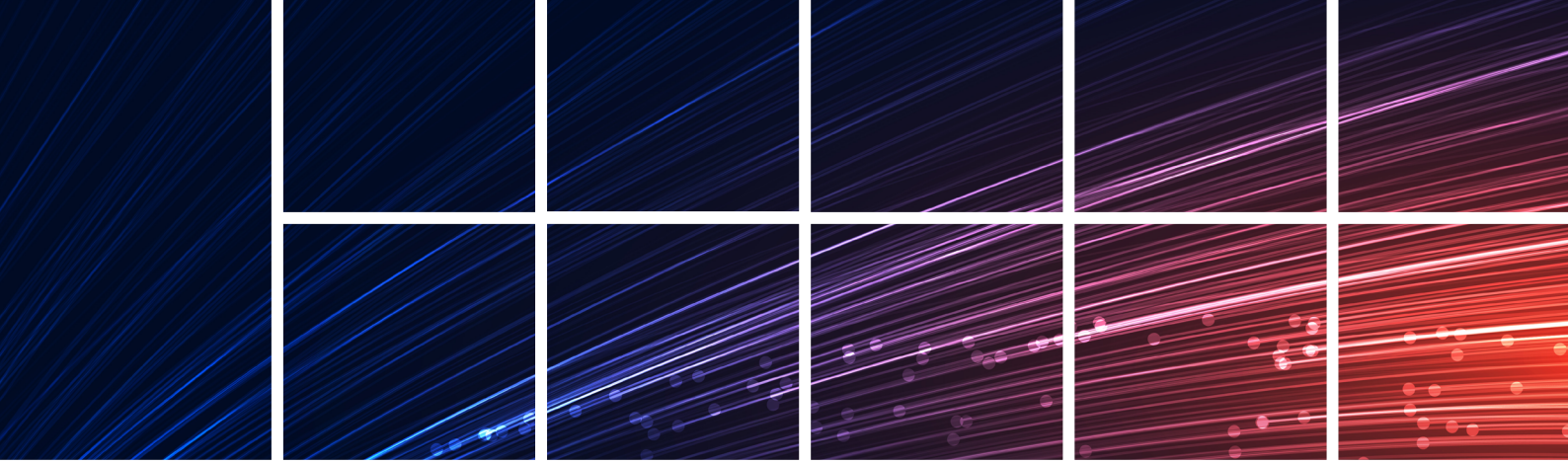


POWER AUTOMATE ADOPTION FRAMEWORK

A playbook to guide you through successfully developing an automation culture with Microsoft Power Automate

Smartbridge

Microsoft Solutions Partner
Data & AI
Azure

Microsoft Solutions Partner
Digital & App Innovation
Azure

V2

Table of Contents

Starting Your Journey	03
The Smartbridge Power Automate Adoption Framework	05
Skills Maturity	07
Operational Analytics	10
Best Practices and Guidance	13
Microsoft Copilot	18
What's Next?	20



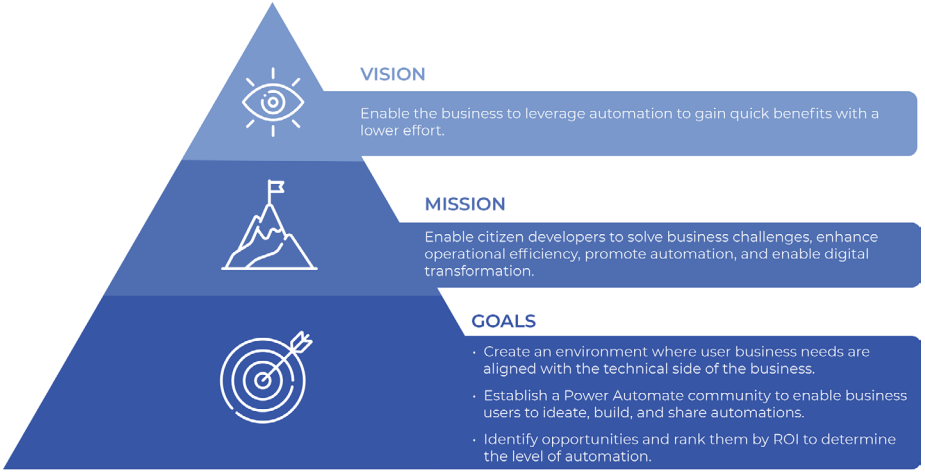
Copyright © 2024 Smartbridge, LLC. All rights reserved.

Starting Your Journey

Power Automate is a low- to no-code tool that can help automate repetitive, rule-based tasks. It is an easy and economically savvy decision for organizations of any size to improve personal productivity and nurture complex departmental and enterprise solutions. However, succeeding at scale is not easy and is full of potential pitfalls.

The Smartbridge Power Automate Adoption Framework is developed to meet users at their skill level. It is a summarized, yet exhaustive, template that will provide your organization with a detailed primer to initiate makers, champions, and admins into Power Automate.

