporate psychology on IT

«Not a single manager was fired for selecting a solution from IBM»

«A system administrator overseeing a system that never breaks is not noticed, but a system administrator overseeing a system that breaks regularly is lauded as a hero, who saves the company at a critical moment»

Expensive and complicated solutions from a «large vendor»:

- ✓ high cost of ownership (TCO)
- ✓ problematic return on investment (ROI)
- ✓ high risk of implementation failure
- ✓ denial of failure of such an implementation



The current world trend in the IT field

✓ **Sociality and simplicity** – a modern trend in the IT field. Instead of complex descriptions of business processes, the entire Adaptive Case Management revolves around checklists, lists of tasks which must be completed, and checkpoints (or milestones, control points)



✓ For ACM, this checklist consisting of tasks and control points – is the same as the «happy path» in traditional BPM systems – the main list of actions, which must be completed and which are assumed prior to the start of the process. However, in ACM this list is corrected and supplemented in the carrying out of the process, in other words it is constantly adapted to reality.

ACM is oriented on results, a process to achieve these results is adapted along the way

The Occam's razor principle

- ✓ The Occam's razor principle is hopelessly forgotten by many IT vendors
- ✓ And the appearance of ACM can be treated as a return to simplicity and fundamental principles of the monk Occam
- ✓ Ease of use and social functionality – the motto of ACM!



Entities should not be multiplied unnecessarily

William of Ockham
~1285—1349

Contacts

Victor Senkevich

E-mail: victors@USA.com

Skype: [paybot](#)

PayDox Case Management: <http://www.PayDox.com>





Thank You!