MODERNIZE INCIDENT REPORTING WITH POWER PLATFORM

BACKGROUND

A globally renowned luxury retail brand had a pressing challenge. Their incident reporting process, fundamental for maintaining store safety and customer service standards, relied heavily on **Excel**. While Excel is a versatile tool, when it comes to complex, multi-step processes like incident reporting in a dynamic retail environment, it posed several limitations:

1. Scalability Issues: As Fendi expanded, the Excel-based system became cumbersome, failing to scale with the company's growth.
2. Inefficiencies: Manual data entry led to errors, and consolidating data across stores was time-consuming.
3. Lack of Real-Time Insights: With data spread across different sheets, real-time analysis was nearly impossible, delaying responses to critical incidents.
4. Accessibility Challenges: Store workers couldn't update the incident reports on-the-go, causing lags and potential inaccuracies.

Understanding these challenges, the luxury retailer approached **Kumo Partners** to help them leap into the modern age with a comprehensive Power Platform solution.

SOLUTION DEMO COMPONENTS, PERSONAS, & DEMO SCRIPT

Kumo Partners proposed and implemented a holistic Power Platform solution, intricately designed with four distinct components tailored for Fendi's unique needs:

### STORE WORKER MOBILE INCIDENT REPORTING POWERAPP
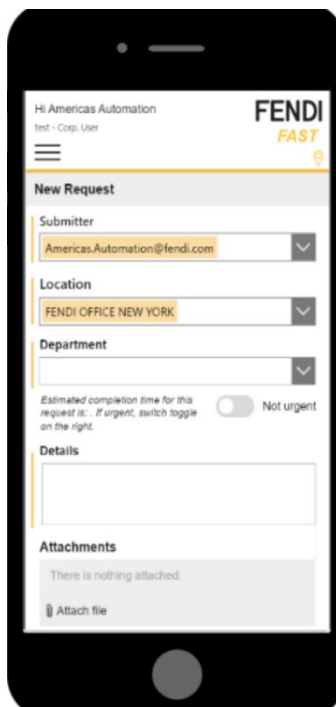
- Empowers store workers to report incidents directly from the shop floor using their mobile devices.

- Intuitive UI ensures that even the least tech-savvy users could create incidents with ease.

- Includes camera usage, image attachments, auto-filled location details, and product descriptions at their fingertips.

Persona: Alex, a diligent store worker at Fendi's flagship location

Demo Script:

- Alex notices a spill on the store floor, which could pose a safety hazard to customers.
- She quickly retrieves her mobile device and opens the Retail Store Worker Mobile Incident Reporting PowerApp.
- Alex selects the 'New Incident' button.
- In the form that appears, she chooses 'Safety Hazard' as the incident type, inputs the location as 'Aisle 5,' and adds a brief description: "Spill near shoe display."
- Alex uses the phone's camera to attach a photo of the spill for clarity and hits the 'Submit Incident' button.
- A confirmation message appears, and Alex feels relieved knowing the incident will be addressed promptly.

POWER AUTOMATE WORKFLOW TO GENERATE PDF REPORT OF INCIDENT AND SEND EMAIL TO ADMINISTRATIVE TEAM
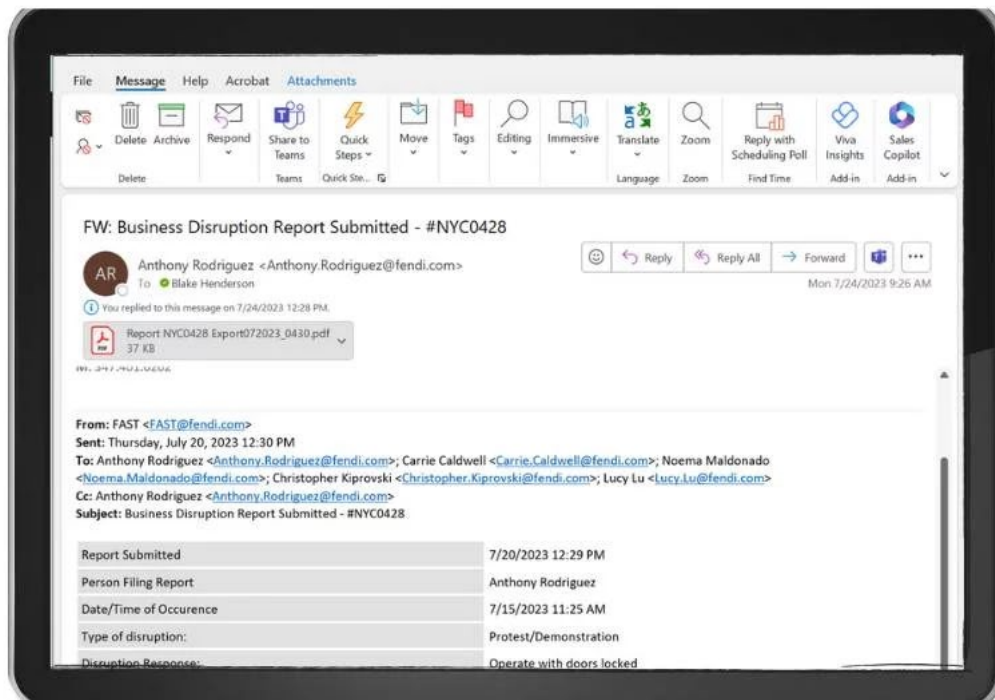
- When an incident is logged through the mobile app or web interface, this automated workflow instantly generates a detailed PDF report for each incident
- The report includes vital incident information, allowing for swift review and action by your administrative team.
- Seamlessly sent these reports via email to the administrative team, ensuring quick and coordinated responses.

