



GLOBAL FINANCIAL SERVICES FIRM

Enables Citizen and Enterprise Application Development with Power Platform

Challenge

A global, multinational risk management, financial services, and advisory firm has many subsidiaries and teams that work autonomously. They needed a strategy and help with implementing governance, adoption, and modernization using Power Platform.

Solution

AIS provided Power Platform Center of Excellence (CoE) capabilities to help establish the platform, implement best practices for security and governance, modernize legacy applications, and effectively scale adoption and modernization efforts across IT and business users in a secure fashion.

Results

The organization has accelerated its enterprise-grade adoption of Power Platform, modernized three legacy applications, and begun to enable its workforce of business users and citizen developers – all in just a few months.

Adopt and manage at scale

Our client, a Global Risk Management, Insurance, and Advisory Firm, is a massive organization with many subsidiaries. Several teams operate autonomously. When they reached out to AIS interested in adopting Power Platform, it was clear that they needed a plan for governance, security, and adoption at scale. AIS worked with the firm to establish a Center of Excellence (CoE) engagement to help them get established, migrate and modernize workloads, and manage and adopt the platform at scale. We used the [Power Platform Adoption Framework](#), the open-source, community-driven standard for large organizations adopting Microsoft Power Platform at scale published by AIS, to help the organization create a plan to make Power Platform a success.

Accelerating platform adoption

AIS has invested in developing frameworks, creating IP, and building enterprise experience in Power Platform to give our clients a head start on the platform. Our teams deliver accelerators and services that aid swift adoption, a considerable gain for an enterprise customer where programs and new technology adoption can take time to take hold. AIS can help you make the same progress through 2-3 months of direct engagement that most organizations would take a year or more to achieve.

Lessen license confusion

With a new technology area that has many functions, licensing can be quite complicated. It could be weeks' worth of work for teams to understand and make the best decision for their org. AIS provides guidance and education, such as supporting documentation to inform decision making, to help you with licensing decisions that offer flexibility and effective cost structures.

In highly regulated organizations such as this client, software licensing and handling of data pose risks. We've created a frictionless way for users to route data appropriately for various needs. As users build a SharePoint list or a Power App to use that data, our approach reduces unnecessary costs and feeds data into the CoE team to ensure compliance.

Govern enterprise users and data

Large enterprises with various subsidiaries and business groups, especially highly regulated ones, require a close eye on governance and risk management. AIS supports clients with Power Platform governance in many ways, such as our Data Leakage template.

When Microsoft first released power Platform connectors, there were around 60 connectors. Now, there are over 400: that's almost one per week. These connectors can be placed into three buckets, Blocked, Non-Business Data, and Business Data. When we started, our client had ERP connectors and other technology in the Non-Business Data group, giving anyone with the right permissions to share out that data to other Non-Business Data group connectors, which included social media providers. AIS provided them a Data Leakage template to resolve data governance risks.

Re-imagine legacy apps

As part of this engagement, we helped the organization establish a landing zone and re-imagine three applications:

Transaction Log

This application records transactions, fees, and more for compliance purposes. The application was on SharePoint approaching the end of life and needed to be migrated. Based on regulatory compliance requirements and data sensitivity, we moved it to Power Platform with the data stored on Dataverse to enable better security and compliance. Users can only see the data that is shared with them.

User experience was also improved from a flat form to a multi-step form and broken up into logical steps. We used the AIS Base Accelerator, a collection of commonly re-usable data components maintained by AIS and provided free of charge to our clients to accelerate app development in their environments, to plug in data for common fields for base entities (geolocation, organizational structure, people, etc.). This gives them the ability to geo-code and geo-categorize fields.

Knowledge Management for Work Process Guides

Initially based in SharePoint 2010 on-prem, this process involved documents with sections and subsections that were referenced for compliance purposes. They were a pain to maintain, as the steps and sections within each document appear in many of the work process guides, and there was no way to link snippets across each one. Teams had to locate and replace outdated content across all versions of the documents when something changed.

To simplify management and reduce the amount of time update took, AIS provided knowledge management capabilities using snippets. Our solution approach enables the end-user with training and support instead of simply delivering a final product, putting powerful productivity and knowledge management tooling in the hands of citizen developers.

The application has two parts: Creating and managing content built on Power Platform in a Canvas App and using Dataverse for Teams, which is a Canvas App relational data service built into Teams that allows us to deploy applications directly into the Microsoft Teams experience, allowing end-users to find and view all work process guides relevant to them in a place they were already working.

IT Project Request Pipeline

AIS built a Model-Driven Power App to migrate processes away from Excel, Word, and Email. The Power App allows users to identify the criteria they want to capture—what the need is, required technology stack, project staff, and check of logged inventory, where necessary—to capture the requests better and streamline communications between suppliers and internal teams.

Manage at scale

Power Platform puts robust, flexible, and user-friendly technology in the hands of both professional and citizen developers, creating an environment where processes and applications can be modernized quickly and securely. AIS helps large organizations like this one with management at scale. For this client, some of those activities included:

- **Measuring success and aptitude with the platform:** We implemented a methodology to measure how the app builder is on a scale of 1-5 to determine support and training needed.
- **Templating:** We built a template that links to centralized styles and themes for applications. These styles are hardcoded into the Power App but linking to the data is soft coded. If teams need to change branding, they can do it with the click of a button.
- **Compliance management:** Teams are given the ability to better grade environments based on compliance levels to maintain proper security.
- **Reporting ROI:** Typically, a lot of time is spent measuring people who make apps, the end-users. We're building options on managing the managers and reporting up to show the platform's full ROI.

Enable your enterprise, from IT teams to business users, through a [Power Platform CoE engagement](#) with AIS. We'll help you deploy, build, and scale the platform to meet your needs.

Seeking similar outcomes?

Learn how AIS can help you implement technology solutions that deliver real business results.

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