Process Automation - approach
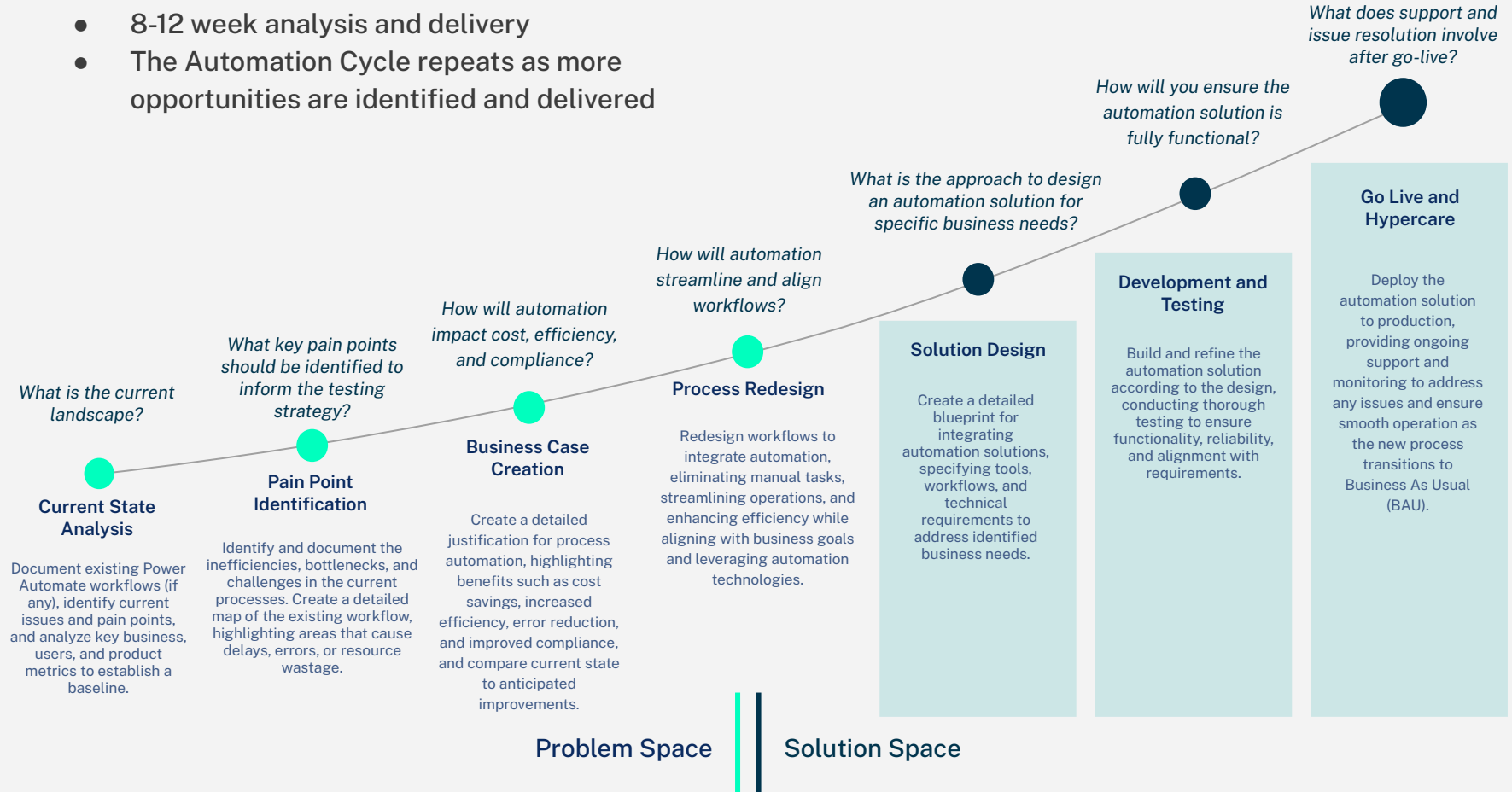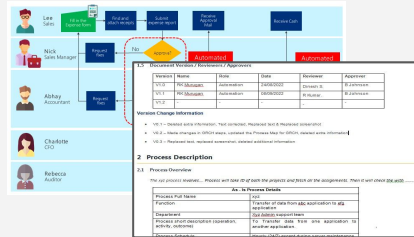
- 8-12 week analysis and delivery
- The Automation Cycle repeats as more opportunities are identified and delivered

What does support and issue resolution involve after go-live?

