

# Power Platform Implementation

Accelerate Digital Transformation



# Digital Innovation Partner



**4400+**

Global Team Members

**1500+**

Projects Delivered

**25+**

IP Accelerators

**170+**

Clients (Long-term Relationships)



## INDUSTRY CERTIFIED

**ISO**

9001:2015

**ISO**

27001:2013

**ISO**

27701:2019

**CMMI**

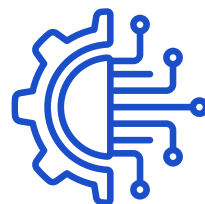
V2.0 Level 3

**PCI DSS**

Compliant

**HIPAA**

Compliant



Backed by Capital Square Partners, TA Associates, True North and CPPI



US-headquartered Tech Services firm with 100% focus on Innovation & Product Engineering

## HOW WE WORK?

### Data at Heart

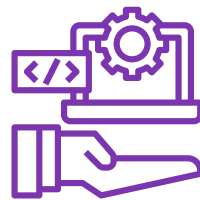
Accion Labs reimagines the possibilities for digital transformation from innovation to growth

### Digital in Thinking

Scalability, manageability, robustness, and efficiency are always our top priorities

### Innovation in Approach

Everything is planned to minute detail, ensuring high-quality deliveries to clients every time



Fastest Growing Tech Services Firm for 5 years in a row. Organic Growth & 9 Capability-centered acquisitions



Emerging Tech first approach - AI/GenAI Applications, investments in IP, Tooling and Innovation



Culture of Outcome, Transparency, Work-life Balance, Innovation & Lifelong Learning



Hands-on Management with Entrepreneurial, Engaged and Value-based Leadership Style

