



Putting the Power of Business Automation into the Hands of Your Business Managers



An AIIM Webinar presented October 19, 2016

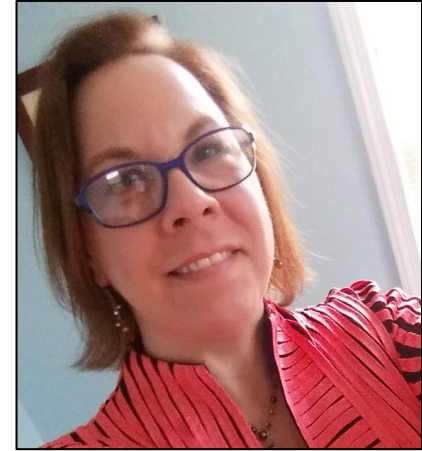
Today's Speakers



Bob Larrivee
VP & Chief Analyst
AIIM



Neil Young
CEO
FlowForma



Host: Theresa Resek
Director
AIIM

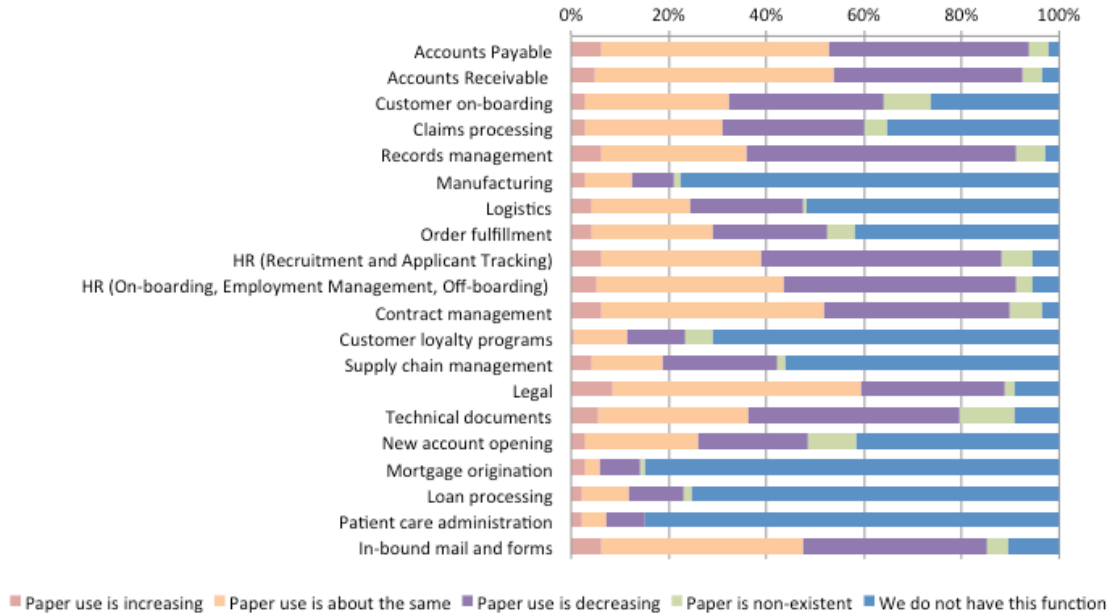
- Many organizations face similar challenges
 - Human Resources
 - Client engagement
 - Contract Management
 - Enabling and accelerating innovation



The Survey Says!



In Which of the following processes is paper increasing?



Substantial paper reductions seen in HR for recruitment (49%) and the employee lifecycle overall (48%)

Source: AIIM Industry Watch: Paper-Free 2016 – Are We There Yet?

