FlowForma®
Empowering Process Automation

FlowStudy

TRANSFORMING PROCESSES FOR REMOTE AID WORKERS

An international humanitarian aid agency relies on FlowForma Process Automation to work more efficiently in challenging corners of the world.

FlowStudy Summary

Processes:
- Conflict of Interest
- HR Onboarding
- Flight Booking Approval
- Payment Requests

Pain Points:
- Highly distributed fieldworkers
- Dependence on email and Excel
- Lack of transparency and governance
- Poor reporting from disconnected information

Benefits:
- Faster processes with code-free development
- Digital processes bring greater transparency
- Automatic updates and new feature releases
- Power BI integration delivers real time reporting
- The FlowForma Process Automation tool creates audit trails for better governance

Next Steps:
FlowForma Process Automation "system champions" are being cultivated to develop more flows more quickly, throughout the organization.

The Challenge

An international humanitarian aid agency that responds quickly and effectively to sudden and slow onset emergencies, sustaining lives and alleviating suffering. From Syria to Haiti, around three thousand volunteers work with affected communities to find and deliver solutions to meet their immediate needs.

One of the challenges when working in global trouble spots is maintaining internal communications. There is no guarantee of internet access and even the most routine processes can suffer. *"A lot of what we do has been paper based, especially in the field where we're often in remote areas with limited connectivity,"* explained the IT Global Solutions Architect.

When a connection was made, documents were shared over email or transferred into Excel spreadsheets. The next problem was version control as people made changes that were not always shared. The IT Global Solutions Architect knew that the solution was what they described as *"one truth"*, a single version of a document in a process that everyone understood to be the definitive record.

Implementing Microsoft Office 365 and SharePoint provided a single document repository – what was needed now was business process software to improve workflows and retain document integrity. FlowForma Process Automation, which runs in the cloud on SharePoint, was a perfect fit.

The Solution

Despite their background as a coder in software development, the IT Global Solutions Architect liked the FlowForma Process Automation tool because it requires no-code. They knew they needed a process automation solution that could eventually be used by everyone in the agency – not just the techies. They started with a flourish, creating her first process, a Global Governance Requirement process, that is used by 1,800 people.

This aid agency's Conflict of Interest policy is all about good governance, ensuring that employees and volunteers declare any personal interest around the work they are doing. The form had previously been written in Excel and then shared over email, not ideal for a workflow that needs to show issues and how they were resolved.

FlowForma Process Automation has transformed not just the

Getting more from your **SharePoint**

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process of declaration but also the reporting of the resolution. Every step is now transparent and auditable. *"We can immediately see if there are conflicts in a specific area and how long it takes to resolve them,"* explained the IT Global Solutions Architect. *"It's much more visible."*

"That's what really sold it for me, the ability to develop something new in a fraction of time it would normally take. FlowForma Process Automation is super quick to work with. We don't have to write reams of code to automate a business process."
IT Global Solutions Architect

This has helped this aid agency Country Directors manage risk and resolve conflicts more quickly. Reminders are set up in FlowForma Process Automation to ensure nothing slips through the cracks.

Other processes include a HR onboarding process and a flight booking approval system, both delivering real value for a globally dispersed organization. Another is for managing payment requests in Syria, streamlining a critical process in a country ravaged by civil war. Everyone involved can see a request at each stage of approval and chase up anything that's outstanding.

The Outcome
FlowForma Process Automation has cut through the complexity of reaching people in difficult corners of the world. It's very much part of the organization's digital transformation strategy, where one of the biggest gains is speed. *"That's what really sold it for me, the ability to develop something new in a fraction of time it would normally take,"* the IT Global Solutions Architect said. *"FlowForma Process Automation is super quick to work with. We don't have to write reams of code to automate a business process."*

"Once you have the requirements it's very straightforward to build. It's very intuitive. If you have a process that needs lots of document automation, then FlowForma Process Automation is a no-brainer. It's been a game-changer for us."
IT Global Solutions Architect

Another big win has been the reporting. FlowForma Process Automation integrates seamlessly with Power PI for instant analytics and insights that the organization has never had before. The old process was painfully slow; reports had to be requested and data exported. Now it's available in real time.

Because FlowForma Process Automation is

delivered as a cloud service it liberates global organizations from having to run and distribute software from their offices. The other benefit is that every new release and upgrade happens automatically. *"Features are being added all the time and there is usually something new that we find useful,"* said the IT Global Solutions Architect.

One addition she found particularly helpful was the Document Generation feature, which allows users to dynamically create a document from information entered during the process. *"Its very useful if you want to have an audit trail. You can automatically generate documents in a process."*

What now takes this aid agency the most time is not building the process but planning them, defining the requirements so that FlowForma Process Automation can optimize them. This is a good thing because the outcome is much faster processes. *"Once you have the requirements it's very straightforward to build. It's very intuitive,"* said the IT Global Solutions Architect. *"If you have a process that needs lots of document automation, then FlowForma Process Automation is a no-brainer. It's been a game-changer for us."*

About FlowForma
FlowForma, the leading provider of Process Automation tools for Microsoft Office 365® has been revolutionizing the traditional BPM space with an innovative approach to developing award winning products that empower users to create and streamline processes smarter and faster, utilizing the familiar SharePoint platform, without any coding.

FlowForma is a Microsoft Gold Partner, with over 150,000 users across America, Europe and Asia. The company is headquartered in Dublin with offices in Boston and London and is motivated by its values to innovate, evolve and achieve with employees, customers and partners.

NO CODE logic only.

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