

848

848 Efficient Business – Process Automation and Optimisation

Part of

The Efficient Business

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Driven by **people.**



Powered by **intelligence.**



Value chain **led.**

Service Overview and Context

What Our Customers Experience

Organisations depend on the reliable flow of information and tasks across teams, functions, and systems. Yet many day-to-day processes are still manual, inconsistent, or dependent on individual knowledge.

Employees repeat the same tasks, re-enter information across multiple systems, and rely on workarounds instead of defined processes. As workloads increase, the volume of manual effort grows, slowing down delivery and introducing avoidable friction into daily operations.

Leaders struggle to understand why tasks take longer than expected, where processes break down, and why teams experience delays or duplication. Operational data is hard to capture, making it difficult to identify bottlenecks or prioritise improvement.

As organisations scale, these inefficiencies compound, reducing productivity and limiting the ability to deliver services predictably. These conditions create a clear need for structured automation and optimisation to reduce effort, improve flow, and support consistent execution across the organisation.

Our Framework for Clarity and Improvement

848's Intelligent Business Framework provides the structure organisations use to redesign processes, streamline workflows, and apply automation in a controlled and outcome-led manner.

It connects people, processes, and digital tools into a unified model for improving operational efficiency. Through this Framework, automation is not deployed in isolation. It is introduced as part of a broader transformation of how work is performed, ensuring that improvements are sustainable and aligned to organisational goals.

The Framework supports traceability and consistency by defining how processes should operate, how digital tools should support those processes, and how value flows through the organisation.

It ensures that automation enhances human work, reduces unnecessary effort, and strengthens predictability across operational tasks. This creates the conditions required for efficient, scalable, and modern ways of working.

The Efficient Business Outcome Area

The Efficient Business outcome area improves operational effectiveness by reducing manual effort, simplifying processes, and enabling employees to perform tasks consistently and confidently.

It focuses on ensuring that work flows smoothly through the organisation and that digital tools support rather than hinder productivity. This outcome area provides the clarity needed to identify inefficiencies, redesign processes, and remove obstacles that limit operational performance.

By strengthening capability in this area, organisations improve coordination, reduce bottlenecks, and gain greater visibility into how work is performed. Processes become easier to follow, handoffs more reliable, and tasks more predictable.

This supports a modern, efficient workplace where teams can deliver value quickly and consistently. Process Automation & Optimisation is a core component of this outcome area, enabling organisations to enhance productivity and streamline operations at scale.

848 Efficient Business – Process Automation and Optimisation

The Process Automation & Optimisation Service Stream improves how work flows through the organisation by reducing manual effort, streamlining processes, and introducing automation where it adds value.

It addresses the challenge of inconsistent, labour-intensive workflows by establishing clear, efficient processes and enabling digital automation to support everyday tasks.

This Service Stream helps organisations identify which processes can be optimised, redesigned, or automated to remove friction and improve throughput. It ensures that automation is applied purposefully, aligned to strategic goals, operational needs, and the reality of how work is performed.

Process Automation & Optimisation supports the Efficient Business outcome area by improving process clarity, reducing variation, and enabling teams to spend time on meaningful work rather than repetitive tasks.

By combining process improvement with targeted automation, the stream strengthens operational efficiency, enhances employee experience, and enables the organisation to scale its processes with confidence.

Purpose of This Document

This document defines how 848 delivers the Process Automation & Optimisation Service Stream within the Efficient Business outcome area. It explains the purpose of the stream, how it aligns to the Intelligent Business Framework, and what organisations should expect from its delivery.

It outlines the methods, scope, and structures used to assess, streamline, and automate processes across teams and functions.

The document is intended for procurement teams, operational leaders, technology owners, and process stakeholders who require clarity on how this service improves workflow efficiency and reduces manual effort.

It should be read alongside the Intelligent Business Framework and the Efficient Business overview, which together explain how Process Automation & Optimisation contributes to predictable, efficient, and scalable ways of working.

The Intelligent Business Framework

Modern organisations depend on technology that support clear outcomes: reliable operations, effective protection, efficient processes, informed decisions, and the ability to adapt. Achieving these outcomes requires more than individual systems or isolated projects. It demands a structured approach that links technology, governance, and operational practice to the results the organisation is working toward.

The Intelligent Business Framework provides this structure. It is the model 848 uses to organise, deliver, and improve services in a way that aligns directly to business need. Rather than presenting a catalogue of independent services, the Framework shows how each area of capability connects to a defined aspect of organisational performance. This gives customers a consistent way to understand what each service is designed to achieve and how it contributes to wider improvement.

The Framework also brings coherence across the 848 portfolio. It defines the outcome areas that modern organisations typically strengthen and introduces a common language for discussing priorities, risks, and investment decisions. This supports focused planning and ensures work progresses in a coordinated and integrated manner, regardless of where an organisation chooses to begin.

Introduction to 848's Intelligent Business Framework

An Intelligent Business is an organisation that develops and operates its technology, processes, and governance in a way that directly supports its core outcomes. It uses platforms, data, security controls, and ways of working to maintain resilience, reduce risk, improve performance, and adapt to change in a controlled and predictable manner.

In an Intelligent Business, technology is not implemented as a set of isolated systems. It functions as an integrated part of how work is carried out, how decisions are made, and how the organisation meets its obligations. Stability, protection, efficiency, insight, and innovation are treated as connected aspects of the operating model rather than separate technical concerns.

An Intelligent Business has clear visibility of its environment, understands how its services and processes interact, and makes decisions based on evidence, risk, and organisational impact. It can respond effectively to new demands, maintain operational continuity as conditions change, and introduce new capability without undermining what is already in place.

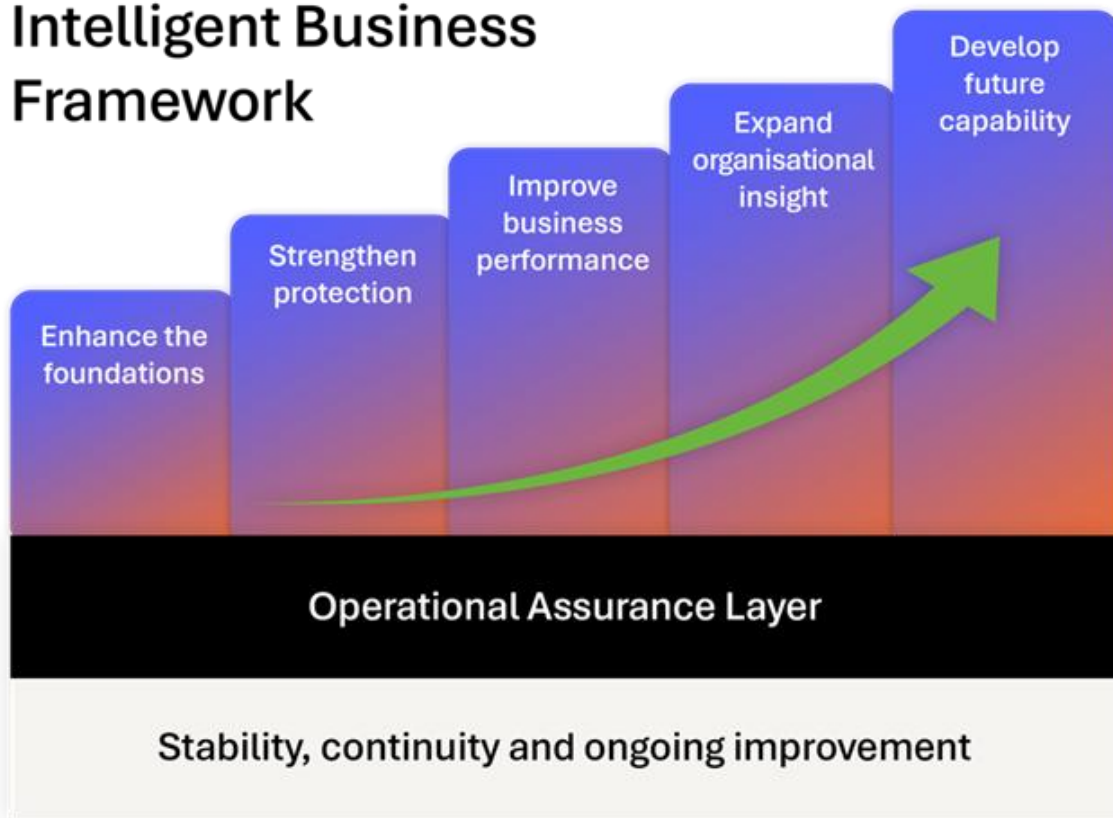
Ultimately, an Intelligent Business uses technology, governance, and operational practice to support reliable, secure, and continually improving performance. It focuses on outcomes, aligns effort to organisational need, and ensures that improvements contribute to long-term capability rather than short-term fixes.

The Intelligent Business Framework is the structure 848 uses to help organisations develop the capabilities required to operate in this way. It translates these characteristics into clear areas of focus, showing how different types of work contribute to stability, protection, efficiency, insight, and future capability. By organising services around these areas, the Framework provides a predictable way to understand what each service achieves and how it supports wider operational goals. This creates a practical link between the outcomes an Intelligent Business depends on and the work required to build and maintain them.

The Operating Domains of The Intelligent Business

An Intelligent Business strengthens capability across several interconnected domains that influence how effectively the organisation operates. These domains reflect the areas where stability, protection, performance, insight, and future capability are developed over time. Each domain represents a different aspect of organisational need, and improvements in one area support progress in others. Organisations may focus on any domain depending on their priorities, with no fixed starting point or prescribed order.

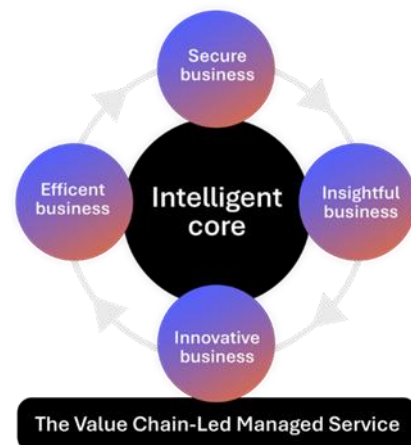
Operating Domains of the Intelligent Business Framework



The Operating Domains describe where organisations strengthen capability, while the Outcome Areas show how the 848 portfolio is structured to support that development. Each Outcome Area represents a defined category of work within the Framework, organising services into clear themes that align to organisational performance. Together, they translate the operating domains into a practical, service-aligned structure that enables consistent planning, delivery, and improvement.

