Making Business Transformation Easy For Everyone

FlowForma®

Step into a world where business processes are easily managed, where data flows exactly how it should, where bottlenecks are identified quickly, process reports are generated with the click of a button and you make better decisions faster.

Start empowering your business users with the FlowForma Business Process Management (BPM) tool for Microsoft 365. A no code, logic only BPM tool, FlowForma BPM empowers business users to deploy business processes with speed and flexibility, no matter what the complexity. Sitting on the SharePoint® platform, the FlowForma Cloud BPM tool incorporates forms, workflow, analytics, document generation and decision making all-in-one place.

FlowForma®

FlowForma BPM

An award-winning app, FlowForma BPM empowers business users and Heads of Departments to quickly digitalize any business process in-house from onboarding to health & safety checks and contracts management, the possibilities are endless.
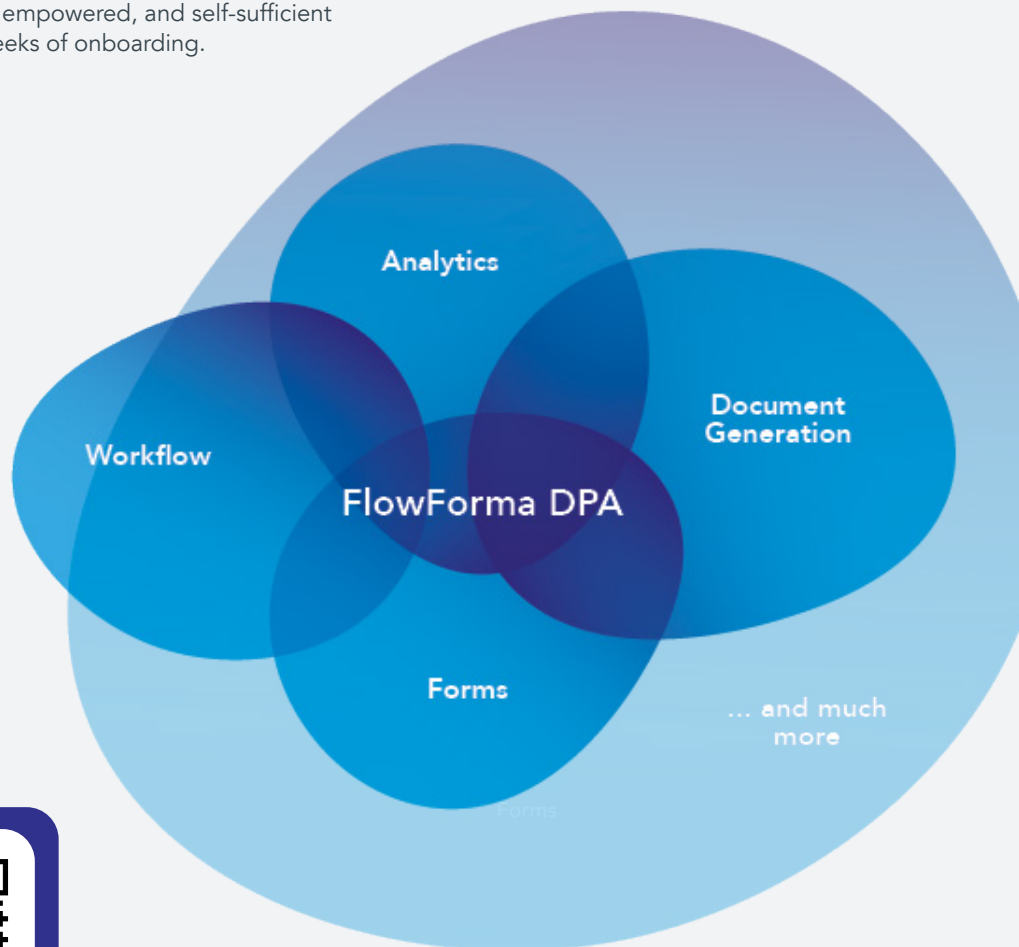
FlowForma BPM is a proven business process empowerment tool. Built for businesspeople, it empowers organizations to seamlessly build out online processes. From the simple every day to the more complex processes, FlowForma BPM permits its customers to drive business process efficiency simply and intuitively.