Our extensive, research-based framework is designed for the organic **skillset growth** of your people, **maturity** of your business processes, and **modernization** of your technology.



Example of a strong foundational core that will ensure automation benefits are accessible in the organization.

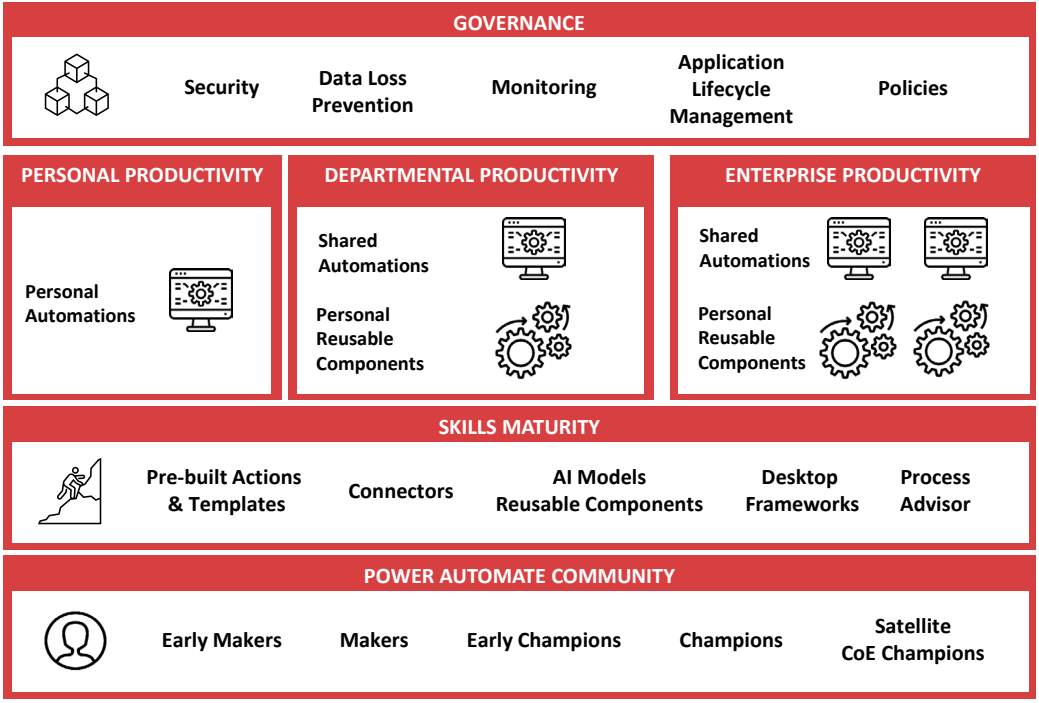
Copyright © 2024 Smartbridge, LLC. All rights reserved.

The goal of this framework is to provide a robust foundation for makers, champions, and business stakeholders to help your organization mature from personal productivity bots to departmental or enterprise automations. This playbook provides a detailed baseline to initiate users into makers and champions, and also build your internal Power Automate Community. This will enable your organization to grow its skills and to define the governance for any automation.

Microsoft Terminology

Maker - builds solutions to simplify, automate, and transform tasks and processes for themselves and their team where they have deep expertise in the solution business domain.

Champion - recognized by their peers as the go-to expert. They continually build, share knowledge, influence, and help their colleagues.



Copyright © 2024 Smartbridge, LLC. All rights reserved.

The Smartbridge Power Automate Adoption Framework

The framework in its full glory consists of these areas:

Power Automate Skills Maturity

Identify the target users and personas by level of interaction with Power Automate to better target their proficiency, level of support, and training needs.

Power Automate Foundation

Establish the necessary tech, processes, security, governance, and architecture for a stable automation platform.

Best Practices and Guidance

Establish effective user experience, reporting, governance, collaboration, and sharing.

Center of Excellence Champions

Identify the leadership and team that will drive the program and progress.

Operational Analytics

Clearly define and understand how maker, at the citizen developer level can monitor activity and measure success.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Getting You Started on the Right Foot

Though we would love to cover all areas of the framework in this playbook, we will spotlight just a few to get you started.

- Power Automate Skills Maturity
- Operational Analytics
- Best Practices and Guidance
- BONUS! Copilot and AI Capabilities

If you would like to learn more about our full Power Automate adoption framework and how it can be tailored for your organization, please reach out to us.



Copyright © 2024 Smartbridge, LLC. All rights reserved.

Power Automate Skills Maturity



Power Automate is an automation tool that is built for everyone to use. Because of this, it's important to understand where your end-users are at in their skill levels and what training might be needed. Identify your target users and personas by their level of interaction with Power Automate to better recognize their proficiency, level of support, and training needs.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

People Skills Maturity



Organizational Skills Maturity

Efficient

- A large internal community and key stakeholders that steer the Power Automate Center of Excellence (CoE).
- Well-established career paths for makers and mentors.
- Strategy and goals for citizen and pro developers are well defined.

