

# Consona Case Management

## What It Is

Let's not kid ourselves. Case management solutions have been around for a while now. As a result, they're not very sexy and they all generally have the same features. They all track internal or external customer service and support incidents. Pretty simple, really.

But think about it for a second. Let's say you're a large enterprise with contact centers and partner locations around the globe, supporting thousands of high tech products in multiple languages for both consumer and business clients. Case management becomes pretty important, and the decision goes well beyond a feature-by-feature comparison. You need to ask:

- How easy is it to integrate this product with the back office stack I have in place today?
- What complementary solutions integrate with this product out of the box—ones I might consider buying down the road, such as knowledge management and self-service apps?
- Is the core of the technology limiting me in any way? Do I foresee major customizations?
- Is the technology vendor planning on upgrading and maintaining this product for the long term?

These are the questions that make a difference. If your job is to cart stuff down the road every day, you buy a truck. If your job is to cart stuff across the country every day, you buy a truck with the best engine and tires on the market.

The screenshot displays the 'Individual Details' page in the Consona Case Management system. The page is divided into several sections:

- Individual Information:** Email (hdaniels@gmail.com), Title (Chief Executive Officer).
- Details:** Type (Customer), SubType (Small Account), Source (Phone), Status (Active).
- Billing Address:** 12 Main St., Sacramento, California.
- Self-Service:** Enabled (checked), Username (hdaniels), Last Updated Date (10/07/2009 03:33 AM).
- Telephone:** Business (984) 343-5345 x, Cellular (344) 334-6454 x.
- History Table:**

Category	Description	Status	Assigned Name	Updated
Support Incident	Unable to send e-mail	Open	Sally Support	10/02/2009 01:04 PM
Support Incident	I need to update my printer drivers.	Open	Knova Ticket Que...	09/30/2009 01:55 PM
Support Incident	Connection issues	Open	Knova Ticket Que...	09/29/2009 11:17 PM
Support Incident	Create Support Request	Open	Knova Ticket Que...	09/28/2009 10:47 AM
Linked Work Ticket	Not Sure	Open	Knova Ticket Que...	09/28/2009 10:47 AM

Optimize agent productivity and workflow with a holistic customer view that acts as a launch pad for the entire service and support experience.



Consona knowledge and incident management products are KCS Verified v4 by the Consortium for Service Innovation.

## Why Case Management Matters

- Prospects and customers think of their relationship with your organization in terms of service, not sales or marketing.

— Patricia Seybold Group

## Why You Need It

- Reduce the cost of training and provide more consistent service with predefined processes and scripts that will ensure your agents are asking the right questions at the right time.
- Increase first call resolution rates by providing your agents with relevant, contextual customer data.
- Reduce the cost per incident and call handling times by automating during- and after-call work.
- Support unique service offerings and customer requirements without added customization and system maintenance costs.
- Manage any type of service environment—ranging from the simplest to the most sophisticated customer relationship—with a uniquely flexible, multi-relational data model.
- Increase manager visibility and team productivity with real-time, holistic customer views and prepackaged reports and dashboards.

## What It Does

**Case and Work Ticket Management**—Manage service and support incident ownership, tracking and communication.

**Multi-Channel Service and Support**—Track and consistently manage customer incidents, cases and touches across all service channels, including:

- Phone
- E-mail
- Chat
- Web incident submissions
- Forums

**CTI Integration**—Integration with any CTI solution allows to pre-populate agent skills queues based on system data, such as products owned or region, or external data, such as options selected in your Interactive Voice Response (IVR) solution.

**Bug and Defect Tracking**—Track product defects and enhancement requests to inform product and service management.

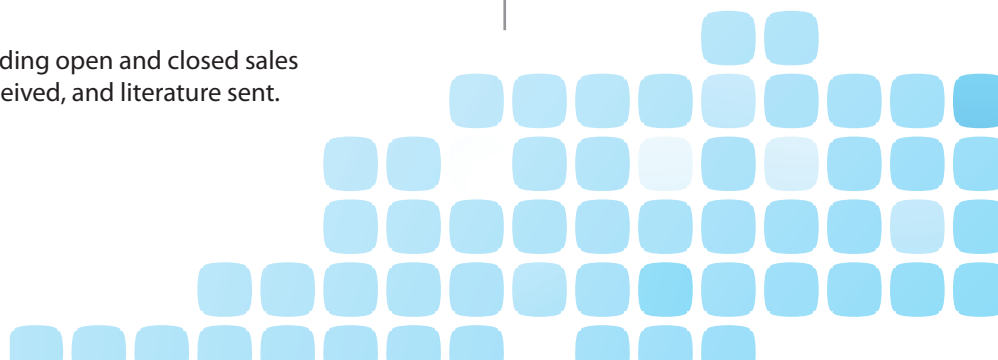
**Feedback Management**—Manage the customer experience throughout the entire customer lifecycle and across the entire service and support process by tracking knowledge article feedback, case comments, survey responses and more.