Persona: Riley, a dedicated member of the administrative staff responsible for store operations.

Demo Script:

As Riley is managing her tasks, she receives a notification in her Outlook inbox.

- The subject reads: "New Incident Report: Safety Hazard in Aisle 5."
- Riley opens the email to find an auto-generated PDF attached. She downloads and reviews the PDF.
- The report contains the incident details: type, location, description, timestamp, and the attached photo. Riley quickly grasps the urgency of the situation.

OFFICE WORKER INCIDENT TRACKING ADMINISTRATION & MANAGEMENT POWERAPP

The administrative counterpart to the mobile store worker app
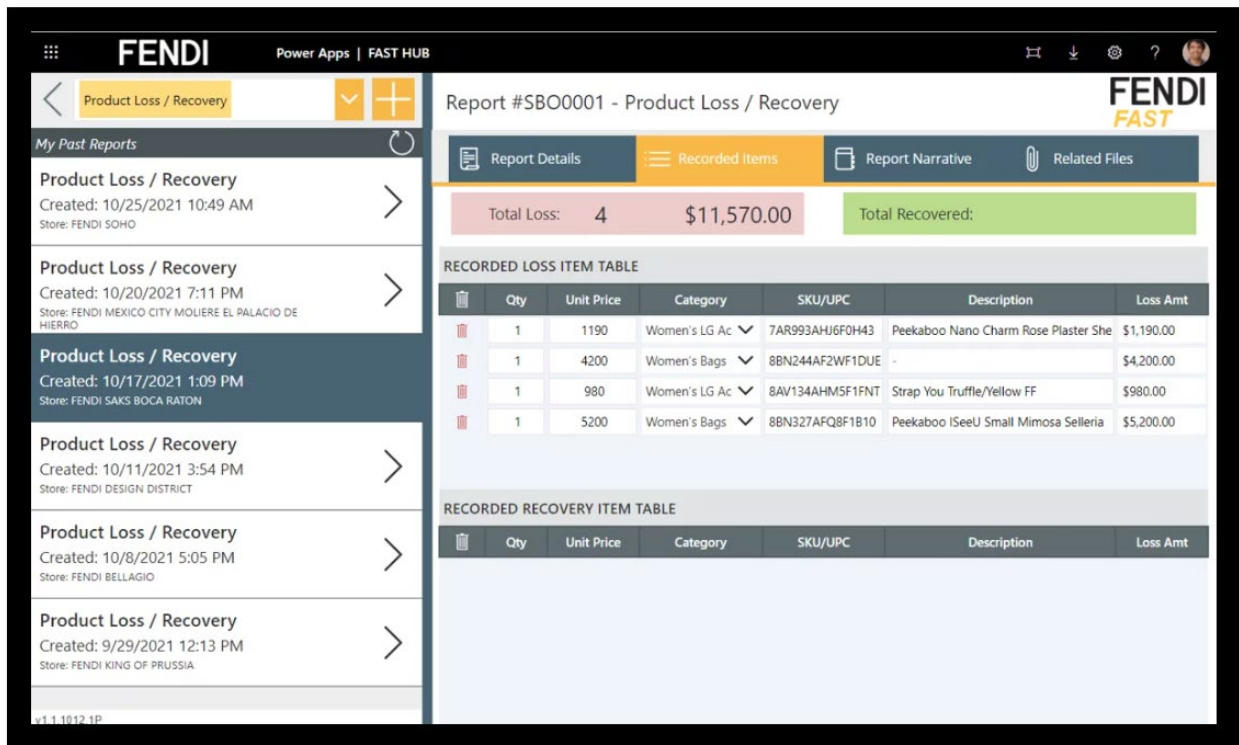
- Designed for office staff, it streamlines the management of incidents reported by store workers.
- Provides office staff a centralized platform to monitor, manage, and resolve reported incidents.
- Allows easy categorization, prioritization, and assignment of incidents.
- It's not just an app; it's a comprehensive incident management solution, allowing your office team to maintain a safer, more responsive retail environment.

