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Streamlining LGT's Global Training: Handling 1000+ Tasks with Flowable

LGT is a leading international private bank owned by the Princely Family of Liechtenstein for over 90 years, employing over 5600 people globally. Committed to innovation as well as long-term thinking, the bank continuously aims to offer client-centric services and products across the globe. Digital transformation plays a crucial role in this, and LGT has chosen Flowable as one of its digitalization platforms.

From manual to automated: Reducing processing time and increasing data accuracy with Flowable

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LGT offers various internal learning and development programs through the Liechtenstein Academy. These trainings range from long-term personal development to leadership and sustainability. Traditionally, applications for these programs were manual, involving a series of tools and applications: Emails, Excel sheets, and templates.

This manual approach presented two significant challenges:

• **Time consumption:** The requirement for multiple quality checks and validations resulted in lengthy email correspondences.

• **Limited transparency and error-proneness:** Siloed communication and the lack of tracking options increased error risk and transparency concerns.

To address these challenges, LGT implemented anend-to-end automated business process using Flowable. This process, **encompassing over 1000 tasks, streamlines the training process from beginning to end: from nomination, application, submission, to the evaluation of training participants.**

Flowable. Intelligent Business Automation
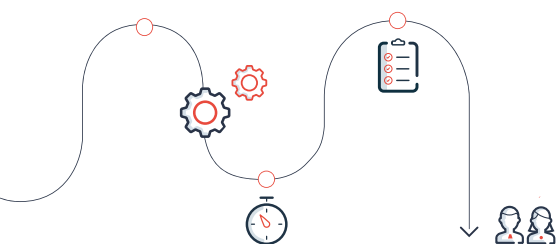
Working with the Flowable Platform is a straightforward process. Thanks to Flowable's model-driven and case management capabilities, we created a nuanced end-to-end process in a short time. The expertise of the Flowable team further accelerated development by providing valuable guidance.

Andreas Fasching, IT Solution Engineer, LGT Financial Services AG

Used globally by all regional managers, line managers, team leads, and the Liechtenstein Academy team, the automated process has significantly:

- ✓ **Optimized resource allocation:** By uniting the entire process on one platform and ensuring a comprehensive overview, the process is faster overall. This frees up time used for manual tasks and allows employees to focus on higher-value activities.

- ✓ **Minimized errors:** Information is automatically validated against pre-defined conditions, ensuring eligibility and reducing manual work.

- ✓ **Enhanced transparency:** Line managers and the academy team receive automatic task notifications, improving process visibility and transparency. Tasks can be tracked across the process, making sure it's always clear with whom it lies.

- ✓ **Enabled a seamless information flow:** Integration with other platforms such as the event management, allows for real-time data access.

By validating information against other systems, Flowable significantly reduced processing time, ensured data accuracy, and minimized manual work for our team.

Beat Büschlen, Learning & Development Specialist, Liechtenstein Academy

Streamlining processes with automation

As part of its digital transformation, LGT is focusing on identifying opportunities for automation, closing departmental gaps, and ensuring successful implementation. This includes identifying automation opportunities, bridging departmental gaps, and ensuring successful implementation across the organization.

LGT modelers and Flowable experts collaborate to estimate, develop, and implement automation projects. **Currently, over 15 workflows are live, spanning various departments, including Business, HR, and internal operations.**

These workflows deliver a multitude of benefits:

- **Increased efficiency and productivity:** Repetitive tasks are automated, freeing up valuable human resources for higher-value activities.

- **Improved accuracy and consistency:** Automation reduces human error and ensures consistency.

- **Cost optimization:** Streamlined and automated processes lead to reduced operational costs.

- **Scalability and agility:** The organization can efficiently scale automation efforts across different departments.

- **Standardization and governance:** Consistent quality and compliance with regulations are ensured.

Manual vs. automated – A process comparison:

Before // Manual Process	After // Automated Process

1.

Training Management

- Training data scattered across multiple Excel sheets hinders easy management and scaling of course offerings.

- Email-based nomination and enrollment rely on manual coordination between the academy team, regional, and line managers.

Training Management

- All course details reside on a single platform, eliminating scattered Excel sheets.

- Regional managers define contingents through automated tasks within Flowable.

- Communication between the academy team and the regional and line managers is streamlined within one platform.

2.

Nomination

- Line managers rely on emails and spreadsheets to coordinate nominations with their teams.

- Manual data entry in Excel sheets increases the risk of errors and delays.

Nomination

- Employees express interest and preferences directly in the Flowable Platform based solution.