- New Hire
 - Initial Welcome
 - Collect relevant information
 - Payroll and benefits
 - Company Policies Review
 - Initiate/track training options
 - Provide review criteria
 - 30/60/90 days



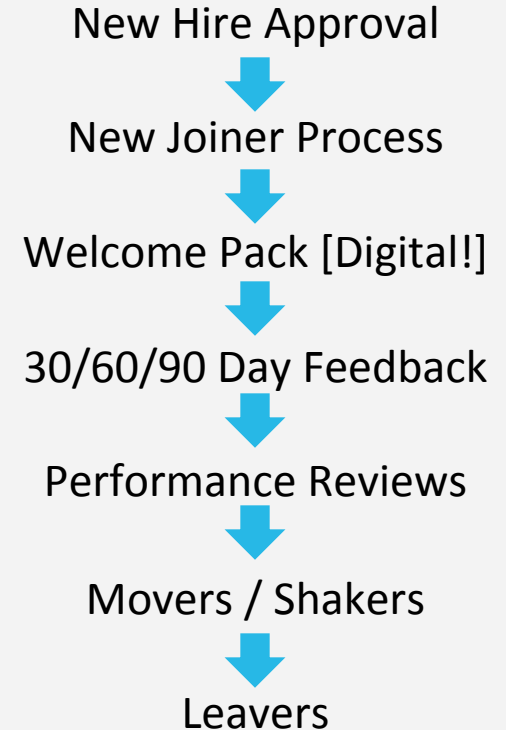
- What have you seen in your customer base?
- How organizations you are working with addressing these issues?



Employee On-Boarding



The screenshot displays the 'Forms - New Item' interface in the FlowForma application. On the left, a sidebar lists various form categories: 'New Hire Request', 'Hiring Manager', 'Senior Manager', 'Business Unit', 'Job Title', 'Job Description', 'Contract Type', 'Position Type', 'Priority', and 'Required'. The main area shows two forms. The top form is 'New Hire Request' with buttons for 'New Hire Request' and 'Open Role Approval'. The bottom form is 'Performance Review' with a progress bar showing seven steps: 'Employee assessment Step No 1', 'April Appraiser Input Step No 2', 'Review Meeting/Agreed ...', 'Appraiser sign off... Step No 4', 'October Appraiser Input Step No 5', 'October Half Year Review Step No 6', and 'Appraiser sign off... Step No 7'. The 'PERSONAL DETAILS' section of the 'Performance Review' form includes fields for 'Appraisee's Name' (Neil Young), 'Appraisee's Department' (FlowForma), 'Appraisee's Job Title' (Managing Director Flowfo), 'PR Approver' (Padraig Canavan), and 'Manager' (Padraig Canavan). It also has radio buttons for 'Performance Review to be completed' (April or October) and a 'Required' indicator. At the bottom are 'Save', 'Submit', and 'Close' buttons.



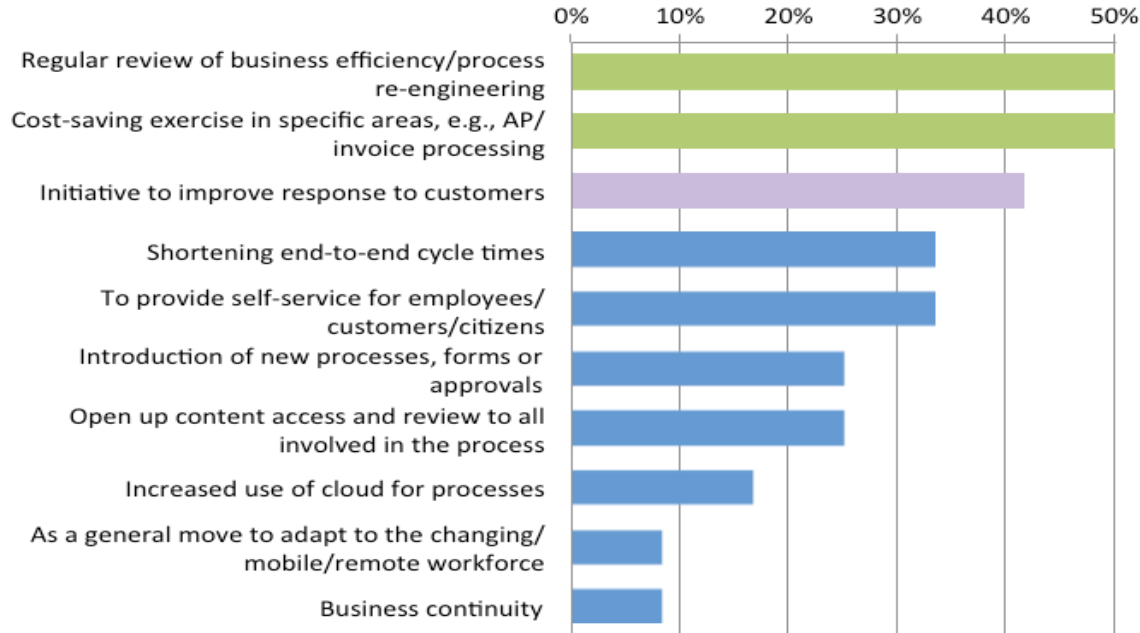
- Responsiveness is Vital
 - Process Structure and Visibility
- Secure Capture
 - Client provided information
- Automated Response
 - Acknowledgements, Notifications



