FlowForma®
Empowering Process Automation

FLOWSTUDY

Digitalization Transforms Social Service

FlowForma Process Automation enabled a US non-profit to transform the way its workforce engages with clients using digital workflows

The Challenge

A US non-profit organization in the Kansas City metropolitan area, AcruxKC helps people on low-income access basic health services, like emergency dental care and prescriptions. Registered clients collect their vouchers from 52 sites and choose where to redeem them from 120 vendor locations.

Beth Radtke, Executive Director of AcruxKC, wanted to **digitalize the service** and **shorten the time social workers were spending on inefficient processes**, rather than more useful work. One goal was to make the voucher scheme more accessible to people who might not have money for transportation to pick up and redeem the vouchers or struggle to get time off work. She saw a web-based process as the way forward, a way to **address the challenges and fix bottlenecks**, such as excessive paperwork and email correspondence.

"Social services as a whole are burdened by a lot of paper and manual processes. It's endemic," she said. *"Administration is very, very difficult. Setting up user profiles, getting agencies and vendors on board into our system – that's a lot of emails going back and forth and the whole payment process is extremely challenging."*

FlowStudy Summary

Processes
- Client Registration
- Voucher Creation
- Invoice Payment

Pain Points
- Excessive paperwork and email exchanges
- Required in-person appointment for clients to get voucher
- Manual processes sapping employee morale and time

Benefits
- Eliminated excess paperwork and duplicate data entry
- Eliminated telephone approval process
- Streamlined work processes to save time
- Reduced payment process time and steps
- A single digital repository for documentation
- Improved staff and partner morale

Next Steps
Work is underway to digitalize vendor invoice submission and to generate automated texts to encourage more uptake of the voucher service.

AcruxKC employs just nine people and has no IT department, so Beth Radtke went looking for a solution that was **simple to use and quick and easy to set up** – no code, effectively. "*We just really wanted to get this up and running and be as self-sufficient as possible,*" she said. "*We don't have a lot of time to waste; we don't have a lot of technology skills on our staff, and we needed to make sure we had plenty of support to get through this work and make the system operational.*"

The Solution

FlowForma proved to be the perfect fit for a lengthy list of requirements, including the functionality to **handle different client types confidentially**; **API integration with the organization's financial software**, and the ability to **add new services and extend the client base** with new workflows.

Among the first workflows to be developed was Client Registration, where personal information about service users is collected before admitting them to the system. Another was Voucher Creation, which involves five types of vouchers, each aligned to five different services. The way **FlowForma Process Automation allows one templated workflow to be customized and adapted for many use cases** was immediately put to use.

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> *AcruxKC Feedback:*
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> "*FlowForma Process Automation is such an important solution for an organization that has been weighed down with paper for two decades.*
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> *It's quick and easy to set up, intuitive to use, and the FlowForma team is always there to provide support.*"
>
> **Beth Radtke**
> **Executive Director,**
> **AcruxKC**

A third process was Invoice Payment, where a workflow incorporating approvals and batch processing replaced a manual task that was taking up too much of the team's time. Going forward, the plan is to enable vendors to engage digitally over FlowForma Process Automation, **reducing the number of emails** that go back and forth when AcruxKC wants to onboard a new partner organization. Other planned use cases include compliance with HIPPA around protecting personal information and making user surveys more efficient.

Digging into the detail of how it's made life easier for her team of social workers, Beth Radtke praised the **integrated document repository** in FlowForma Process Automation, which ensures everyone always has access to the latest digital versions. No more trawling through four-inch binders full of paper or having to print something out to share it.

The other advantage of having all the information in one place is **improved reporting**. She looks forward to trying out **FlowForma Analytics**, which provides insights into the effectiveness of workflows, accelerating a journey of continual improvement. She also wants to use FlowForma to bring digital workflows to grant and scholarship programmes, which she plans to build herself, such is her enthusiasm for the product.

The Outcome

Saving time and **simplifying processes** has been the biggest benefit of FlowForma Process Automation to AcruxKC, transforming paper-based work with digital workflows. For Beth Radtke, it's evidence that a non-profit with limited resources can be part of a tech-driven revolution in the way people work. "*FlowForma Process Automation is such an important solution for an organization that has been weighed down with paper for two decades,*" she said. "*It's quick and easy to set up, intuitive to use, and the FlowForma team is always there to provide support.*"

FlowForma Process Automation is also helping create a more positive experience for both the non-profit organisation and its clients. It has **improved the work life** of AcruxKC employees by **eliminating time-consuming tasks**, like a telephone approval process. On the client side, being able to apply for vouchers online has empowered disadvantaged people. They take more personal responsibility and better care of their own health.

Future plans include an automated text to remind clients to use their vouchers, because 20% never get redeemed. "That's thousands of dollars of care and hundreds of people who aren't getting what they need, so we want to automate some reminders to them, and also add a workflow where we can follow up and get them to use their vouchers," said Radtke.

Another big win has been the **elimination of duplicate data entry,** something that Radtke has put up with for 25 years in her social services career. "*I'm really proud that we're able to overcome that barrier and have improved staff and user morale,*" she said. "*Now that we are leveraging technology and doing it internally on our own, we've started to transform a community perception about our organization being a 'folksy little program.' People are sitting up and taking notice, which is great for us and we're really proud of it.*"

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, 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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