FlowForma®
Empowering Process Automation

Replacing Paper Trails and Driving Collaboration

LSTM
LIVERPOOL SCHOOL OF TROPICAL MEDICINE

FlowForma Process Automation helped Liverpool School of Tropical Medicine (LSTM) create a new culture of engagement and collaboration that benefits all stakeholders

The Challenge

Liverpool School of Tropical Medicine (LSTM) is the oldest school of tropical medicine in the world, with hundreds of staff working across the globe. When the School was awarded HEI status in 2013, this presented an opportunity to leverage the very latest technologies and design its IT infrastructure from scratch.

The decision was taken to become a cloud-first organization, building an environment on Microsoft cloud services, including Microsoft 365®, SharePoint Online®, Skype for Business® and Azure®. There was also a need to introduce Digital Process Automation (DPA) solutions, **replacing paper-based processes** that were inefficient and made compliance a challenge.

"*There was a big demand for electronic workflows, but progress was slow because we only had limited internal resources able to create them and outsourcing was expensive,*" said Martyn Coleman, IT Systems Architect, Liverpool School of Tropical Medicine. "*It was one piece of the jigsaw we were finding difficult to fit.*"

Several BPM products were trialled before LSTM came across FlowForma Process Automation. A successful workshop used real examples of existing workflow requirements, and convinced

FlowStudy Summary

Processes
- Finance and travel approval

Pain Points
- Custom solutions were expensive and ineffective
- Lack of user engagement
- Disconnect between users and processes
- Inefficient dependency on paper trails

Benefits
- Turnaround times dramatically reduced
- Compliance made easy
- Different departments are more engaged
- Collaborative culture replaces departmental silos
- Self-service processes create a better fit for academics
- Better value than customised software
- Leverages existing IT investments

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management and IT that they had found the missing piece.

The Solution

Tightly integrated with the SharePoint platform, the **no code** FlowForma Process Automation tool is a perfect fit for LSTM and it's cloud-first strategy. Eight people were trained by a local FlowForma partner, the first two workflows went live within a month. Others quickly followed and **the solution was soon embedded in the organisation.**

One particular process around travel typified the paper dependency this registered charity was trying to escape. Sending staff to disease endemic countries all over the world to undertake research and interventions, LSTM requires that employees assess the risks and get the appropriate level of sign off before every trip. Four paper forms had to be filled in, with some duplication across forms.

"*On the one hand, we needed the Travel Assist process to provide robust risk assessments,*" explained Martyn Coleman. "*On the other, we don't want our talented academics spending hours filling in forms.*"

Earlier attempts to introduce electronic systems that ticked both boxes had failed. **FlowForma Process Automation succeeded for many reasons**, not least because it leveraged the SharePoint investment, making it easier to create new flows and share them. It addressed the complexities of the travel requirements without being too onerous to

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> *Liverpool School of Tropical Medicine Feedback:*
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> "*As soon as FlowForma Process Automation delivered a couple of high profile wins, everyone started to think about their own practices and how they could make them cross-departmental and improve them.*"
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> **Martyn Coleman,**
> **IT Systems Architect,**
> **Liverpool School of Tropical Medicine**

complete.

Rather than simply replicate paper-based processes, it introduced new efficiencies and encouraged **cross-department engagement**. "*The best thing about FlowForma Process Automation for me is that you can come up with a specification to deliver a solution that involves all the stakeholders,*" said Coleman. "*In the case of Travel Assist, there were a couple of curve balls around the process that we were able to address very quickly because of the flexibility and ease of use of FlowForma Process Automation.*"

Self-service components make it **more accessible** to users, while links from inside the system to outside sources, like the government travel advice service and travel health advice providers, **made risk assessment easier.** "*We get good quality compliance data out of Travel Assist and a way to nudge travellers along on a process they have to complete,*" said Coleman.

The Outcome

LSTM has launched 65 workflows in the 14 months since FlowForma Process Automation was deployed. An organisation that was once "*awash with paper form based processes*" is seeing **huge efficiency gains**. Finance flows have been particularly successful, replacing paper trails that depended on people being available for sign off. Requests for a bank transfer or foreign currency are now electronic processes, where authorisation is just one in a series of automated steps.

FlowForma's impact on the way LSTM works has been profound, according to Coleman, democratising the development of process improvements. Departments are more involved than when they outsourced development to third parties. New processes are turned around more quickly and better **aligned to the business need**.

The **intuitive interface** of FlowForma Process Automation has been central to its success. "*I have no development skills at all but I'm a very confident user of FlowForma Process Automation,*" said Coleman.