The Survey Says!



What are the strongest triggers in your organization for converting more processes to paper-free?



Improved customer response is in the top three along with process reviews, and cost savings

Source: AIIM Industry Watch: Paper-Free 2016 – Are We There Yet?

- What have you seen in your customer base?
- How are organizations you are working with taking their first steps?



Client Engagement

[Football](#)[Hurling](#)[GAA.TV](#)[Be There](#)[Centenary](#)[The GAA](#)[My GAA](#)

E-Vetting Application

Applicant details
Step No 1

National Vetting Bureau (Children and Vulnerable Persons) Acts 2012 to 2016

Under Section 26(b) of the National Vetting Bureau (Children and Vulnerable Persons) Acts 2012 to 2016, it is an offence to make a false statement for the purpose of obtaining a vetting disclosure.

County Board to which your club is Affiliated? *

Club *

Club Position/Role *

Is your application related to Féile? * ☐ Yes ☐ No

GAA Membership No.

First Name *

Surname *

Date of Birth *

Email Address *

Verify Email Address *

Note for applicant

Please note all correspondence in relation to your Garda Vetting Application will be sent to this address. If under 18 the above email address must be that of the Parent/Guardian when this form is accompanied by a fully completed NVB 3 Parent/Guardian Consent form.

Address Line 1 *

Address Line 2 *

Address Line 3

County *

Post Code

Country

Forms - New Item



GAA Garda Vetting Name: Club Position/Role: GAA Membership No.:

Applicant details

GAA Review

Garda Approval

National Vetting Bureau (Children and Vulnerable Persons) Acts 2012 to 2016

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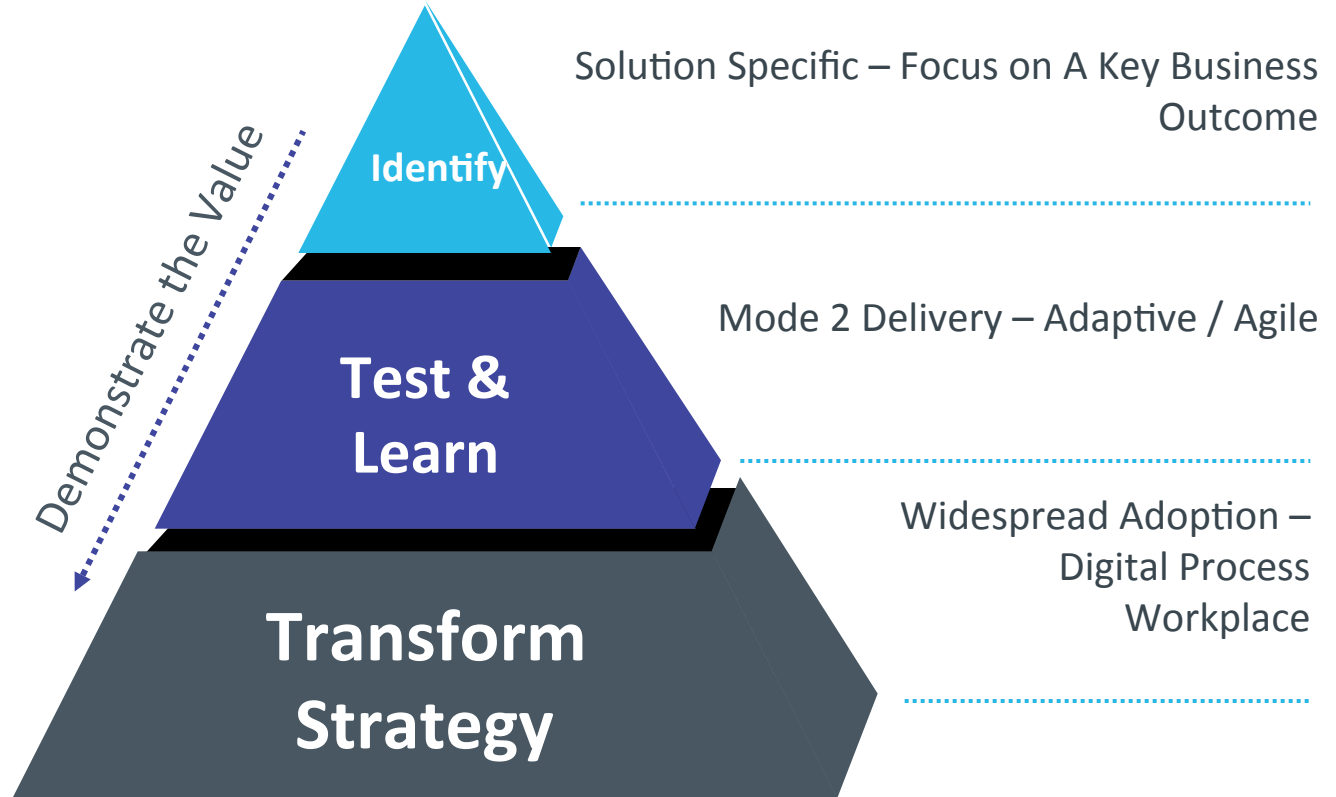
Full name

Date of Birth

Are you over 18?

Email Address

Client Engagement – First Steps



Underwritten by:

FlowForma
Business Process Enablement

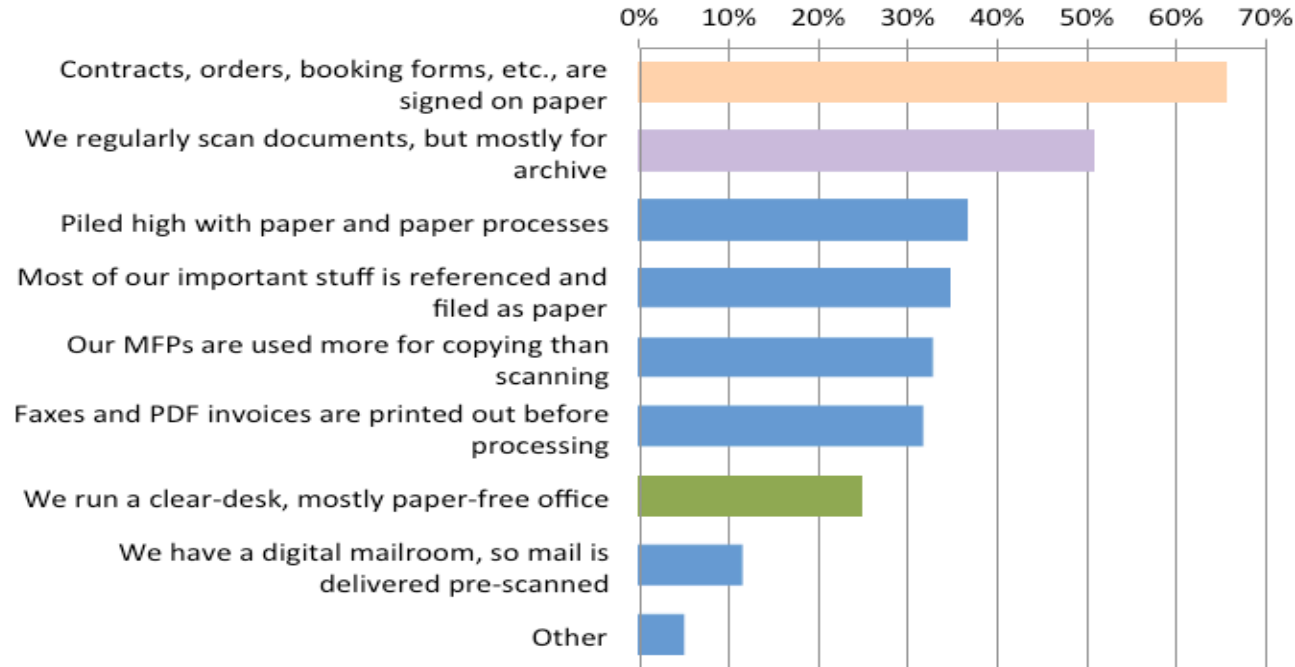
- Initiation
- Reviews and approvals
- Status tracking
- Mobile support



The Survey Says!



Which of the following would describe your office or typical offices in your organization?



The majority of respondents (65%) say they are still signing contracts in paper form.

Source: AIIM Industry Watch: Paper-Free 2016 – Are We There Yet?

- What have you seen in your customer base?
- How are organizations you are working with taking their first steps?



Contract Management



Case Status
Stage Status

Case RAG Status
RAG Status
RAG Reason

Or
To
Re

Drafts Document Negotiations Pre Closing Closing Post Completion

All documents ready date

Documents

Owner required	Document Name	Draft received/sent out date	Negotiation agreed	Pre Closing engrossed	Client
		17/10/2016			

Case Comments

Date	User	Comment	Comment type	Step	Amount	Client no
12/10/2016	Ross Cullen		Information only	Instruction		Yes

Last comment date 12/10/2016

Attachments

Dear tomas ,

Many thanks for your email and we would be delighted to assist Fabien as Irish counsel for this matter. I set out below our proposed scope of work and fee estimate.

Scope of work

1. Review and comment on foreign law loan agreement and security documentation from an Irish law perspective;
2. Draft Irish law aircraft mortgage, negotiate and agree form of agreements with Borrower's Irish counsel;
3. Review Memorandum & Articles of Association/Constitution of each Irish company and advise on any amendments required to be made
4. Review and comment on draft board minutes and powers of attorney (drafts to be provided by Borrower's Irish counsel)
5. Draft form of corporate certificate for Irish companies
6. Advise on the applicability of the Cape Town Convention, liaise with the parties to establish Transaction User Entities and appoint A&L Goodbody as Permitted User Entity
7. Obtain consents in order to carry out International Registry filings, carry out filings and obtain priority search certificates
8. Arrange and review closing searches against each Irish company on date of closing in order to issue legal opinion on closing
9. Prepare and issue any subsequent delivery date legal opinions
10. Prepare and file security filings Forms C1 and F8

Underwritten by:

