Best Practices for Case Management Using Compliance Analytics

Supplement compliance analytics data with other data sources	Better assess potential leads by enriching them with information from your customer and prospect databases, third-party business databases, and proprietary industry knowledge about other infringements.
Integrate your compliance and CRM systems	Integrate your compliance and CRM systems, so it's easy to receive and share relevant information, communicate with team members and partners, and automate your case management workflows.
Map leads to accounts	Implement systems that automatically aggregate all infringements associated with a specific organization, identify that organization, and link with existing accounts in your CRM.
Automatically prioritize followup with lead scoring	When generating large numbers of leads, use tools that score them automatically based on rules you define and adjust (e.g., levels of usage over time, number of machines, etc.). Your most qualified opportunities automatically rise to the top.

Provide the right information to the right people, when they need it	Implement systems that make it easy to manage permissions, provide relevant reporting for different access levels, and restrict viewing only to assigned accounts. For example, you might provide limited compliance dashboards to channel partners, or generate and share PDF reports with specific stakeholders only.
Streamline workflow and approval processes	Manage your compliance pipeline with a portal that lets you assign leads internally and externally approve cases, review program status, and analyze results by market, geography, partners, and more.
Use templates to get communications right	Standardize your compliance approach and best practices for sales and compliance team members, as well as letters and language used with infringing prospects or customers.
Leverage out-of-the-box compliance dashboards	Access basic metrics immediately including: total compliance opportunity, damage calculations, count of infringing organizations, number of machines running pirated software, and number of infringements that represent actual use of your application. You should also be able to easily customize your dashboards to generate geographic heat maps, segment and filter based on your business models, and integrate other business intelligence tools to support and analyze higher volumes of infringement data.
Use outside compliance specialists	If you don't have the resources to manage compliance in certain markets, or if internal sales organizations can't comfortably do so, leverage outside compliance specialists with expertise in monetizing piracy efficiently and dispassionately, based on best practices and extensive experience.