

CASE STUDY ROUND-UP SERIES

Enable Efficiency with Data Consolidation through Citizen Development



AT A GLANCE

Partners

- Joget
- Kianda
- Quixy
- Toca
- TrackVia

Customers

- US Vision Insurance Carrier
- Lagan Homes
- Cochin Port Trust
- Azets
- LifeCenter & LifeLine of Ohio

INTRODUCTION

This month we are bringing you real-life stories on how citizen development can enable efficiency, compliance, and governance through data consolidation.

In a time where the amount of data being generated is increasing daily, data consolidation is crucial. This process ensures that quality and accurate data is available, making it quicker and easier to process and analyze.

For most organizations, real-time feedback is mandatory. It's becoming an agile world and in order to make quick pivots and adjustments our stakeholders need information fast. The challenge is that this data varies from client to client and from platform to platform.

For data management and data consolidation initiatives to be successful there needs to be an organizational shift that focuses on accuracy, governance, and compliance. Only with reliable, up-to-date, and accurate data, can companies adapt to data trends and make valid strategic decisions.

Continue reading to see real life examples of how our partners are helping organizations across the world successfully manage and consolidate their data with the power of Citizen Development.



"For an organization to grow, it is important for it to evolve out of the outdated ways if they do not serve their purpose efficiently anymore. The key is to not be rigid, but rather keep a flexible perspective towards the ever-changing industry and being able to adapt to those changes so that you make the most out of it. Data Management is one of the most basic requirements for an organization to run smoothly."



US VISION INSURANCE CARRIER - HEALTHCARE & INSURANCE

Through Citizen Development, the client established a singular platform that effectively manages and maintains their entire product catalog (frames, spectacles & contact lenses) - making the production, distribution & sales more streamlined and efficient.



Problem

The client routinely got updated product information and change requests from various stakeholders. It needs to consistently update its product catalog, and it is challenging to perform manually via spreadsheets, which resulted in:

- Slower updates of catalog data due to the lack of an automated workflow which resulted in delayed product onboarding.
- Inaccuracies in data due to manual updates to catalog database.
- Dependency on IT team due to the lack of User Interface (UI) to interact with the catalog database.
- Inability to create rich metadata for the client's products.
- Non-existent or minimal data security due to the lack of role-based permissions to access catalog data.



Solution

- Built on Joget, the Catalog Management Application provides a single source of truth for the client to effectively streamline its process of managing and maintaining its product catalog, based on different roles that were assigned to the business user.
- This modernized approach enables them to better maintain and improve control over the full product catalog at the speed of the business.
- The application automates the multi-stage approval process for increased efficiency and improved auditability.



Outcome

- Business leaders were empowered to collaborate with the technical team in their application development, hence breaking down the traditional silos between business and IT.
- Time taken for product updates was reduced through Joget's Userview CRUD functionalities such as the ability to use current products as templates, bulk approvals for product additions and updates, single-click change migration to various deployment environments, etc.
- The Catalog Management Application enabled the client to save more than a million USD, as a result of streamlining its internal and external business workflows.



"Joget provides us a lower cost, quicker-to-market alternative to handle massive transformations and gives us tremendous advantage from a cost perspective as well as a competitive advantage which is very critical for us as the second largest vision insurer in the US. We are quicker to market and now are able to get to the end user more quickly than our competition. These are the solutions of the future and a great alternative to traditional development."

FORMER SVP

Major US Vision Insurance Carrier



LAGAN HOMES - CONSTRUCTION

Citizen development empowers Lagan Homes to optimise quality, health and safety by streamlining data collection, management and reporting on-site and in manufacturing facilities.



Problem

- Gathering information on-site and in manufacturing facilities with spreadsheets, paper forms and other systems required a lot of manual re-work and was extremely time consuming.
- Lack of visibility and traceability into core business processes made it difficult to track and monitor overall operations.
- The health and safety of Lagan's employees was a major concern in the beginning of COVID-19, with construction sites being forced to close and re-open, Lagan needed a solution that would allow them to track and record workers health and safety in a compliant way once they re-opened for business.