FlowForma Process Automation has helped to encourage a culture of collaboration, "*As soon as FlowForma Process Automation delivered a couple of high profile wins, everyone started to think about their own practices and how they could make them*

![FlowForma — Empowering Process Automation]
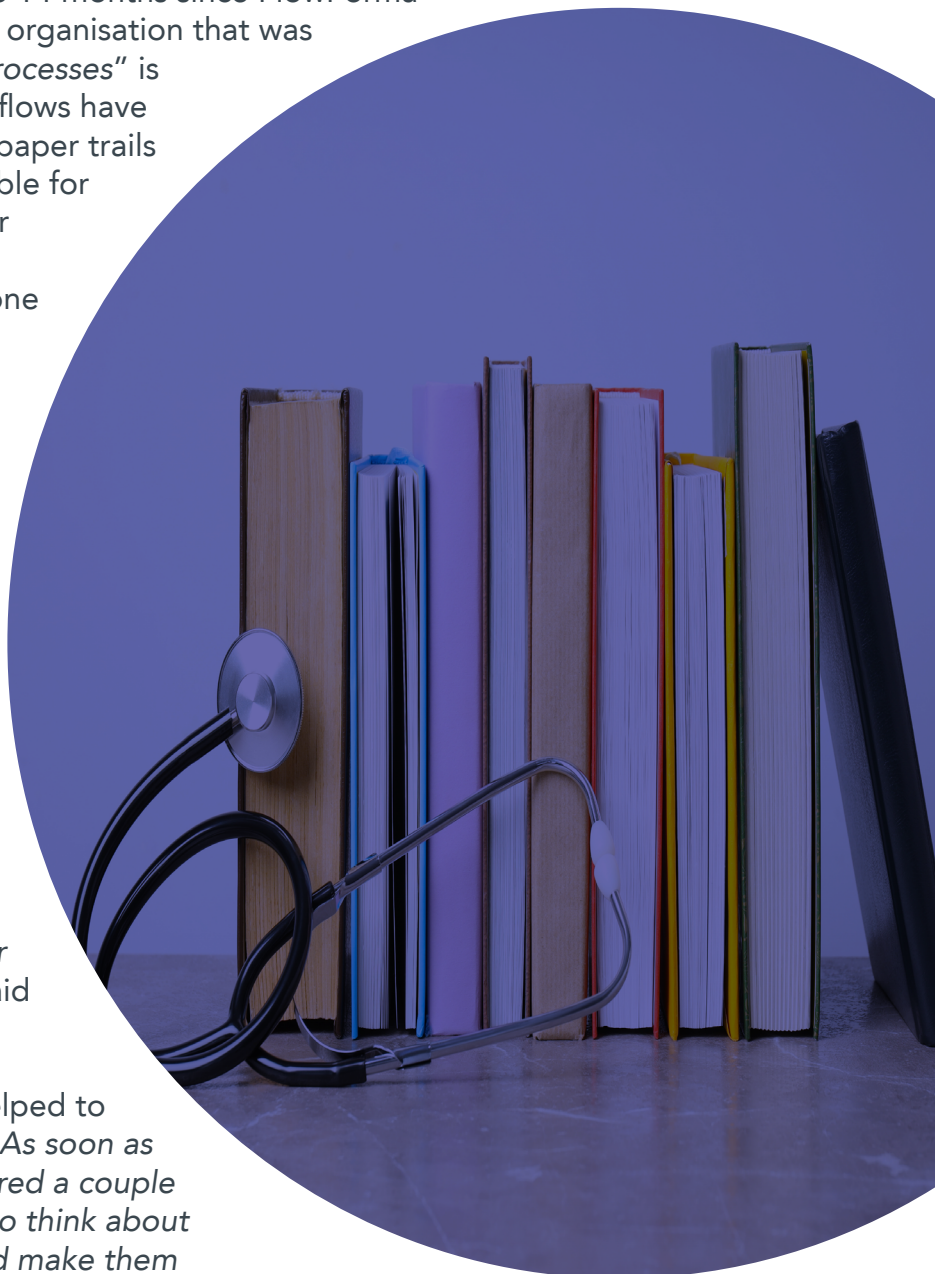
cross departmental and improve them."

Martyn Coleman has also been impressed by FlowForma as a solutions provider. *"We have had a very good support experience and there has been a helpful exchange of information on both sides that has led to product improvements. Their interest doesn't stop when you sign the invoice,"* he said. *"I really like the FlowForma team and I've only had positive experiences. We've been treated very well and have a high level of access to their expertise if we need it."*

Next Steps

Every department is now engaged in replacing paper-based processes with best practice processes.

About FlowForma

FlowForma is globally recognized as the leading no code Digital Process Automation provider. The company is committed to empowering businesspeople to rapidly digitalise a wide range of processes in-house, without writing any software code.

FlowForma customers are live with digital processes, empowered and self-sufficient within 4 weeks of onboarding, and secure a return on investment within 6 weeks.

Headquartered in Ireland with offices in New York, Boston and London, FlowForma serves 200,000 global users. A Microsoft Gold partner, its multinational customers include Bouygues, Aon, Grant Thornton and the NHS.

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