848

Process Automation and Optimisation

Service Definition

Efficient Business

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Driven by **people.** Powered by **intelligence.** Value chain **led.**

1. Service Overview

Repetitive tasks and unclear hand-offs consume time that staff could use to deliver better service. Automating a poorly understood process can preserve the same problems in a different form. Process Automation and Optimisation first clarifies the work, then applies selected Microsoft automation or low-code capability where it can improve execution.

Process Automation and Optimisation sits within The Efficient Business, part of 848's Intelligent Business Framework. The framework connects technology investment to the way the organisation operates, makes decisions and delivers services. Each engagement addresses the selected outcome while considering its place in the wider customer environment.

From business need to usable capability

The service connects everyday friction to a specific change. Process owners explain what happens now and the result they need; design defines the chosen workflow; implementation and validation show how it works in practice. Customer teams receive the knowledge needed to use and maintain the selected automation.

Connected Business Operations and Customer and Service Experience provide the application context for many workflows. This service addresses selected tasks across those environments, while ongoing efficiency services can reinforce adoption and incremental improvement. Data-driven decision automation can draw on the separate Insightful Business services where required.

2. Scope and Service Boundaries

Customers select the elements that support their intended outcome. The scope identifies what 848 will deliver and the work retained by customer teams or suppliers.

Service	Outcome
Process discovery and mapping	Workshops document current tasks and hand-offs to identify improvement opportunities. Findings establish the basis for subsequent design; they do not imply implementation.
Automation environment setup	Selected Power Platform or Azure Integration Services foundations support later workflow development. Building flows and tenant-wide security engineering are separate.
Workflow design and deployment	Power Automate or Azure Integration Services implement the agreed repetitive task or integration. Broader process reengineering and custom APIs are separate.
Power Apps development	Single-purpose canvas or model-driven applications digitise selected forms and interactions. Multi-module applications, portals and independent workflow automation are separate.
AI Builder enablement	Selected Microsoft AI Builder or Copilot Studio capability supports defined extraction or assisted interactions. Custom machine-learning programmes and enterprise chatbot delivery are separate.
Dynamics 365 process automation	Standard workflows and business rules support selected CRM activity. Schema extensions, custom code and CRM rollout are outside this element.
Legacy task automation	Power Automate Desktop automates stable, repeatable user actions where modern interfaces are unavailable. Legacy application replacement and complex strategic RPA programmes are separate.
Citizen developer enablement	Guidance and guardrails help internal users develop low-risk flows and canvas apps. An enterprise centre of excellence and advanced development enablement are separate.
Process analytics review	Native telemetry reveals workflow performance and exception patterns. Recommendations guide further work; ongoing monitoring and implementation are separate.

Dependencies and exclusions

The engagement covers selected processes and supported Microsoft capabilities. Customer systems and interfaces must be suitable for the chosen pattern. Full application replacement, bespoke integration engineering and ongoing automation operation require separate scope. Legacy screen-based automation depends on the stability of the application interaction it reproduces.

3. How 848 Delivers the Service

Delivery follows the selected scope, using the customer's operating context to guide the work. The sequence below explains how evidence and decisions progress towards the agreed outputs. Customer review and knowledge transfer form part of that progression.

Understand how the work is performed

848 reviews the selected process with people who perform and own it. The evidence identifies repetition and points where information or responsibility changes hands. The customer confirms the task and intended improvement before automation design.

Design the selected workflow

848 defines the commissioned automation or application and its integration points. Customer owners review the logic and exception handling. The design remains within the selected platform and process boundary.

Build and validate the capability

848 implements the agreed component and tests representative scenarios with the customer. Findings show how the workflow handles expected inputs and exceptions. Customer specialists resolve data or system dependencies affecting validation.

Embed use and review findings

848 explains the delivered component and the responsibilities needed to sustain it. The receiving team reviews documentation and open actions. Selected analytics or enablement work helps identify the next improvement without implying a continuing managed service.

4. Service Delivery and Management

4.1. Deliverables and Outcomes

The outputs give the customer a usable record of the work and the information needed to act on it. The selected elements determine which deliverables apply; findings and limitations remain visible alongside the results.

Deliverable	Use for the customer
Process findings and design	Describes the selected task, dependencies and intended automation logic.
Workflow or low-code component	Provides the commissioned application, flow or supporting configuration.
Validation and maintenance guidance	Records test findings and explains how the receiving team should use the capability.

4.2. Working with 848

Process owners approve workflow logic and exceptions. Users provide practical scenarios for validation. Platform or application owners maintain access and dependencies and receive the technical handover.