Solution

- Using Kianda no-code platform, Lagan have easily and quickly built many digital applications and forms that fully integrate with other data systems to streamline data management.
- Centralized data and easy-to-use dashboards enable Lagan to retrieve and report on data that they never could before.
- To ensure health and safety of workers during COVID-19, Lagan rapidly built a digital form in 1 day to allow managers to compliantly record employee temperatures on-site using a mobile or tablet which they could automatically submit and store it in the Kianda system.



Outcome

- Minimized human error and manual re-work and saved a significant amount of time and resources by automating and speeding up data collection, reporting and management.
- Greatly improved how Lagan retrieved, processed and monitored data enabling them to make data-driven decisions and continuously enhance productivity.
- Gained better quality control by empowering teams on-site to proactively respond to critical issues and resolve and record them in real-time.
- Enabled Lagan to re-open sites and facilities while ensuring the health and safety of workers throughout COVID-19.



“We have been actively using Kianda, and it's giving us information that we were never getting before, very quickly. Building forms is pretty simple, even for somebody like me with no coding experience.”

JIM FENNELL

Information Systems Manager



COCHIN PORT TRUST - FRIEGHT STATION

Using Quixy, all Container Freight Station (CFS) operations were automated, consolidated, and integrated with the Port Community System (PCS).



Problem

- With the advent of globalization and various government initiatives, there has been a major upswing growth in the volume of the year-on-year imports and exports over the past decade.
- Import, Export, and Transshipment processes carried out at the Cochin Port CFS involved extensive documentation in the form of paper documents for every service catered against the container at the CFS.
- Manual handling of forms along with manual processes was slowing down CFS operations resulting in poor customer satisfaction.



Solution

- Using Quixy, all CFS operations including Import, Export, and Transshipment activities were automated including integration with the Port Community System (PCS).
- All documents are submitted online and inbuilt workflow notifications and reminders ensure swift processing of all requests.
- SAP integration has enabled the seamless flow of service data between the CFS and the SAP system enabling online generation of invoices thus eliminating errors and delays from manual entry.



Outcome

- With the new automated CFS system powered by the Quixy platform, Cargo dwell time has been reduced by 25% thereby reducing the traffic congestion at the CFS.
- The automated CFS system enabled the process efficiency to improve by 40%.
- All stakeholders now have real-time access to the status for their requests thus improving customer satisfaction significantly.



"Quixy is a great tool for businesses to automate processes across all job functions. It has helped us reduce our Cargo dwelling time by 25%."

M V PAUL

Security Deputy Director



AZETS - ADVISORY SERVICES

Through data consolidation and automation, Azets was able to meet regulatory obligations, freeing partners to focus on billable work.



Problem

- Client offboarding is complex, involving multiple data points, systems, processes and departments.
- inefficient processes resulted in delays in client debt collection, unnecessary licensing fees and risk of non-compliance with regulations.
- The firm identified that Partners were spending too long on admin, which resulted in lost billing hours.
- The lack of a streamlined, standardized process also created compliance issues and lots of manual admin.



Solution

- The firm sought a flexible solution, able to support multiple offices and its different offboarding processes.
- It was crucial that any solution was fully integrated with Azets' existing systems which don't have APIs - a challenge the firm had been unable to overcome in the past.
- Built in Toca in just nine days, Azets created a standardized automated offboarding process and portal for staff.
- The solution provides a consolidated view of inactive clients across the firm, flagging unpaid client debt, outstanding tasks and a full audit trail, minimizing risk of non-compliance.



Outcome

- Using Toca, it was quick and easy to automate the database's UI.
- An offboarding portal for staff displays client data returned from the client's CRM system, automatically creating tasks and providing departments with a consolidated view of all clients being offboarded, making it easy to track progress.
- In addition to supporting a streamlined, timely offboarding process, the solution has freed Partners from hours of manual admin so that they can focus on billable work.



"In a matter of days, we've worked with Toca to build a solution which supports a streamlined offboarding process and is fully integrated with legacy systems lacking APIs."