The self-service tool is uniquely designed for business users, requiring minimal IT involvement. Customers are live with digital processes, empowered, and self-sufficient within 4 weeks of onboarding.

The tool creates a real-time user experience across any process and allows project managers to oversee tasks with ease. It integrates directly with your Microsoft 365 environment to leverage all the benefits that this powerful collaboration tool provides.

Accelerate Your InfoPath Migration
Dedicated to making the complex simple, FlowForma BPM has simplified the InfoPath forms migration challenge for clients, by developing a unique InfoPath migration tool. This tool empowers users to accelerate the migration of business process steps and fields to the FlowForma BPM environment.

Analytics

Workflow

Document Generation

FlowForma DPA

Forms

... and much more

Watch A 2-Minute Demo Video

HELPING
YOU ADAPT

All organizations face continuous change. Whether corporate or public sector, large multinationals or small enterprises, organizations are under continuous pressure to respond quickly to changes in their market. Competitive threats, legislative changes, and other influences require that organizations rapidly adapt how they do business and deliver this business change cost effectively.

FlowForma®

FlowForma BPM is deployed globally in a broad spectrum of organizations from healthcare bodies and construction companies to manufacturers and energy companies. Some common business challenges FlowForma has helped organizations address include:

Automotive – Data visibility, Consistency, Optimal Customer Experience

In an industry known for its traditional practices, the automotive sector is increasingly recognizing the need for digital transformation. Process automation is an integral part of this. The integration of process automation solutions is revolutionizing the way automotive retail and manufacturing businesses operate, providing numerous benefits and addressing obstacles in the current digital landscape.

Some FlowForma automotive clients, including Peter Vardy Ltd and Jacksons, have collectively digitalized over 500 processes across most departments within their organizations and the appetite for future digitalization is showing no signs of slowing down.

The FlowForma Process Automation tool engenders a culture of innovation and allows simple and complex processes to be digitalized by process owners rather than reliance on IT or outsourced expensive providers.

Energy – Risk Management

In the digital age, data is one of the most vital assets for energy organizations to identify, assess and monitor risks. FlowForma Process Automation provides a comprehensive view of risks associated with price, politics, technology, financing, environment, and operations, enabling business leaders to offset risk exposures with data-centric decision-making.

Faced with the challenge of replacing a legacy IT system following divestiture, Dresser Natural Gas teamed up with FlowForma to manage its IT risk. With a tight deadline, FlowForma's no code tool was successfully deployed to replace 'code-heavy' processes. The risk associated with the migration was managed successfully while driving cost savings and increased efficiency for the business. The widespread adoption of FlowForma Process Automation has led to a 'tech-savvy' culture, which has rejuvenated an established company, to feel like a start-up.

Construction – Compliance, Onboarding

FlowForma Process Automation is used by leading construction firms globally to streamline workflows, automate repetitive tasks, and empower workers to solve key business challenges.

Our award-winning tool supports compliance with legislation such as ISO, BIM, the Building Safety Act and Construction Design Management. One of FlowForma's customers, Coinford, recently digitalized 10 QA processes, with significant business outcomes.

Digitalizing the hiring and onboarding of employees and managing suppliers can be a game-changer for construction organizations. Morgan Construction transformed its recruiting process by deploying FlowForma Process Automation to digitalize an error-prone HR Excel spreadsheet. This resulted in real-time accurate reporting, productivity gains, and cost savings.

Healthcare - Operational Efficiency, Standardization

The FlowForma Process Automation tool is used by our NHS clients to standardize processes including, HR (onboarding, offboarding, system access, health & safety etc..), Procurement, IT provisioning and more. Blackpool Teaching Hospitals Trust has digitalized 70+ processes to date with plans for many more as they continue to reap the cost efficiencies and achieve the standardization needed.

