



FLOWSTUDY



Bridging the Divide Between Back-Office and Building Sites

A UK building firm unlocks new efficiencies by using FlowForma Process Automation to digitalize a wide range of construction site processes.

The Challenge

A construction company operating in the southeast of England, Coinford has 120 office-based staff and a further 900 working in around 30 sites across the region. The firm has a hard-earned reputation for experience and professionalism, displaying excellence in every part of the construction process, from bulk excavation to building concrete frame superstructures.

Like a lot of construction companies, there was a disconnect between work carried out on site and back-office functions, a gap between physical and digital processes that was causing bottlenecks. The company wanted them to be standardized and transparent, with up-to-date information that could be seen in dashboards rather than tracked down painstakingly through emails and phone calls.

Archiving and storing site related documents was difficult; retrieving them for audit purposes time-consuming, particularly when paperwork went missing. The company had identified the solution, as Suzy Pinsent, Project Manager, explained:

"We started getting a lot of boxes and it was becoming a problem, so we started digitalizing everything. The next step was to digitalize at source."

FlowStudy Summary

Processes

- Health And Safety Inspections
- Quality Assurance Inspections
- Compliance Checking
- Labor Onboarding
- Training Inspection Records

Pain Points

- A disconnect between site and back-office processes
- Excessive paperwork makes audits hard
- Bottlenecks lead to incomplete workflows
- Employees bogged down in process rather than productivity

Benefits

- Process administration time cut in half
- Site managers save up to two hours a day
- Reporting and compliance are much easier to achieve
- All information resides in easily accessed files

Next Steps

A Surplus Materials process is in progress that could save the firm hundreds of thousands of pounds.

This decision went in tandem with a move to Microsoft 365, and the adoption of SharePoint and Teams for document management. It provides the cloud environment for Coinford to bridge the digital divide with a business process application tool. A number of solutions were assessed. *“We ended up at FlowForma Process Automation because the other tool we looked closely at had a heavy bias toward health and safety. FlowForma Process Automation would do it all,”* said Pinsent.

The Solution

After a three-day training course, Suzy Pinsent was confidently working with FlowForma Process Automation, kickstarting the development of processes that digitally connected construction sites to the back office. **To date, 25 processes have been digitalized,** with health and safety an early beneficiary.

Before, pictures were taken with a digital camera and shared over email to provide a visual checklist of completed tasks. Today, using the camera on a tablet with 5G providing the connectivity, FlowForma Process Automation enables images to be captured and immediately logged in designated files in

SharePoint. *“Tablets allow engineers, project managers and site managers to walk the site and use FlowForma Process Automation forms on the move, not just in cabins,”* explained Shaun O’Donnell, IT Director.

Around 10 QA (Quality Assurance) tasks have all also been moved to FlowForma Process Automation. One process specifically, **Ground Bearing Slab Inspections**, is fundamental to every new build before concrete is poured onto foundations. Engineers and site managers are notified of an inspection through FlowForma Process Automation and prompted to complete a checklist. When every box has been ticked, a preparation stage report will be sent to the client for sign-off, which will sanction the pouring of concrete.

Defect Management is another QA form, used for reporting mistakes in the build process. FlowForma Process Automation has turned endless emails between the person managing defects and the contract manager into a seven-step process, where the site manager has several options, all carried out through the software tool. Notifications are sent back and forth between Coinford staff and the external client, so each can fulfil their part of the process. No more paper or email trails.



Project Administrator time reduced by **50%**



20% Site Manager Hours Saved



25 Processes Digitalized

Another pain point for Coinford – and the construction industry as a whole – is compliance. FlowForma provides an **auditable digital record** to help meet increasing regulatory demands, like the **Building Safety Act 2022**. The legislation calls for a digital audit trail of safety information across the entire construction lifecycle, something that FlowForma Process Automation enables for all stakeholders, simply and cost effectively.

The Outcome

Just 18 months into using FlowForma Process Automation, Coinford is seeing significant benefits, according to Shaun O'Donnell, primarily around time saving. Site managers and project managers estimate that having access to the tool on tablets as they move around sites has saved them between an hour and two hours per day (approximately 15% - 20% of their time).

Suzy Pinsent has also seen efficiency gains, estimating that both the **Defect Management** process and **Slab Inspections** have cut administration time in half. Better reporting is another big win, with the data collected from FlowForma Process Automation stored in SharePoint for easy access by different departments. *"Nobody has to file anything anymore; they don't have to print anything to a PDF. They know where everything is going to be,"* she said.

Shaun O'Donnell is seeing a steady adoption of the tool across the business, with people in different departments seeing the benefit of converting more paper-based processes into digital workflows. Going forward, the plan is to train two more people in FlowForma Process Automation process building, one of them in HR because they see an opportunity to improve the onboarding of new employees.

The firm is also targeting workflows that could offer a bigger return for the business. In the pipeline is a **Surplus Materials process** that could save the firm hundreds of thousands of pounds, according to Shaun O'Donnell.

"Essentially, it's a way for different sites to put surplus material on a list that other sites can draw from, rather than them buying something that the company already owns," he explained.



Overall, he sees FlowForma Process Automation as a great enabler for the business.

"It allows our people on sites to complete a form on a tablet device very simply; they click finish and that's their bit done. It frees them up and gives them a lot more time to get on with what they're really good at," he said. "The major impact is not from an IT perspective; it is enabling other departments to be more efficient and have better visibility of what's going on."

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 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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