



FLOWSTUDY

Creating an Environment for Excellence



Morgan Construction and Environmental Ltd. is an oilfield construction company based out of Edmonton, Alberta and with branches across the province. Morgan Construction prides itself on the delivery of excellence and upholding the utmost workplace safety.

The Challenge

Morgan Construction believes that the core of their business lies in their employees and contractors. Due to the nature of their business, the company has a high volume of these individuals being onboarded to work on contracts across the various oilfield sites they serve.

Morgan's team of recruiters and coordinators relied on a shared Microsoft Excel spreadsheet to manage and track the onboarding progress of employees. This method was time-consuming, susceptible to human error, and was no longer an efficient tool considering the volume of individuals that were being onboarded at a time. The spreadsheet could not show the team up-to-date reporting nor could it efficiently organize the 200+ employees tracked in the spreadsheet. The team needed a solution for providing timely and accurate reports to executives and client sites to ensure they were kept up-to-date on the status of when employees and contractors would be available for the next job.

The team at Morgan Construction sought out a solution from Pontem Innovations that would allow them to organize, track, and report on the

FlowStudy Summary

Processes

- HR Onboarding
- Fleet Maintenance Tracking
- Fleet Transfers Between Sites
- Employee Expense Claims

Pain Points

- Overdependent on time consuming Excel spreadsheets
- Excess paperwork
- Inadequate visibility
- Sign-off took too long
- Potential for human error

Benefits

- Standardized simplified processes
- 'No code' solution encourages self-build flows
- Automation accelerates process completion
- Clear visibility of process along the entire approval chain
- Increased organization and strategic direction for future growth

progress of these employees to ensure that all requirements were met and that progress could be accurately reported to keep all stakeholders, especially site leadership, informed.

The Solution

Morgan Construction used FlowForma Process Automation as a workflow solution that **organized the onboarding process, reduced the likelihood of human errors**, and allowed for **automated, accurate progress reporting**. To ensure this strategy aligned with the current needs of the organization along with the strategic direction for future growth, Pontem Innovations worked closely with the Field Recruitment Supervisor and members of the team to develop a **customized solution** with the use of FlowForma Process Automation.

By using FlowForma Process Automation as the basis for the digital workflow, Pontem Innovations could tailor the tool to **meet the specific needs** of the business requirements – particularly the automation of the process that allowed the HR team to **no longer manually update documents**, track progress status through one shared Excel, nor email documents back and forth.

“

Morgan Construction Feedback:

“The digital workflow built with FlowForma has helped bring automation into the recruitment onboarding process, taking what was a giant excel spreadsheet with endless data entry that had outgrown its capabilities and combined it into a process flow that is very intuitive to use. The business logic built into FlowForma will save time and increase data integrity because information is only touched once. My team is very excited to have this digital workflow solution in place!”

Carolynne McCaughey
Director of Corporate,
Morgan Construction &
Environmental Ltd



The Outcome

Morgan Construction now have a digital workflow up and running – using a digital form from FlowForma Process Automation dedicated to each employee being onboarded and having it automate into Power BI to **provide reporting for stakeholders.**

The recruiting team can use these forms in SharePoint to stay up-to-date and organized with **digital task lists for each employee** and receive automated notifications. Stakeholders are able to get **easy-to-digest, customized report pages** for high-level executive updates, detailed reports to site, and historical analysis. These reports allow any person in the organization to see up-to-date key metrics and the statuses of new hires through either desktops or mobile devices.

The team at Morgan Construction is now better organized, has more control to prevent manual error, and is able to see results and reports in a timely manner with the most accurate results. This has saved a significant amount of time, allowing Morgan Construction to scale their business without the need to add new positions.

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.

(US) +1 (866) 237 2317
(UK) +44 (0)20 3481 1319
(IRL) +353 (0)1 5369 650
www.flowforma.com
info@flowforma.com

Ready to start accelerating the digitalization of your business processes?

[ACCESS YOUR FREE 14-DAY TRIAL](#)