- Automated quality checks, based on pre-defined rules, ensure eligibility, highlighting any potential divergence.

3.

Allocation

- The academy team uses Excel to assign participants to courses. Multiple manual quality checks are required to avoid mistakes.

- Excel sheets make it difficult to optimize scheduling based on employee preferences.

Allocation

- The academy team has all the information on nominations, priorities, and course dates in one place.

- Errors are immediately visible through automatic validation against pre-defined conditions.

4.

Conclusion

- Participant information requires manual transfer to the event management system, increasing workload.

- Separate manual emails congratulate participants, lacking a streamlined process.

Conclusion

- Participant and course details seamlessly flow to the event management system.

- Congratulatory emails are automatically sent to participants, improving efficiency.
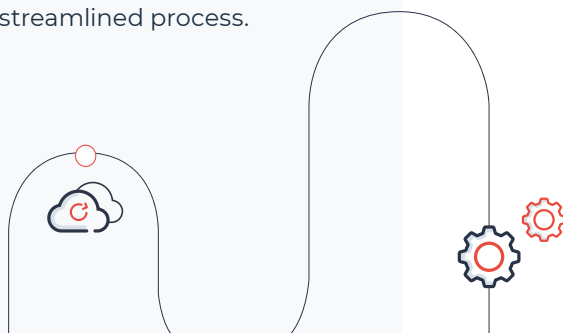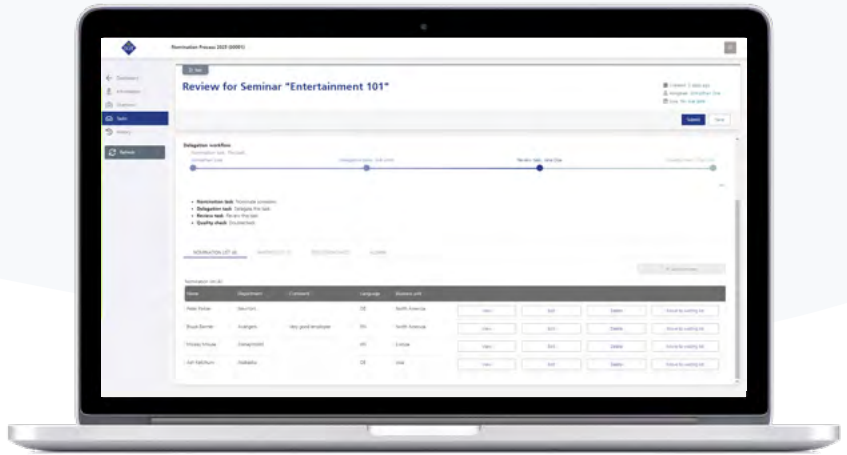
Screenshot of the end-user application created with Flowable.

Flowable as digitalization platform

When looking for a digitalization platform, LGT chose Flowable based on three main criteria:

1. **Comprehensive case management and business process management capabilities:** Flowable offers a wide range of functionalities, spanning from automating simple, repetitive tasks to supporting complex, unpredictable processes. Flowable's case management capabilities give LGT a complete picture of its processes.

   With Flowable, LGT can map out dynamic scenarios using case management and automate repetitive tasks using business process management. Additionally, Flowable's model-driven design and open architecture make it easy and fast for LGT to build and implement these complex processes.

> **We chose Flowable for a multitude of reasons, an important one being that it's built on open standards and open source. In an ever-evolving tech landscape, these standards serve as a universal language, ensuring continuity amidst the flux of emerging technologies. Embracing standardized technologies not only future-proofs our development but also fosters resilience and long-term growth.**

Philipp Schildknecht, Head of Workflow Management, LGT Financial Services AG

2. **Focus on open standards:** Flowable's foundation on open standards (BPMN, CMMN, and DMN) ensures process adaptability and seamless integration with future technologies. This future-proofs development and fosters resilience, allowing LGT to weather disruptions and achieve long-term stability.

3. **Data management and integration capabilities:** By leveraging Flowable's data management capabilities, LGT was able to validate data across different systems, increasing data consistency. Flowable's ease of integration ensures that data seamlessly flows across different systems, which is important for the overall process.

A look into the future

LGT's digital transformation streamlines processes, saving time and reducing errors. Flowable is a crucial part of LGT's digitalization strategy, providing an end-to-end platform for efficient automation. The first process in production exemplifies this efficiency: Over 1000 tasks within the training application process are handled seamlessly, involving over 500 employees across different countries.

LGT plans further automation workflows with Flowable, spanning various departments, including Business, HR, and internal operations.

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