How will you ensure the automation solution is fully functional?

What is the approach to design an automation solution for specific business needs?

How will automation streamline and align workflows?

How will automation impact cost, efficiency, and compliance?

What key pain points should be identified to inform the testing strategy?

What is the current landscape?

Go Live and Hypercare

Deploy the automation solution to production, providing ongoing support and monitoring to address any issues and ensure smooth operation as the new process transitions to Business As Usual (BAU).

Development and Testing

Build and refine the automation solution according to the design, conducting thorough testing to ensure functionality, reliability, and alignment with requirements.

Solution Design

Create a detailed blueprint for integrating automation solutions, specifying tools, workflows, and technical requirements to address identified business needs.

Process Redesign

Redesign workflows to integrate automation, eliminating manual tasks, streamlining operations, and enhancing efficiency while aligning with business goals and leveraging automation technologies.

Business Case Creation

Create a detailed justification for process automation, highlighting benefits such as cost savings, increased efficiency, error reduction, and improved compliance, and compare current state to anticipated improvements.

Pain Point Identification

Identify and document the inefficiencies, bottlenecks, and challenges in the current processes. Create a detailed map of the existing workflow, highlighting areas that cause delays, errors, or resource wastage.

Current State Analysis

Document existing Power Automate workflows (if any), identify current issues and pain points, and analyze key business, users, and product metrics to establish a baseline.
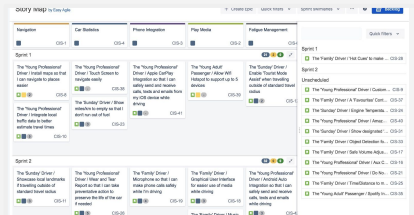
Problem Space | **Solution Space**
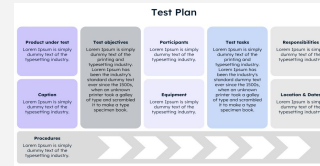
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Key Deliverables

The automated solution (bot) streamlines workflows by automating repetitive tasks, integrating seamlessly with systems to enhance accuracy, efficiency, and real-time reporting.
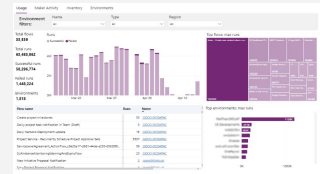

Process Design Document (PDD) details the automation integration plan, current process mapping, improvement areas, and requirements, ensuring alignment with business goals and a roadmap for deployment and support.
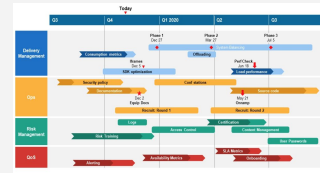

As is and to-be process - "As-Is" process outlines the current workflow, while the "To-Be" process describes the optimized workflow with integrated automation in Power Automate.

Test Strategy - a detailed test plan outlining scenarios and expected outcomes. We will utilise mock data to simulate real-world conditions, test each flow step individually, and regularly update and retest for performance and compatibility.

Metrics Analysis will evaluate your current state using KPIs and tailor custom measures to track test effectiveness. Deliver ROI by acting on insights and establishing continuous process monitoring and improvement.

Implementation Roadmap - puts everything together by providing with specific action items, timelines, change management of how to implement the recommendations

Solution Design Document(SDD) outlines the detailed design of the automation solution, specifying workflows, tools, and technical requirements. It ensures alignment with business needs and provides a blueprint for development and implementation.