Persona: Jordan, another member of the office staff, who oversees incident management.

Demo Script:

- Jordan opens the Retail Office Worker Incident Tracking Administration & Management PowerApp on her desktop.

- The main screen presents a list of all submitted incidents, ordered by priority.
- Spotting the recent incident from Aisle 5, Jordan clicks on it to view more detailed information.
- The PowerApp displays the full report, with options to assign the incident to a specific team member, add notes, or change its status.
- Understanding its urgency, Jordan assigns the incident to the store's cleaning staff and changes the status to 'In Progress.'

EXECUTIVE/LEADERSHIP INCIDENT REPORT POWERBI DASHBOARD:
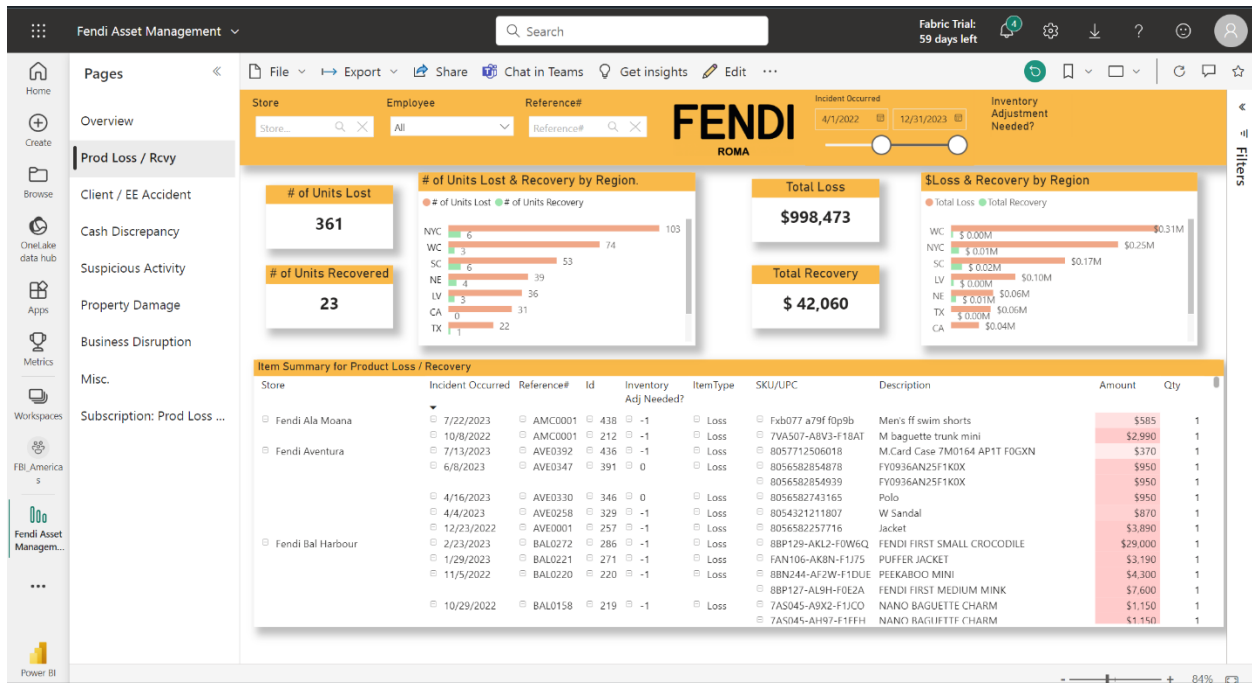
- This dynamic report compiles and distills all incident reporting data into an interactive dashboard.
- Enables leadership to get a bird's eye view of all incidents across retail outlets, enabling executives to spot patterns, make strategic choices, and prioritize actions effectively.
- Provided data-driven insights, trends, and metrics to drive continuous improvement in-store operations.

Persona: Chris, a high-ranking executive at Fendi, responsible for store operations and safety.

Demo Script:

- Chris starts his day by reviewing the Retail Executive/Leadership Incident Report Analytics Dashboard powered by PowerBI.
- The dashboard provides an overview of all incidents: a breakdown by type, status, location, and other relevant metrics.
- He zooms into the recent incidents and spots the 'Safety Hazard' from Aisle 5.

- Diving deeper into the analytics, Chris gains insights into the frequency and patterns of safety-related incidents.
- Using these insights, he considers implementing additional safety measures, ensuring that Fendi continues to prioritize the well-being of its customers and staff.

CONTACT INFO FOR QUESTIONS

- Please reach out to ethan@kumopartners.com for any questions
- Check out the case study for this solution on our website: https://kumopartners.com/luxury-brand-uses-power-apps-to-simplify-complex-business-processes/