Participant	Responsibility
848 delivery team	Performs the selected work, explains findings and documents the relevant outputs. Coordinates review and knowledge transfer with the customer.
Customer service owner	Confirms the intended outcome and scope. Makes customer decisions and identifies who can resolve dependencies or approve changes.
Customer specialists and suppliers	Provide relevant information and agreed access. Complete retained activity and participate in review or validation where their systems or processes are involved.
Receiving team	Reviews the relevant outputs and takes ownership of the activities that continue after handover.

4.3. Service Assurance

Testing checks the agreed workflow behaviour and representative exceptions. Customer review confirms the delivered component and remaining actions. A process review engagement is accepted against its findings, not against an uncommissioned implementation.

Review focus	What is checked
Scope alignment	The delivered work and outputs address the agreed requirements and selected service elements.
Evidence and validation	Findings or test results show the basis for conclusions, including known limitations and unresolved dependencies.

Review focus	What is checked
Customer acceptance	Relevant owners review the outputs and understand any open actions before accepting the commissioned work.

4.4. Onboarding

Onboarding establishes the conditions needed for useful delivery. The customer and 848 confirm what the engagement should achieve and check that the people and information needed for the selected work will be available.

Preparation	What needs to be established
Outcome and scope	Confirm the selected elements, boundaries and expected outputs, together with the customer's priorities.
Information and access	The customer provides process information, suitable example data and access to the selected systems. Required licences and supported connectors must be available, with a ready environment for technical work.
Participants and decisions	Identify the service owner, relevant specialists and receiving team. Confirm review participants and escalation routes.
Delivery readiness	Agree the applicable schedule and customer prerequisites. Confirm any operational constraints affecting access, validation or handover.

4.5. Operating and Improving

Usage and exception patterns can identify further simplification. Customer teams decide which changes to make and maintain the automation after handover. Continuing monitoring or improvement delivery requires explicit scope.

4.6. Handover and Exit

848 walks through workflow logic and relevant administration tasks. The customer confirms responsibility for operation, dependency changes and future maintenance of the selected component.

Handover item	Purpose
Agreed outputs	Provide the final documents or configuration material relevant to the selected service.
Findings and open actions	Preserve the evidence, limitations and remaining work for the customer or receiving provider.
Knowledge and ownership	Explain how the outputs should be used and confirm who owns the next operational or improvement activity.

5. Why 848

848 helps organisations improve how technology supports the way they operate, make decisions and deliver services. Our focus is not on deploying technology for its own sake, but on connecting technology investment to measurable business outcomes.

Our services are aligned through The Intelligent Business Framework, which brings together five outcome areas: The Intelligent Core, The Secure Business, The Efficient Business, The Insightful Business and The Innovative Business. This provides a consistent way to move from technology foundations and security through to operational efficiency, data-led decision-making and innovation, without treating each requirement as an isolated project.

848 combines consulting, engineering and managed service capability within one UK-based team. That matters because the people who design and implement change understand how technology must operate once it enters live service. Architecture, cloud, security, data, Power Platform, Dynamics 365, Microsoft 365 and managed services can therefore be considered as connected parts of the customer environment rather than separate technical towers.

Our Microsoft capability is supported by established partner credentials and practical delivery experience across Microsoft Azure, Microsoft 365, Power Platform, Dynamics 365, Fabric, Sentinel, Defender, Intune, Entra ID and Purview. 848 is a Microsoft Solutions Partner for Security and a Microsoft Direct CSP, giving our teams direct access to Microsoft technologies, programmes and commercial capability.

Service quality and security are supported by recognised organisational standards. 848 holds ISO/IEC 27001, ISO 9001, Cyber Essentials and Cyber Essentials Plus, with security-cleared capability available where required. These controls sit behind the way we manage information, quality, access, risk and service delivery across customer engagements.

What differentiates 848 is the connection between delivery and improvement. Through Value Chain-Led Managed Services, service information is converted into practical intelligence about how technology and services perform across users, teams, suppliers, systems and hand-offs. Service Flow Analysis extends that view by identifying friction, delay, rework, unclear ownership and recurring service issues across end-to-end journeys. The result is a clear improvement backlog based on real operational evidence rather than assumption.

We also place a strong emphasis on internal capability. Knowledge transfer, clear ownership and practical handover are built into our services so that customers understand what has been delivered, how it works and how it should evolve. Where 848 remains involved, improvement continues through review, prioritisation and measurable service outcomes rather than static support.

For customers, the result is a partner able to move from strategy through design, implementation, validation, operation and improvement while maintaining a consistent view of the wider business outcome. 848 brings together the people, Microsoft capability and service intelligence needed to make technology easier to operate, easier to improve and more valuable over time.