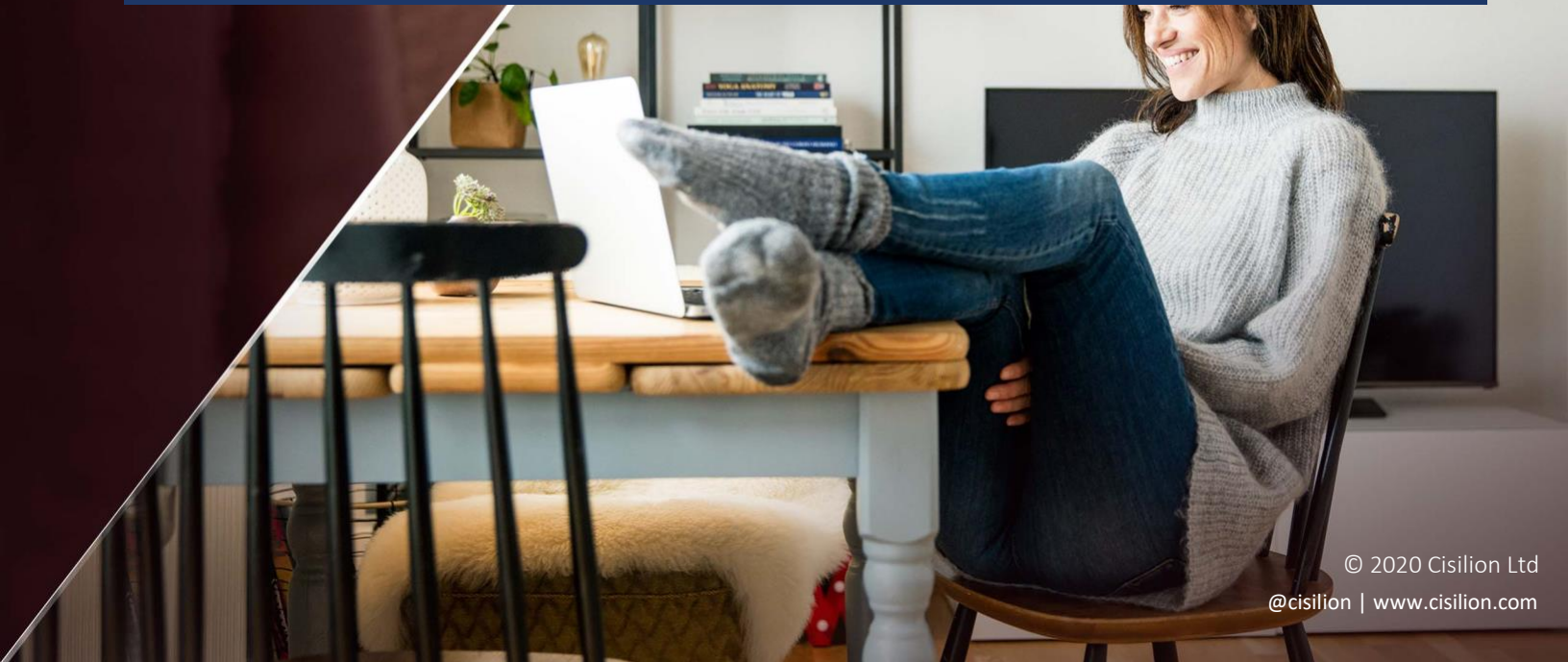CISILION

Getting Started

Microsoft Power Platform

with robotic process automation, approvals, low-code application development and business intelligence reporting.

CISILION

An introduction and insight into the art of the possible.

Winter 2020

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Microsoft
Power Platform

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Executive Summary

Organisations across every sector, every size and across the globe have a desire to get more out of the services and technology they use and pay for today, to help achieve an improvement in productivity as well as lower their operational costs.

One method of achieving this would be through automation. Tools to develop basic power apps and chatbots/virtual assistants have been developed within Microsoft to enable operational teams to deliver business process automation. This allows those with the front-line knowledge of business processes, the ability to quickly develop and deploy prototypes that can be used to enrich your business in ways previously not possible.

