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FlowForma Process Automation Becomes A Strategic Asset for Eurofound

Initially deployed to solve an HR process problem, FlowForma Process Automation® has gone on to become a key tool for increasing efficiencies.

The Challenge

Dublin-based Eurofound is a European Union agency that provides research and knowledge in the area of social and work-related policies for the improvement of living and working conditions.

Like every organization, the agency is constantly evaluating business processes to increase efficiencies and save money. Following significant EU changes to the way employers assess employees, Systems Analyst David Pritchard was particularly focused on internal HR review procedures. A Process Automation tool was needed to support a HR team of six people and a workforce of 110.

Compounding the need to meet new regulatory requirements were issues around the application Eurofound had been using for electronic forms. Not only was the InfoPath software being discontinued, its limited features struggled to deliver the workflow functionality that the agency was looking for.

Dave Pritchard considered a number of options before going with FlowForma Process Automation. *"We had two things happening. We had uncertainty around the product we had been using and needed to make significant changes to the HR process, which more or less made the*

FlowStudy Summary

Processes
- HRDP (Human Resources Development Plan)
- Teleworking Requests

Pain Points
- An ageing form-building application (InfoPath) was proving inadequate
- Increasingly regulated HR procedures demanded process change
- Inefficient business processes relied on paperwork and email
- Poor audit trails

Benefits
- Replaces paper and email-based processes with electronic workflow
- Simple to use self-service tool
- Ticks boxes for regulators and auditors
- 75% quicker to build new workflows software
- Leverages existing IT investments

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decision for me that it was time to rebuild it from scratch," he explained. *"When I got a demo of FlowForma Process Automation I quickly saw how powerful it was and how easy it would be to automate the HR workflow. It was perfect timing to make a clean break and rebuild the entire process."*

The Solution

Eurofound is a Microsoft house that has made SharePoint® the central pillar of its internal application development. FlowForma Process Automation is a natural fit, built from the ground up to integrate with the SharePoint platform, but it was a combination of **features, ease-of-use, and price** that made it Eurofound's preferred solution.

The company's Human Resource Development Plan (HRDP) that prompted the FlowForma Process Automation investment is a complex employee review process that takes place over a year. Involving everyone in the company and steered by each staff member's reporting officer, it's a way of assessing job performance and making sure people are aligned to core company values.

After some initial training from the FlowForma team, Pritchard **took just a week to build a solution** aligned to the intricacies of the HRDP, involving multiple stakeholders, forms going back and forward, and an appeals process that needed to be incorporated into the workflow.

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> ### EuroFound Feedback:
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> *"We rebuilt a process in around a week, as opposed to the month we would have needed with the old application – that's a 75% efficiency improvement – and we've ended up with something much better than what we had before,"*
>
> **Dave Pritchard,**
> **Digital Workplace Analyst,**
> **EuroFound**

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The Outcome

Adopting FlowForma Process Automation has been a double win for Eurofound. As Dave Pritchard addressed the immediate HRDP requirements he was familiarizing himself with an application that he now uses at every opportunity. "*It's got to the point where FlowForma Process Automation has strategic importance to the organization for driving efficiency and freeing up staff time to do other work,*" he said.

Eurofound is now on the latest version of the software and Pritchard has seen tangible improvements. "*We've grown together,*" he said. "*It can handle a lot more complexity and it's got a lot easier to build a process. I haven't really done any hard-core programming for a couple of years, but with a tool like FlowForma Process Automation I don't need to.*"

This matters for a research organization where the drive is always to disseminate information as quickly as possible rather than wrestle with software and technology. "*A tool like FlowForma Process Automation is the link between IT and the business. I can find out what the business requirements are, then use FlowForma Process Automation to come up with a solution without having to get any extra help,*" he explained. "*Now that it's embedded in the organization, I can only see us going from strength to strength.*"

Eurofound has a roadmap with between 5-10 processes identified for workflow automation using FlowForma Process Automation:

1. Already automated is a **teleworking request process** for authorizing employees to spend time working from home. Involving the jobholder, their reporting officer and a director, it's become a more formalized process that's much more efficient. **The flow only took an hour to build**.

2. In pre-production is a **press release approval process** where the research part of the organization works with the communications team to push out news to the media. An approval workflow devised in FlowForma Process Automation will replace a process that currently involves 50-60 emails going around the company.

3. Processes that currently rely on Microsoft Word® documents that have to be printed out and signed are

![FlowForma - Empowering Process Automation]

also being moved over to FlowForma Process Automation, **including special leave requests**, where the first question prompts a drop-down list of types of leave, and a **training request form** that follows on from training needs identified in the HRDP process.

4. Payments that currently depend on folders and an internal post box will also be migrated to FlowForma Process Automation with **automated steps speeding up authorization** and replacing a physical, paper-based process.

5. An **employee onboarding process** has been mapped out that will incorporate the different departments a new worker touches – HR, IT, facilities, reception. It's another process that is currently managed with Word documents and email. Another flow is also being considered to facilitate people **changing roles within the company**, formalizing the way they are able to access applications and IT services.

"2017 is going be the year of FlowForma Process Automation in Eurofound, because FlowForma is the best tool we currently have to build electronic workflows" said Pritchard. *"It can take as little as half a day to set something up, so I'm always looking at new ways to maximize the investment."*

Process Automation solutions are benefitting the agency in many ways, **meeting the needs of regulators and auditors** who want more formalized processes in place, and advancing top line strategies around replacing paper trails with electronic workflow that increases efficiency.

"*The beauty of something like the training request form is that HR will no longer have to enter reams of paper documents into a database or spreadsheet to provide metrics on how much training has been requested. I do it in FlowForma Process Automation and export the data into a list or build a report for them,*" he explained.

FlowForma Process Automation can also **export flows as XML files** which makes it **easy to share processes**, furthering opportunities for inter-agency co-operation that is strongly encouraged in the EU. "*They'd have 80-90% of the process built for them with just a few clicks. Some of the agencies would have ten times the staff we have, so you can imagine how much efficiency that would bring,*" he said.

FlowForma as a company has also impressed David Pritchard. "*I've found them great to work with. They have an excellent product that's enhancing all the time. You give them feedback and then see improvements in the next iteration,*" he said. "*I think it's essential for an organization of our size with a limited IT budget to be able to look at a process and know you have a tool that can automate it.*"

Next Steps

With plans for another 5-10 projects in the pipeline, FlowForma Process Automation has become a strategically important application that's used across the organization.

About FlowForma

FlowForma is globally recognized as the leading no code Digital Process Automation provider. The company is committed to empowering businesspeople to rapidly digitalize 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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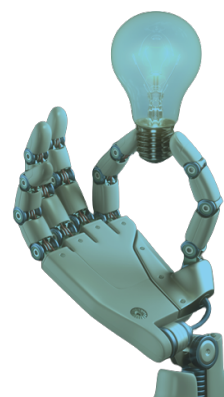
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