FlowForma®
Empowering Process Automation

FLOWSTUDY

Overcoming Paperwork Bottlenecks

Grant Thornton

Professional services company Grant Thornton are utilizing FlowForma Process Automation to mitigate risk and drive process transformation.

The Challenge

One of Ireland's fastest growing professional services firms, Grant Thornton prides itself on delivering a breadth of financial and business services to clients in an innovative way and to the highest standards. Always interested in leveraging technology to solve problems, the firm was looking at ways to **leverage technology to improve internal processes** between seven Irish offices that employ around 1,400 people.

The company was suffering bottlenecks and general **inefficiencies from paper-based processes** that depended on printed-out forms, Excel® spreadsheets and intermittent email correspondence. A Job Appraisal process highlighted the issue.

At the end of a client assignment trainees would fill in a form, ticking off four or five tasks that they completed from a list of 20. They would print off the word document and hand it over to their manager who would rate them on each task, before passing it over to an administrator to manually enter into an Excel spreadsheet.

"It would involve around 700 forms a year in a paper trail that would go between 100 trainees and up to 50 managers across three offices," explained William McCann, IT Manager. *"Forms would inevitably get mislaid or buried under paperwork."*

FlowStudy Summary

Processes
- Job appraisal
- Client acceptance
- Data access requests
- Mobile requests

Pain Points
- Excessive paper trails
- Form-based bottlenecks
- Lack of visibility
- Risk exposure
- Poor reporting

Benefits
- 60% process time improvement
- Ease of use enables fast deployment
- Central repository drives better reporting
- Process visibility supports transparency
- Reduced risk and improved governance

Next Steps
Continue to automate key business processes with an emphasis on IT, Finance, and Risk Compliance processes.

The IT team had tried to tackle the problem with technology. Microsoft SharePoint had been embraced as a way to better manage documents, but attempts to integrate add-on applications to improve workflow had been unsatisfactory. Only when the firm's Microsoft provider recommended FlowForma was the right solution found.

The Solution

A no code solution that sits on top of SharePoint, FlowForma Process Automation replaces fragmented paper trails with an **automated digital 'flow' to transform business processes**. Grant Thornton's Job Appraisals paper trail was the first to go; replaced by **a single digital journey that seamlessly encompasses** the trainees, managers and administrators.

Right now, William McCann creates the processes himself. The one exception was a Client Acceptance process. He brought a FlowForma team in for some development days to integrate with a time and billing application. It's used to **mitigate risks when on-boarding new clients**, providing checks and balances such as clearances around **anti-money laundering and internal business conflicts**. Run by the company's Risk Compliance and Professional Standards department, it has **transformed governance** around a business critical procedure.

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> *Grant Thorntons Feedback:*
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> *"The more processes I've automated, the more the business sees the benefits and the more they want to use it.*
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> *FlowForma Process Automation is completely different to other SharePoint apps; much more business intuitive. I designed a five-step Mobile Request form and completed it in a day."*
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> **William McCann,**
> IT Manager,
> Grant Thornton

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The Risk team has proved to be the fastest adopters. Another flow is Data Access Requests, a timely solution for GDPR requirements that empower people to get a full disclosure of the personal information companies retain about them. After a request is established as legitimate, the automated process goes through multiple departments, imposing a timeline and much **greater efficiency** on what had been a difficult process.

The Outcome

To date, Grant Thornton has **transformed eight processes** using FlowForma Process Automation. The most enthusiastic adopters have been the Risk and IT teams – both have seen it as a way to **improve governance as well as increase efficiencies**. The Client Acceptance and Data Access flows have brought a **new transparency** to processes that the Risk department has to stand over.

The success of the Job Appraisal flow is indicative of other benefits FlowForma Process Automation has delivered – coming in at least **60% more efficient than the old paper-based process**. Because it's digital, trainees can log into the company's Virtual Private Network (VPN) and complete it when they're out on the road.

"It gives our department heads an overall insight into how many forms are being created and the number of staff out on jobs," said William McCann.

The response has been very positive from the business, according to McCann. *"As with any new software there's a mindset change for people, but it helps that they can see tangible benefits straight away. The more processes I've automated, the more business sees the benefits and the more they want to use it."*

Another big change is the way that FlowForma Process Automation's single repository provides a foundation for **faster and more accurate reporting**. By pulling the data in to Microsoft Power Pivot, it has given the business more insights around day-to-day processes and helped relieve bottlenecks.

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He also spoke highly of FlowForma as a vendor. *"Their people have a deep knowledge of what the product can do. In the Client Acceptance project I had an idea about how one element of it might work. They suggested a better way and they were right about it."*

Crucially, it's also easy to use. *"FlowForma Process Automation is completely different to other SharePoint apps; much more business intuitive. I designed a five-step Mobile Request form and completed it in a day,"* he said. *"Even putting a person's details into a form is so much simpler and **a completely different ball game to other applications I've used."***

About FlowForma

FlowForma is globally recognized as the leading no code Digital Process Automation provider. The company is committed to empowering businesspeople to rapidly digitize 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 Boston 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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