The Six Outcome Areas

The Outcome Areas represent the structured way the Intelligent Business Framework organises capability. Each area describes a distinct aspect of organisational performance and provides the lens through which 848 designs, delivers, and aligns its services. Together, they form a connected model that supports stable, secure, efficient, insightful, and adaptable operations. These areas are not sequential; organisations may focus on any one of them depending on priorities, pressures, or the state of their current environment.



The Intelligent Core

The Intelligent Core provides the technical foundations that support the organisation's ability to operate reliably and scale responsibly. It focuses on the architecture, platforms, and engineering practices that underpin modern digital environments. This includes establishing stable cloud environments, defining coherent enterprise architecture, and applying disciplined platform engineering approaches such as DevOps and SecDevOps.

Strengthening the Intelligent Core ensures that technology aligns to organisational objectives, reduces operational fragility, and creates the structural consistency required for higher-level capability. It enables the organisation to introduce new services, adapt to change, and maintain performance without compromising stability or security.

The Secure Business

The Secure Business focuses on protecting people, data, applications, and operations. It helps organisations understand their risk landscape, implement appropriate safeguards, and maintain resilience as threats and environments evolve. This outcome area ensures that security is embedded into everyday operations rather than treated as a separate or reactive activity.

By strengthening this area, organisations gain clearer visibility of their exposure, greater confidence in their protection measures, and a structured way to govern risk. It supports responsible decision-making and ensures that security contributes directly to safe, predictable, and well-managed operations.

The Efficient Business

The Efficient Business strengthens how work flows across the organisation. It focuses on reducing friction, improving process reliability, and supporting teams to deliver work consistently and effectively. This outcome area addresses the operational constraints that affect performance, from duplicated effort and unclear responsibilities to inconsistent ways of working.

By improving efficiency, organisations reduce operational drag and increase the capacity of teams to deliver value. This supports better utilisation of technology, clearer accountability, and smoother end-to-end processes that contribute to predictable, scalable performance.

The Insightful Business

The Insightful Business enables organisations to make informed, timely, and confident decisions. It focuses on improving visibility of operations, strengthening reporting, and ensuring that data is captured, managed, and interpreted in a way that supports organisational objectives.

Developing this outcome area improves the organisation's ability to understand current performance, identify emerging issues, and assess the impact of change. It provides the foundation for measurement, analysis, and evidence-based planning across all areas of the Intelligent Business.

The Innovative Business

The Innovative Business supports the development of new capability and structured improvement. It enables organisations to explore new approaches, adopt modern tools and methods, and respond effectively to changing needs or opportunities. This outcome area covers areas such as automation, AI adoption, and the creation of new service models or ways of working.

Strengthening this area helps organisations evolve at a controlled pace. It ensures that innovation is introduced safely, aligned to organisational priorities, and built on a stable foundation, without disrupting existing operations or increasing the organisation's level of risk.

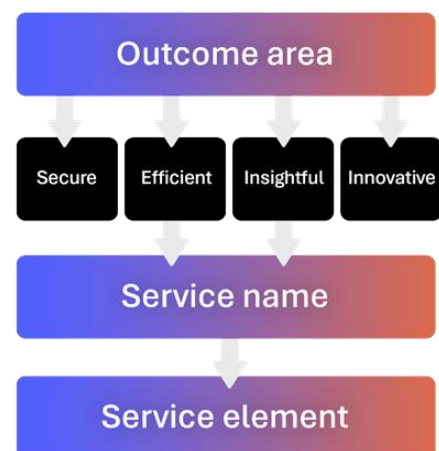
The Value Chain-Led Managed Service

The Value Chain-Led Managed Service provides the operational assurance that underpins every other outcome area. It maintains continuity, stability, and performance by aligning support to the organisation's value chain — the real end-to-end flow of work that keeps the organisation operating.

This outcome area ensures that services are monitored, governed, and improved through a structured, consistent approach. It reduces operational friction, maintains alignment between service delivery and business need, and supports the organisation's ability to sustain improvements made across the other outcome areas.

How Services Align to the Outcome Areas

Each Outcome Area is supported by a set of Service Streams, and each Stream contains the individual Service Elements that make up the work delivered. This structure provides a clear line of sight from each Service Element to the organisational outcome it supports. It ensures that services are delivered consistently, contribute to defined areas of performance, and can be selected according to the organisation's priorities without needing to follow a fixed sequence or maturity path.



The Efficient Business

The Efficient Business is the outcome area that focuses on how organisations execute the work that supports their strategic goals. It addresses the operational systems, processes, and activities that underpin daily performance across the value chain. Where The Intelligent Business defines how organisations create clarity, alignment, and control, the Efficient Business applies those principles to the way work is structured, routed, and completed.

What the Efficient Business Is

The Efficient Business is the operational layer of The Intelligent Business. It provides the methods, services, and capabilities that streamline operational work, remove friction, and ensure that activities are executed in a consistent and controlled way. It aligns business applications, process design, automation, data flows, and workplace tools into a coherent operational framework. This framework supports predictable execution by simplifying processes, reducing manual effort, and enabling information to move cleanly between systems and teams.

It ensures that the operational environment reflects the organisation's strategic intent and is able to adapt to changes in demand, scale, or operating model.

How Work Is Structured Within the Efficient Business

Work within the Efficient Business is structured around the flow of operational activity through the value chain. The structure focuses on four areas of operational enablement:

- **Process and workflow design:** Activities are analysed, standardised, and optimised to reduce variability, improve accuracy, and establish repeatable patterns of work.
- **Applications and line-of-business capability:** Systems that support operational roles are configured and maintained so they reflect defined processes and provide users with the information and functions required to complete tasks efficiently.
- **Automation and integration:** Routine tasks, handoffs, and data movements are automated. Systems are connected to minimise rekeying, reduce error rates, and enable real-time flow of operational information.
- **Workplace productivity:** Employees are supported with structured digital tools, role-based guidance, and collaborative environments that provide clarity and consistency across dispersed teams.

These components work as a single operational ecosystem. Each Efficient Business service focuses on a specific part of the ecosystem, but all are aligned to improving throughput, accuracy, and the quality of operational decision-making.

What the Efficient Business Helps Organisations Achieve

The Efficient Business enables organisations to operate with greater reliability and reduced operational overhead. It ensures that core processes are executed in a consistent way, supported by the right systems, data, and automation. This improves productivity and reduces the dependence on manual intervention, complex workarounds, or individual knowledge.

The outcome is an operational environment that is easier to manage, easier to scale, and easier to continually improve. Organisations gain clearer insight into performance, faster execution of routine activity, improved accuracy in operational data, and a structured foundation for targeted automation and transformation.

It also supports operational resilience. When processes, systems, and data flows are standardised and integrated, organisations can sustain performance through change, growth, and external pressure.

How This Outcome Area Supports the Intelligent Business

The Efficient Business delivers the operational capabilities required for The Intelligent Business to function. The Intelligent Business defines how organisations achieve connected strategy, secure operations, and outcome-led governance. The Efficient Business provides the reliable operational environment that allows those principles to take effect.

By aligning processes, applications, automation, and data, the Efficient Business provides the operational integrity necessary for secure, intelligent decision-making. It ensures that information is accurate and timely, that operational activity is controlled and consistent, and that the tools used by employees support the organisation's strategic intent.

The result is an operating model where strategic intelligence, secure practices, and operational execution reinforce each other. The Efficient Business acts as the bridge between strategic ambition and the day-to-day activity required to deliver measurable outcomes across the value chain.

848 Efficient Business – Process Automation and Optimisation

848 EFFICIENT BUSINESS PORTFOLIO

WORKFORCE PRODUCTIVITY & COLLABORATION	PROCESS AUTOMATION & OPTIMISATION	CONNECTED BUSINESS OPERATIONS	CUSTOMER AND SERVICE EXPERIENCE	ONGOING EFFICIENCY ENABLEMENT SERVICE
Microsoft 365 Modern Workplace Foundation	Business Process Discovery and Mapping Workshop	Dynamics 365 Business Central Implementation	Dynamics 365 Sales Implementation and Automation	Efficient Business Adoption Framework
Microsoft Teams Deployment and Optimisation	Automation Governance and Environment Setup	Business Central Upgrade and Modernisation Service	Dynamics 365 Customer Service Implementation and Optimisation	Continuous Capability Maturity Uplift
SharePoint Online Intranet, Knowledge Hub, and Content Management Enablement	Automation Workflow Design and Deployment	Dynamics 365 Project Operations Deployment	Dynamics 365 Field Service Deployment	Improvement Implementation Sprint Packs
Modern Device Management	Automation Development and Integration Service with Microsoft Power Apps	Financial Management and Reporting Enablement	Dynamics 365 Marketing Implementation	Evergreen Release and Change Readiness Support
Viva Suite Deployment and Employee Experience Programme	AI Builder and Intelligent Automation Enablement	Supply Chain and Inventory Optimisation Service	Dynamics 365 Customer Self-Service Enablement	
Hybrid Meeting and Collaboration Device Standardisation	Dynamics 365 Process Automation and Optimisation	Business Process Standardisation and Optimisation	Dynamics 365 Contact Center Deployment	
Collaboration Governance and Lifecycle Management Framework	RPA and Legacy Process Modernisation	Operations Integration and Data Connectivity Service	Dynamics 365 Customer Insights Enablement	
Microsoft 365 Copilot Readiness and Enablement	Automation Adoption and Citizen Developer Enablement	Power Platform Extensions for Business Central	Dynamics 365 Customer Voice Deployment	
Microsoft 365 Adoption and Change Management Service	Process Analytics and Continuous Improvement Review	Connected Operations Performance Review	Power Platform Extensions for Customer Experience	
Digital Workplace Continuous Improvement Review		Business Central Support and Managed Service	Customer Experience Support and Improvement Service	

Alignment to The Intelligent Business

The Process Automation & Optimisation Service Stream strengthens the Intelligent Business by improving how work flows through the organisation and ensuring that processes operate with clarity, consistency, and predictability.

