



Industry Fund Services welcomes savings **as it** **welcomes new employees**

Australian wealth management firm creates
Welcome Portal for onboarding new employees
using Nintex Forms and Nintex Workflows.

Organization

Company name
goes here

Website

<https://ifs.net.au/>

Industry

Financial Services

Country

Australia

Business situation

Industry Fund Services
looked to improve their IT
and production processes
for new employees and
customer interactions.
The firm wanted to reduce
repetitive processes and
onboard new staff quickly.

Solution

In-house design and
development of Workflows
and Forms created
efficiencies and a better
overall work experience.
The agile nature of the
solution provides the group
with a competitive edge. By
automating the onboarding
process, the company
provided immediate work
readiness for new staff,
saving time, effort and
money.

Benefits

Faster and more efficient
onboarding of new
employees for greater
professionalism, job
satisfaction and retention

Integrates easily with
existing company apps

Improved data capture and
analysis

Increase employee and customer engagement

“In a way, we built a mini CRM system in Nintex. ... Now issue resolution is faster and easier.”

— **Rebecca King**, Digital Workplace Manager at IFS

To retain its competitive edge, Industry Funds Services (IFS) needed to increase staff and customer engagement. The company is one of Australia’s leading providers of specialist financial products, advice and business solutions to industry and other “all benefit to member” superfunds and other financial products and services.

While the group focuses on superannuation and financial services, it also handles financial planning and para planning, business support, collections and non-super investment products. IFS’s head office is located in Melbourne, however, the group also has a number of primarily financial planning staff throughout Australia.

The group turned to Melbourne-based Evolve Information Services, which recommended Nintex, explaining how well it would integrate into the company’s existing SharePoint environment.

With Nintex Workflow and Microsoft SharePoint, IFS would be able to improve collaboration, communication, work efficiency and data management, and truly centralize IFS information sources while allowing staff located away from the head office to access the same data in real time.

All aboard?

The company needed company-wide buy-in to be successful with this type of sweeping change solution. Identifying company priorities allowed the internal team to build a clear business case for the new approach. Two core concerns required immediate attention:

Security

With IFS staff working all over Australia, the intranet and extranet would face an array of complex security issues.

Poor Track Record

Based on previous experience with poorly configured SharePoint systems in other companies, (which hid some of the programs most useful features and functionality), several IFS employees expressed concerns about the implementation of a SharePoint solution.

But two important factors increased the project's momentum:

Recent Shift to the Cloud

IFS had recently changed IT providers and moved to the cloud. The next rational step was a digital upgrade.

Upper Level Support

Senior executives embraced the project's vision and were willing to sponsor changes because of the potential to streamline and cut down on manual processes, allowing staff to focus on more important tasks.

Reducing redundancy to gain buy-in

During a pilot project, IFS focused on streamlining repetitive processes — using Nintex and SharePoint to handle the “boring,” giving staff more time to focus more on client and staff engagement.

With the old system, the department had to wade through a long volley of emails, which required a good deal of oversight. Using Nintex Workflow and Nintex Forms, IFS was able to remove the redundancy as well as potential for error.

As news of the pilot project's success spread, staff grew excited about the solution's potential. The full reporting and other tool features drove a whole new outlook on SharePoint within IFS. Staff now seek out the internal project team to provide recommendations for new workflows.

Great customer service starts with great employees

“Nintex takes the potential of SharePoint and boosts it even further.”

— **Rebecca King**, Digital Workplace Manager at IFS

Because IFS depends so heavily on outstanding employees, IFS wanted to improve the new employee onboarding process. Previously, new employees felt disconnected and frustrated, especially on their first day. This concerned IFS executives, especially when onboarding new staff members not based in the Melbourne head office.

The company created a Welcome Portal for onboarding new employees before they began their first day. This portal provided information about benefits, and gathered banking information required by HR staff to ensure new starters were quickly added to the payroll system. By using both Nintex Workflow and Nintex Forms, the system alerts IT staff to new starters' equipment and software needs. IFS anticipates that this organized, positive and professional first impression will greatly improve employee satisfaction and retention.

IFS also reviewed the concerns of existing employees who said their intranet was not very user-friendly. Updating the intranet means staff have a place to connect and collaborate.

Leveraging Nintex flexibility

“We’re changing the perception that we’re just computers and hardware. People are seeing that they can come to us to streamline reporting or fix processes that bottleneck or have issues.”

— **Rebecca King**, Digital Workplace
Manager at IFS

IFS has deployed 20 Nintex workflows so far. The company looks forward to seeing the additional savings and efficiency returns from those workflows as they continue. IFS is already looking into how it can integrate Nintex into its BI reporting tool suite.

“In a way,” notes King, “we built a mini CRM system in Nintex. While it’s all pretty new, teams are already seeing that they have much greater and faster access to transparent and available data. There is also better data capture and analysis. While there are a lot of products out there that capture data, that isn’t much use if it can’t be quickly and easily broken down into actionable information. Now issue resolution is faster and easier.”

Goal: Great customer service starts with great employees

Nintex Offers Flexibility

Nintex products require no coding and can be customized by developers as needed. They can be easily integrated with other technologies, and companies can tailor and build workflows in-house. This hands-on capability means IFS can design processes that fit both employee needs and business objectives, saving money on external vendors.

Nintex Integrates with Other Applications

Since Nintex integrates with Microsoft applications, including Access and other tools that IFS staff already use on a daily basis, existing staff are eased into Nintex by pairing it with the software they are already comfortable using. This helps to make the transition for employees as easy as possible.

Nintex is a Big Hit

IFS employees are relieved that they can log in, see the exact status of their apps, and get data with a click. They no longer have to search through various Excel files to get the information they need. Employees also appreciate that they now get timely, accurate onboarding information and that it's an automatic process. IFS believes that it's saving approximately three hours in staff time for each new starter.

Nintex Saves IFS Money

With each workflow and form built in-house, IFS saves an estimated \$3,000. Those savings became apparent immediately after the automated onboarding process went live. With streamlined information flow and task management, new starters have everything they need to do their job, on day one.

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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