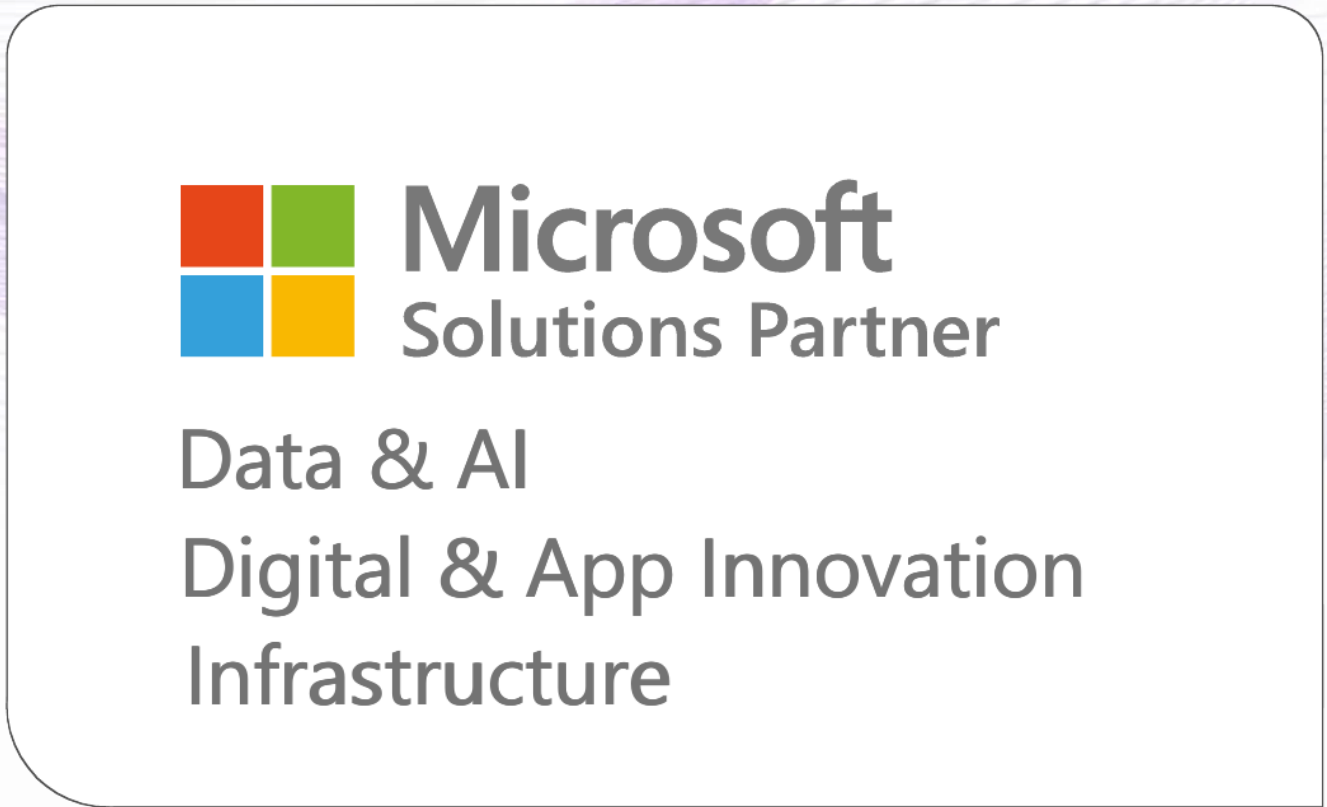


# Microsoft credentials and awards



Now available on

**Microsoft Azure**  
MARKET PLACE





# Introduction to Power Platform

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Microsoft Power Platform is a suite of low-code/no-code tools designed to help organizations build apps, automate workflows, analyze data, and create virtual agents without requiring extensive coding knowledge. It empowers both technical and non-technical users to innovate quickly.



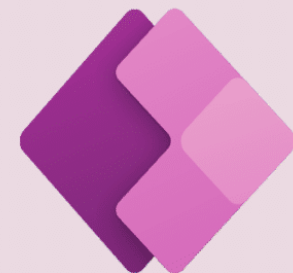
## Microsoft Power Platform

The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



### Power BI

Business  
Analytics



### Power Apps

App  
Development



### Power Automate

Process  
Automation



### Power Virtual Agent

Intelligent chat  
conversation



### Power Pages

External-facing  
websites



# Creating Value and Measurable Impact

## Why Power Platform Matters:

- Accelerates Digital Transformation  
Enables rapid app development and automation without heavy coding, reducing time-to-market.
- Unified Microsoft Ecosystem  
Seamlessly integrates with Microsoft 365, Dynamics 365, Azure AI, and third-party apps.
- Empowers Business Users  
Democratizes innovation by allowing non-technical teams to build solutions.
- Scalable & Secure  
Enterprise-grade governance, compliance, and data security through Microsoft Dataverse.

## Business Impact:





# Accion Labs' Capabilities

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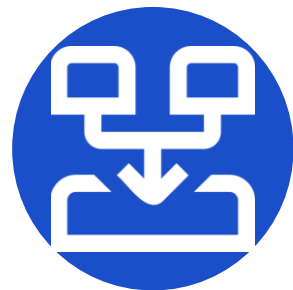
Integrated into the UI for AI  
(Microsoft 365 Copilot)



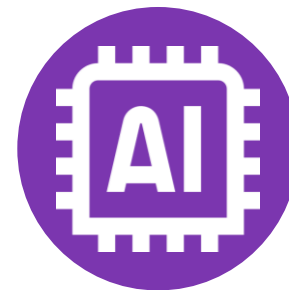
Automate business processes with  
agents



