FlowStudy

ONLINE WORKFLOWS ADVANCE AON'S DIGITAL TRANSFORMATION

Insurance giant Aon uses FlowForma Process Automation to meet regulatory requirements, improve business process efficiency and advance its digital transformation strategy.

FlowStudy Summary

Processes:
- HR Onboarding/Offboarding
- GDPR Requests
- Insurance Vetting System
- Internal Transfers
- Complaint Process
- IT Outages

Pain Points:
- Different business units run different processes
- SharePoint processes too clunky to use
- Excessive dependency on email, Excel and paperwork
- No audit trail and lack of visibility

Benefits:
- Automation projects completed in days not months
- Processes standardized around a single repository
- Workflows aid audits and compliance
- 'No code' development encourages business-wide adoption
- More detailed planning around process automation

Next Steps:
A steady migration of old processes to FlowForma Process Automation continues; more business units are adopting it and additional functionality is constantly being added to existing processes.

The Challenge

One of the world's largest insurance brokers, Aon has a strong Irish presence with five sites employing around 700 people. Like a lot of companies, the business is always looking at new ways to improve processes, drive productivity and increase efficiencies.

The goal of Robbie Molloy, Product Manager responsible for SharePoint services, was to find a tool to customize workflows, quickly and easily, replacing legacy processes with automated processes that save time and money. Different business units had their own way of recording and sharing information, usually a combination of Excel spreadsheets and paperwork, increasingly at odds with the IT department's digital transformation strategy.

"Across all areas of the business there were lots of processes we had in place, but there wasn't any standard process," said Molloy. *"We needed a uniform process to actually keep all this information recorded and have it easily available."*

What they wanted was a single data repository, a central location supporting highly automated processes that were transparent and auditable, ticking boxes around compliance, which is front and centre in what an insurance company does.

A heavy user of SharePoint but unconvinced by the software's clunky workflow capabilities, Aon was looking for an integrated application that could build processes within the Microsoft platform. After seeing a demo of FlowForma Process Automation, Robbie Molloy knew he'd found his solution.

"We didn't have to go off and buy infrastructure; we could pretty much slot it into the systems we had but it gave us much greater control," explained Molloy. *"SharePoint isn't the best when trying to do workflows so having the customization option in FlowForma Process Automation is great."*

The Solution

Robbie Molloy has built nearly 30 processes to date and is impressed by the look and feel of them as much as the functionality, which he attributes to the application's Design Manager feature.

Although he attended a training course with FlowForma that introduced him to advanced functionality, he argues that training isn't really needed because the product is so intuitive to use. He built his first process, on his own, in less than a day.

Getting more from your **SharePoint**

One of the first was a HR Onboarding/Offboarding system for new hires and leavers. The priority was to put in place a workflow that an auditor could use to ensure no one had access to information or systems that they shouldn't. When someone leaves, it's imperative that access to confidential files and folders is removed. The process now validates this.

Another flow was designed to make sure GDPR requests about the use of personal information are tracked and recorded accurately. All up-to-date information is instantly available in a central repository for inspection. Again, potential pain points around compliance and transparency have been avoided.

Other processes include an Insurer Amendments process, where stakeholders in different business units can approve or reject requests, and an Insurance Vetting System, for onsite contractors. The second has proved to be a game-changer, mitigating exposure to liabilities when contractors work on site. *"We give clients peace of mind,"* said Molloy. *"They can log in to the portal and make sure the correct insurance is in place."*

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> **Robbie Molloy,**
> **Product Manager,**
> **Aon**

A new process is Internal Transfers, enabling HR to simplify the set-up of application access for employees who move between business units, and a Complaints process where people can log issues, such as health and safety concerns. The IT department is building another one for itself, to record infrastructure and application outages. *"It's a good way of keeping track of issues and resolving them,"* said Molloy.

The Outcome
Aon's Irish IT department has fully embraced FlowForma Process Automation as part of its digital transformation strategy, and the wider business has become proactive in its adoption, recognizing an opportunity to save time, increase efficiency and stay compliant.

A workflow like the Insurance Vetting System has transformed an unwieldy process that relied on phone calls, paperwork and hoping the right person with the right information was on hand to answer questions. Now it's a super-sleek process that takes moments instead of days to establish if a contractor is covered to work on a site.

Crucially, anyone can use the 'no-code' development tools. A colleague from a non-IT background built one of the more advanced processes from scratch and Molloy expects more managers in different business units will do the same. Interestingly, it's not the building in FlowForma Process Automation that takes time; it's scoping the requirement.

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He likes that it sharpens people's minds and makes them think harder about precisely what they want to automate. There's an iterative process where he shows business owners a prototype and they come back with further requests once they've seen some of the features and possibilities. It's a development approach that works well for both sides.

The big benefit for the IT department is stepping up the pace of its digital agenda. *"We can now build a fully functional process in less than a day, which is much preferable to a six month project,"* said Molloy. *"Customization within FlowForma Process Automation is far better than anything we have had previously. It gives us a platform to help the business make their jobs easier and my job easier."*

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 Microsoft Gold Partner, with over 150,000 users across America, Europe and Asia. The company is headquartered in Dublin with offices in Boston and London and is motivated by its values to innovate, evolve and achieve with employees, customers and partners.

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