



CASE STUDY ROUND-UP SERIES

Increased Efficiency (Part 2 of a 3-Part Series)

AT A GLANCE

Partners

- Kianda
- Joget
- AUTTO
- Quixy
- TrackVia

Customers

- Galway University Hospital
- NFPC (National Food Products Company)
- Burgess Salmon
- Pantanjali Renewable Pvt. Ltd.
- DT TRAK

INTRODUCTION

This month we are bringing you real-life stories on how citizen development can enable organizations to increase efficiency in their day-to-day projects - the second part of our 3-part series.

Many business leaders are unaware of how tedious and time-consuming everyday tasks can become. It is easy to accept these manual processes as necessary evils without giving a second thought.

However, extraordinary outcomes can often be achieved when outdated processes are enhanced by automation and technology. The number one challenge is typically getting started with the correct technical solution to assist in such initiatives.

With some assistance from a technology partner, organizations are able to increase efficiency in day-to-day tasks through citizen development.

Continue reading to see real-life examples of how our partners are helping organizations across the world successfully automate processes, expand capabilities, and save time with the power of citizen development.



"Our team took so much away just from collaborating and thinking differently about very routine processes."

JASON FRANCIS

Trainee Solicitor at Burgess Salmon



GALWAY UNIVERSITY HOSPITAL, SAOLTA HEALTHCARE - HEALTHCARE

University Hospital Group, Saolta build a modern and user-friendly purchasing management system with Kianda no-code platform to enable efficient reporting and forecasting.



Problem

- Galway University Hospital's (GUH), Medical Physics & Clinical Engineering (MCPE) department were facing huge challenges with their inefficient 16-year-old equipment management system which couldn't cope with purchasing facilities or changing healthcare demands.
- To execute daily purchasing management activities, teams had to juggle between Excel, Word and Outlook which was manually extensive and time-consuming.
- Lack of visibility into spending became a major issue for the MCPE department which made it difficult for the hospital group to accurately measure forecasts and budgets.
- Many off-the-shelf equipment management systems lacked the functionality and flexibility that GUH needed.



Solution

- Kianda no-code / low-code application development platform enabled the MCPE department at GUH to build their own bespoke solutions to support their needs.
- Without coding, they built an end-to-end purchasing system in just under 1 month which allows them to manage all of their purchasing activities in a single platform.
- Their purchasing management system easily integrated with other data systems such as SharePoint, Power BI and other systems including a 16-year-old legacy equipment management system.
- The solution included visual dashboards for tracking and monitoring purchasing tasks, mobile capabilities to allow reporting from any location and can be easily modified to suit new requirements.



Outcome

- Using no-code / low-code empowered GUH to rapidly and easily build, maintain and adapt their solutions to suit their unique requirements.
- Integrating their purchasing system allows teams to report, track and monitor all processes within one location without having to conduct additional manual re-work across Excel, Word or Outlook.
- Kianda's mobile responsive capabilities enabled insightful reporting from anywhere, on any device which facilitated successful remote working.
- Using Kianda, GUH dramatically increased efficiencies by saving a significant amount of time, costs and other resources, provided great user experience by delivering flexibility and agility to teams and is enabling them to deliver better and safer care to their patients.



"Using the Kianda platform, there is now a big opportunity to build more processes. With challenges ahead, it is systems like Kianda that are going to help us get over those battles to improve our systems for patients".

MICHAEL DUANE

Principal Clinical Engineer



NFPC (NATIONAL FOOD PRODUCTS COMPANY), UAE - MANUFACTURING

NFPC, one of the Middle East's premier food & beverage (F&B) producers, leveraged Joget to build an application that would enable increased efficiency in processing thousands of delivery notes daily.