This enables businesses to, for example: -

Delivering empowered client connections through
- Improved client / customer on-boarding
- Greater transparency throughout the relationship / customer lifecycle
- Augment every client interaction with virtual agents

Improve the employee experience through
- Improved and enhance shared knowledge within the organisation
- Provide faster access to critical information
- Ensure your employees have the right tool for the job
- Use automation of repetitive tasks to free up time and improve productivity

Respond more quickly to client needs with
- AI driven insights offering new / enriched services to fulfil emerging and changing client needs
- Predictive analytics that support the next best action to quickly make informed decisions

Re-imagine and Re-invent
- Access to data from multiple sources to generate more efficient collective insights to reduce administration, improve decision making and empower employees to do more
- Allow IT, Service, departments, and employees to build custom no-code or low-code apps to increase efficiency and flexibility by extending the function and reach of new and legacy applications.

Gartner predicts that "**65% of all application development will be low-code by 2024**".

Rather than going into the detail about **how** the technology works, we have put together this guide that uses a handful of **real business scenarios** and examples which we walk through throughout this guide.

Introducing Power Platform

Enabling business efficiency through insights, automation, and low-code app development
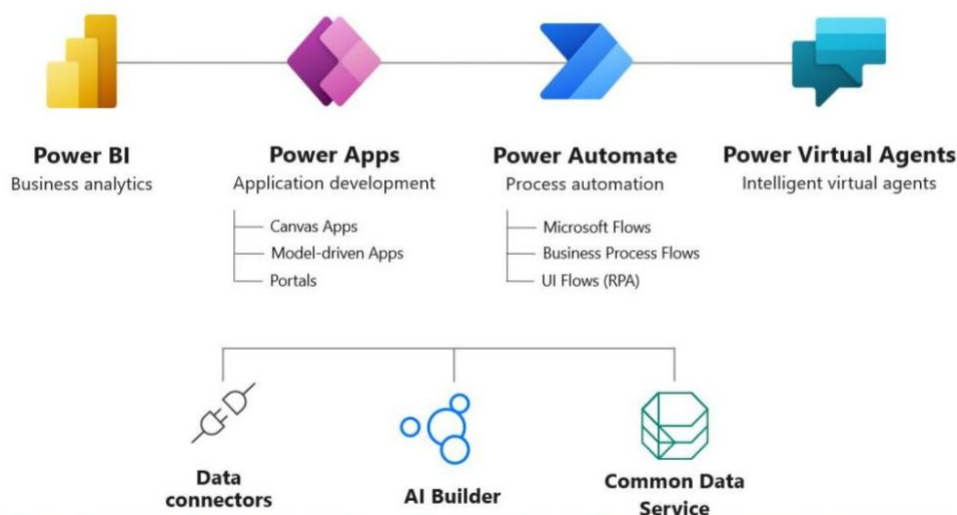
Power Platform is a suite of apps, services, connectors, and data platform that provides a rapid application development environment to build custom apps for your business needs. This is frequently referred to as "low-code" and includes key services from Microsoft which are all supported by a Common Data Platform:

- Power Automate
- Power Apps
- Power BI
- Power Virtual Agents

What can this do for my business?

One of the key benefits of Power Platform is to help empower your organisation, departments, and individual employees to focus on what matters most….and then automate the rest – reducing business complexity, driving down cost, reducing manual processes, reducing human error, and improving business responsiveness and lengthy approval processes.

Working with apps and dev teams and most importantly line of business, you are able build bespoke workflows, approvals, process automation solutions and even mobile apps directly with rich integration into over 350 off the shelf applications or through your customer API connectors.

Rather than talk about how the technology works and going into technical detail here, we have put together this guide that uses a handful of real business scenarios and examples which we walk through the following sections.