Legacy systems are often costly, just to 'keep the lights on' and while RPA (Robotic Process Automation) solutions work for many processes that do not require human touch, they can fall short for workflows that require a decision.

The no code solution is ideal for a citizen development approach and empowers those who know their processes best to design and implement what is required. It is attractive to healthcare organizations such as Liverpool Schol of Tropical Medicine, Beaumont Hospital and Airedale NHS Foundation Trust as it eases the pressure off the IT department.

KEY BENEFITS

Empowerment

The FlowForma BPM tool empowers business change by allowing rapid prototyping of business solutions, which can be configured by the process owner or business decision maker, with an intuitive user interface to encourage adoption.

Easy to use user interface with a Visual Flow Designer option

Integrated forms, workflow and document generation

Encourages ownership of processes and data

Accessible on desktop and mobile

Agility

Processes are delivered quickly, so that they are relevant from the moment they are deployed. There are features to monitor and refine the processes, when resource changes or external factors necessitate change.

At least ten times faster delivery of working solutions

Perfect for prototyping, ensuring the production process is right first time

Facilitates process evolution

InfoPath conversion utility to accelerate conversion of legacy InfoPath solutions

In-Flight Process Change

Processes are adapted to the circumstances. Each time the process executes, business rules adjust resource assignments, data collection, steps executed and communications generated, so that every process is tailored to the specific circumstances at that time.

Each execution of the workflow is unique

The workflow and form adapts based on the data collected

Workflows can interact so that actions in different resource pools can impact each other

Visibility

The user is presented with a full view of the process, its current status, future steps and past history. Process performance can be compared to benchmarks, with bottlenecks identified and investigated. Automated communications can be generated to drive resources to complete assigned steps. All information captured throughout the process is available for reporting.

Ability to create relationships between parent and multiple child forms

Allows all resources involved in achieving the process goal to see the full history of the process and its current status

Communicates internally and externally to drive processes forward

Transparency

Access to FlowForma BPM is achieved via SharePoint security. All process steps are assigned to specific resources and the workflow record is stamped with their unique credentials when steps are completed.

All process steps are assigned to resources

Contributions from resources are stored in the form

Workflow progression is stored in the form, with a record of who did what and when

Value

FlowForma BPM combines several functions (forms, workflow, analytics, and document generation) into one tool. This single tool seamlessly integrates functions which increases efficiency of both building solutions and ultimately delivering user acceptance.

Integration of workflow, forms and communications increases configuration productivity

Easy to use end user interface reduces the number of clicks required to enter data and progress workflow

Affordable and transparent pricing

Delivering ROI In Under 6-weeks

"There are huge time-savings with FlowForma Process Automation, which leads to cost savings, and that allows us to take on almost twice as many deliverables as we normally would!"