It supports efficient and scalable operation by reducing manual effort, eliminating duplication, and ensuring that digital tools and human activity work together in a coordinated and purposeful way.

Within the Intelligent Business Framework, this Service Stream enhances operational reliability by establishing defined processes that are easier to follow, monitor, and improve. It enables organisations to understand how tasks are completed, where bottlenecks occur, and how automation can simplify or accelerate work. This clarity allows leaders and teams to make informed decisions about where optimisation will deliver the most value.

The stream also improves value flow by aligning workflows to business outcomes, ensuring that tasks progress smoothly from one step to the next. By standardising processes and applying automation where it supports efficiency, the organisation reduces friction, increases throughput, and strengthens the end-to-end delivery of services.

Process Automation & Optimisation further supports human-centric operation by removing unnecessary manual activity and enabling employees to focus on higher-value work. It improves consistency across teams, enhances user experience, and reduces the cognitive load associated with unclear or repetitive tasks.

This supports a working environment in which people can perform their roles more effectively and confidently.

Through these contributions, the Service Stream reinforces the Intelligent Business vision: an organisation where processes, people, and digital tools operate in harmony to deliver efficient, scalable, and predictable outcomes.

Service Purpose

The Process Automation & Optimisation Service Stream exists to address the operational challenge of manual, inconsistent, and inefficient workflows that slow down delivery and reduce productivity.

Many organisations rely on processes that have evolved informally over time, depend on individual knowledge, and require repeated effort across multiple systems. These conditions limit throughput, create avoidable delays, and reduce confidence in how work is completed.

This service provides the structured analysis, process improvement, and targeted automation required to modernise and streamline how tasks are performed. It improves organisational capability by simplifying workflows, removing unnecessary steps, and enabling digital tools to support consistent and efficient work.

Through clear process design and purposeful automation, teams gain predictable and repeatable ways of working that enhance operational performance.

The purpose of Process Automation & Optimisation is to create a working environment where employees can focus on meaningful activity rather than manual administration. It improves the flow of work across functions, strengthens coordination, and supports the organisation in delivering outcomes more efficiently.

By reducing effort and improving clarity, the service supports the broader Efficient Business outcome area and helps teams operate with confidence, consistency, and greater productivity.

What This Service Provides

The Process Automation & Optimisation Service Stream provides individuals across the organisation with clearer, more efficient ways of working by streamlining processes and reducing manual effort.

It ensures that workflows are understandable, repeatable, and supported by digital automation where appropriate. Each role group benefits from improved clarity, simplified tasks, and more predictable operational flow.

Role Group	What They Gain	Why They Matter
Executive Teams & Senior Leaders	Clear visibility of where process inefficiencies exist and how automation improves performance. Evidence of operational improvements aligned to organisational objectives. Confidence that teams are focused on outcomes rather than repetitive manual tasks.	They set strategic direction and rely on efficient processes to execute organisational priorities.

Governance, Risk & Compliance Stakeholders	Consistent and traceable processes that support operational oversight. Improved alignment between defined procedures and day-to-day execution. Clarity on how workflows are structured and maintained.	They ensure processes are followed reliably and support organisational governance.
Operational and Business Leaders	Improved understanding of where workflows slow down and how automation can help. More predictable process performance and reduced variation across teams. Tools and practices that support efficient service delivery.	They coordinate operational outcomes and require streamlined processes to meet delivery expectations.
People Managers and Team Leaders	Clearer, standardised processes for their teams to follow. Less manual administration and reduced risk of errors. Improved ability to monitor workflow performance and identify improvements.	They guide day-to-day activities and depend on efficient processes to maintain productivity.
Knowledge Workers and Operational Staff	Simplified, automated workflows that minimise repetitive manual effort. Clearer task expectations and reduced need for workarounds. More time to focus on higher-value activity.	They perform the operational tasks that deliver organisational value and are directly impacted by process inefficiencies.

How This Service Is Delivered

The Process Automation and Optimisation service stream is delivered through a structured methodology that ensures automation and optimisation activities are built on clear understanding, aligned to defined outcomes, and introduced into the organisation in a controlled and sustainable way. This methodology is applied consistently across all Service Elements within the stream.

Method Component	Stage 1: Understand Current Processes & Operational Challenges	Stage 2: Redesign & Optimise Workflow Patterns	Stage 3: Apply Automation Where It Adds Value	Stage 4: Embed Optimised Processes & Automations	Stage 5: Review, Measure & Refine for Continued Improvement
Stage Description	This stage examines how processes operate today and identifies the tasks, handoffs, and dependencies that influence productivity and workflow performance.	This stage develops simplified and efficient processes that reduce effort, remove complexity, and support predictable task flow.	This stage introduces automation to remove repetitive manual effort and support efficient, consistent execution of tasks.	This stage integrates the improved workflows and automation into daily operations, ensuring employees understand and adopt new working practices.	This stage ensures process performance and automation effectiveness are monitored and refined as organisational needs evolve.
Purpose of the Stage	To ensure improvements are based on real operational conditions and aligned to organisational priorities.	To create optimised processes that provide a strong foundation for automation and improved productivity.	To enable digital tools to support efficient working practices and reduce operational overhead.	To ensure improvements become part of everyday practice and are sustained long term.	To maintain and enhance operational performance, ensuring processes continue to deliver value.
Activities Included	Reviewing existing processes, procedures, and working patterns Assessing manual activities, bottlenecks, and workflow variations	Redesigning workflows to remove unnecessary steps Defining streamlined processes and standard operating patterns	Identifying automation opportunities within optimised workflows Designing low-code or no-code automation components Applying automation to routine tasks, approvals,	Providing guidance and enablement for new workflows Supporting teams as they transition to optimised processes	Reviewing workflow performance and automation outcomes Gathering feedback from employees and operational leaders Identifying areas for further optimisation

	Mapping information movement and task dependencies	Establishing clear roles, responsibilities, and handoffs	notifications, and data movement	Ensuring automation is used consistently and effectively	Updating processes, automations, or documentation as required
	Identifying opportunities for simplification or automation	Aligning workflows to desired outcomes and performance expectations	Ensuring automations support clearly defined workflows	Establishing process governance tasks to maintain clarity over time	
What This Provides	A clear and validated understanding of how work flows today and the challenges that limit efficiency.	Documented, consistent workflows that support efficient day-to-day operation.	Automated activities that reduce manual effort and improve the reliability of process execution.	A smooth transition to new ways of working, supported by clear communication and operational readiness.	A cycle of continuous improvement that strengthens workflow efficiency over time.

Service-Level Benefits

The key business-level benefits of the service are:

- Reduces manual effort through structured, reliable workflow automation.
- Improves task clarity by defining consistent operational steps.
- Strengthens decision-making with clear, rule-based process progression.
- Enhances accuracy by limiting variation in task execution.
- Increases throughput by streamlining repetitive operational activity.
- Improves information flow across teams and systems.
- Supports employees by simplifying complex or multi-step processes.
- Reduces operational friction through predictable task handoffs.
- Creates process transparency through defined structures and rules.
- Enables continuous improvement through measurable workflow performance.

Service Scope

In-Scope Summary

The Process Automation & Optimisation Service Stream covers the structured activities required to understand existing workflows, redesign processes for greater efficiency, and apply automation where it improves productivity and reduces manual effort.

It focuses on simplifying how work is performed, enabling digital tools to support operational processes, and embedding optimised workflows across teams. The scope includes analysis, design, enablement, and continuous improvement activities that strengthen the organisation's ability to operate efficiently within the Efficient Business outcome area.

Theme	Description
Workflow and Process Discovery	Reviewing current processes, manual activities, and operational challenges to understand how work is performed today.
Process Redesign and Optimisation	Simplifying workflows, defining streamlined practices, and establishing clear roles and handoffs.
Automation Design and Enablement	Creating and enabling low-code/no-code automation components that support operational tasks.
Data and Information Movement	Improving the accuracy and flow of information within redesigned processes.
Operational Alignment and Adoption Support	Helping teams transition to optimised processes and ensuring consistent adoption.
Digital Workplace Integration	Ensuring that tools such as Microsoft 365, Power Automate, and related platforms support efficient processes.
Governance and Process Clarity	Establishing lightweight governance tasks that maintain consistent and reliable workflows.
Continuous Improvement and Process Refinement	Reviewing performance and identifying opportunities to enhance efficiency over time.

Out-of-Scope Summary

The Process Automation & Optimisation Service Stream does not include the implementation of large enterprise platforms, system remediation, custom software development, or organisational restructuring activities.

It does not cover work that falls within unrelated outcome areas or requires deep technical engineering outside the scope of workflow optimisation and light automation.

These exclusions ensure the service remains focused on streamlining processes, reducing manual effort, and enabling efficient working practices.

Exclusion	Description
Enterprise System Implementation	Deploying or configuring major platforms such as ERP, CRM, or HR systems.
Custom Software or Application Development	Building bespoke applications or integrations not required for process automation.
Infrastructure or Network Engineering	Making changes to servers, networks, or underlying infrastructure.
Advanced Code-Based Automation	Developing automation requiring full-code engineering, scripting, or custom API solutions beyond agreed scope.
Remediation of Technical or Operational Issues	Fixing unrelated system faults, broken processes, or errors discovered during analysis.
Business Continuity or Operating Model Redesign	Performing organisation-wide operational restructuring or business continuity planning.
Managed Service or Ongoing Operational Running	Providing continuous operational support or management of automated workflows.
Training Programmes Outside Scope	Delivering organisation-wide training not required for process adoption or workflow clarification.
Compliance or Audit Activity	Performing regulatory audits or certification services.
Unscoped Business Units or Processes	Reviewing or redesigning processes not included within the agreed service boundaries.

