

Case Management Workflow

Project Scenario before my engagement:

Process:

- The vendor receives the daily work from the Client through excel sheets via email. Multiple email throughout the business hours.
- The Excel data is a collection of To-Be completed work and can have duplicate data if the work sent was not completed by the vendor.
- Vendor had a module to read the email and attachment and store the excel rows into SQL tables
- Vendor has engaged a third party software to manage the cases in a workflow as per the Client business rules.
- The third party software provided an API to retrieve the completed work from the workflow and Vendor to update the status in the SQL tables.
- A web report was developed by the Vendor to pull the case status and report them to various client locations

Issues and Challenges:

- The excel source from Client had issues to collate the correct records from their database tables.
- The vendor has to send individual emails to the Third party software to create a new case in the workflow causing email traffic and non-receipt of email in workflow hence missing of cases.
- The License cost of the third party software was huge that the vendor can afford or found it viable to provide access only to the critical resources.
- Due to on premises, the critical resources can't work from home on the cases as no access available.

My Contribution:

- Proposed a cost effective and process efficiency solution to the vendor management team comprising new workflow design, development platform, approach and timelines, cloud hosting cost projections, Ramp-down of Third party software, Ramp-up of new vendor proprietary workflow with uninterrupted ZERO downtime to Client business.
- Designed, documented the workflow GUI, workflow database tables, Pseudo codes, API list and functions, Reporting modules and created web jobs.
- Collaborated with the development teams on the coding and implementations.
- Developed a few critical scenarios and implemented the programs in Azure Cloud
- Planned and executed the Ramp-down and Ramp-up of Client volumes with ZERO downtime.

Benefit Summary:

- Vendor cost for workflow reduced monthly cost to 85%
- Realtime updates and insights to Client and Vendor teams on the project happenings.
- Unlimited access and access from anywhere

- Adhered to all Client business process rules and also introduced quality management system which was missing in the Third party software.
- No manual interventions throughout the workflow

AS-IS and TO-BE process:

