

FlowStudy

CUSTOMER ONBOARDING TRANSFORMED

FlowForma Process Automation has been a gamechanger for Ergo, removing a potential obstacle to growth by creating a single source of truth that makes it easier to onboard new customers.

FlowStudy Summary

Process:

- Customer onboarding

Pain Points:

- Diverse business units used diverse systems
- Multiple sources of truth led to inconsistencies
- Onboarding challenges risked bad customer experiences
- Lack of visibility and accountability

Benefits:

- Single source of truth increases efficiency
- Consistent onboarding across multiple divisions
- Automation accelerates process completion
- A better experience for customers

Next Steps:

Ergo will continue to evolve its use of FlowForma Process Automation to be more reactive and better meet changing market demands for new products and services.

The Challenge

Over almost 30 years Ergo has grown to become one of Ireland's leading cloud and IT managed service providers, an IT company that thrives at the intersection of business and technology. As the firm expanded through acquisitions and natural growth it evolved into separate business units, each with its own specialities and fields of work. This presented a challenge in the way new clients were onboarded.

Sales, Finance and the IT Service Management (ITSM) function had their own way of engaging with customers. Sales use a CRM system; Finance works with an accounts package; ITSM relies on a specialist application. The challenge was that client information was disseminated to different stakeholders at different points in time, causing inconsistencies in the way contracted services were onboarded.

Inaccurate information could reach Finance, for example, because Sales entered details of a proposal that was subsequently adjusted in the final contract. As customers passed through the sale-to-order lifecycle, there

could be multiple versions of something as fundamental as a contact phone number. *"There was potential for ambiguity around services, commercials and governance, and we needed reliable information,"* recalled Mary Donnelly, Legal and Compliance Officer at Ergo. *"There was also the risk that it could impact the customer experience and we wanted to avoid that."*

As part of a lean programme of work to improve process efficiency, Ergo took the decision to consolidate the paperwork for each of its business units. Ergo now create contracts using a master service agreement ('MSA') which governs the relationship between Ergo and its customer and a service schedule which specifies what has been sold, each MSA can have multiple service schedules attached to it which enables a smoother sales effort across all divisions.

The Solution

FlowForma Process Automation integrates seamlessly with Microsoft SharePoint, an application that Ergo was already using, which made it a perfect fit for the new onboarding service. The licence allows up to 120

employees to use the no code software solution, with five or six typically working on each individual contract.

Now when a new customer is engaged for a contracted piece of work, Ergo's Account Manager generates a master service agreement in FlowForma Process Automation. Static text is input while the document generation feature pulls in and populates a 'flow' with variable fields. Essentially, it protects content that needs to stay constant while allowing for each business unit to add their own requirements. A single source of truth is established and maintained throughout.

The next step is choosing the type of service, which aligns with different business units and their service/product portfolios. The Managed Print business, for example, will have information that is specific to its service cycle. The variable fields are added and populated during the onboarding of the flow and merged with the static text to produce a service schedule.

FlowForma Process Automation is a no code solution that empowers Account Managers to create contracts by themselves. When creating a service schedule, the Account Manager is selecting services directly from the service catalogue which ensures that all internal teams are all aligned as to what is to be delivered to the customer. Once the service schedule is agreed with the customer, operationally approved, and signed, the Account Manager authorises billing. An agreed schedule is uploaded at this point, signed by Ergo and the customer. Finance now completes the billing process, based on inputs around various factors including start date, frequency, and notional cost and finally the Account Manager is informed that the billing is complete.

The flow then passes over to credit control, who cross reference the CRM in Sales and the accounts package in Finance to ensure reconciliation. At the same time, FlowForma Process Automation generates an automatic alert for ITSM, telling them they have a new client to onboard into their systems. It's an end-to-end process has been adopted for automated contract renewals as well as new business.

The Outcome

The huge growth Ergo has experienced in the last few years would have been difficult to achieve with the old onboarding system, according to Mary Donnelly, "we needed clarity of information that could step through multiple business units in a timely fashion and fundamentally foster trust in

everyone that the information was reliable. FlowForma allowed us to achieve that."

"Our biggest goal was to manage the communications better and bring everybody along on the journey. With FlowForma Process Automation, everybody sees the same information, harmonised for different teams in a really effective way. We have turned what was three points of truth into a unified, single source of truth."

Mary Donnelly,
Legal and Compliance Officer,
Ergo

Operating in the fast-changing world of technology, the need for agility has become business critical to Ergo. The company is recognised for innovation and coming up with new customer propositions, a process made more efficient with FlowForma Process Automation. New service schedules comprised of templates and variables can be quickly generated. "The way we use FlowForma Process Automation evolves constantly and it enables us to be very reactive and accommodate the business in whatever it wants to do," said Donnelly.

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 200,000 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.

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