Jimmy Monahan,
Principal Consultant,
Rimkus

Book a Free Trial

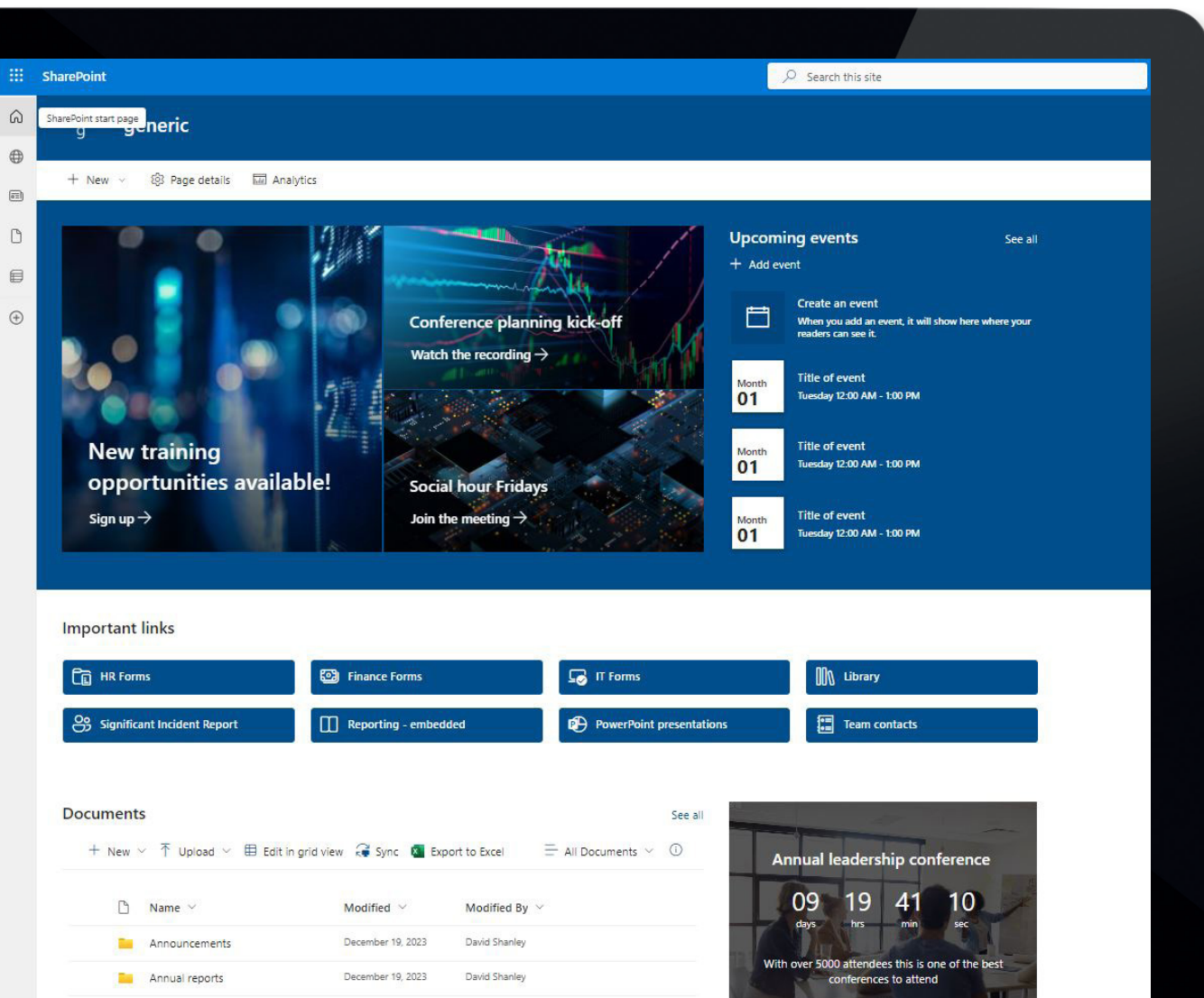# How it works...
No code, logic only

FlowForma Process Automation empowers businesspeople to digitalize processes in-house without needing any coding experience. An award-winning tool, it uniquely incorporates forms, workflow, analytics, and document generation, all-in-one place.

From the FlowForma welcome dashboard your workforce can:

- ► View processes awaiting their input
- ► Rapidly automate processes, either from pre-made templates or starting from scratch
- ► Participate in a process
- ► Review process performance
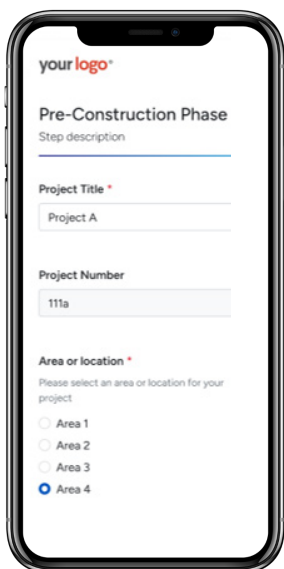- ► Access important reports