Discover, deploy, and manage pre-  
built 1P and 3P agents



Connect to your LOB apps,  
developer tools, business data,  
and analytics



Bring your own model,  
knowledge, and agents through  
Azure AI Foundry

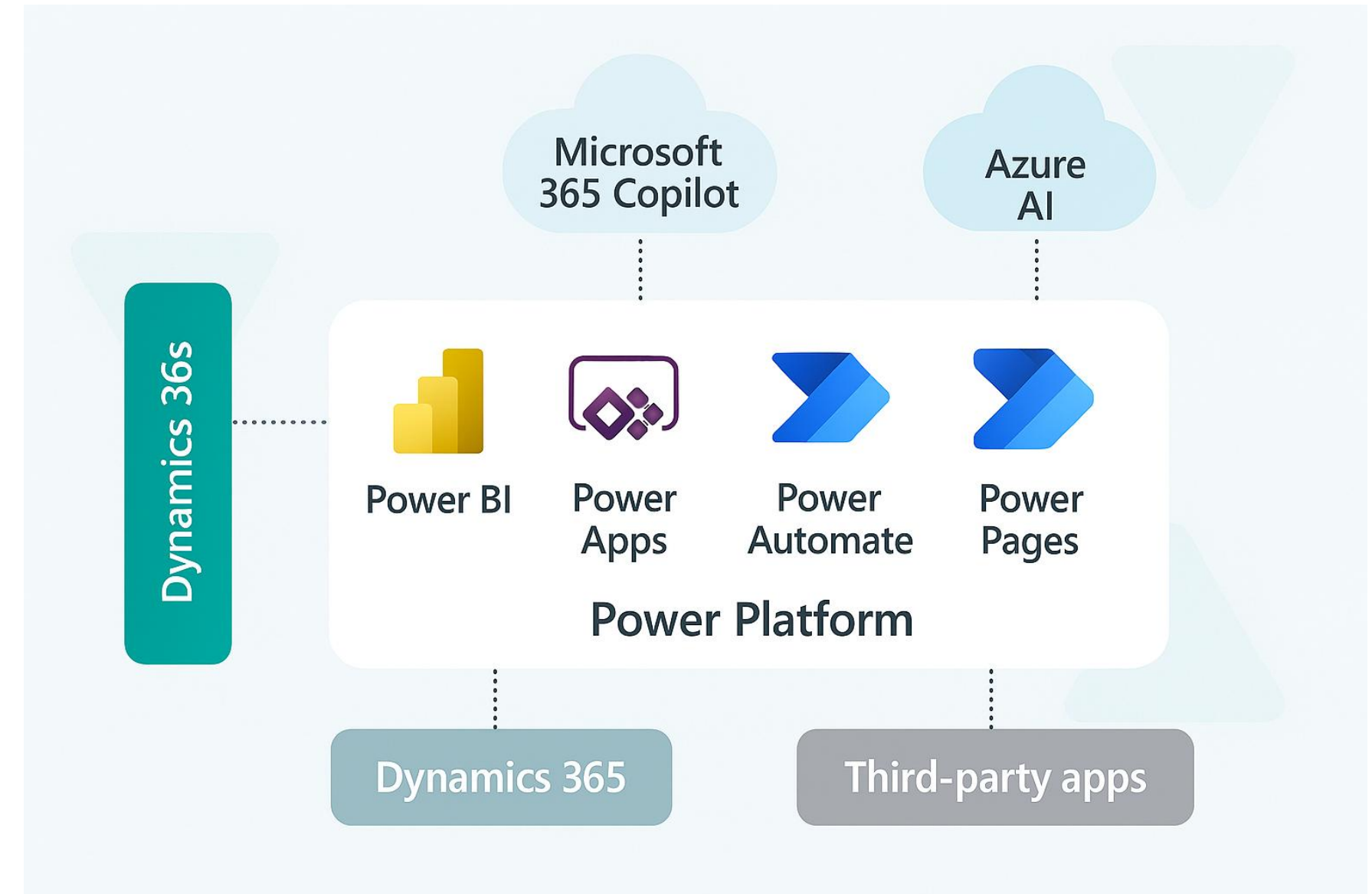


Turn insights into action with  
data-driven execution



Unlock innovation with integrated solutions across Microsoft ecosystem

- **End-to-End Implementation:**  
Design, build, and deploy Power Apps, Power Automate flows, Power BI dashboards, and Power Pages portals tailored to your business needs.
- **Seamless Integration:**  
Connect Power Platform with Dynamics 365, Microsoft 365 Copilot, Azure AI, and third-party applications for unified workflows and intelligent automation.
- **AI & Copilot Enablement:**  
Extend capabilities with Copilot Studio and Azure AI for conversational experiences, predictive insights, and generative AI-driven automation.
- **Data-Driven Decisions:**  
Leverage Power BI and Dataverse for secure, scalable data management and actionable insights.
- **Governance & Compliance:**  
Implement robust security, DLP policies, and compliance frameworks to ensure enterprise-grade reliability.
- **Industry-Specific Solutions:**  
Proven success in Healthcare, Financial Services, Energy, and Legal sectors with ready-to-deploy accelerators and custom integrations.