These examples are based on each of the core components of the Power Platform; however, our suggested approach is to look at this from a business perspective rather than the app / service itself since there are likely to be scenarios in which multiple of these services may be used – along with of course other core aspects of Microsoft 365.
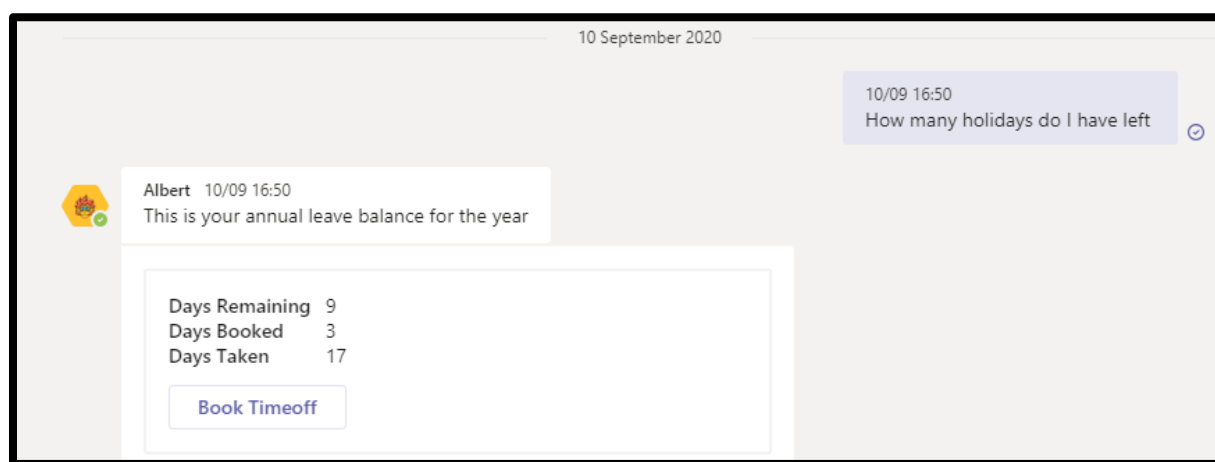
Power Virtual Agents

Intelligent Virtual Agents (chat bots) with leading edge natural language processing

Power Virtual Agents (or chatbots) can also be used in conjunction with any of the power apps or as stand alone, they can integrate with other products and services you use every day to same time and increase productivity.

Example 1 – HR System Integration

In this example, we are connecting the Virtual Agent into your existing HR system using their published APIs to allow for a seamless and improved process for checking and requesting annual leave directly from within Teams.

In the example below, you can see how an employee can check their outstanding annual leave balance directly from Microsoft Teams using the virtual agent!

The result returned from the virtual agent can then continue, allowing the employee to go directly into the HR system to request leave – or even to automate this process directly from the chat.

Adaptive cards are configurable and other options can be added as shown in a later example.

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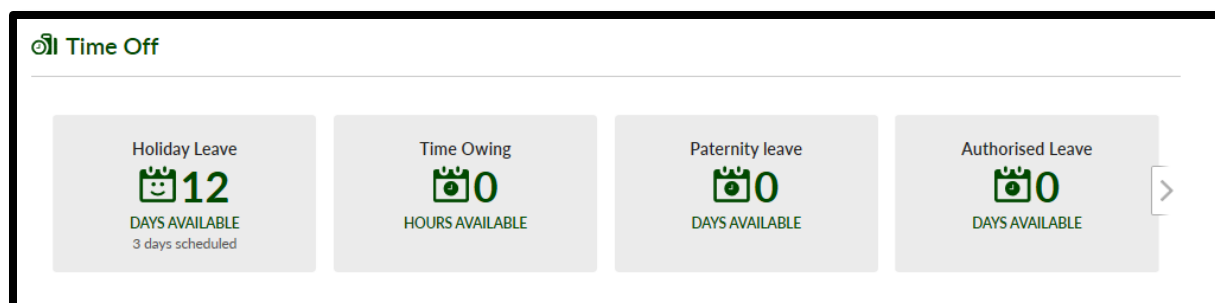
Example 2 – Intelligent Search

In this example, we see ways in which a virtual agent is being used to help an employee find documents from various repository stores or third-party systems.