Problem

- In the past, the client always had problems of missing 'Delivery Notes (DNs)' and 'Seals on DN's', which resulted in:
 - Frequent delivery conflicts between the client and its customers.
 - Slow invoicing and subsequent delayed payments.
 - Additional resources spent to trace, document, and manually maintain Proof-of-Delivery (POD) records on paper.
 - Substantial risk of losing important data over time.
 - Minimal oversight and transparency to manage SLA breaches between the client and its customers. (like cases of missing POD documents)



Solution

- Built on Joget and integrated with its AI-ready Tensorflow plugin, the application provides a single ecosystem for the client to effectively communicate all POD-related information with its customers.
- This modernized approach enables the client to simplify its POD-discrepancy management process.
- This reduces the stress to handle issues of missing documents, improves POD transparency, and ensures a smooth customer invoicing cycle.



Outcome

- The application supports high processing load, allowing the client to process up to 5000 DN's per day.
- The application integrated seamlessly with the client's legacy ERP database, and eventually uses OCR technology to sort, match, and validate critical business information on all POD and invoice documents from the Document Management System.
- It additionally provided a dashboard to holistically present all related POD data in a comprehensive and graphical form-factor. The client can also download customizable reports in multiple formats for timely data retrieval and analysis.
- Each business user is now only provided with information access that they are allowed to. Each business user only has the access to customer information that is assigned to them.



BURGES SALMON - LEGAL

As a part of its 'B-Innovative Week,' AUTTO worked with a group of trainees from Burgess Salmon to develop a prototype automation or app that could be of direct value to clients.



Problem

- Burges Salmon strongly believes in the importance of identifying new technology to improve client service and delivery. As part of this, the annual 'B-Innovative Week' brings together people from across the firm to explore and be inspired by the latest technologies and approaches.
- During a professional event, 37 trainees were charged with identifying where they could innovate processes to directly or indirectly support client service. They were then tasked to create a prototype automation or app to achieve this.
- The best ideas would be collated and then voted on with an overall 'winner' decided by Richard Read, Burgess Salmon Executive Committee partner with responsibility for advanced technology innovation.



Solution

- Using AUTTO, a no-code automation tool, the trainees were able to create a prototype automation or app to achieve this.
- All nine creations fitted the brief of benefitting clients either directly or indirectly.
- Trainees were able to navigate the platform quickly and efficiently, with some initiatives developed in just one afternoon.



Outcome

- Merits of the creations included:
 - Improvements in efficiency - processes such as setting deadlines, generating diary reminders, registration, and mailouts were automated.
 - Clear, quick and easy presentation of legal information to clients - an Environmental Reporting Tool created a simple questionnaire to streamline and present appropriate advice to corporate clients.
 - Scheduling court deadlines - an app was created to simplify and assist colleagues in booking and diarizing court deadlines.
 - Internal workflow challenges met - AUTTO was utilized to help address behind-the-scenes workflow challenges.



AUTTO's 'no-code automation' slogan really does ring true. Within minutes of using the platform, we were able to start to project our ideas onto it, designing workflows and generating applications that were practical and easy to follow.

EBONY EZEKWESILI

Trainee Solicitor



PATANJALI RENEWABLE - ENERGY

Streamlined automated processes renew productivity rates by 40% for Patanjali Renewable.



Problem

- The company's scope of work includes generating leads, following up on leads, customer registrations, and renewals, managing service complaints, allotting complaints to field engineers and tracking complaints to closure as per service level agreements (SLAs).
- However, there was no systematic way of managing sales leads and customer service requests.
- Tasks allocated to sales staff and service engineers were disorganized and unconsolidated leading to poor utilization of field staff and delays in issue resolution for the customers.



Solution

- Patanjali used Quixy's no-code platform to automate the lead management and support processes. This has enabled and ensured that all leads and customer complaints are systematically logged into the system and assigned accordingly to sales and service staff.
- Calls to the support number have now replaced with automated support tickets. Sales and Service staff are notified about their tasks. They can log their progress on these tasks or close the tasks using any device from anywhere.
- All allocated tasks are now tracked in the system giving real-time insights into staff productivity and SLA compliance status.



