



FLOWSTUDY

Charity Work Made More Efficient



FlowForma helps TOUCH Community Services optimize their processes to support its work in the community without the burden of high costs or complexity.

The Challenge

Set up in Singapore in 1986, TOUCH Community Services are a not-for-profit organization, running various support groups and clubs for people across all age groups. The charity has transformed the lives of low-income families that struggle to make ends meet, but like a lot of non-profit organizations it has the constant challenge of trying to improve services without incurring excessive costs.

Puay Meng Lim, IT Manager, wanted to strike the right balance when he went looking for ways to improve key business processes within the organization. Specifically, he wanted an automated electronic process to replace HR and finance forms that were an unwieldy combination of word documents, spreadsheets and old-fashioned paperwork. Manual processes were compounded by an approval process that depended on local and centrally-based managers.

"Getting a form filled in often involved local supervisors who then had to pass it through to headquarters," said Puay Meng. "It took a long time, so I was searching for a Digital Process Automation tool to automate and centralize the process." A form in the charity could be used by as many as 300 employees across the different offices, so getting anything done quickly was always a logistical challenge.

FlowStudy Summary

Processes

- HR approval system
- Finance requisition

Pain Points

- 300 employees across multiple locations
- Spreadsheet and paperwork dependency
- Time-consuming and inefficient approval process

Benefits

- No coding required
- Automation improvements on manual processes
- Excellent support/training
- Out of the box integration with Microsoft 365 and SharePoint

Next Steps

Having made a quick start with six processes that have already justified their investment in FlowForma Process Automation, the plan is to continue to replace paper-based forms across the organization and deliver even more efficiencies to the charity.

A training request process, for example, was used to log the number of hours staff spent on training courses. All done manually in a Microsoft Excel spreadsheet, it was difficult to track and not always up to date. Puay Meng Lim knew there must be a more efficient solution.

The Solution

A custom-built solution was briefly considered before Puay Meng Lim came across FlowForma® Process Automation on Microsoft AppSource. Having already invested in Microsoft 365® with SharePoint, it made sense for TOUCH to go with a product that was fully integrated with the Microsoft suite and more competitively priced.

He took the free 14-day trial and knew he had found his solution when he devised a process for three users. **"During the trial I had a lot of questions and got help from the FlowForma team. I soon managed to develop two test forms and was able to show these to my management. They gave me the green light to take out a subscription,"** he said.



Touch Community Feedback:

"I would definitely recommend the product to other companies.

FlowForma is a really good organization to deal with."

Puay Meng Lim,
IT Manager,
Touch Community Services



Puay Meng Lim has an IT background but always thought it was important that the business process solution he chose would be code-free and intuitive to use. To get up and running quicker, **he took advantage of FlowForma SureStart**, an onboarding program run over five days across two months. An Implementation Specialist and Client Manager were always available as he went on the journey from setting it up to 'going live'.

It worked. **Puay Meng Lim would complete his first full production of 'flows' in under three days.** He has gone on to devise a total of six processes – four around HR and two in finance – that range from training requests to staff and purchase requisitions. As well as mandatory set-up steps, there are configurable options that let you tailor forms to specific business needs. The ability to build-in different approval levels was a particularly good fit for TOUCH's requirements.

The Outcome

Puay Meng Lim's expectations have been more than met. He was pleasantly surprised at how much more productive FlowForma Process Automation has made the charity, estimating **a 70% efficiency improvement in the time it takes to circulate a form.** Management has fully embraced the FlowForma Process Automation tool because it ticks all the boxes for the charity – it solves business problems cost-effectively and without complexity.



The staff were quick to embrace it too, although it took some of the more elderly workers, many of whom are over sixty, a little longer. *"Once they got to know the advantages, there were no issues. Now you give them the forms and they just get on with it,"* said Puay Meng Lim. For now, he is the only person developing 'flows' in FlowForma Process Automation but as he pursues a plan to automate more processes he expects others to get involved. He knows from his own experience that training them up on the software will be quick and easy.

"I would definitely recommend the product to other companies," he said. *"FlowForma is a really good firm to deal with."*

About FlowForma

FlowForma is globally recognized as the leading no code Digital Process Automation provider. The company is committed to empowering businesspeople to rapidly digitize 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 and London, FlowForma serves 300,000 global users. A Microsoft Gold partner, its multinational customers include Bouygues, Aon, Grant Thornton and the NHS.

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your business processes?

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