Below, you can see the virtual assistant being asked for a document and returning the up-to-date version of the document within a few seconds.
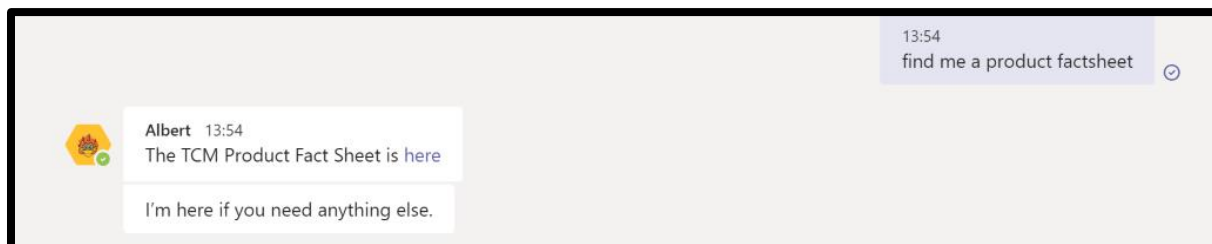
This example below, shows a FAQ scenario with an adaptive card being returned to enable further options.
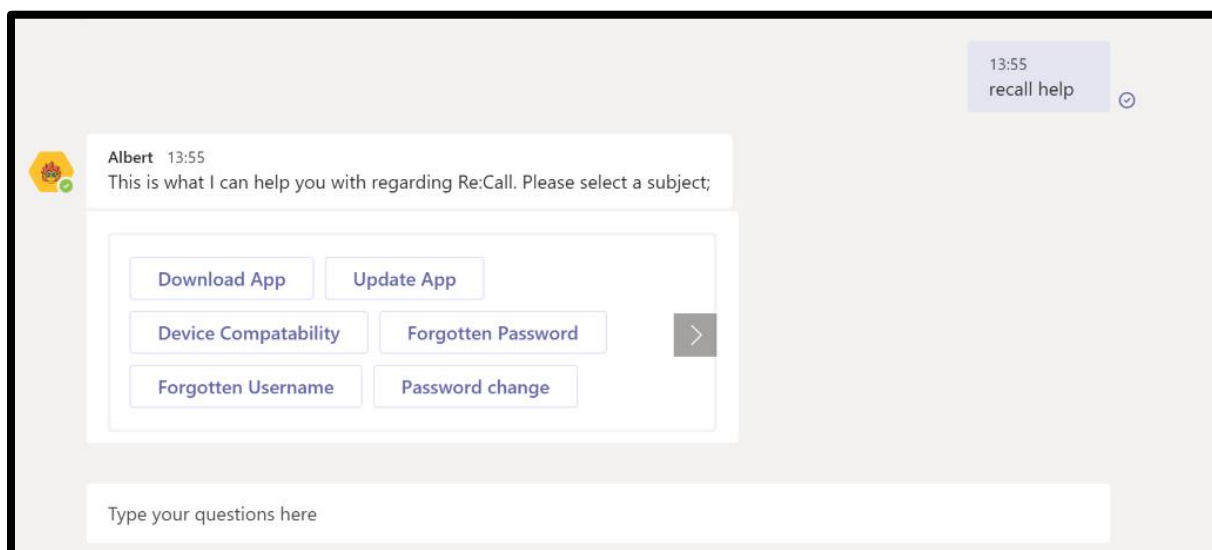
Power Automate

For Workflow and Process Automation

Example 1 – Staff require multiple people to "sign off" to approve expenses

Existing Process:

1. Employee completes expenses form and emails to line manager.
2. Line manager approves request and forwards to their manager via email for final sign off (if rejected it is returned to requestor for more information)
3. Senior manager approves request and leave is granted or for expenses passed to accounts to process payment. (if rejected passed back and process starts again)