Outcome

- Patanjali has streamlined its leads management and support processes because of Quixy's no-code platform.
- With efficient logging, allocation, and tracking of tasks, the utilization of its field staff has improved by an impressive 40% while reducing the cost related to manual task allocation and tracking.
- The automation has increased transparency and accountability in operations. With the reduced complaint resolution time, customer satisfaction has also improved.



DT TRAK - MEDICAL CLAIM SERVICES

Modern, low-code technology replaces disparate spreadsheets, eliminates duplicate and manual work, streamlines operations and improves customer satisfaction.



Problem

- DT Trak had long relied on spreadsheets and other manual tools for tracking and managing its coding, billing, and accounting services.
- Working with a massive amount of complex data, DT Trak's previous processes proved to be overly manual and prone to human error.
- Employees had to comb through huge Excel files stored on their internal SharePoint site, which caused versioning issues and resulted in miscommunication, disorganization, confusion, and duplicate work among employees.



Solution

- With TrackVia, DT Trak was able to quickly digitize its spreadsheet-based processes and to streamline their operational workflows across teams and departments.
- Sophisticated user roles and permissions enable employees to only see information that is relevant to them, and each employee is now automatically assigned to perform work for one or many facilities, clinics, payers, etc.
- Client's assignments and processes change quickly and DT Trak relies on TrackVia's low-code applications, which adjust to evolving business needs with drag-and-drop ease.
- Additionally, the system's embedded, custom business logic ensures that their data is constantly being audited, so they remain fully compliant.



Outcome

- Leveraging the system, DT Trak has completely digitized their operations. By reducing Excel-, SharePoint-, and email-based processes, they've greatly reduced manual and duplicate work—increasing their overall productivity.
- Using TrackVia's intelligent workflow engine, DT Trak has improved their operational efficiency—allowing work to seamlessly flow from one step to the next.
- Their clients also depend on TrackVia's timely, personalized reports and analytics. DT Trak has seen unparalleled gains in productivity, efficiency, and client satisfaction. As a result, they've gained a significant competitive advantage in their market—now able to better serve their customers and to ultimately win more new business.

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IN SUMMARY

Citizen development enables organizations to save time by eliminating manual entry, automating repetitive tasks, and improving complex processes.

Due to increased efficiency, organizations found that less time was able to be spent on administrative tasks allowing greater emphasis on strategic initiatives and fewer manual errors.

FEATURED ORGANIZATIONS

Galway University Hospital	NFPC National Food Products Company	Burgess Salmon	Patanjali Renewable	DT TRAK
<p>The Saolta University Health Care Group provides acute and specialist hospital services to the West and North West of Ireland – counties Galway, Mayo, Roscommon, Sligo, Leitrim, Donegal and adjoining counties.</p>	<p>Headquartered in Dubai and founded in 1971, NFPC is one of the Middle East's premier food and beverage producer. With a number of well-known brands that more than half of the nation has grown up with, NFPC is one of the region's largest employers with more than 4,500 employees spanning across the UAE.</p>	<p>Burgess Salmon is the independent UK law firm which delivers the best mix of advice, service and value. They are committed to building long-term relationships with our clients, frequently provide bespoke training, seconded lawyers and secondment opportunities for our clients' lawyers.</p>	<p>Patanjali Renewable Pvt. Ltd. is one of the largest and most trusted, privately-owned renewable energy service providers in India. They are a leading manufacturer of Solar PV Modules, Solar Inverters, Solar Street Lights, Solar Water Pumps, and Solar batteries.</p>	<p>DT-Trak Consulting, Inc. provides services to federal, state, tribal and commercial enterprises, across the country. They are a Small Business Administration 8(a) Certified, minority-owned company and GSA Schedule holder, with over 18 years of contract performance.</p>

To learn more about the partners featured in this series, as well as information to become a partner, click [here](#) to be directed to the PMI Citizen Developer Partner Portal.





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