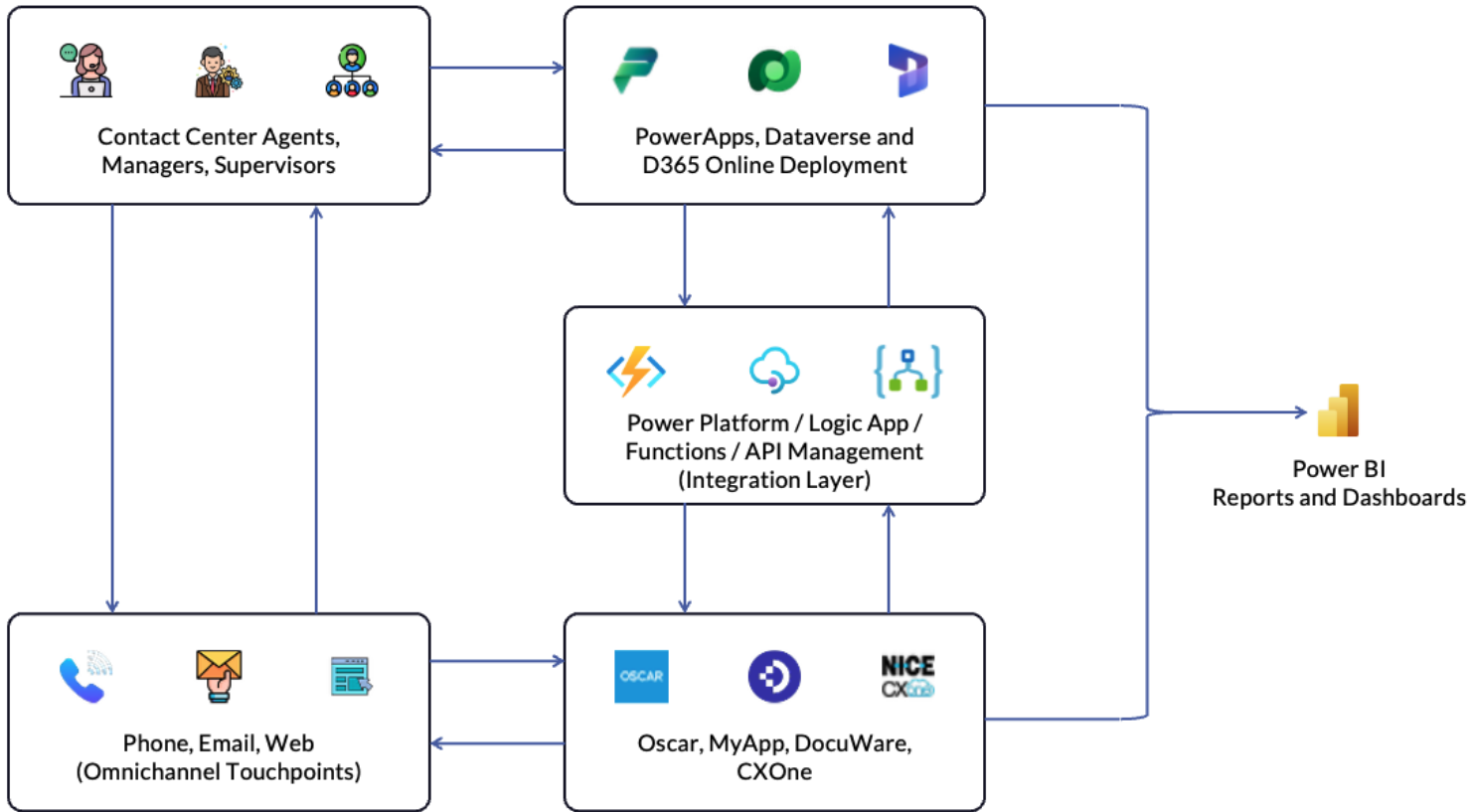




# Case Studies

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## About the client



Non-profit



US



100+ employees



Utility assistance, hardship programs, energy efficiency

## Solution Approach

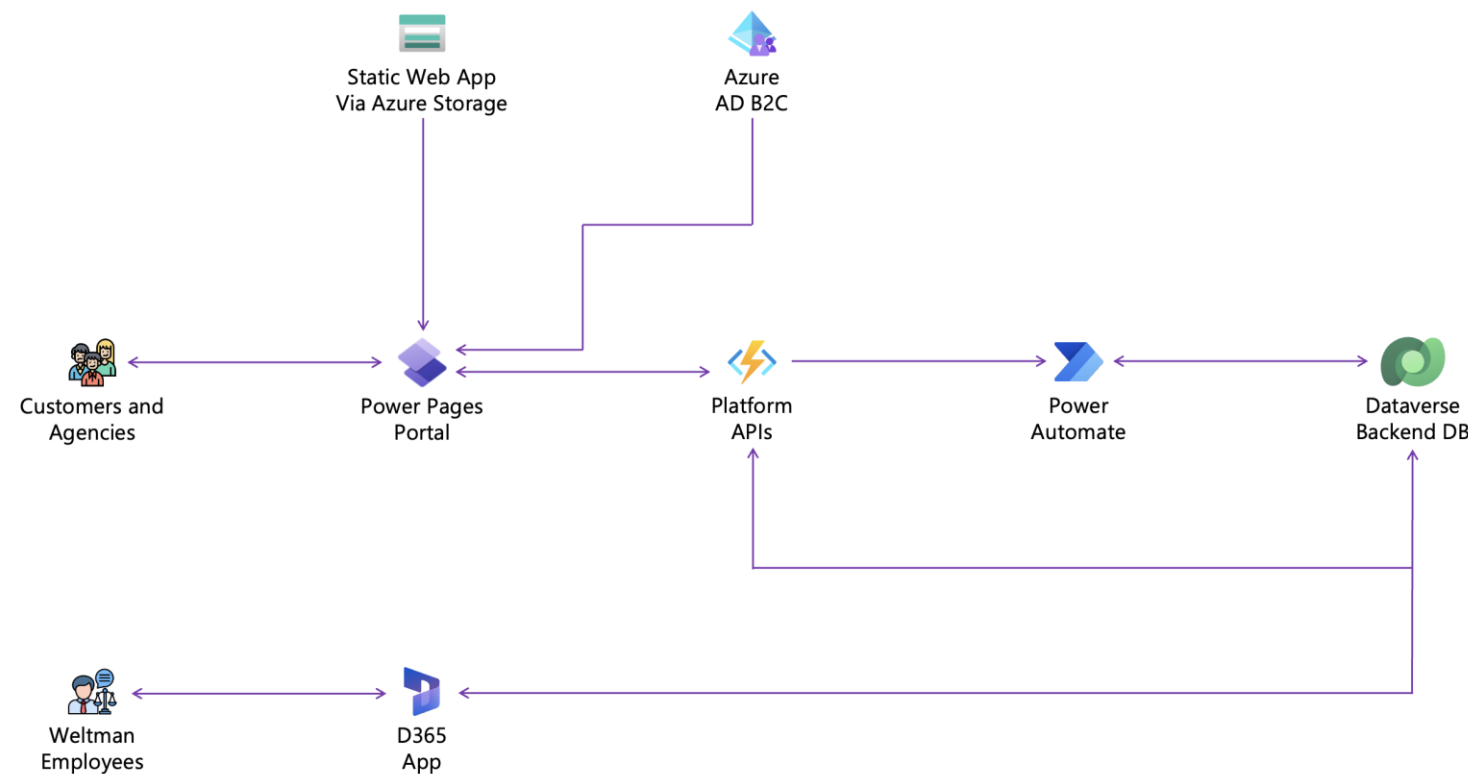
### Power Platform Adoption, CRM Modernization and Integration

- 1. System Integration Enhancement:** Integrated D365 CRM with Oscar, MyApp, DocuWare, and other key platforms to establish seamless bi-directional data flow via M365 Power Platform.
- 2. Comprehensive Channel Integration:** Expanded CRM capabilities to track SMS, chat, and web interactions in addition to existing phone and email channels through Power Apps integrations.
- 3. Workflow Automation Implementation:** Automated all major workflows—including approvals, notifications, status changes, program eligibility checks, document validation, and customer follow-ups—to streamline operations and reduce manual processing.
- 4. Data Quality Improvements:** Implemented robust address validation and data quality controls such as geocoding and postal standardization to improve accuracy, consistency, and trustworthiness of customer records.
- 5. Security and Compliance Reinforcement:** Strengthened security by tightening access controls to sensitive data, enhancing audit log management practices, and enforcing compliance with data retention and privacy policies.
- 6. Performance Optimization:** Improved CRM responsiveness and usability by cleaning up legacy customizations, removing obsolete entities, and archiving outdated data.
- 7. Advanced Reporting and Analytics Development:** Created real-time dashboards and built-in reporting tools within CRM to meet both operational and management information needs.
- 8. Role Redesign and Permissions Control:** Redesigned user roles and permissions to introduce supervisor and workforce management roles and implement restrictions on risky activities such as large-scale data exports.