By utilising a simple Power Automate workflow, it is possible to simplify this as per the following process:
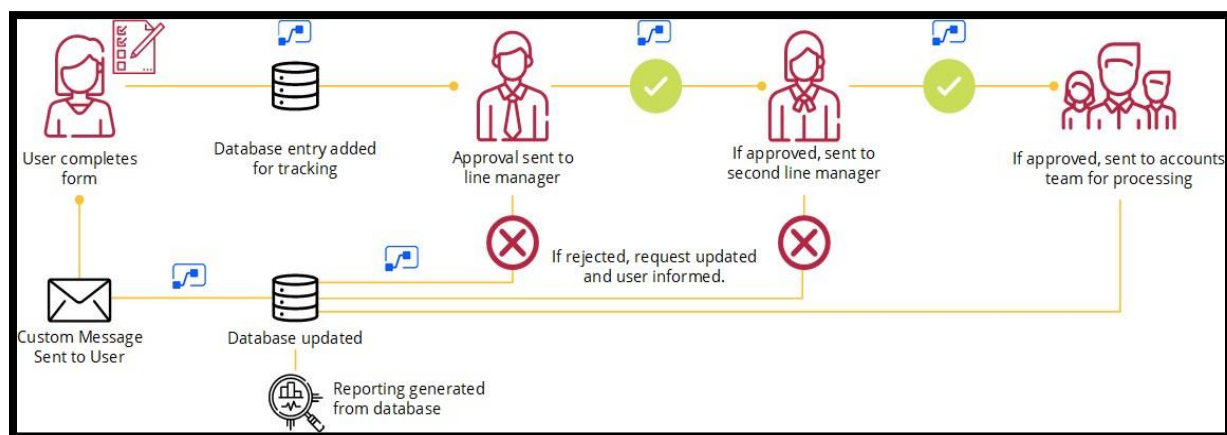
Example 2 - User onboarding and task allocation

Existing Process:

1. User is added to a central group/distribution list as part of onboarding.
2. Key tasks for the user to complete are allocated based on job role/persona User is tested as tasks are completed and results tracked.
3. Progress monitored and line managers kept informed.

By leveraging the power of Power Automate, this streamlined and automated the process as per the example process flow illustrated below with native integration onto your Office applications and of course Microsoft Teams.
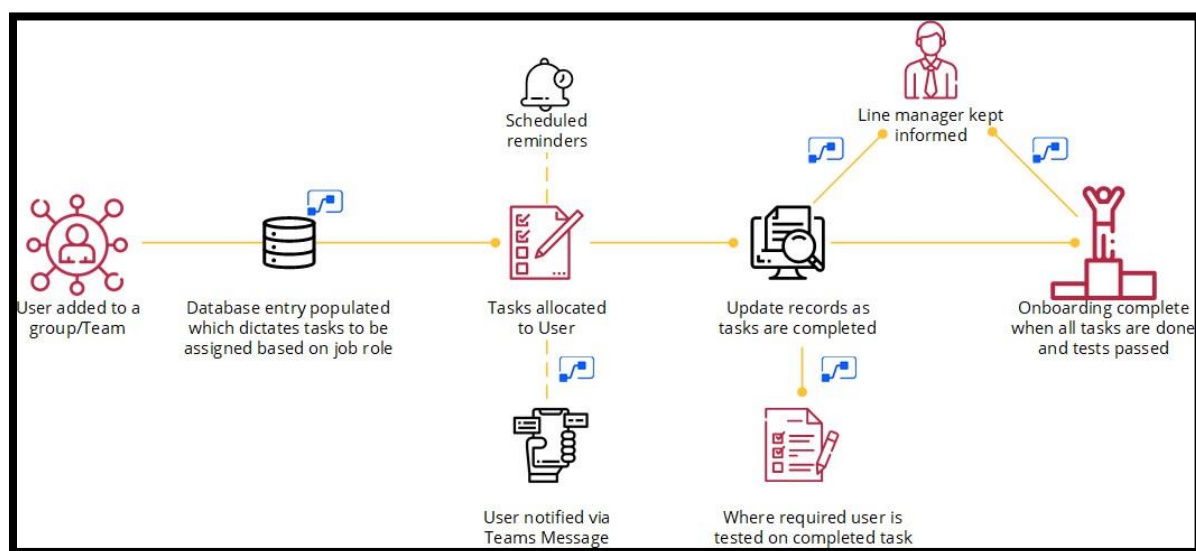
This process could also be extended to include account creation and group allocation through Azure AD automation.

Example 3 – Purchase Order Approval

Existing Process:

1. Request PO number from Admin team
2. Requestor completes PO form.
3. Forwarded to be checked and approved.
4. Forwarded to admin & accounts.
5. Approval confirmed back to requestor.

