

FlowStudy

# OIL AND GAS FIRM REFINE ON-SITE PROCESSES

*FlowForma replaced paper-based processes and delivered time and cost-saving benefits to one of the UK's largest oil refineries.*

## FlowStudy Summary

### Processes:

- New employees arrival
- Health referral
- Equipment request
- Waste transfer
- Civil department work requests
- Process safety

### Pain Points:

- Large site makes face-to-face processes difficult
- Lost forms and paperwork
- Lack of transparency and governance
- Poor reporting from disconnected information

### Why FlowForma Process Automation?

- Processes completed at least 5x faster
- Time saved for on-site employees
- Central data repository enables better reporting
- Captured data drives continuous improvement
- Digitizing paperwork supports digital transformation
- Audit trails enables better governance

### Next Steps:

- A growing pipeline of processes are planned and the IT department has embraced FlowForma Process Automation as part of its digital transformation strategy.

## The Challenge

Our client is a large oil refinery in the UK and represents a critical part of the UK's transport and energy infrastructure. Employing around 800 people and occupying nearly 1,900 acres at its base, the size and complexity of the site presented many logistical challenges, not least for business processes around Health and Safety, HR and Finance.

*"We have a document management solution for the engineering side of the business, but we didn't have one to cover all the documents on personal drives and servers that are unrelated to site assets," explained the Manager of the Documentation, Data & Engineering IT Team. "We needed something to help make site management processes more efficient."*

The company had identified Microsoft SharePoint<sup>®</sup> as a solution and had been migrating non-project documents into the repository for years. This brought to light literally hundreds of historic processes, particularly around Health and Safety and HR, that were very inefficient.

They were almost always paper-based, depending on printed Microsoft Word<sup>®</sup> documents, spreadsheets and questionnaires. Typically, they would be handed around the site in face-to-face exchanges that could involve dozens of people. *"It's a massive site and*

*paperwork inevitably got lost. Important documents needed for auditing processes were very hard to find," commented our client.*

To improve and streamline workflows, they began looking for a business process tool that could supplement SharePoint, digitize paper-based forms and bring new efficiencies to the business. Three products were considered and after an impressive on-site demo, the FlowForma Process Automation tool was chosen.

*"It was more cost-effective than its competitors and easier to use. In the past, we had to hire expensive consultants to help us with SharePoint and wanted to get away from that. FlowForma Process Automation requires no coding skills and that was important because we needed something that non-IT people could use," he added.*

## The Solution

Our client availed of the FlowForma SureStart training program and were soon up and running. They found it intuitive to use and were impressed at how quickly they were able to develop workflows. At the same time, it became clear that richer features and more sophisticated functionality would be available as they grew more comfortable with the software's rules.

Their plan was to embed the FlowForma Process Automation tool in multiple business units, where people could identify processes that could be improved with electronic workflows. Adoption was quick and they had soon developed a team of 12 “superusers” across different business departments, including HR, Operations, Maintenance, Finance and Procurement.

Striking the balance between making FlowForma Process Automation widely available and maintaining good governance was important for the business. So, a form approval process and steering group was established, which included the company's Chief Information Officer. *“We didn't want to let everyone loose to do what they wanted; it was important to maintain control over it,”* the Manager of the Documentation, Data & Engineering IT Team commented.

A central repository was set up in SharePoint for form development. When a process is approved and signed off by the steering group it is migrated into the SharePoint repository of the department using it, where it becomes their responsibility to manage and implement flows.

This rollout strategy has been a great success. They have personally developed around 10 flows and the team of superusers a further 20, with many more planned. These include:

- New employees arrival form that checks off induction requirements
- Health referral process that involves uploading medical certificates
- Safety equipment request form
- Waste transferal process.

*“It is certainly a game-changer for a lot of staff on site. Moving from an onerous paper-based process to a streamlined digital process has freed up a lot of their time.”*

**Manager of the Documentation,  
Data & Engineering IT Team**

In tandem with the smaller flows, our client began developing a complex Process Safety form. The original plan had been to start with simple projects, but an exception was made because the business had an urgent need for a way to record on-site safety work. Because it involves hundreds of people, our client went for an enterprise license and a FlowForma consultant was brought on-site to help develop the process.

## The Outcome

Introducing the FlowForma Process Automation tool has fulfilled the fundamental requirement of digitizing paper-based processes for our client, but the benefits, impact and rate of adoption have exceeded expectations. They stated that form-based tasks are typically completed at least five times faster and the old problem of losing

documents and slowing down processes has been eliminated.

The company's audit capability has improved dramatically. *“There's full traceability in FlowForma and SharePoint, which has created a repository of valuable data. Documents that were hard to find when we were paper-based can now be easily searched,”* he explained.

Data from all kinds of processes are visualized in dashboards used with KPIs (Key Performance Indicators) to identify areas for business improvement. In the case of a Management Referral form for off-sick employees, the collated information shows if there are any recurring medical issues that warrant investigation.

All of this benefits our client's wider digital transformation strategy. They liken the change to other online services, like taxing a car – what took half a day when you physically had to bring documents into a tax office is now done in a couple of minutes on a web site.

Business improvements were guaranteed from the outset because there's a window of opportunity to tweak processes and make them better when they are migrated into the FlowForma app. *“We always look at a process critically and optimize it before we move it across. Many of them are old and quite long-winded so there's a lot of scope for streamlining,”* he said.

The collective impact of developing over 30 flows has been dramatic. *“It is certainly a game-changer for a lot of staff on site. Moving from an onerous paper-based process to a streamlined digital process has freed up a lot of their time. It's been a no-brainer as far as we're concerned.”*

This client has also been impressed by FlowForma as a vendor: *“Training went well and we've had consultancy support when we've needed it. The experience has been very good with no issues to date.”*

## 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 America, Europe 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.

## Find out More

To find out more about FlowForma Process Automation visit [www.flowforma.com](http://www.flowforma.com) or call our team on:

+1 (617) 398 4990 (USA)  
+44 (0)20 3481 1319 (UK)  
+353 (0)1 5369 650 (IRL)

Gold

**Microsoft Partner**