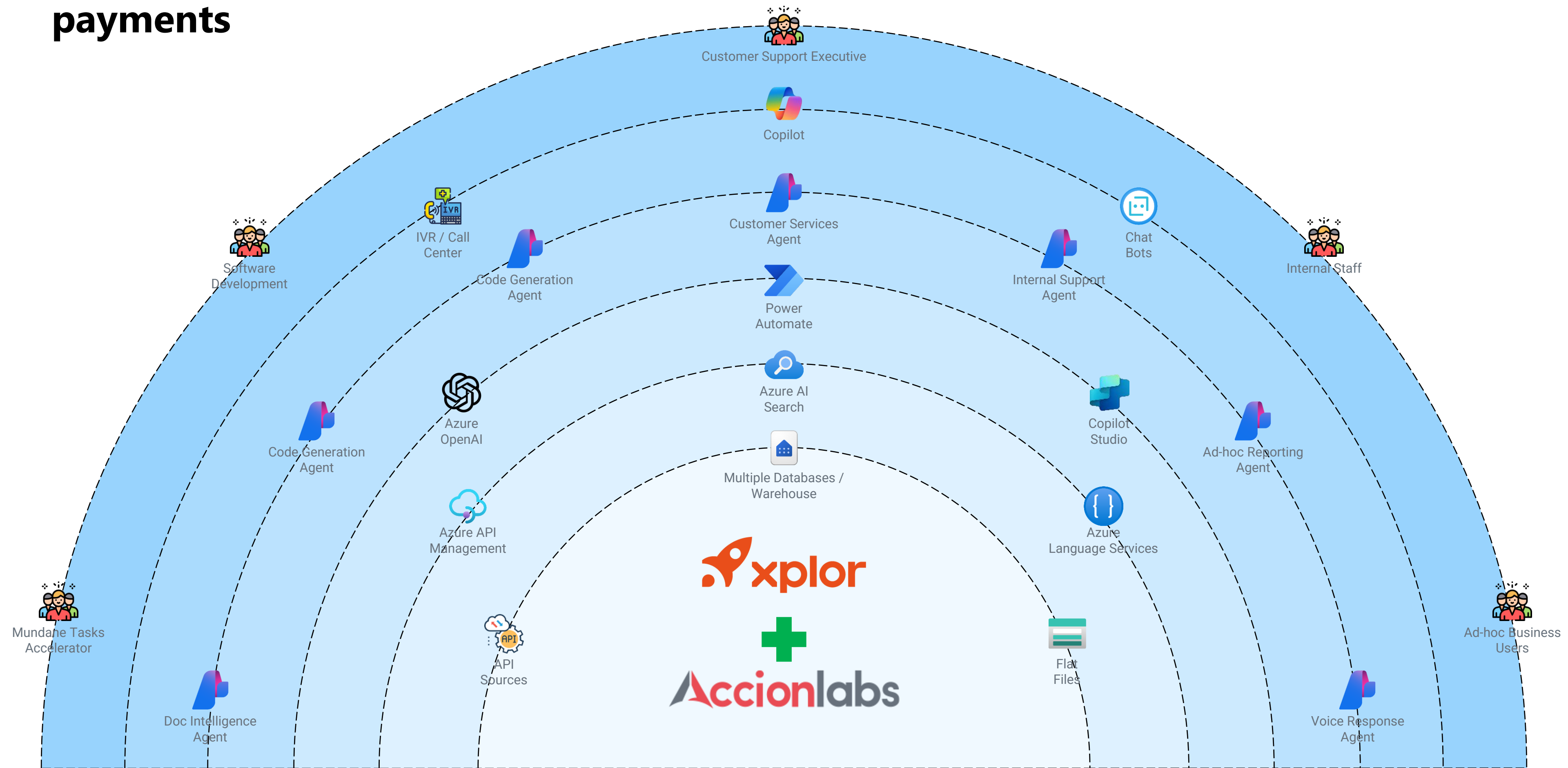
## Solution Approach

Power Platform based Portal for B2C Probate scenarios serving legal, financial, and estate admins

- ~3,000 monthly active users.
- User onboarding, request submission, progress/status tracking, communications, reporting.
- Secure display of sensitive records, file upload, and transaction audit.
- Facilitate single/bulk record submission, file uploads, workflow progression, error handling, and automated notifications.
- Integrate deeply with Weltman APIs for request creation, result polling, and secure information display.
- Ensure confidentiality, audit logging, and compliant data handling practices.



# Systems Integrator for vertical-specific SaaS, embedded payments





# Thank you.

Partner for long-term Strategic and Engineering Engagements



[mssales@accionlabs.com](mailto:mssales@accionlabs.com)



[www.accionlabs.com](http://www.accionlabs.com)

