



## What Is ACM, Really?

*Highly interactive business applications that typically benefit most from ACM implementations include claims management, contract management, customer account management, purchase-to-pay, and fraud investigation.*

Compiled by Vicki Amendola, editor of ECM Connection

In the world of content management, acronyms are nothing new. I've often heard it referred to as our recipe for technology alphabet soup. One acronym that is becoming ever-more-prevalent is ACM — adaptive case management. Although it's not a brand new acronym, it still manages to cause some confusion in the market, especially to newer users that are still trying to come to an understanding with the differences between workflow and BPM (business process management). How is ACM truly defined? Where does it fit in the ECM equation? What makes it different? Those are just a few of the questions we aimed to explore when we sat down for this interview series with Annemarie Pucher, CEO of ISIS Papyrus.

### **Q: JUST WHAT IS ACM AND WHAT'S THE BEST USE FOR IT?**

**Pucher:** ACM is the next evolution of case management for a fast-moving, unpredictable customer service environment. It's business empowerment technology that takes us beyond traditional case management — beyond the planned, expected, and predefined activity and rules for providing a service or outcome for a person or entity. It enables true collaboration, visibility, and flexibility without losing control of the end result or the customer relationship.

The structured processes for standard case management typically allow little, if any, departure for unpredicted outcomes or unstructured responses (called exceptions). Because of this, any ad-hoc event, activity, or communication created outside of the predetermined case management structure must occur outside of the processes — and the case itself — and then cannot be easily tracked or captured as part of the case. But in an increasingly competitive and resource-constrained customer service environment, ACM allows management to not only establish common goals but also empower front-line business users with the appropriate authority, visibility, and flexibility to make experienced decisions and certain adjustments in response to unexpected needs and exceptions — all toward ensuring progress, accountability, and ultimate success toward the common business goal(s).

ACM is ideal for professional, healthcare, and public services industries that demand flexibility with accountability in managing and coordinating all of the complex, interconnected activity, communication, and processes for each customer. Highly interactive business applications that typically benefit most from ACM implementations include claims management, contract management, customer account management, purchase-to-pay, and fraud investigation.

### **Q: WHAT DIFFERENTIATES ACM FROM BPM OR ADVANCED WORKFLOW?**

**Pucher:** ACM is not BPM or advanced workflow — rather, it is complementary to both. Where BPM and advanced workflow provide a foundation for managing and structuring work and activity, ACM supplements these existing corporate-level tools with a flexible and responsive foundation for managing and improving complex activity and unstructured processes as a whole through business applications used in high-touch service environments.

ACM consolidates the existing elements of BPM, ECM, and CRM, to offer an advanced, holistic model for case management that aligns process, content, and data with the common goals for resolving a case successfully. Further, ACM allows a reduced dependence on IT to make process and document updates and modifications needed urgently by the line-of-business users, thus adding flexibility and responsiveness without losing control and accountability.

Because a case is not just data and processes, ACM is also different by incorporating the creation and association of



*Moderator:*  
Vicki Amendola,  
editor,  
ECM Connection



*Guest:*  
Annemarie Pucher,  
CEO,  
ISIS Papyrus

## What Is ACM, Really?

customer content and communications into the mix — unifying all customer activity through a single view of the customer (or case) and enabling document creation and delivery alongside activity history, status, and task management. This is the complete picture and context that service organizations have been requesting for years but were told they couldn't achieve in a multi-platform environment — until now.

### **Q: WHY ARE SO MANY VENDORS JUMPING ON THE ACM BANDWAGON NOW?**

**Pucher:** Competitive, regulatory, and operational pressures converging on service-oriented businesses demand faster response and equally fast change. This, in turn, demands that businesses must 1) streamline and focus the work of the IT department; and 2) enable expert business employees to make decisions and take action outside the standard processes when required to achieve shared goals.

Now that enterprise organizations know that both the technology and methodology are available and showing results, the vendor community is finally stepping up to help service companies and organizations improve and empower their customer operations where the rubber meets the road. All offerings claiming adaptive or dynamic capabilities are not the same, but the organizational needs in the market are consistent and demand for this next step is high.

In addition, the newer channels for customer communications — social, mobile and digital — have introduced an added level of 'exceptions' since many existing case management systems were not designed to accommodate or manage this type of unstructured activity or ad-hoc content, leaving a large amount of information about the customer outside of the core case.

### **Q: WHAT TYPES OF ORGANIZATIONS SHOULD BE MOST INTERESTED IN LEARNING ABOUT/PURSUING AN ACM STRATEGY TODAY, AND WHY?**

**Pucher:** The most important thing to know about ACM is that it is not a strategy in itself. ACM is an enabling approach — available in a framework with common structure — to mission-critical business applications that brings continuity across the management, business, and IT levels. The business need has to be there before ACM has a place in the organization. It is there to achieve business goals, so those goals determine whether, where, and to what extent the ACM approach is needed and applied.

But there are key areas where ACM can help achieve the most success. Business applications requiring more interactive and even personalized customer service and communication — versus just straight-through processing (STP) and automation of tasks and responses — can use ACM to gain improved service and satisfaction, faster resolution, greater efficiency, and increased productivity through reduction of manual coordination, exception handling, and location of customer history and data. And with cross-selling and upselling opportunities available through a consolidated view of the customer and integrated content creation with ACM, the overall business advantage quickly becomes clear.

While the professional services, healthcare, and public sectors are already looking at migrations to systems and applications using ACM, enterprise organizations in finance, banking, utilities, telecom, and even manufacturing are quickly seeing the potential and actual benefits of implementing ACM-based applications as their legacy systems seem to lag behind the demands of their customers in a competitive global marketplace.

### **Q: WOULD ACM REPLACE OR COMPLEMENT EXISTING ECM SOLUTIONS?**

**Pucher:** Any enterprise can implement ACM with the right approach, technology, and tools for consolidating data, rules, and policies from multiple existing systems and platforms. While ACM can, in some cases, replace legacy or siloed business approaches, ACM should absolutely function as a complement to business applications and back end systems already housing critical corporate assets, permissions, and processes — including classic ECM systems and other content repositories.

Ensuring thorough integration across systems, applications, policies, and data — as well as content and communications — is the most efficient and effective way to serve corporate compliance, IT, and business goals in a growing and changing organization.

We believe the key to success in this integration effort is loosely coupling data through adapters and type-managers to avoid extra coding or reprogramming, which is usually the case with the APIs that silo many legacy systems. In addition, ISIS Papyrus is fully supporting the emerging CMIS (Content Management Interoperability Standard) as a Foundational Sponsor of OASIS, which released its first standard to address interoperability between different content archives that an organization may need to access or even consolidate.