Drive the outcomes your customers deserve by aligning people, technology and information for complex, life event processing

Customer requests do not always fit into a pre-defined linear process; sometimes the work is unstructured, involves multiple people and departments, takes time and the steps to completion vary. Complex processing, such as managing claims, opening accounts, and processing benefits, requires a more flexible, collaborative approach than traditional business process management (BPM).

The AWD® case management workspace is an integrated way for businesses like yours to help customers manage changes that arise from life events such as having a baby, buying a home, and preparing to retire. The workspace organises the entire set of activities and content needed for complex processing, empowering knowledge workers to optimise how they deliver the best experience to each customer.

Deliver exceptional customer experience with maximum efficiency

Understanding context, aggregating information from disparate systems and connecting multiple activities are key to maximising success in today’s complex business and technological environment. Collaboration and teamwork are also crucial in delivering higher quality service to customers when managing cases.

The AWD case management workspace consolidates everything into a single view so the case owner and everyone in the team shares resources, has context for their work, and knows how they contribute to successful completion of the case.

Simplify, organise, collaborate

- Optimise visibility, flexibility and efficiency – no matter how many tasks, documents, and participants – with a complete picture of the entire set of work for a case
- Easily link associates, teams and departments together to complete work in an organised and collaborative manner
- Reduce the likelihood of missed deadlines with visual timelines for progress
- Manage content in a simple, people-friendly way to leverage relevant information at the moment it is needed to drive a case forward to resolution
- Maximise likelihood that cases will progress smoothly with ad hoc task creation for agility to adapt in a dynamic environment
- Easily aggregate information from multiple sources using standards-based web services
- Capture and share best practice for common procedures with case templates
- Reduce risk of non-compliance by addressing regulations and corporate policies with structured processes embedded in cases when appropriate

AWD case management is ideal to manage complex work for life event processing such as customer on-boarding. A few specific uses by industry include:

**Insurance**
- Claims processing
- New policy processing
- Underwriting

**Healthcare**
- Benefits processing and analysis
- Claims processing
- Appeals

**Mutual Funds**
- Fund mergers
- New fund setup
- Transfer on Death processing

**Retirement**
- New plan onboarding
- Plan administration
- Rollovers

**Banking**
- Loan processing
- Know Your Customer (KYC)
- New account setup
Empower your knowledge workers to optimise how they deliver the best experience to each customer. The AWD case management workspace can help eliminate the need to toggle between multiple systems or rely on sticky notes, spreadsheets or checklists.

On the AWD platform

From complex, to straight-through and straight-to processing, AWD provides one integrated platform that manages the different types of work that exist across your organisation. AWD is a configurable application, not a toolkit that requires long ramp up and a lot of custom code, accelerating the time to value and reducing the total cost of ownership.

The case management workspace is a new way to manage complex work processing in AWD. It enables your knowledge workers to bring order to the chaos by providing a centralised location containing all relevant case activity and information, and clearly communicating progress and deadlines – helping to eliminate the need to toggle between multiple systems or rely on sticky notes, spreadsheets or checklists.

With the AWD case management workspace, your knowledge workers have the freedom to do things differently as well as visibility of the big picture to ensure all critical tasks are accomplished.

Product highlights

- Provide transparency and context in a consolidated view including updates, associated tasks, team workload and source content for all cases being managed
- Enable knowledge workers to manage work that is less automated and can be unpredictable, using structured processes where appropriate and creating tasks on the fly to meet the unique aspects of each case
- Monitor timelines for progress and overdue activity to efficiently, accurately and successfully close each case
- Automatically audit activities and sources of every case for a complete and easy to retrieve system of record
- Easily create and share case templates as a reusable framework that can adapt as needed so your associates can do what’s best for each customer
- Consolidate all source documents and key data into a single view, enabling all team members to collaborate and share information

About DST

DST Business Process Solutions, a wholly-owned subsidiary of DST Systems, Inc., is a trusted provider of technology-based service solutions to the world’s best known insurance, retail and commercial banking, utilities and media communications organisations. AWD, our intelligent business process (BPM) and case management application, is used by over 400 clients to align people, technology and departments to execute effective operations. For over 20 years, our clients have used AWD to help them to reduce cost, improve customer service, ensure compliance and improve overall operational efficiency. There are now over 200,000 AWD users within the DST family of organisations, partners and clients.

1. The case management workspace is part of the platform for AWD service pack 7.