By utilising Power Automate this has now streamlined and automated the process as shown below
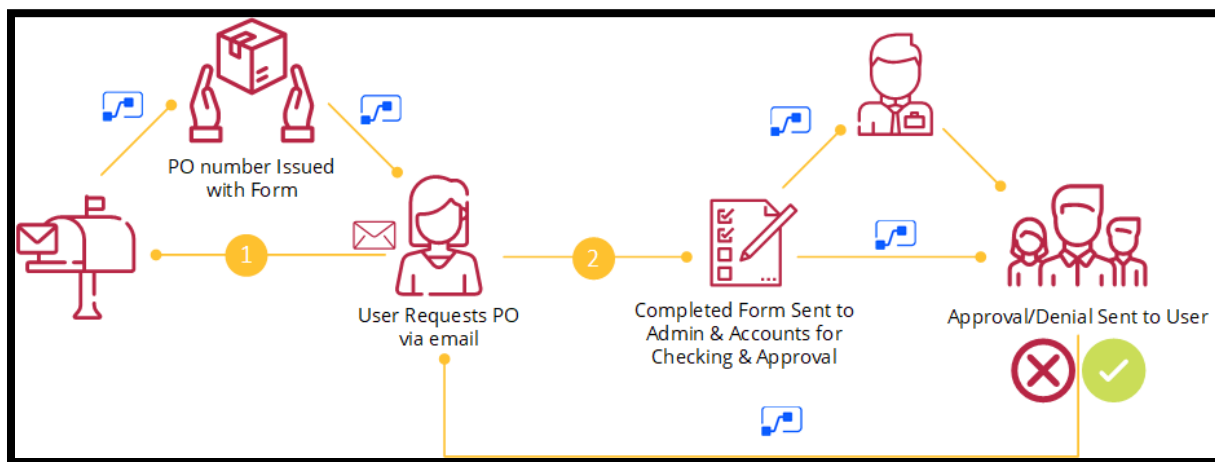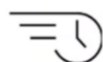
Power Apps

Low-Code and No-Code Application Development

By leveraging Microsoft Power Apps, you can build custom business apps (or extensions to apps) that connect to your business services, your data, Office 365 services and hundreds of third-party apps. Power Apps is platform agnostic and can run on mobile devices, web browsers or via "triggers" allowing quick easy access to key data, securely and safely leveraging all the data access controls available across Microsoft 365.

The key benefits of low-code application development are:

Increased Development Agility   **Speed and cost savings**   **Efficiency**

Example 1 – Sales team accessing customer contract dates.

Existing Process:

1. Request to Operations Team to check dates.
2. Operations Team check dates with commercial to make sure they are correct.
3. Sales then advised of the current state.
4. Sales request reporting for info on the customer
5. Reporting creates a report for that customer.
6. Reporting send report to Sales.
7. Sales speak to customer.

The following shows a solution we put in place which in turn gave the sales team the information they required and cut out the manual steps, saving time for both sales operations and sales lead reporting.

In this example, the data warehouse now populates a contracts table with customers information nightly.

- Contract Start Date
- Contract End Date
- Account Manager
- Email Address

A PowerApp can be connected to the table above which allows the user to search for a customer and apply contract dates along with the account manager and email address.

Browse Contracts

Search items

Waverton Investment Management Ltd
Business Systems (MVNO)

10 Associates Ltd
TTG Ltd

1519 - Thirsk Samsung Customer Center
No Reseller

2 Plan Wealth Management ReCall POC
No Reseller

290502997
Three Ireland

4IT Support
Cardium Solutions

Example 2 – Process required for colleagues return to the office under COVID restrictions.

Existing Process:

1. All employees must inform their line manager and HR of their intent to visit the office.
2. A running tally of attending personnel and headcount is kept ensuring adequate social distancing.
3. In the event the total equals pre-defined limits for any given day a notice is issued to HR/Admin for appropriate denial of future requests
4. On entering premises, employee must manually sign into a register and sign out when leaving.

This process has inherent risk due to the fact an employee could visit the office without prior notification – and risk exceeding the maximum headcount limit on any given date.

The following solution was put in place to reduce the time spent by employees emailing requests to HR/Admin and the subsequent manual checks of headcount for any given day for approval or denial.

