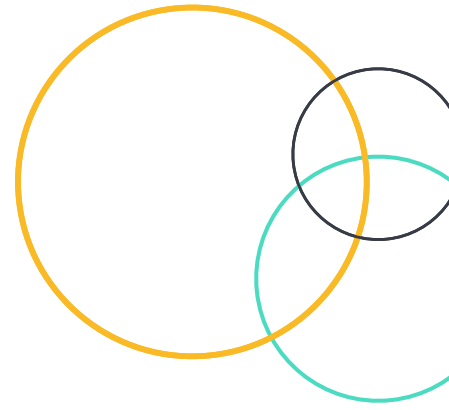


Power Automate: Unlocking Efficiency with Automation



Power Automate is a powerful tool from Microsoft designed to streamline business processes through automation. By connecting your applications and automating repetitive tasks, Power Automate helps organisations reduce manual workloads, minimise errors, and free up time for higher-value work. It's part of the Microsoft Power Platform and integrates seamlessly with the whole Microsoft platform as well as Salesforce, Amazon, Google, Oracle and many more.

Why choose Power Automate?

Efficiency gains: Automate time-consuming tasks, allowing teams to focus on strategic goals and higher-value work, driving overall productivity.

Cost savings: Reduce the overhead associated with repetitive manual processes, enabling organisations to achieve more with fewer resources.

Scalability: Enable your business to grow efficiently by automating manual processes, reducing the need to hire additional staff as demand increases.

Improved accuracy: Minimise human errors in data handling and workflows, ensuring consistent, reliable outcomes and reducing costly mistakes.

What can you Automate?

- **Reporting:** Automate data consolidation and presentation, providing real-time insights for management and board meetings.
- **Repetitive admin tasks:** Create Word, Excel and PDF documents automatically using templates and your data, no more cut and paste from different systems.
- **Client communications:** Automate sending documents, scheduling notifications and follow-ups via e-mail and Teams.
- **Service management:** Streamline ticketing systems by automating routine escalations and resolutions.
- **and many more routine processes.**



Real world examples: How could you use Power Automate?

Client onboarding

Problem: An accountancy firm needs to build complex folder structures and customised documents for new clients. This process is time-consuming and prone to delays during busy periods, with typos and naming inconsistencies requiring folders to be recreated.

Solution: Power Automate triggers when a new client is created in their accountancy platform, automatically generating a standardised folder structure in SharePoint and customised documents using Word and Excel templates. Documents are converted to PDF where needed and emailed directly to the client.

Impact: End-to-end automation saves time, ensures folder structures and documents are created instantly as clients onboard, and reduces errors by pulling client data directly from the accountancy platform.

Arranging engineer visits and tasks

Problem: A service organisation with dozens of engineers must create daily task lists for client approval. Scheduling and task data are stored in separate systems, requiring manual cut-and-paste, which is error-prone and time-consuming. Clients often fail to respond, resulting in aborted visits.

Solution: Automation runs weekly to pull scheduling and task data, generating PDF task lists using a template. These are emailed to clients with 'Approve' and 'Decline' buttons that trigger notifications. Clients who don't respond receive automated follow-up emails.

Impact: Automating task list creation saves days of admin work, while approval buttons significantly increase client response rates, reducing aborted visits and enabling more billable engineer time.

New starter HR documents

Problem: Preparing contracts, welcome letters, and other documents for new starters is time-consuming and prone to errors, particularly when onboarding large groups.

Solution: Power Automate uses a Microsoft Form for single starters or an Excel spreadsheet for groups to generate contracts and standard employment documents via Word templates. Documents are saved securely and a link is emailed to HR for review.

Impact: Automation reduces HR workload, ensures consistent and rapid document creation when offers are made, and enhances the onboarding experience for new hires.

Importing data from cloud systems for reporting

Problem: Management reporting requires data from multiple cloud systems. Leaders manually run reports, copy data into Excel, and update reports only when necessary due to the time-intensive process.

Solution: Power Automate uses cloud platform APIs to pull data from various systems multiple times daily, storing it securely in a Dataverse database within Microsoft 365. Power BI consolidates this data with other sources for real-time reporting.

Impact: Automation eliminates manual data collation, keeping reports always up-to-date and accessible to leadership. This enables faster, data-driven decisions and allows leaders to focus on insights rather than report preparation.

Power Automate reduces labour-intensive processes to achieve significant cost savings, and enhances employee satisfaction by enabling staff to focus on meaningful work. With Power Automate, the opportunities for efficiency are vast and can be tailored to meet the specific needs of any organisation.

Find out more

Contact us for more information on how Power Automate can help your organisation.

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