FlowForma
Business Process Enablement

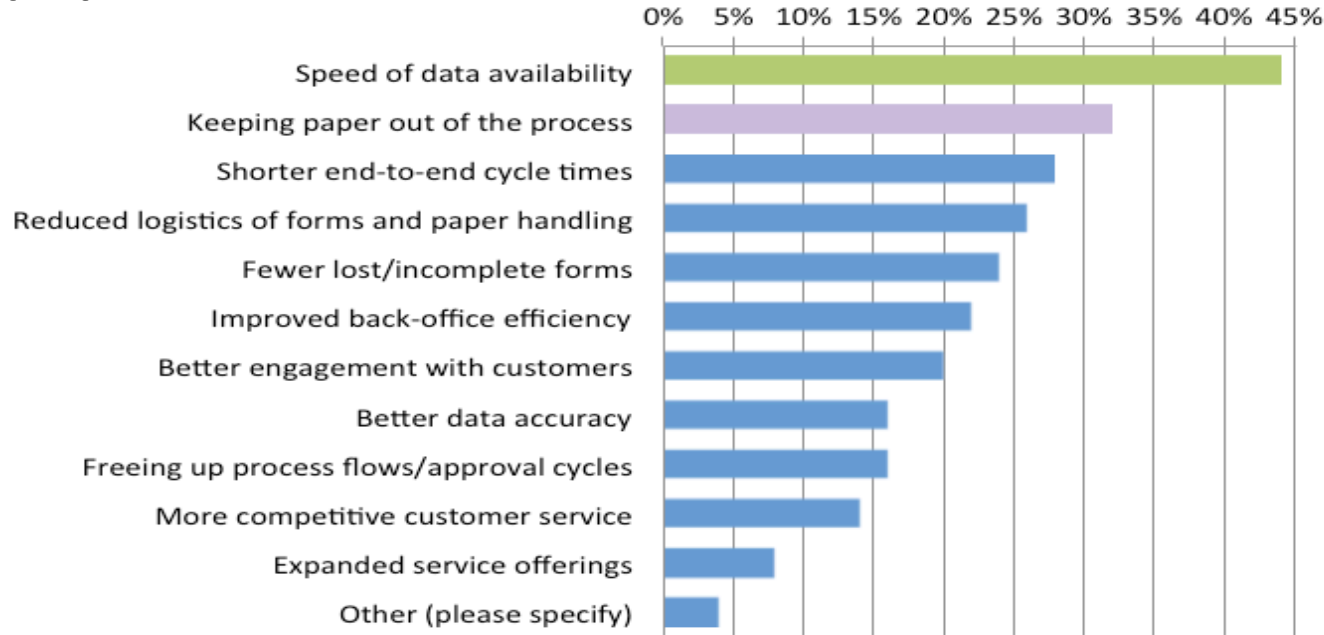
- Idea generation
- Collaboration
- Development and refinement
- Launch and improve



The Survey Says!



What have been the three biggest benefits of your mobile/portable capture projects?



Speed of data availability is the greatest benefit of all related to mobile capture (44%) which in turn reduces cycle times (28%)

Source: AIIM Industry Watch: Paper-Free 2016 – Are We There Yet?

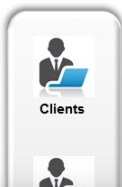
- What have you seen in your customer base?
- How are organizations you are working with taking their first steps?



Innovation



FlowForma ID8 Incremental Innovation Model...



Clients

Concept
Review

Arch...

Submitter -
General...

Project Manager
~...

Change Control
Board -...

Results

CCB Member

Enter user names, email addresses...

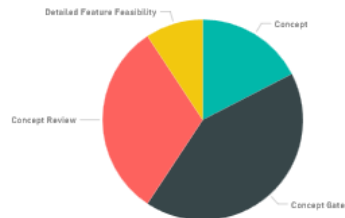
✓ Yes

✗ No

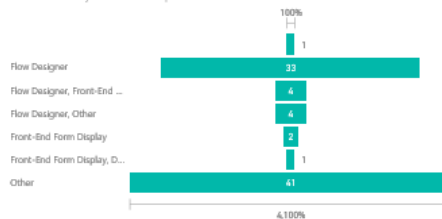
+ Vote

CCB Decision

Count of Items by Status



Count of Items by Product Area Impact



Vote administration

Start vote

Finish vote

Cancel vote

Reset vote

Vote history

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FlowForma
Business Process Enablement

Prime Opportunities



- Industries
 - Finance, Banking, and Insurance
 - Healthcare
 - Yours...
- Processes
 - Review and Approval
 - Contracts and agreements



What to Consider

- Product usability
- Collaborative capabilities
- eSignature support
- Scalability



Next Steps

- Document a process
- Identify who is in charge of radical process review
- Do not limit your possibilities to be within the corporate walls
- Promote successes



How FlowForma BPM Delivers Value



Speed to Deliver

FlowForma BPM allows you to build and publish online business process solutions **10 times faster** than traditional software development tools.