Service Element: Business Process Discovery and Mapping Workshop

Description

The Business Process Discovery and Mapping Workshop establishes a clear understanding of how work is currently performed across the organisation. It examines the tasks, decisions, handoffs, and information flows that employees rely on to complete their roles, and documents the process in a way that supports informed improvement and automation planning.

Through structured workshops and focused analysis, the service identifies where processes depend on manual effort, where friction occurs, and where inconsistencies or delays affect performance. It also confirms the systems, data, and dependencies involved in the execution of each process.

The workshop produces documented process maps that reflect the operational reality of the workflow, including steps, roles, inputs, outputs, and exception paths. These maps are supported by a register of issues, risks, and constraints that influence the efficiency or reliability of the process.

Automation and optimisation opportunities are identified and assessed based on effort, impact, dependency, and alignment to organisational priorities. The resulting outputs provide a structured basis for determining where automation could add value and which processes should be prioritised for future improvement activities.

The outcome is a clear, evidence-based understanding of current working practices and a well-defined set of opportunities for process automation and optimisation. This ensures future delivery is based on accurate information, reducing uncertainty and enabling organisations to progress with confidence.

Deliverables

Deliverable	Description
Process Discovery Workshops	Structured sessions to review tasks, decision points, data requirements, handoffs, and system interactions with process stakeholders.
Current-State Process Maps	Documented maps showing the flow of work, roles, steps, inputs, outputs, and exception paths.
Process Narrative and Supporting Documentation	Written description of the process, including key activities, variations, dependencies, and influencing factors.
Issues, Risks, and Constraints Log	A record of operational challenges, bottlenecks, risks, and limitations identified during discovery.
Automation and Optimisation Opportunity Register	A structured list of tasks or steps that could be automated or simplified, including high-level feasibility considerations.
Prioritisation Matrix	An assessment of opportunities based on impact, effort, dependency, and value alignment to support structured decision-making.

Discovery and Mapping Report	A consolidated summary of findings, maps, opportunities, prioritisation outcomes, and recommendations for next steps.
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Dependencies

Delivery of this Service Element requires:

- Access to employees who perform, manage, or support the process.
- Availability of process owners or subject matter experts.
- Access to relevant systems for understanding inputs and outputs.
- Existing documentation, diagrams, or reference materials where available.
- Attendance and engagement from identified workshop participants.
- Clarity from the customer on strategic priorities to support opportunity prioritisation.

Constraints

This Service Element is subject to the following constraints:

- Access to employees who perform, manage, or support the process.
- Availability of process owners or subject matter experts.
- Access to relevant systems for understanding inputs and outputs.
- Existing documentation, diagrams, or reference materials where available.
- Attendance and engagement from identified workshop participants.
- Clarity from the customer on strategic priorities to support opportunity prioritisation.

Benefits

This Service Element supports The Intelligent Business by providing an accurate and structured understanding of how work is performed across the organisation. It strengthens decision-making by revealing where manual effort, process variation, or unclear responsibilities affect operational performance.

By identifying and prioritising opportunities for automation and optimisation, it establishes the clarity required to improve processes in a targeted and efficient way. The documented insight enables organisations to progress with confidence, ensuring future changes are aligned to real working practices and address the areas that will deliver the greatest operational benefit.

848 Responsibilities

Under this Service Element, 848 will:

- Access to employees who perform, manage, or support the process.
- Availability of process owners or subject matter experts.
- Access to relevant systems for understanding inputs and outputs.

- Existing documentation, diagrams, or reference materials where available.
- Attendance and engagement from identified workshop participants.
- Clarity from the customer on strategic priorities to support opportunity prioritisation.

Customer Responsibilities

The customer must:

- Access to employees who perform, manage, or support the process.
- Availability of process owners or subject matter experts.
- Access to relevant systems for understanding inputs and outputs.
- Existing documentation, diagrams, or reference materials where available.
- Attendance and engagement from identified workshop participants.
- Clarity from the customer on strategic priorities to support opportunity prioritisation.

Assumptions

This Service Element is delivered on the basis that:

- Access to employees who perform, manage, or support the process.
- Availability of process owners or subject matter experts.
- Access to relevant systems for understanding inputs and outputs.
- Existing documentation, diagrams, or reference materials where available.
- Attendance and engagement from identified workshop participants.
- Clarity from the customer on strategic priorities to support opportunity prioritisation.

Exclusions

This Service Element does not include:

- Access to employees who perform, manage, or support the process.
- Availability of process owners or subject matter experts.
- Access to relevant systems for understanding inputs and outputs.
- Existing documentation, diagrams, or reference materials where available.
- Attendance and engagement from identified workshop participants.
- Clarity from the customer on strategic priorities to support opportunity prioritisation.

Success Measures

This Service Element is successfully delivered when:

- All planned discovery workshops are completed with required participation.

- Current-state process maps accurately reflect operational reality.
- Issues, risks, and constraints are clearly identified and documented.
- Automation and optimisation opportunities are captured and prioritised.
- The discovery and mapping report is delivered, reviewed, and approved by stakeholders.

Service Element: Automation Governance and Environment Setup

Description

The Automation Governance and Environment Setup Service Element establishes the controlled and secure platform foundation required for developing and operating workflow automation and integration solutions using Microsoft Power Automate and Azure Integration Services.

It defines how automation will be delivered across both platforms, or either platform individually, depending on organisational need. This includes configuring Power Platform environments for low-code workflow automation and app development, and establishing the Azure Integration Services components required for enterprise-grade workflows, durable orchestration, and API-driven integration.

The service configures the environments, policies, and controls that determine how automation solutions are created, deployed, secured, and managed. This includes defining and implementing data loss prevention policies, connector rules, access boundaries, and environment roles within Power Platform.

It also includes designing and implementing governance structures for Azure Integration Services, covering resource organisation, API policies, integration access rules, and naming conventions that support consistent and secure delivery.

Governance frameworks are introduced to control solution ownership, development standards, lifecycle processes, and deployment practices across both platforms. Monitoring and oversight controls are configured to provide visibility into the operation of Power Automate flows, Logic Apps, API calls, and other AIS components. This ensures that all automated processes operate reliably, securely, and in accordance with organisational policy.

The outcome is a fully governed automation and integration environment that provides a stable, scalable, and compliant foundation for future workflow and integration development. It prevents uncontrolled development, enforces consistent standards, and supports reliable operation across Power Automate and Azure Integration Services.

Deliverables

Deliverable	Description
Power Platform Environment Configuration	Setup and configuration of development, test, and production environments for Power Automate and Power Apps, aligned to governance requirements.
Azure Integration Services Resource Structure	Design and configuration of AIS resource groups, organisational structure, and naming standards for Logic Apps, API Management, Event Grid, or Service Bus.
Data Loss Prevention (DLP) Policies	Definition and deployment of DLP rules for Power Platform, including connector classification and data boundary enforcement.
Environment Security and	Configuration of roles, permissions, and identity boundaries across Power Platform and AIS based on least-privilege principles.

Access Controls	
Automation and Integration Governance Framework	Documented rules covering solution ownership, development standards, connector usage, API policies, and lifecycle requirements across both platforms.
Deployment and Promotion Standards	Standards for packaging, deploying, and promoting Power Automate flows, Logic Apps, and related components into controlled environments.
Monitoring and Oversight Configuration	Setup of monitoring and logging for Power Automate flows, Logic Apps, and AIS components, including error reporting and operational dashboards.
Governance and Environment Documentation Pack	Consolidated documentation describing all environment structures, governance rules, security boundaries, and operational responsibilities.
Knowledge Transfer Session	Structured sessions walking through the environment configuration, governance framework, and administration expectations for Power Platform and AIS.

Dependencies

Delivery of this Service Element requires:

- Active licensing for Power Automate, Power Apps, and any required Azure Integration Services components.
- Administrative access to the Microsoft 365 tenant, Power Platform admin centre, and Azure subscriptions.
- Customer agreement on governance rules, connector usage, API policies, and security boundaries.
- Participation from IT administrators, platform owners, or architects in governance discussions.
- Stable identity and access configurations suitable for applying environment-level controls.

Constraints

This Service Element is subject to the following constraints:

- Governance is limited to Microsoft-native automation and integration tools; no third-party RPA or integration platforms are included.
- Tenant-wide security baselines, conditional access, or identity governance are not configured within this Service Element.
- Existing Power Automate flows, Logic Apps, or integrations are not remediated unless separately scoped.

- Environment changes may require customer approval cycles or architectural decisions that influence timelines.
- This Service Element does not design or build any automated workflows, low-code applications, or integration logic.

Benefits

This Service Element strengthens The Intelligent Business by providing a secure, governed, and scalable foundation for workflow automation and integration across Power Automate and Azure Integration Services.

It ensures that all future automations are created within defined boundaries, using agreed development standards and access controls that maintain consistency, reduce operational risk, and support maintainable growth.

By introducing clear governance and oversight, the service prevents uncontrolled automation activity, improves operational visibility, and ensures that employees and technical teams can rely on a structured environment that supports dependable, policy-aligned automation throughout the organisation.

848 Responsibilities

Under this Service Element, 848 will:

- Design the automation and integration environment architecture for Power Automate and/or Azure Integration Services.
- Configure Power Platform environments including development, test, and production boundaries.
- Configure AIS resource structures such as Logic Apps resource groups, API Management policies, and related components where required.
- Define and deploy Data Loss Prevention policies governing connector and data movement for Power Platform environments.
- Configure environment security roles and access controls across Power Platform and AIS in line with agreed governance rules.
- Establish governance frameworks covering solution ownership, development standards, connector usage, API policies, and lifecycle controls.
- Define deployment and promotion standards for Power Automate flows and Logic Apps.
- Configure monitoring, logging, and oversight controls for Power Automate and AIS components.
- Produce governance and environment documentation reflecting all configuration and platform rules.
- Deliver knowledge transfer to the customer's platform owners or administrators.

Customer Responsibilities

The customer must:

- Provide administrative access to Power Platform, Azure Integration Services, and the Microsoft 365 tenant as required.
- Confirm governance priorities, connector classifications, API usage rules, and environment boundaries.
- Identify technical stakeholders, platform owners, or administrators to participate in governance and environment discussions.
- Supply relevant architectural, security, and operational information that informs environment design.
- Review and approve environment configuration, governance frameworks, and associated documentation.
- Maintain and operate the governed environment after handover in line with agreed responsibilities.

Assumptions

This Service Element is delivered on the basis that:

- The customer can provide administrators or platform owners to approve governance decisions.
- Required Power Platform and Azure Integration Services licensing is active and correctly assigned.
- The organisation has a stable identity and access management structure suitable for applying roles and boundaries.
- Any existing automation or integration solutions will be reviewed separately if remediation is required.
- Customer stakeholders will participate in workshops and reviews necessary to finalise governance requirements.

Exclusions

This Service Element does not include:

- Development or configuration of Power Automate flows, Logic Apps, or low-code applications.
- Governance or deployment frameworks for third-party RPA systems such as UiPath or Blue Prism.
- Custom development of APIs, middleware platforms, or non-Microsoft integration frameworks.

- Tenant-wide security or compliance engineering, including DLP, Conditional Access, or identity governance.
- Redesign of organisational operating models or role structures.
- Migration or remediation of existing automation or integration solutions unless separately contracted.

Success Measures

This Service Element is successfully delivered when:

- Power Platform and/or Azure Integration Services environments are fully configured in line with the approved architecture.
- Data Loss Prevention policies, API policies, and connector rules operate as intended across all configured environments.
- Security roles, access controls, and environment boundaries are correctly applied and validated.
- Governance frameworks covering solution ownership, standards, connector usage, and lifecycle processes are documented and approved.
- Monitoring and oversight controls provide reliable visibility of Power Automate flows and/or AIS components, including error handling and operational metrics.
- Governance and environment documentation is delivered and accepted by customer stakeholders.
- Knowledge transfer sessions are completed with administrators and platform owners.
- Customer stakeholders formally acknowledge readiness of the governed environment for future automation and integration development.

Service Element: Automation Workflow Design and Deployment

Description

The Automation Workflow Design and Deployment Service Element delivers the design, build, testing, and deployment of automated workflows that replace manual, repetitive, and inconsistent activities across the organisation.

These workflows are implemented using Power Automate and/or Azure Integration Services, depending on the complexity, integration needs, and operational requirements of the process.

Power Automate is used to deliver user-centric or Microsoft 365-aligned workflows such as approvals, notifications, task routing, and data updates. Azure Integration Services is used to deliver enterprise-grade workflows that require durable orchestration, event-driven triggers, API integration, or cross-system coordination.

This Service Element translates a defined current-state or target process pattern into an operational workflow that executes tasks reliably and consistently. It includes designing the workflow structure, modelling decision logic, implementing system interactions, configuring triggers and conditions, and creating the controls required for exception handling.

Each workflow is tested to confirm correct behaviour, accurate data movement, and alignment with governance and operational rules. The workflow is then deployed into the governed environment established during earlier Service Elements, ensuring consistency with organisational standards for quality, access, and lifecycle management.

The outcome is a working automated workflow that reduces manual effort, increases process reliability, and ensures tasks progress through a defined and predictable structure. It enables employees to focus on higher-value activity while routine work is executed automatically, securely, and in accordance with organisational policy.

Deliverables

Deliverable	Description
Workflow Design Specification	Documented structure of the workflow, including triggers, steps, decision logic, integrations, and exception handling.
Power Automate Workflow or Logic App Build	Configuration and development of the workflow using Power Automate and/or Azure Integration Services as appropriate.
Integration Configuration	Implementation of connector usage, API calls, or AIS components required to support workflow execution.
Workflow Testing and Validation	Structured testing covering functional, integration, exception, and performance scenarios.
Deployment into Governed Environments	Promotion of the workflow into development, test, and production environments in line with agreed lifecycle controls.
Operational Documentation	Documentation covering workflow behaviour, triggers, dependencies, configuration settings, and operational considerations.
Knowledge Transfer Session	Sessions reviewing the design, configuration, dependencies, and operational requirements of the deployed workflow.

Dependencies

Delivery of this Service Element requires:

- Defined current-state or target-state process information to guide workflow design.
- Access to required systems, data sources, APIs, or Microsoft services involved in workflow execution.
- Appropriate licensing for Power Automate and/or Azure Integration Services components.
- A governed environment for Power Platform and AIS configured through the Automation Governance and Environment Setup Service Element.
- Customer approval of workflow design before build and deployment.
- Availability of subject matter experts to validate workflow logic and operational requirements.

Constraints

This Service Element is subject to the following constraints:

- Workflow design is limited to the processes and steps agreed in scope and does not include wider process reengineering.
- Custom API development or middleware outside Microsoft-native services is not included.
- Performance and behaviour depend on the availability and responsiveness of connected systems.
- Workflows requiring unsupported connectors or non-standard integrations may require separate scoping.
- Deployment follows the governance and lifecycle controls defined in the customer's automation environment.

Benefits

This Service Element strengthens The Intelligent Business by converting defined processes into dependable automated workflows that progress work consistently and transparently. It reduces manual effort, improves accuracy, and ensures that tasks follow clear rules aligned to organisational requirements.

By using governed automation platforms, the Service Element reinforces operational control and provides employees with workflows that guide actions, simplify decision points, and reduce the risk of delays or inconsistencies. This supports reliable, outcome-focused operations across the value chain and enables the organisation to scale process automation with confidence.

848 Responsibilities

Under this Service Element, 848 will:

- Design the workflow structure, decision logic, and interaction points.
- Build the workflow using Power Automate and/or Azure Integration Services.
- Configure any required connectors, API calls, or AIS components.
- Conduct functional and integration testing of the workflow.
- Deploy the workflow into development, test, and production environments.
- Produce workflow documentation covering configuration, behaviour, and dependencies.
- Deliver knowledge transfer to customer administrators or process owners.

Customer Responsibilities

The customer must:

- Provide accurate process information and confirm workflow scope.
- Supply access to systems, data sources, and APIs required for workflow execution.
- Review and approve workflow designs, test outcomes, and deployment decisions.
- Ensure that identity, access, and licensing prerequisites are in place.
- Make subject matter experts available for testing and validation activities.
- Maintain the workflow after handover in accordance with governance requirements.

Assumptions

This Service Element is delivered on the basis that:

- The target workflow fits within the capabilities of Power Automate and/or Azure Integration Services.
- Required connectors, APIs, and system integrations are accessible and functional.
- Customer governance and environment setup has been completed prior to workflow deployment.
- Stakeholders are available for design validation, testing, and approval.
- Any future modifications or enhancements will be delivered through separate activities.

Exclusions

This Service Element does not include:

- Redesign or reengineering of the broader business process.
- Development of custom APIs, bespoke integration middleware, or non-Microsoft automation platforms.

- Creation of enterprise applications or multi-module Power Apps.
- Migration, remediation, or redevelopment of existing automations unless separately scoped.
- Ongoing management or monitoring of the deployed workflow.

Success Measures

This Service Element is successfully delivered when:

- Workflow design is approved by customer stakeholders.
- Power Automate and/or AIS components are built and configured correctly.
- Testing confirms correct behaviour, accurate data movement, and reliable exception handling.
- The workflow is deployed into the appropriate governed environment.
- Documentation is delivered, reviewed, and accepted.
- Knowledge transfer is completed with administrators or owners.
- Customer stakeholders formally acknowledge workflow readiness for operational use.

Service Element: Automation Development and Integration Service with Microsoft Power Apps

Description

The Automation Development and Integration Service delivers low-code applications that digitise manual tasks, forms, and process interactions using Microsoft Power Apps.

The service develops single-purpose applications that support defined operational processes by providing structured data capture, guided input, and user interfaces that remove reliance on paper forms, email exchanges, and inconsistent spreadsheets.

Applications are developed as canvas or model-driven apps depending on the nature of the process, the data structure required, and the integration needs of the workflow.

The service connects applications to data sources using Microsoft connector-based integration. Dataverse, SQL, SharePoint lists, and other supported data sources are used where appropriate to store and manage application data.

The service also integrates applications with Teams, Power Automate, Azure Integration Services, and Dynamics 365 through standard connectors to support workflow execution and ensure data moves reliably between systems. Integration with Dynamics 365 is limited to light-touch operations such as reading or updating records through approved connectors and does not include CRM configuration or customisation.

Each application is designed and built in alignment with the governance, environment, and lifecycle controls established for automation and low-code development. The service includes application configuration, integration setup, testing, and deployment into the agreed environment structure.

The outcome is a dependable, single-purpose application that supports the execution of an operational process, improves data consistency, and strengthens the organisation's ability to automate and optimise work.

Deliverables

Deliverable	Description
Application Design Specification	Documented structure of the application, including screens, logic, data sources, and integration points.
Power Apps Build (Canvas or Model-Driven)	Development of a single-purpose application to support a defined process requirement.
Data Source Configuration	Configuration of Dataverse tables or other connector-based data sources required for the application.
Integration Setup	Setup of application integrations using standard connectors for Teams, Power Automate, AIS, Dynamics 365, or other supported services.

Application Testing	Functional and integration testing covering data capture, validation, navigation, and system interactions.
Deployment into Governed Environments	Deployment of the application into development, test, and production environments in accordance with agreed lifecycle controls.
Operational Documentation	Documentation covering application purpose, structure, configuration, dependencies, and operational considerations.
Knowledge Transfer Session	Sessions reviewing the application behaviour, data sources, integration points, and administration expectations.

Dependencies

Delivery of this Service Element requires:

- Defined process requirements and application scope agreed prior to build.
- Access to data sources, systems, and services required for integration.
- Appropriate licensing for Power Apps, Dataverse, connectors, and integrated services.
- Availability of subject matter experts to validate functional requirements.
- Completion of the automation governance and environment setup activities.
- Customer approval of the application design before build and deployment.

