

Collaborative Work Management

# Start Enabling Your Cross-Functional Teams to Collaborate

An award-winning Office 365® App, FlowForma® addresses your digital transformation needs by empowering business users to automate business processes with speed and flexibility, no matter what the complexity.

Sitting on the SharePoint® platform, the FlowForma Process Automation tool incorporates forms, workflow, document generation and much more, all in one place.

A proven no-code, logic only approach enables business users and Heads of Departments to quickly implement any process online, from employee onboarding to insurance policy renewals and product innovation, increasing organizational efficiency and productivity, while driving positive customer experiences.

FlowForma's Collaborative Work Management (CWM) Add-On provides organizations with additional features and functionality, to enable cross functional teams to collaborate on strategic initiatives in a secure, collaborative and mobile way.

## The Challenges

In today's business world, we see trends towards increased project based work and more and more strategic initiatives across organizations. But with this movement - organizations are often challenged on how to support cross-functional teams, with technology to enable efficient collaboration in a secure and mobile way, across varying departments and geographies.

## Meet Collaborative Work Management (CWM)

FlowForma Process Automation drives processes through the organization; assigning work, gathering data, issuing communications and measuring progress.

FlowForma's CWM Add-On broadens the scope and targets adoption, making collaboration seamless across organizational boundaries.

Virtual teams of disparate resources can be associated with programs of work (initiatives/projects), where each program contains many processes, which may be owned by multiple process owners across the business.

CWM provides a macro view, that aggregates all activity related to a program of work, regardless of

where the work is carried out. It shows the user a personalized view; so that an individual resource associated with a program can see queues of work specifically related to them, against a dashboard of all program activity.

Just like FlowForma Process Automation, CWM can be configured without any code. You just need an understanding of the business need and your human resources.

### Add-On Highlights

- ✓ ability to group processes into dashboards that can give trend analysis on processes
- ✓ access work item queues to view what processes in a process group are assigned to a user and what stage they are at
- ✓ a discussion board for process groups, allowing you to tag users or processes in messages to the team

## How it Works

CWM enables cross-functional teams to collaborate on programs of work that achieve key business goals. Programs can be defined at any level, for example a team working within a department or a board initiative applied across the entire organization.

For each program, resources work together, engaging in measurable activities with direction, precision and purpose.

- **Groups** - Groups define the dimensions of the program of work
- **Links** - Links initiate new processes in the program
- **Work Items** - Work items are steps that are assigned to you, the current user. Each work item has a benchmark duration and an actual completion time. FlowForma Process Automation can manage work items so that they are automatically reassigned.
- **Queues** - Queues show current work items. Work items are processes at defined stages which are assigned to resources. Queues show work items filtered according to the current user's needs.

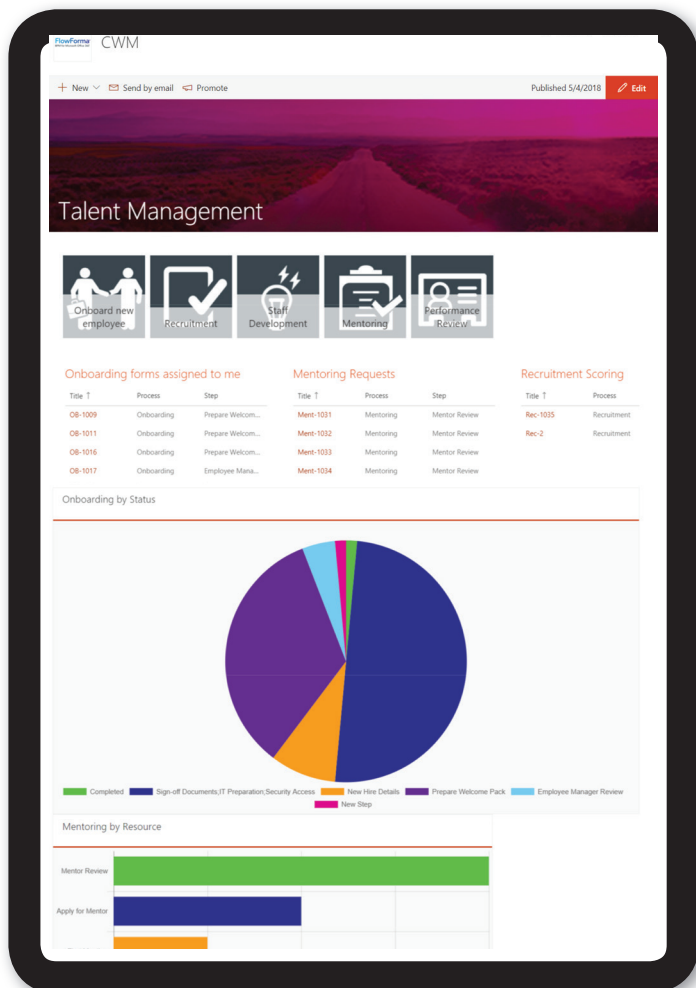


Fig 1: CWM - Talent Management Process Use Case

### Key Benefits

- Seamless and secure collaboration across process groups, no matter what the organizational boundaries
- Quick visibility of work queues with personalized views
- Easy reporting via dashboards
- Simple and effective group communication via the process group discussion board
- Ideal for managing strategic initiatives that have a customer experience focus, CWM helps organizations to radically transform processes to drive positive customer experiences

### Example Use Cases

- **Your Innovation Strategy**  
If we take a theme such as innovation for example, it must be collaborative across all divisions/business units to thrive in an organization.

With FlowForma CWM, your Innovation Group will benefit from:

- a central area where they can access all innovation information
- up-to-date analysis of all processes that they have started around innovation
- visibility of all group processes at each stage of their innovation lifecycle
- quick actioning of all pending innovation processes assigned to them

- **Your Talent Management Process**

To develop talent that drives your competitive advantage, you must have a strategy that touches every human resource from the point that when a position is created, a resource is hired, developed and ultimately released. If we take a process like talent management, it needs to be collaborative across departments.

With FlowForma CWM, your HR and Hiring Managers will benefit from:

- a central location for managing and collaborating on talent management
- easy access to job applications and their stage in the recruitment process
- seamless visibility of employee onboarding process
- ability for manager, employee and HR to input to performance reviews and learning and development plans
- employee retention dashboards etc.



### 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 Gold Microsoft Partner, with over 150,000 users across Europe, America and Asia. The company is headquartered in Dublin with offices in London and Boston and is motivated by its values to innovate, evolve and achieve with employees, customers and partners. **For further information, visit [www.flowforma.com](http://www.flowforma.com)**