

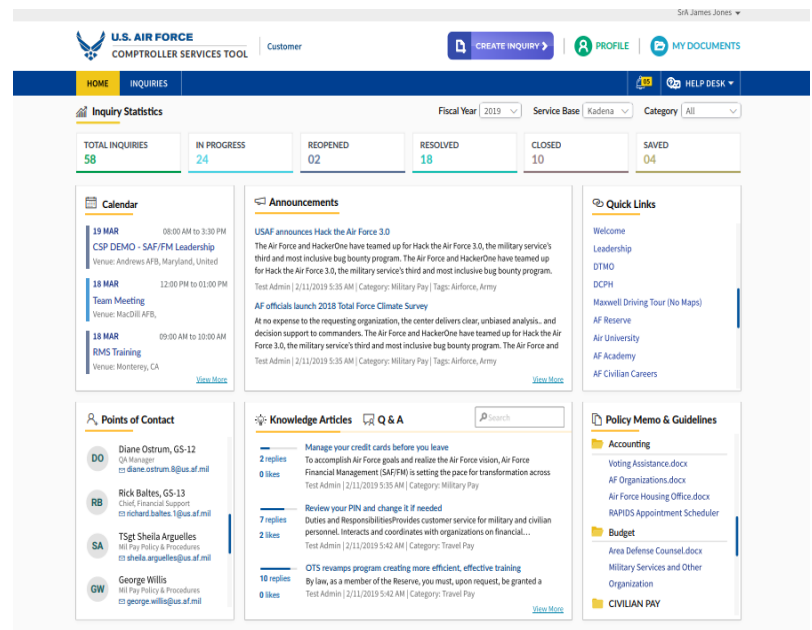
Power Automate Your Customer Service Experience –Assessment

Create a self-service platform for Finance customers using visualization and storyboarding to automate customer service for your organization. Automation of financial services workflows will enhance customer service, automate manual workflows, enhance workflow visibility, and provide centralized data and analytics.

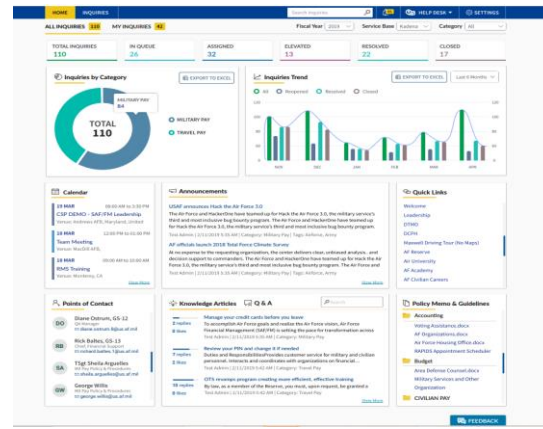
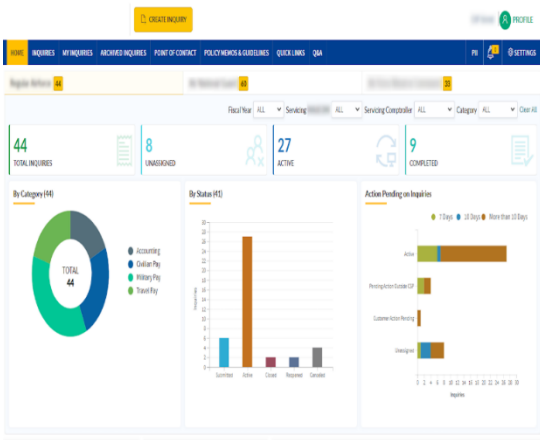
The assessment will uncover process inefficiencies, review current organization and employee practices, and aid in developing an automated solution that is practical, usable, and intuitive.

The assessment is a half-day effort, with questionnaires and whiteboard sessions engaging subject matter experts (SMEs) to understand how the organizational process will evolve to create business success leveraging Microsoft Power Automate and Azure.

Upon completion of the assessment, customers receive a customized visual storyboard providing a road map for future successful implementation.



“The quality of the services provided by Idea Entity has consistently exceeded expectations. Throughout the Assessment, Idea Entity provided high quality of service, receiving significant positive feedback from clients and users across the Air Force.” – Air Force survey



The Assessment provides:

- Assessment of the current AS-IS state of the finance customer services processes and provide the future TO-BE model
- Develop visual storyboards to demonstrate how our approach can improve customer services, automate finance inquires, and provide centralized data and analytics for management
- Creates a roadmap to help with scoping and prioritization to deliver a financial customer services platform

Business Benefits

- Builds the business case to deploy an automated and modernized financial customer services platform which will enhance customer experiences, improve productivity, access to knowledge base for inquires, and provides insightful analytics through digitized dashboards
- Delivers a value proposition that includes long-term and short-term goals of return on investment for a financial customer services platform
- Visually demonstrates the end user experience, increased customer service productivity, the automation of current workflows, and scale for further innovation

The assessment results in a clear understanding of the current challenges within the finance customer services area and provides a future to-be model.