Constraints

This Service Element is subject to the following constraints:

- The application will support a single process or functional requirement and will not operate as a multi-module or departmental system.
- Integration is limited to Microsoft-native connectors and approved data sources; custom API development is out of scope.
- Dynamics 365 integration is restricted to light-touch read or update operations via standard connectors.
- Application behaviour depends on the availability and performance of connected systems and data sources.
- Enhancements or extensions beyond the agreed scope require separate work.

Benefits

This Service Element strengthens The Intelligent Business by enabling employees to complete tasks through structured, digital interactions that reduce variation, improve data accuracy, and support automated workflow execution. By digitising forms and process steps, it replaces inconsistent manual activity with clear and predictable input patterns aligned to operational needs.

The integration of applications with Microsoft 365, Dynamics 365, and workflow automation ensures that information moves reliably across the value chain, supporting consistent outcomes and enabling organisations to scale automation in a controlled and efficient manner.

848 Responsibilities

Under this Service Element, 848 will:

- Design the application structure and data interactions.
- Build the application using canvas or model-driven Power Apps.
- Configure Dataverse or other supported data sources.
- Implement application integrations using approved connectors.
- Conduct functional and integration testing.
- Deploy the application into governed environments.
- Produce application documentation.
- Deliver knowledge transfer to customer administrators or process owners.

Customer Responsibilities

The customer must:

- Provide clear process requirements and application scope.
- Supply access to all required systems and data sources.
- Confirm licensing for Power Apps, connectors, and integrated services.
- Make subject matter experts available for requirements validation and testing.
- Review and approve application designs, test results, and deployment outcomes.
- Maintain the application after handover in accordance with governance requirements.

Assumptions

This Service Element is delivered on the basis that:

- The required data sources are available and compatible with Microsoft connectors.
- The application scope is limited to a single process or functional boundary.
- The automation governance and environment setup is complete prior to deployment.
- Customer stakeholders will participate in design validation, testing, and approvals.
- Future application enhancements or additional apps will be delivered separately.

Exclusions

This Service Element does not include:

- Development of multi-module or departmental applications.

- Custom API engineering or creation of non-Microsoft integration frameworks.
- Dynamics 365 configuration, customisation, or CRM module development.
- Development of web portals or Power Pages solutions.
- Process reengineering, future-state design, or workflow automation.
- Migration or remediation of existing Power Apps unless separately scoped.

Success Measures

This Service Element is successfully delivered when:

- The application design is documented and approved by the customer.
- The application is built and integrates correctly with required data sources and systems.
- Testing confirms correct behaviour, data validation, and integration performance.
- The application is deployed into the governed environment structure.
- Documentation is delivered, reviewed, and accepted.
- Knowledge transfer is completed with administrators or process owners.
- Customer stakeholders formally acknowledge readiness of the application for operational use.

Service Element: AI Builder and Intelligent Automation Enablement

Description

The AI Builder and Intelligent Automation Enablement Service Element introduces AI-assisted capabilities into automated workflows and low-code applications to improve accuracy, reduce manual effort, and support more consistent process execution.

It leverages Microsoft AI Builder models and Copilot Studio capabilities to automate tasks such as document classification, structured and semi-structured data extraction, prediction, and guided conversational interactions.

Models may be configured using customer-provided examples where required, ensuring they reflect the specific documents, terminology, and patterns present within the organisation's processes.

AI Builder models are integrated into Power Automate workflows, Azure Integration Services components, or Power Apps to support activities such as document processing, intelligent routing, data prediction, and classification.

Copilot Studio is used to deliver structured conversational and decision-tree experiences that help employees complete tasks, capture information, or initiate workflows in a consistent way. AIS can be used to orchestrate multi-step AI operations where workflow complexity or integration needs extend beyond Power Automate.

All AI capabilities are implemented within the governed automation and integration environments established earlier in the service stream. This ensures that models, predictions, and automated decisions operate within defined boundaries, follow approved data-handling rules, and support dependable process behaviour.

The outcome is an enhancement of existing workflows and applications with AI-driven steps that improve efficiency, reduce variation, and support employees in completing tasks with greater accuracy and confidence.

Deliverables

Deliverable	Description
AI Builder Model Configuration	Setup and configuration of AI Builder models for document processing, prediction, or classification using customer-provided examples where required.
Copilot Studio Conversational Designs	Development of structured conversational and decision-tree interactions to support guided input or task initiation.
AI Integration in Workflows	Integration of AI Builder or Copilot Studio capabilities into Power Automate or Azure Integration Services workflows.

Application-Level AI Integration	Embedding AI-driven actions within Power Apps to support validation, classification, or decision support.
Testing and Confidence Evaluation	Functional testing, accuracy review, and validation of model performance against real process scenarios.
Deployment to Governed Environments	Deployment of models, flows, and integrations into development, test, and production environments.
Operational Documentation	Documentation covering AI model configuration, integration behaviour, dependencies, and operational considerations.
Knowledge Transfer Session	Sessions reviewing model behaviour, integration points, and ongoing maintenance expectations.

Dependencies

Delivery of this Service Element requires:

- Appropriate licensing for AI Builder capacity, Copilot Studio, and any required connectors.
- Customer-provided document samples or training examples for semi-structured models.
- Access to data sources, systems, and environments involved in AI integration.
- Completion of the Automation Governance and Environment Setup Service Element.
- Availability of subject matter experts to validate AI outputs and confirm expected behaviour.

Constraints

This Service Element is subject to the following constraints:

- AI Builder is limited to supported model types; custom ML or advanced NLP models are not included.
- Copilot Studio is used only for structured conversational and decision-tree interactions.
- Dynamics 365 integration is restricted to light-touch use via standard connectors.
- Workflow behaviour depends on the availability and accuracy of connected data sources.
- Model performance is influenced by the quality and representativeness of customer-provided examples.
- Enhancements or retraining beyond the agreed scope require separate activity.

Benefits

This Service Element strengthens The Intelligent Business by introducing AI-driven capabilities that make processes more accurate, reliable, and efficient. It reduces manual interpretation of documents, simplifies decision points, and enables workflows to progress based on consistent, data-driven outcomes.

By using Microsoft-native AI services within governed automation environments, the service reinforces control, improves clarity for employees, and enhances the organisation's ability to operate with dependable, repeatable processes that adapt to varied inputs and operational needs.

848 Responsibilities

Under this Service Element, 848 will:

- Configure AI Builder models using customer-provided examples.
- Develop structured conversational or decision-tree flows in Copilot Studio.
- Integrate AI capabilities into Power Automate workflows and AIS components.
- Embed AI actions within Power Apps where required.
- Conduct testing and validate model performance.
- Deploy models and workflows into governed environments.
- Produce operational documentation and guidance.
- Deliver knowledge transfer to customer administrators or process owners.

Customer Responsibilities

The customer must:

- Provide document samples or data examples required for model configuration.
- Supply access to systems, data sources, and environments involved in integrations.
- Confirm licensing for AI Builder, Copilot Studio, and connector usage.
- Provide subject matter experts for output validation and behaviour confirmation.
- Review and approve model configurations, test outcomes, and deployment decisions.
- Maintain AI models and integrated workflows after handover.

Assumptions

This Service Element is delivered on the basis that:

- Customer-provided examples are representative of actual operational documents and data.
- AI Builder and Copilot Studio licensing and capacity are available and active.
- Governance of automation environments is complete and supports AI usage.

- Stakeholders will participate in testing and validation activities.
- Future improvements, retraining, or further scenarios will be delivered separately.

Exclusions

This Service Element does not include:

- Custom machine learning models, Python-based modelling, or Azure ML workloads.
- Deep Dynamics 365 configuration, CRM customisation, or plugin-based extensions.
- Enterprise chatbot programmes, omnichannel bot deployment, or NLP model design.
- Integration with non-Microsoft AI platforms or third-party RPA AI features.
- Redesign of processes or workflow automation outside the defined integration scope.
- Migration or remediation of existing AI models unless separately scoped.

Success Measures

This Service Element is successfully delivered when:

- AI Builder models or Copilot Studio components are configured and approved.
- Testing confirms reliable extraction, prediction, or classification behaviour.
- AI capabilities integrate correctly into Power Automate, AIS, or Power Apps.
- Solutions are deployed into governed environments without error.
- Documentation is delivered and accepted by customer stakeholders.
- Knowledge transfer is completed with administrators or process owners.
- Customer stakeholders acknowledge readiness for operational use.

Service Element: Dynamics 365 Process Automation and Optimisation

Description

The Dynamics 365 Process Automation and Optimisation Service Element introduces structured automation and operational improvements within Dynamics 365 Sales, Customer Service, and Field Service environments.

It uses out-of-the-box Dynamics 365 workflow capabilities, Business Process Flows, business rules, and Power Automate integrations to remove manual effort, improve data consistency, and ensure CRM tasks progress in a controlled and predictable way.

The service automates routine CRM activities such as lead progression, opportunity and case updates, service task routing, notifications, approvals, and data synchronisation.

The service enables light-touch integration between Dynamics 365 and Business Central using Microsoft-standard connectors to support operational scenarios such as invoice progression, order updates, service case handling, or customer record synchronisation.

It configures Dynamics 365 Copilot modules to assist employees with task completion, contextual insights, and guided interactions, and embeds Copilot-driven actions into automated workflows where this enhances process flow and decision-making.

Automation is implemented within the existing CRM structure and does not modify the underlying entity model, system configuration, or security architecture. All automation follows the governance and lifecycle controls established for Power Platform and Azure Integration Services, ensuring that CRM automations operate consistently, securely, and in line with organisational policy.

The outcome is a set of operational improvements that enhance employee efficiency, reduce manual handling, and strengthen the reliability of CRM and service processes.

Deliverables

Deliverable	Description
CRM Workflow and Business Rule Configuration	Implementation of Business Rules, Business Process Flows, and out-of-the-box CRM workflows to automate defined CRM steps.
Power Automate Integration for CRM Processes	Development of flows that trigger from or update Dynamics 365 records to automate routine tasks and cross-system actions.
CRM-Business Central Integration Setup	Configuration of operational integrations between Dynamics 365 and Business Central using standard connectors for defined process scenarios.

