INSURANCE LEADER MODERNIZES INFOPATH INVENTORY
WITH AIS' POWER PLATFORM ADOPTION FRAMEWORK

A well-known insurance organization reached out to AIS for help modernizing their InfoPath inventory. Over years of efforts to empower its staff, the company had built thousands of on-premises InfoPath forms with varying degrees of complexity across groups and business processes. However, these forms were time-consuming to create and update, and the data that they generated was disconnected and difficult to evaluate. People needed faster, easier, and better ways to navigate and understand the information that drove the business.

We built a modern system to optimize core functions of their business that taps into the combined potential of Power Platform and Microsoft 365—one that gives the organization more visibility into the solutions they rely on. Using guiding principles from the **Power Platform Adoption Framework** to help the organization get established with the technology, we accelerated the organization's roadmap for modernization at scale.

Challenge

An industry-leading insurance provider relied on thousands of disparate InfoPath forms. These forms were difficult to build and update, and they generated siloes of data.

Solution

AIS restructured the organization's data and unified related forms into single, automated business applications using Power Platform and Microsoft 365.

- **Rally, Roundup, and Restructure:** AIS led a Power Platform Quick Start to help the company see what was possible and then got to work bringing it to life. The existing InfoPath forms varied in complexity, ranging from small and simple to long and intricate. After analyzing the InfoPath inventory and the data systems that were involved, we recognized that, in some areas, we'd need to normalize the data by shifting from a flat structure to a more relational structure. Normalizing and cleaning the data made it more accessible and useful across the organization.

- **From Forms to Function:** Once the data was in shape, AIS focused on consolidating the InfoPath forms and creating a streamlined system of business applications. We used Microsoft Power Apps and Power Automate to build a suite of custom apps that could replace the forms and make it easier for groups across the organization to collect and analyze information. To free up time that people had spent manually entering duplicate information, we used SharePoint REST services and Microsoft 365 User Connectors so the new apps could automatically pull from back-end data and other sources such as Outlook contact details.

- **Scalable Excellence in Enterprise Management and Governance:** New capabilities such as monitoring, alerting, and actions for administrators ensure proper governance as the organizations scales their environment. To complement the in-house IT group, we provide Center of Excellence (CoE) guidance as a service. This service gives them the flexibility to ramp up and scale down as their platform needs evolve, tooling and automation to help manage and govern the platform at scale, and access to world-leading technical experts and Microsoft MVPs with more flexibility and cost savings than would be possible in-house.

- **A More Useful System for Usability Services:** Usability Services, the group that manages testing for the company's customer-facing apps, was a major beneficiary of these efforts. Under the old system, they used an InfoPath form that took months to develop, couldn't be updated easily, and generated volunteer data that people downstream had to search through manually. In two weeks, AIS replaced the InfoPath form with a Power App and restructured the data so that when other people in the organization need to find target volunteers, they can find them quickly using a simple filter. their platform.

- **Reworking the Call Center Workflow:** The call center is critical to this insurance provider's business, and they need processes that help them deliver the best possible customer service in a timely fashion. Supervisors in the call center rely on data from auditors to ensure quality and coach the agents who take calls. The existing process to audit a single call included 8 InfoPath forms spanning the 35-point scoring fields, Excel spreadsheets for scoring guidance, and one-off emails to supervisors to kick off the next steps for customer service coaching.

- **The Open Road Ahead:** Now that AIS has restructured the organization's data, built automated applications that are easier to customize and update, and helped the company design a scalable enterprise management system to build and scale modern solutions on Power Platform, this insurance provider is well equipped to make the ambitious progress that defines their brand. Staff is empowered to find the information they need, regardless of its origin. Processes and insights are more visible. There's a unifying purpose and intention behind how the apps and data will be managed. And development that used to take months can be done in a matter of weeks or even days.

Results

The insurance company has relieved employees of onerous, erroneous manual data-entry, freeing them to focus on strategic work. Management has instant access into accurate data that helps it drive the business.