Database contains a register of the following:

- Date of request to visit site.
- Intended date of attendance.
- Employee requesting attendance.
- Employee's line manager
- Approval status
- Notification to line manager

A simple Canvas App was built and made available to users on their phones to both request site visits (and view approvals or declines) as well as sign in/out of the site as appropriate on the given day. In addition, a running tally of headcount is calculated, and appropriate alerts issued to HR/Admin via Power Automate.

Power BI

Business Analytics across any platform, data or service.

Power BI pulls together data from almost an unlimited number of sources and can be displayed in a single, interactive dashboard allowing your organisation to find and share meaningful insights in a single view.

Example 1 – Provide analysis of the key search terms and usage of our internal "chatbot".

Once data is visualised, you can share it, query it, ask questions of it and leverage it across different areas of the business.

In this example, we use it to prioritise areas of business improvement, additional training or staff development for example in relation to bot services.

What Cisilion can provide

There is no doubt that the global COVID-19 pandemic has fuelled digital transformation in almost every industry in the biggest "innovate or die" paradigm in recent years. Many organisations now recognise the need to be able to quickly develop and extend functionality with advanced service options to scale up and extend the initial concept or their ideas for improvement, automation, and innovation.
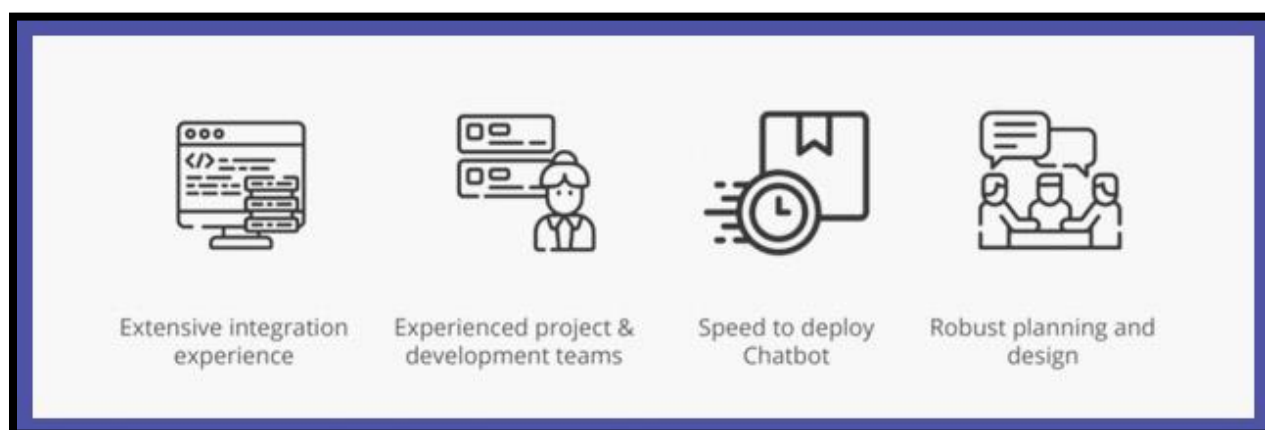
Extensive development resources and experience in these areas, provides customers with an extended toolset, to develop, deploy, secure, and deliver on those efficiency and productivity requirements. Rather than trying to boil the ocean on day one, we aim to work with your teams to helps impart knowledge and expertise, fill immediate knowledge gap, spark ideas and innovation and helps you develop and deploy solutions that drive real business benefits.

Our approach

Our approach is to extend its significant development resources and experience to deliver a chatbot based service with an adaptive modular approach. This assures efficient deployment of core components, with an ability to develop and extend out functionality. Customers are provided with a set of chatbot skills, with an ability to tailor their approach with additional integrated skills, which offers customers huge advantages.

To help you get started, we have built a set of envisaging and fast start enablement services to help impart knowledge and expertise across your business and drive imagination across different departments.

The aim of these is to fill immediate knowledge gaps and let you quickly get started with real life examples relevant to your organisation. These will fuel and innovate teams to better understand, scope and build services that will drive business efficiency with rapid ROI through.

Extensive integration experience   Experienced project & development teams   Speed to deploy Chatbot   Robust planning and design

So where do I start?