**Holistic Customer View**—Optimize agent productivity and workflow via a single screen, with access to:

- Case history, including open and closed cases, their resolution status, and complete audit trails.
- Wizard-like processes and corresponding scripts based on key customer data points, such as products owned or contractual status.
- Customer information, ranging from basic demographics and survey answers to a graphical display of relationships with other customers, or even your own employees.
- Past marketing and sales activities, including open and closed sales opportunities, marketing campaigns received, and literature sent.

## Features

- Case and Work Ticket Management
- Multi-Channel Service and Support
- CTI Integration
- Bug and Defect Tracking
- Feedback Management
- Holistic Customer View
- Configurable Business Rules
- Process and Call Scripting
- Easy Integration With Core Business Apps
- Fully Integrated With Consona Knowledge Management
- Fully Integrated With Consona Live Assistance



**Configurable Business Rules**—Design object-level business rules that play off complex organizational hierarchies and role groupings that you define, as well as kick off mission-critical processes such as checking for product warranties before allowing service incidents to take place.

**Process and Call Scripting**—Use these WYSIWYG administrative tools to automate linear, agent-facing processes and pre-prepared service scripts, ensuring that the right steps are followed every time.

**Easy Integration With Core Business Apps**—The extensive use of non proprietary communications transport methods (e.g., SOAP, REST) in the solution's business logic, along with the presence of a high-functioning integration framework allowing for either direct or indirect integrations at the UI, middle tier, and database levels, will assist you with any CRM or back-office integration you require.

**Fully Integrated With Consona Knowledge Management**—Combine with our Consona Knowledge Management solution to track agent assisted service alongside customer self-service, as well as build organizational knowledge.

**Fully Integrated With Consona Live Assistance**—Combine with our Live Assistance solution to track agent assisted chats and remote control based problem-solving, as well as pull in diagnostic information from the customer's PC directly into case notes.

## More on Consona Case Management

With Consona Case Management, you can track all your agent assisted service and support incidents, regardless of channel, and build a rock-solid foundation for your customer data. Consona Case Management keeps the customer record at the center, allowing one-to-many data relationships to help you drive at the truth about your service levels. For example, you can track multiple tickets within a single open case, while supporting multiple cases for various contacts at a single customer company—and not miss a beat. Add to the mix this solution's ability to integrate with scores of other business applications, easily pulling in relevant customer and transactional data into a holistic customer view, and acting on that data to automate service and support processes.

Our flexible solution supports your initiative, no matter how large or small. But the real special sauce is in Consona Case Management's deep integration with our Consona Knowledge Management solution. Has a CRM or incident management vendor ever told you how wonderful their knowledge management "module" is? If so, steer clear. If you want to create more efficient service and support operations by building continuously improving organizational knowledge that will help your agents and customers resolve problems, you need deeply integrated, knowledge-driven case management, and no other vendor offers both.

What's more, when you combine Consona Case Management with our Live Assistance solution, you can add chat to your arsenal of channels, providing a seamless escalation for a customer from a self-service portal to an assisted chat. Everything a customer viewed within his self-service session is recorded and passed to case notes, thereby saving him the time and frustration of explaining everything ... again. For technical service and support, Consona Chat can gather the technical details of the customer environment such as the OS Version or IP Address, which can then be presented to the agent to speed resolution. And when it's all said and done, with Consona Live Assistance's remote diagnostics and repair tools, your agents can take that extra step to solve the problem for your customer—making a lasting impression.

## Holistic Customer View

Optimize agent productivity and workflow with a holistic customer view that acts as a launch pad for the entire service and support experience.

## Feature Quick Takes

**Verify Caller Information**

The following phone number has placed a call into support. Please verify the information below with the caller.

Phone Number: (984)343-5345

First Name: Howard

Last Name: Daniels

Address: 12 Main St.

City: Sacramento

State: California

Is the information correct?

Yes

No

Automate agent-facing processes and pre-prepared service scripts, ensuring that the right steps are followed every time.

Description	Assigned	St
Unable to send e-mail	sallys	Op
I need to update my printer drivers.	knovatick...	Op
Connection issues	knovatick...	Op
Consona Corporation: Test Company	sallys	Op
Create Support Request	knovatick...	Op
sql server connection issue	knovatick...	Cl

Selected: 0 of 6

View a complete case history, including open and closed cases, their resolution status, and complete audit trails.



**Consona Corporation**  
450 East 96th Street, Suite 300  
Indianapolis, IN 46240

Toll Free/Fax:  
(888) 8 CONSONA  
(888) 826-6766

info@consona.com  
www.consona.com/crm

## About Us

With a comprehensive set of solutions spanning self-service, customer management, chat, communities and proactive, just-in-time marketing and support—all fueled by a patented, best-of-breed knowledge management platform and backed by advanced analytics—Consona's KCS Verified tools are the choice for integrated, multi-channel customer service and support. The only CRM vendor focused entirely on service and support, Consona helps the Global 2000 control costs while providing a superior customer experience.

Consona

**Problem: Solved!**

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