

How a paper-reliant business went digital, achieving complete visibility, increasing compliance and enabling flexible working along the way

 25 employees

 Vic, Australia

 Investments

THE COMPANY

RMBL Investments Limited are an AFS Licensed contributory Mortgage Investment Manager with around 25 staff based in Victoria, Australia.

We spoke to Matt Purves, CIO of RMBL, about how they transformed from a paper-based business into a flexible, digital workplace.

THE CHALLENGE

Before commencing his first day at RMBL, Matt knew that tackling their paper-based issues would be a key challenge. But he didn't quite realize how baked-in those processes were.

"I didn't fully appreciate how big the challenge would be. RMBL has long standing staff who have 20+ years' experience of undertaking these paper-based tasks. Shifting that behavior was going to be extremely difficult."

Change was going to be hard, but these processes were having detrimental impacts on the business. Processing 30+ complex transactions a day meant paper was flying around the office.

"We were very paper heavy with little emphasis on digital processing. Being a highly transactional organization, staff would physically pass manila folders around the office in order to complete transactions and business processes."

THE SOLUTION

Workflow automation was a new path for RMBL. Not only did they want to find a provider that could do what they needed, they wanted someone who would help them at every step of the way.

"As a small company we needed support. I wanted to get something up and running, without needing to have an in-depth knowledge of the system myself."

They shortlisted 3 other vendors. In the end, it came down to the personalized approach offered by Flowingly.

"The onboarding and succession program was the difference when comparing the available solutions. It allowed our IT Department to rapidly deploy electronic workflows during a very disruptive period."

As an extremely lean IT Department, that rapid deployment was essential for Matt.

In this customer story, we explore how Flowingly was used to:

- Track transactions and compliance in real-time
- Reduce email traffic and paper waste
- Enable flexible, remote working
- Rapidly deliver solutions across the entire business, from Investments to HR

"Approvals weren't happening on time. People were spending time searching for information in huge email trails. There was no transparency and it was extremely difficult to determine the status of these processes."

They initially started with DocuSign to digitally execute documents however, they quickly realized that they needed a workflow automation solution to:

- Formalize their business processes
- Ensure compliance
- Reduce paper volume
- Promote flexible working

Where the adoption started to accelerate rapidly was during the initial stages of the COVID-19 pandemic. Staff came to the realization very quickly that paper processes were not feasible when forced to work remotely.

Matt Purves
CIO



"Using Flowingly, it takes me around half a day to document the process, then 30-40 minutes to build the workflow. Then it's ready for testing."

They started building out their most frequent and complex business process to ensure that Flowingly could meet their requirements. Working with their Flowingly Customer Success Manager on a regular basis, they went through almost 15 versions of the process until all business units were satisfied.

From there, they started to build out all of their daily processes across all business units, from investments to HR.

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THE IMPLEMENTATION

From a staff onboarding perspective, RMBL experienced slow adoption at first. They undertook their usual change management programs, highlighting the challenges of the current process vs. the benefits of using Flowingly, undertook demonstrations, and worked with team leaders to build their business processes within Flowingly. There were three key aspects to their adoption.

First, Flowingly was very easy to use. This was important to ensure that staff would push through the change barrier, rather than reverting back to paper.

Second, the onboarding approach.

And finally, the timing.

"Where the adoption started to accelerate rapidly was during the initial stages of the COVID-19 pandemic. Staff came to the realization very quickly that paper processes were not feasible when forced to work remotely, and email processes were chaotic and unregimented. Staff saw the value of Flowingly very quickly, so we rapidly built out our processes."

THE RESULTS

As a result of their use of Flowingly, RMBL have seen the following results:

- **Business processes are now able to be completed remotely on both PC and phone.**
- **They now support a paper-lite flexible working environment.**
- **Risk has been reduced, with processes no longer deviating from the right path.**
- **Management have full visibility of day-to-day tasks, understanding where delays are in real-time.**
- **Digital records meant that their compliance responsibilities are consistently met.**

The rapid transition from paper-dependent has transformed the business over the past 12 months, and Matt can't imagine how they would have coped during Victoria's lockdowns without Flowingly.

"To be honest I don't even want to think about it. We would have had to run a skeleton staff and push into the office much sooner."

By rapidly deploying workflows, tapping into the resource within the Flowingly Customer Success team and managing the change well internally, RMBL were able to see concrete results around 2 months into using Flowingly.

"Once the dust settled, our staff 100% understood why we went down this path. Now they regularly come to me to build workflows!"

ADVICE

We asked Matt what his advice would be to other businesses who are looking at moving away from paper processes:

"Embrace trial and error, you won't get it right the first time so continue refining and improving the user experience."

"Go through your Change Management initiatives and give it the best opportunity to succeed. Gain staff buy in and take them along for the journey, engage team leaders and their staff in designing their processes. Push the change from the top down as well as up."

And finally, would he recommend Flowingly to others?

"Absolutely, workflow management tech was a new path for RMBL and the support we have received from Flowingly to date plays a large part in our successful adoption. Flowingly's competitive edge is not just the technology, but the supporting customer onboarding initiatives which sets it apart from traditional SaaS based offerings."

The onboarding and CS program was the difference when comparing the available solutions. It allowed our IT Department to rapidly deploy electronic workflows during a very disruptive period.

Matt Purves

CIO