Dynamics 365 Copilot Module Enablement	Configuration and enablement of Copilot modules for Sales, Customer Service, or Field Service to support intelligent task completion.
Embedded Copilot Automation Actions	Integration of Copilot-assisted steps into Power Automate or CRM flows where beneficial for decision-making or classification.
Workflow Testing and Validation	Functional and integration testing to confirm correct behaviour, data movement, and alignment with defined process logic.
Deployment into Governed Environments	Promotion of workflows, integrations, and Copilot configurations into development, test, and production environments.
Operational Documentation	Documentation describing CRM workflows, Power Automate integrations, Copilot behaviour, dependencies, and operational considerations.
Knowledge Transfer Session	Sessions reviewing configurations, workflows, and operational support requirements.

Dependencies

Delivery of this Service Element requires:

- Access to Dynamics 365 environments and relevant CRM modules.
- Appropriate licensing for Dynamics 365, Power Automate, Copilot modules, and required connectors.
- Confirmed CRM processes and defined automation requirements prior to configuration.
- Access to Business Central for integration scenarios.
- Availability of subject matter experts to validate workflow behaviour.
- Completion of automation governance and environment setup.

Constraints

This Service Element is subject to the following constraints:

- CRM customisation, entity model changes, new tables, plugins, or solution architecture modifications are not included.
- Business Central configuration or functional redesign is out of scope.
- Integration is limited to Microsoft-standard connectors; custom APIs or middleware are not included.

- Automation applies only to defined CRM processes and will not redesign the CRM solution.
- Copilot modules are limited to native configuration and cannot be extended through custom AI development.
- Process reengineering or redesign falls outside the scope of this Service Element.

Benefits

This Service Element strengthens The Intelligent Business by ensuring CRM processes operate with greater consistency, clarity, and reliability. Automated workflows reduce manual handling, improve accuracy, and ensure data moves between CRM and connected systems in a predictable and controlled manner.

Dynamics 365 Copilot modules enhance employee performance by providing contextual insights and guided actions that support timely and informed decision-making. By aligning CRM automation to governed standards and operational requirements, the service enhances the efficiency and transparency of sales, service, and field operations across the value chain.

848 Responsibilities

Under this Service Element, 848 will:

- Configure CRM workflows, Business Process Flows, and Business Rules.
- Build and configure Power Automate flows that integrate with Dynamics 365.
- Implement defined CRM–Business Central integrations using standard connectors.
- Enable and configure Dynamics 365 Copilot modules.
- Embed Copilot-assisted automation within CRM or Power Automate flows.
- Conduct workflow testing and validation.
- Deploy configurations into governed environments.
- Produce operational documentation.
- Deliver knowledge transfer to customer administrators or process owners.

Customer Responsibilities

The customer must:

- Provide access to Dynamics 365 environments and Business Central where integration is required.
- Supply defined CRM process requirements and automation objectives.
- Ensure appropriate licensing for CRM, connectors, and Copilot modules.
- Make subject matter experts available for validation and testing.
- Review and approve automation designs, test outcomes, and deployment activities.

- Operate and maintain CRM workflows after handover.

Assumptions

This Service Element is delivered on the basis that:

- CRM processes to be automated are stable and clearly defined.
- Required connectors for Dynamics 365 and Business Central integration are available.
- Governance and environment setup activities have been completed.
- Customer stakeholders will participate in design validation and testing.
- Future enhancements or additional CRM processes will be scoped and delivered separately.

Exclusions

This Service Element does not include:

- CRM entity model changes, schema extensions, or custom tables.
- Custom development such as plugins, JavaScript, or bespoke integrations.
- Business Central configuration, module implementation, or financial modelling.
- Dynamics 365 data migration or CRM rollout activities.
- Enterprise chatbot programmes or non-native AI capabilities.
- Redesign of CRM architecture, forms, or role-based security structures.

Success Measures

This Service Element is successfully delivered when:

- All CRM and Power Automate workflows operate as designed and are validated by stakeholders.
- CRM–Business Central integration performs correctly for defined process scenarios.
- Dynamics 365 Copilot modules are enabled and functioning as expected.
- Workflows and integrations are deployed into governed environments without issue.
- Documentation is delivered and accepted by customer stakeholders.
- Knowledge transfer sessions are completed.
- Customer stakeholders formally acknowledge readiness for operational use.

Service Element: RPA and Legacy Process Modernisation

Description

The RPA and Legacy Process Modernisation Service Element introduces automation into legacy or non-integrated applications where APIs, connectors, or modern integration methods are not available.

It uses Power Automate Desktop to replicate predictable, manual user actions such as data entry, screen navigation, and information extraction. This enables the organisation to automate repetitive tasks, reduce operational effort, and integrate legacy systems into wider digital workflows without requiring system replacement or modification.

The service identifies stable and repeatable tasks, captures the sequence of user actions required to complete them, and develops automation scripts that perform these actions reliably.

Bots may operate in attended or unattended modes depending on the process requirements, and can move data between multiple systems when traditional integration methods are unavailable. Microsoft-native OCR and AI Builder capabilities are used for scenarios involving structured or semi-structured documents that support data extraction in legacy environments.

The automation is deployed into the organisation's governed environment structure and aligned with the controls established for Power Platform. This ensures that legacy automation operates consistently, can be monitored effectively, and integrates cleanly with Power Automate or Azure Integration Services workflows where required.

The outcome is a reduction in manual workload and an improvement in process reliability across legacy applications that are otherwise difficult to modernise.

Deliverables

Deliverable	Description
RPA Task Analysis	Identification and documentation of manual steps suitable for RPA using Power Automate Desktop.
RPA Script Development	Development of attended or unattended automation scripts to replicate defined user tasks.
Multi-System Interaction Configuration	Configuration of bot actions that move data between systems lacking native integration.
AI Builder OCR Integration	Use of Microsoft-native OCR for structured or semi-structured document handling, where required.
Bot Testing and Validation	Functional testing to confirm accurate task execution, exception handling, and reliability.

Deployment into Governed Environment	Deployment of RPA scripts within the approved environment structure and governance controls.
Operational Documentation	Documentation covering bot design, steps performed, dependencies, triggers, and operational considerations.
Knowledge Transfer Session	Sessions explaining bot behaviour, execution triggers, operational requirements, and maintenance expectations.

Dependencies

Delivery of this Service Element requires:

- Access to legacy or non-integrated systems involved in automation.
- Stable user interface or predictable task flow for reliable RPA execution.
- Appropriate licensing for Power Automate Desktop and AI Builder where required.
- Availability of subject matter experts to validate task behaviour and process accuracy.
- Completion of automation governance and environment setup activities.
- Supports for service accounts or bot identities if unattended operation is used.

Constraints

This Service Element is subject to the following constraints:

- RPA applies only to predictable, stable, and repeatable tasks; tasks involving high variability or subjective decision-making are unsuitable.
- No third-party RPA platforms are included; automation is limited to Power Automate Desktop.
- OCR capability is limited to Microsoft-native AI Builder features.
- RPA does not modify legacy applications or perform system-level configuration.
- Long-running or complex multi-branch automations may require separate process redesign or workflow automation.
- Bots operate within the governance controls established for Power Platform.

Benefits

This Service Element strengthens The Intelligent Business by enabling legacy systems to participate in modern workflows without requiring system replacement or bespoke integration. It reduces manual effort, improves data accuracy, and ensures that legacy applications do not become operational bottlenecks.

By automating stable and repetitive tasks, it allows employees to focus on decision-based activities while maintaining the reliability of processes that depend on older systems. The

integration of RPA with Microsoft-native automation and AI capabilities ensures that legacy processes remain clear, controlled, and aligned to organisational requirements.

848 Responsibilities

Under this Service Element, 848 will:

- Identify manual tasks suitable for automation using Power Automate Desktop.
- Design and develop RPA scripts for attended or unattended execution.
- Configure bot actions that span multiple systems where integration is unavailable.
- Integrate Microsoft-native OCR and AI Builder capabilities when required.
- Conduct testing and validate bot performance and reliability.
- Deploy RPA scripts into governed environments.
- Produce operational documentation and guidance.
- Deliver knowledge transfer to customer administrators or process owners.

Customer Responsibilities

The customer must:

- Provide access to legacy systems and the environments in which tasks occur.
- Supply detailed information on manual tasks and process requirements.
- Ensure required licensing for Power Automate Desktop and AI Builder.
- Provide test users or accounts where attended automation is required.
- Make subject matter experts available for validation and testing.
- Review and approve automation designs, test results, and deployment outcomes.

Assumptions

This Service Element is delivered on the basis that:

- Tasks selected for automation follow consistent and repeatable patterns.
- Legacy systems present stable interfaces that do not change frequently.
- Customer stakeholders will participate in testing, review, and validation.
- Governance and environment setup activities are complete before deployment.
- Any future bot enhancements or additional processes will be scoped separately.

Exclusions

This Service Element does not include:

- Use of third-party RPA tools such as UiPath, Blue Prism, or Automation Anywhere.
- Redesign or reengineering of legacy applications.

- Development of complex orchestration bots involving multiple branching paths or strategic RPA programmes.
- Custom OCR models or advanced NLP capabilities beyond Microsoft-native tools.
- Replacement or modernisation of legacy systems.
- Ongoing bot monitoring or operational management unless separately contracted.

Success Measures

This Service Element is successfully delivered when:

- RPA tasks are identified, documented, and validated with stakeholders.
- Scripts execute accurately in attended and/or unattended modes as required.
- Bots reliably perform multi-system interactions within defined constraints.
- AI Builder OCR performs correctly when used for document handling.
- RPA scripts are deployed into governed environments without issue.
- Documentation is delivered and accepted.
- Knowledge transfer is completed.
- Customer stakeholders formally acknowledge readiness for operational use.

Service Element: Automation Adoption and Citizen Developer Enablement

Description

The Automation Adoption and Citizen Developer Enablement Service Element develops the skills, structures, and controls required for internal users to build low-risk automations and applications safely within a governed Power Platform environment.