ANDY MACKEY

Transformation Director UK



LIFECENTER AND LIFELINE OF OHIO - HEALTHCARE

By increasing the speed and accuracy of data, both LifeCenter and Lifeline of Ohio have improved their overall quality and compliance



Problem

- Office employees struggled to make sure case workers received and reviewed important notifications and documents.
- The OPO's office employees struggled to make sure case workers received and reviewed important notifications and documents, as well as completed training and certification.
- There was no simple verification process; one organization resorted to posting paper sheets on an office door for case workers to sign when they read documents or completed trainings.
- This information forced to be kept in paper files which had been aggregated and recorded in Lotus Notes.



Solution

- LifeCenter and Lifeline of Ohio sought a solution that could accomplish two main objectives:
 - increase the speed and quality of the donation process
 - improve reporting for regulatory compliance, particularly related to communication, donation documentation, training, and certification..
- Through TackVia, the two organizations were able to create a flexible approach to support all employees.
- Utilizing the TrackVia mobile app, the coordinators now capture data in real-time and that information is fed into a central database.



Outcome

- Overall, the LifeCenter and Lifeline of Ohio report up to an 80% time savings for data collection, program management, and reporting.
- Additionally, coordinators now sign-off on reports or other important documents from their mobile devices. Alerts are sent to office staff in real-time when donations are completed or certifications are done. The two OPOs agree that the accuracy of data has greatly improved.
- The organizations were able to improve their audit preparedness and compliance related to the donation process, training, and certification.



"With Excel, we couldn't see what employees were doing. With TrackVia it's easy to track work and view what exactly has been completed. This resulted in an 80% time savings."

CARRIE HOLZDERBER

Quality Director

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IN SUMMARY

Citizen development supports data consolidation by improving outdated systems, automating repetitive tasks and creating an environment where data entry is efficient and updated in real-time.

Three common themes from our featured case studies:

Efficiency:

Before citizen development: Many of the featured organizations were still using outdated and inefficient systems such as capturing data with papers and photos and tracking via multiple spreadsheets.

After citizen development: Multiple, separate systems were consolidated into one application which provided a single source of truth that vastly improved visibility and efficiency.

Automation:

Before citizen development: Data entry and consolidation was a slow, tedious process that caused errors in efficiency and compliance.

After citizen development: Manual and repetitive tasks were automated giving employees real-time notifications of data updates and integrations.

Continuous Improvement:

Before citizen development: Due to lack of skills, business users relied solely on outdated methods such as spreadsheets and paper records that were both time consuming and prone to inaccuracy.

After citizen development: Empowered Citizen Developers have the skills and technology to ensure data is managed properly.

FEATURED ORGANIZATIONS

Lagan Homes



Lagan Homes England is part of the Lagan Homes Group with three regions across the UK and Ireland developing over 600 units per annum. Supported by Lagan Investments they are a well funded and rapidly growing business. Lagan Homes also owns two sustainable modular timber frame operations, Frame-tech Structures and FastHouse, with capacity for more than 3,000 housing units per annum servicing markets across the GB and

Cochin Port Trust



The Mission of the Cochin Port Authority is to provide dependable, cost-effective Port services through modern and efficient infrastructure coupled with high quality, customer friendly services. The Port shall manage its assets and resources for optimal economic use to the Nation and the community. The Port shall strive to be the main catalyst for the economic development of the region, with a strong commitment to environmentally sound policies and safe practices.

Azets



Azets is a people-powered business delivering a range of accounting, tax, audit, advisory and business services providing you with a personal experience, both digitally and at your door. With over 6,500 smart dedicated people across our 158+ offices, Azets help leaders and organizations of all shapes and sizes, public sector enterprises and high net-worth private clients achieve their personal and business ambitions.

LifeCenter & LifeLine of Ohio



LifeCenter and Lifeline of Ohio are Organ Procurement Organizations (OPO) that promote and facilitate the donation of human organs and tissue for transplantation. Lifeline of Ohio's mission is to empower our community to save and heal lives through organ, eye and tissue donation.