Better Value for Money (3 in 1)

FlowForma BPM combines forms, workflow and document generation services in one mobile friendly tool, providing you with the **most competitive price**, and a named user licence model, managed by you!



User Empowerment

Process/BA focused as opposed to technical/developer focused, this intuitiveness of FlowForma BPM, will **empower process owners to quickly build** processes themselves.



Collaborative Decision Making

FlowForma BPM supports **multiple decision making** with secure online voting functionality, public and private balloting with e-signatures, securely and traceably.

FlowForma BPM – Sample Customers



NSAI



Grant Thornton

A&L Goodbody



PEARSE TRUST

TótalPródúce.
Let's Grow Together



Pernod Ricard

refreshingly dependable
Lipoman

Ornua
THE HOME OF IRISH DAIRY



aspen
PHARMA

uniphar

NHS



PRIMARK®

Primera Air

VESTERGAARD
IMPACTING PEOPLE

proserv

Underwritten by:

FlowForma®
Business Process Enablement

Revolutionizing the Traditional BPM World



FlowForma BPM is an awarding winning tool, that will add value to your business with:

- Rapid installation
- No code, simply logic
- Quick user adoption (tool intuitiveness and SureStart)
- Empowered process owners deploying processes 10 times quicker
- A 3-in-1 tool at a highly competitive price with an added layer of collaborative decision enablement
- Maximisation of your existing Microsoft investments
- Uniquely links workflow and decision making

"I needed a tool to be able to develop workflows that was simple enough that I wouldn't be beholden custom coding, yet powerful and flexible enough to do design processes that meets our needs. I was able to take our previously undocumented processes and formalize them using rules to enforce behavior in a matter of weeks."

Mike Torres
Nisga'a

VOTED
Best European
Office 365
App 2015

Next Steps



FlowForma 5.0 - The BPM Tool for Office 365
Empowers Users to Make Informed Decisions

Watch video @

<http://www.flowforma.com/flowforma-latest-update-5.0-demo-video>

Try a Free Trial

Discover FlowForma BPM for yourself by
signing up to a **FREE 30 DAY TRIAL @**

<http://www.flowforma.com/sign-up-for-a-free-30-day-flowforma-trial>

Stay in Touch



Neil Young
CEO, FlowForma

**Your
questions
are
welcomed!**

T: +353 (0)1 5369 675

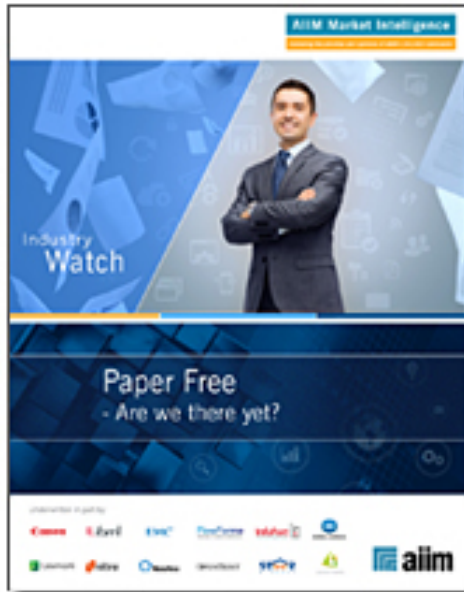
E: neil.young@flowforma.com

W: www.flowforma.com

Thank You!



Check out our latest Paper Free research



To Contact Bob:

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[@BobLarrivee](https://twitter.com/BobLarrivee) on Twitter

www.linkedin.com/in/boblarrivee

AIIM is the Community for Information Professionals



**AIIM believes that information is
your most important asset.
Learn the skills to manage it.**

Our mission is to improve organizational
performance by empowering a
community of leaders committed to
information-driven innovation.

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