We suggest you start with either an envisaging workshop (usually 3-4 hours), or a "hack-a-thon" session (usually a day or two) in which we not only undertake the envisioning workshop and demos but ensure that your business walks away from the session with not only a clear vision of what can be done.

We also have a set of **fixed price quick start services** which we will work to build with you to deliver some of the functionality and examples described in this paper. We can of course provide more than this, but we find these are a great place to start with minimal upfront investment in terms of cost and resource.

1. Power Platform Hack-a-thon	
Designed to see and experience the "the art of the possible".	Delivered virtually, in person or as hybrid workshop over Microsoft Teams. Suggested minimum of 5 attendees.
• Delivered over (usually) 1.5 days. • Overview of the art of the possible related to your organisation • Workshop (with your team in groups) to scope and build a minimum of 1 proof of concept or prototype to help you sell across the organisation. • *General Q&A* • Follow-up and action setting.	
Price	**£2,250**

2. Conception and birth of a virtual assistant	
Deployment of Virtual Assistant (chat bot) within Office 365 environment.	Delivered virtually, in person or as hybrid workshop over Microsoft Teams We allow 3 days consultancy for integration, configuration, and testing
• Overview of Microsoft Power Virtual Agents and use cases • Build of a **General "chat bot"** (based on QnA Maker) • Building of example (but functional) FAQ Service (customer supplied F&Q) • Implementation of Microsoft Calendar and To Do Skill	
Option of implementing **one** additional skill as part of this PoC. This requires agreement in advance and is subject to app **API** being made available by customer or application owner	
Implementation of the Power BI usage and Insights Dashboard	
Price	**£5,995**

3. Power Automate – Workflow Automation Pilot

A look inside and chance to design and develop business workflow efficiency with a pilot Power Automate solution.	Delivered virtually, in person or as hybrid workshop over Microsoft Teams.

• **½ day workshop** to walk through key components and benefits of low-code application development with Power Automate including the new UI workflow automation tools including licensing considerations.
 	
• ½ day idea generation and scoping to peer inside the business, look at existing areas of manual process or repetitiveness to use as pilot.
 	
• **Up to 3 days** of development consultancy to work with the organisation to "build" to automate / simply or improve the business intelligence behind the chosen area such as.
 	
    o   Document or Expense Approval (via Teams)
 	
    o   User onboarding and task allocation
 	
    o   Expense or PO approval process (multi-level approval)
 	
• Hand-over, follow-up and action setting.
	We allow 3 days consultancy for integration, configuration, and testing

Price	**£6,495**

4. Power Apps – Low Code Application Pilot

A look inside and chance to design and develop a functional low code app	Delivered virtually, in person or as hybrid workshop over Microsoft Teams.

• **½ day workshop** to walk through key components and benefits of low-code application development with PowerApps including licensing.
 	
• ½ day idea generation "hack-a-thon" to peer inside the business, build and promote ideas and scope pilot solution are to solve using a PowerApp
 	
• **Up to 3 days** low-code development consultancy to work with the organisation to "build" a PowerApp similar in scope to the following examples: -
 	
    o   Sales Team Customer App
 	
    o   COVID-19 Safe – return to work tracker
 	
• Hand-over, follow-up and action setting.
	We allow 3 days consultancy for integration, configuration, and testing

Price	**£6,495**

5. Dashboard in a Day	
Deliverables	Delivered virtually, in person or as hybrid workshop over Microsoft Teams. 1-day total allocation in additional to initial intro call.
• Delivered over 1 days. • Overview of Microsoft Power BI services, data sources and data Q&A • Workshop to look at and agree a business or data area that would benefit from Visualisation and data manipulation in Power BI • *Build of a dashboard as above scope.* • Follow-up and action setting.	
Price	**£1,495**

Terms and Conditions:

• Pricing is subject to VAT at 20%
• All pricing subject to a free technical design workshop and agreement of Statement of Works
• Additional work charged on day rate of £1,095.00 unless otherwise agreed in writing.
• Pricing excludes Azure resource licensing, Microsoft 365 and Power Platform licensing unless otherwise agreed.
• Trail tenant and licensing available on request.

Please contact your account manager for further information, to book at call or enquire about any of the quick start bundles discussed within this document.

Speak to one of our IT experts today