Figure 1 Welcome Dashboard: Generic homepage
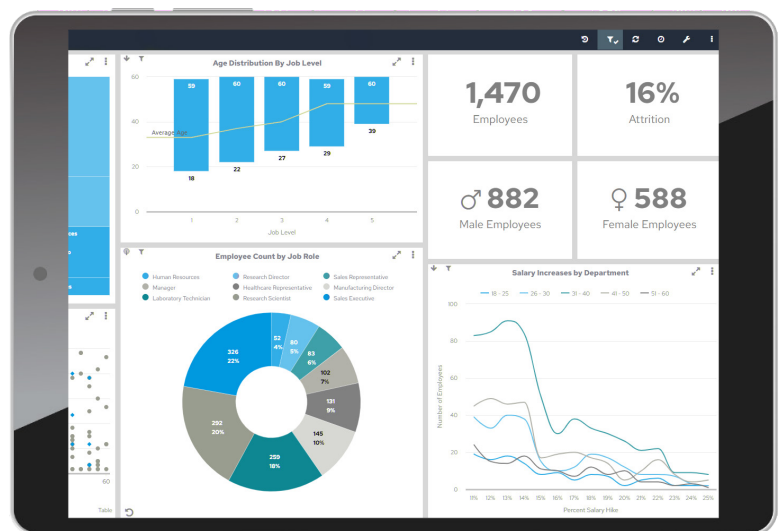
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How it works...
(continued)

— **Build Processes**: The Flow Designer empowers users to rapidly prototype and build online processes using the intuitive drag-and-drop functionality. Empowered with a graphical representation of the process, it makes communication, sign off and even training much simpler. Process Creators can add process steps, questions to collect data, and business rules to carry out automated actions based on business needs. Steps in the process can be assigned to different people. Assigned users will receive an email prompt letting them know that they must complete a step in the process.

— **Build once**: Uniquely you only need to build once for your process to be digitalized for both desktop and mobile

— **Involve external stakeholders**: FlowForma Engage expands your reach even further, empowering customers, contractors, and other external users to complete steps by submitting data and documents.

— **Participating in processes**: A Process Tracker provides process participants with an immediate overview of their current process step and in-depth insights into the overall process progression. Those participating in the process can leave notes for each other, encouraging better collaboration and communication. Users can quickly jump to various steps, with any issues prominently highlighted for immediate attention. A succinct summary of process progress is provided, delivering users the information they need to know to get updated and prepared to move forward.

— **FlowForma Analytics**: With FlowForma Analytics, no Excel wizardry or Power BI skills are needed. From within the tool, you can create dashboards in minutes to assess all aspects of your processes and business data.

— **Document Generation**: Save time by generating documents from data collected within your processes, for example, employee contracts.

Figure 2 Mobile App:
Visually build processes using the intuitive drag and drop functionality

Figure 3 FlowForma Analytics:
Showing several graphs and visual aids to showcase data gathered using the FlowForma Process Automation tool.

FlowForma is a Microsoft Partner, with over 300,000 users worldwide. The company is headquartered in Dublin with offices in New York and London and is motivated by its values to innovate, evolve and achieve with employees, customers and partners.

Momentum Leader
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Leader
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SPRING 2024

High Performer
SPRING
2024

High Performer
EMEA
SPRING 2024

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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.

FlowForma®
Empowering Process Automation

www.flowforma.com

NO CODE
logic only.

Discover what our clients have
to say about using FlowForma
BPM for Microsoft 365®

FlowForma®

"

Once you digitalize 3 processes with FlowForma Process Automation, you've already got your ROI."

Suzy Pinsent, Systems Project Manager Coinford

"

The speed of development & the opportunity to involve process owners in creating their own forms & workflows is a game-changer."

Martyn McKechnie, Head of Digital Identity, Blackpool Teaching Hospitals

Case Study Library

"

The more processes I've automated, the more the business sees the benefits and the more they want to use it. I designed a five-step Mobile Request form and completed it in a day."

William McCann, IT Manager, Grant Thornton

"

We're going to use FlowForma Process Automation on all our projects. It makes my job much easier and saves a lot of time. The only limitation is your own imagination; it can pretty much achieve anything."

Karl Henderson, Digital Engineering Lead, Downer New Zealand

FlowForma®

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