It equips citizen developers to create simple and intermediate Power Automate flows and canvas applications that support operational tasks without compromising data integrity, security, or platform stability. The service enables users to work confidently within defined guardrails by introducing clear rules for development, patterns for safe solution design, and structured guidance on when to escalate requirements to IT or specialist teams.

The service configures platform features that support governance enforcement, including environment-level templates, solution starter structures, and permissions aligned to maker responsibilities. It provides a development framework that ensures citizen-led solutions follow approved naming conventions, connector usage, lifecycle processes, and deployment rules.

Training is delivered using a virtual train-the-trainer model supported by structured self-service materials, enabling organisations to sustain capability and onboard new makers over time. The outcome is a citizen development capability that operates safely within a controlled environment, empowering employees to automate simple processes while maintaining organisational confidence in quality, consistency, and compliance.

Deliverables

Deliverable	Description
Citizen Developer Training Sessions	Virtual train-the-trainer sessions introducing safe development practices for Power Automate and canvas applications.
Self-Service Learning Materials	Structured guidance and reference materials covering safe development, supported patterns, and approved practices.
Maker Enablement Framework	Documentation covering guardrails, supported scenarios, naming conventions, lifecycle rules, and escalation pathways.
Governed Maker Environment Configuration	Configuration of maker permissions, starter solutions, templates, and access controls aligned to governance requirements.
Supported Development Patterns	Standardised solution templates and design patterns for simple and intermediate automations and canvas apps.
Maker Onboarding Process	Process definition for approving, onboarding, and monitoring citizen developers in line with governance rules.

Operational Documentation	Consolidated documentation describing maker responsibilities, governance expectations, templates, and usage guidance.
Knowledge Transfer Session	Sessions reviewing maker enablement structures, platform controls, and ongoing administration requirements.

Dependencies

Delivery of this Service Element requires:

- Completion of the Automation Governance and Environment Setup Service Element.
- Appropriate Power Platform licensing for citizen developers.
- Access to the Power Platform admin centre and relevant environments for configuration.
- Availability of nominated champions or trainers for enablement sessions.
- Customer agreement on connector restrictions, environment boundaries, and approved maker roles.

Constraints

This Service Element is subject to the following constraints:

- Citizen developers may only use standard connectors and approved templates.
- Maker activity is limited to simple and intermediate automations and canvas applications; complex or business-critical solutions are out of scope.
- Advanced Power Platform capabilities such as custom connectors, model-driven app development, or enterprise ALM pipelines are not included.
- Training does not include instructor-led end-user education beyond the train-the-trainer model.
- Adoption depends on customer participation and internal engagement from nominated makers.

Benefits

This Service Element strengthens The Intelligent Business by enabling employees to automate routine tasks safely within a structured and governed environment. It increases organisational capacity by allowing low-risk automations and simple applications to be developed by internal users while ensuring that all solutions conform to consistent, secure, and maintainable patterns.

By providing clear guardrails, system configurations, and practical training, the service creates a dependable foundation for distributed automation capability, reduces reliance on manual work, and supports continuous operational improvement across the value chain.

848 Responsibilities

Under this Service Element, 848 will:

- Deliver virtual train-the-trainer sessions for nominated citizen developers.
- Produce self-service materials to support safe, governed development.
- Configure maker-level permissions, environment templates, and starter solutions.
- Develop and document the maker enablement framework and supported patterns.
- Define and document the citizen developer onboarding process.
- Provide operational documentation covering governance expectations and maker responsibilities.
- Deliver knowledge transfer to administrators and champions overseeing citizen development.

Customer Responsibilities

The customer must:

- Nominate internal champions or trainers for citizen developer enablement.
- Provide access to Power Platform environments and relevant governance information.
- Review and approve maker governance rules, connector restrictions, and development guardrails.
- Assign appropriate licensing to citizen developers.
- Support internal communication and adoption for the citizen development capability.
- Review and approve enablement materials, templates, and documentation.

Assumptions

This Service Element is delivered on the basis that:

- Governance for Power Platform environments is already in place.
- Internal participants have baseline digital skills appropriate for low-code development.
- The customer will manage ongoing maker activity in accordance with governance rules.
- Stakeholders will attend workshops and validation sessions as required.
- Additional training for new makers after handover will be delivered internally or through separate engagements.

Exclusions

This Service Element does not include:

- Delivery of the Power Platform Centre of Excellence or enterprise fusion team models.
- Enablement for custom connectors, premium connectors, or advanced ALM pipelines.
- Development of applications or workflows on behalf of citizen developers.

- Enterprise change management, communications strategy, or culture-shift programmes.
- Model-driven app development, portal development, or multi-module application design.
- Ongoing monitoring or operational management of citizen developer activity.

Success Measures

This Service Element is successfully delivered when:

- Citizen developer training is delivered and acknowledged by the nominated champions.
- Maker frameworks, templates, and supported patterns are approved and accessible.
- Maker permissions, environment templates, and governance controls are configured successfully.
- Documentation is delivered and accepted by customer stakeholders.
- Knowledge transfer is completed with champions and administrators.
- Customer stakeholders confirm readiness to onboard and support citizen developers.

Service Element: Process Analytics and Continuous Improvement Review

Description

The Process Analytics and Continuous Improvement Review provides a structured evaluation of how automated workflows, integrations, and low-code applications perform in operational use. It examines the performance of Power Automate flows, Azure Integration Services components, Power Automate Desktop scripts, and relevant Power Apps to identify bottlenecks, exceptions, and patterns that influence process efficiency.

Using native analytics from Power Platform and Azure, supported by light Power BI summary dashboards, the service assesses workflow reliability, error patterns, run frequency, usage behaviour, and the effectiveness of exception handling.

Where appropriate and licensed, the service may use Process Advisor to analyse task execution or process variations, providing additional insight into where manual effort remains or where automated steps may be improved.

The findings highlight where workflows can be refined, simplified, or restructured to reduce failure rates and improve operational reliability. The review also considers whether AI Builder models require retraining, whether RPA scripts remain stable, and whether integration steps continue to operate correctly across connected systems.

The outcome is a set of clear, evidence-based recommendations that improve technical performance and strengthen overall process efficiency. This enables organisations to maintain dependable automation and align future improvements to operational needs, supporting continuous optimisation across the digital value chain.

Deliverables

Deliverable	Description
Automation Performance Analytics	Analysis of Power Automate, AIS, and Power Automate Desktop performance using native analytics and logs.
Process Efficiency Review	Evaluation of run patterns, bottlenecks, exception trends, and workflow behaviour.
Light Power BI Summary Dashboards	Creation of focused dashboards presenting high-level automation performance and insights.
Process Advisor Insights	Task or process mining insights when licences are available and usage is appropriate.
Improvement Opportunities Log	Documented issues, risks, constraints, and improvement opportunities.

Recommendations Report	Structured recommendations for technical refinement and process efficiency improvements.
Stakeholder Review Session	Sessions discussing findings, prioritisation, and next steps for improvement.

Dependencies

Delivery of this Service Element requires:

- Access to Power Automate analytics and Azure Integration Services logs.
- Access to Power Automate Desktop run history and performance logs.
- Access to relevant Power Apps analytics where included in scope.
- Customer licensing for Power BI and Process Advisor where used.
- Availability of stakeholders for workshops, validation, and review.
- Access to previously documented automation designs and configurations.

Constraints

This Service Element is subject to the following constraints:

- Review frequency is limited to 6-monthly or yearly cycles as agreed.
- Power BI usage is restricted to summary dashboards; full BI development is not included.
- Process Advisor is used only when licensed and applicable to the process.
- Automation improvements are not implemented within this Service Element; recommendations only are provided.
- Accuracy of insights depends on monitoring data and logging availability.
- The service does not include redesign of end-to-end processes or organisational structures.

Benefits

This Service Element strengthens The Intelligent Business by ensuring automation remains reliable, efficient, and aligned to operational needs. It delivers clear insight into how automated workflows and integrations perform in practice, enabling organisations to identify where issues occur and where improvements will have the most meaningful impact.

By combining technical analysis with process-focused recommendations, the review supports continuous optimisation, reduces error rates, and maintains the value delivered by automation across the digital estate.

848 Responsibilities

Under this Service Element, 848 will:

- Review performance analytics for Power Automate, AIS, and Power Automate Desktop.
- Analyse process efficiency, error trends, and exception patterns.
- Produce light Power BI dashboards summarising automation performance.
- Use Process Advisor where licences and scenarios allow.
- Document improvement opportunities and constraints.
- Produce a structured recommendations report for technical and process improvements.
- Facilitate stakeholder review sessions to discuss findings and next steps.

Customer Responsibilities

The customer must:

- Provide access to automation analytics, logs, and relevant systems.
- Confirm licensing for Power BI and Process Advisor where required.
- Supply contextual information on operational issues or recent changes.
- Ensure stakeholders are available for review sessions and validation.
- Review and approve the recommendations report.
- Determine which improvements will be prioritised and progressed under separate activities.

Assumptions

This Service Element is delivered on the basis that:

- Relevant analytics and logging features are enabled and accessible.
- Automated processes are stable and suitable for structured performance review.
- Customer stakeholders will engage in workshops, validation, and review.
- Improvements identified will be scoped and delivered through separate Service Elements.
- Automation designs and configurations are available to support analysis.

Exclusions

This Service Element does not include:

- Continuous monitoring or managed service operations.
- Full BI development, dashboarding, or enterprise reporting.
- Deep process mining or data engineering activities.
- Implementation of improvements or workflow redesign.
- Organisational change, KPI modelling, or transformation programmes.

- Integration of third-party RPA analytics.

Success Measures

This Service Element is successfully delivered when:

- Analytics and performance insights are collected and reviewed successfully.
- Efficiency issues, bottlenecks, and exceptions are documented clearly.
- Power BI summary dashboards are delivered and accepted.
- Recommendations for improvement are specific, actionable, and aligned to priorities.
- Stakeholder review sessions are completed.
- Customer stakeholders acknowledge readiness to proceed with improvement actions.