Capable

- Regular training and upskilling events for champions.
- Maker assessments and certificates are promoted.
- Sharing and celebrating success stories across the organization.

Defined

- Makers provide business solutions to alleviate pain points.
- Knowledge sharing is constant and proactive.
- An internal community of champions is nurtured.

Repeatable

- Early onboarding strategy for new makers.
- Makers start knowledge sharing efforts and become ambassadors.
- Makers promote or participate in hackathons or RPA days.

Initial

- Content created is unrecognized.
- Knowledge transfer and sharing are unstructured.
- Experimentation or figuring out by trial and error.
- Individual or team-based initiatives.

Focus on people. Encourage success stories.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Skills and Knowledge Maturity

The strategy to upskill and train makers, champions, and business units is fundamental to creating a strong community. Rewarding champions will provide recognition, motivation, and inspiration to the Power Automate Community. These incentives can range from CoE direct input, sponsored specialized training, or company rewards.

Makers Training

- As makers are identified, design a training path for makers and facilitate training materials tailored to the organization.
- If there are no defined training paths, the initial makers can access the basic training available on Microsoft Learn.
- Encourage talent within the organization. Share makers' initiatives and invite automation sponsors to learn more about the benefits.

Event-Driven Training

- Events are helpful for organizations to rally and encourage people to try new frameworks or processes. Some events can be:
  - RPA Day(s)
  - Show and tell sessions
  - Hackathons
  - Q&A sessions
- Engage your internal Power Platform Community to do regular internal meet-ups to connect and discuss new success stories, updates, and best practices.

Certifications

- Microsoft provides multiple Power Platform certifications so makers can use the platform to its full potential.
- You can view the full list of certifications from Microsoft Learn.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Operational Analytics



After deploying your automation with Power Automate, you'll want to make sure you continuously evalute and refine your envrionements and flows. Monitoring activity and usage can help you measure the success of automations as well as help you determine the business impact they are producing.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Power Automate Monitoring

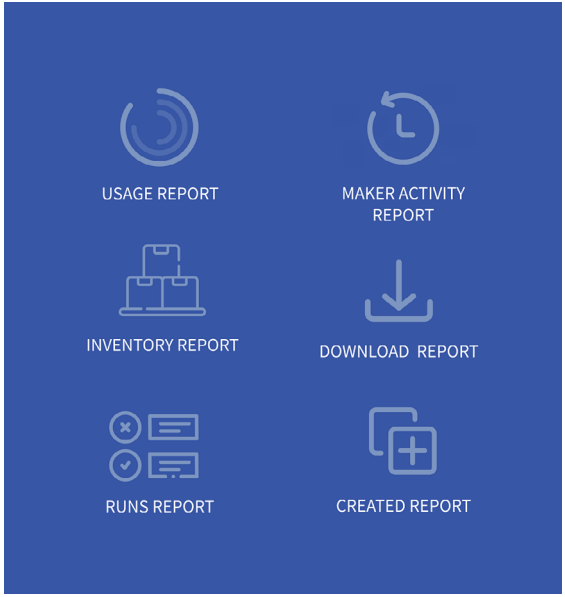
The designated champion(s) or Power Platform admin(s) are responsible for having full visibility of the flows to help the CoE govern and secure the environment(s). The following roles can see the Power Automate analytics, however, there is a difference in the access level for each role:

Environment Admin - Full management at the tenant level. Can view reports only for the environments that the admin has access to.

Power Platform Admin - Can view reports for all environments.

It is best practice to have a dedicated champion or team that monitors the tenant environment(s) utilizing the reports at the tenant level.

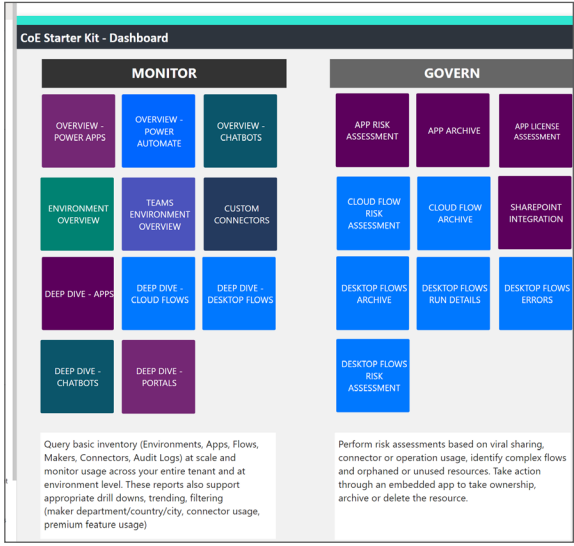
Tenant Level Reports



Copyright © 2024 Smartbridge, LLC. All rights reserved.

Monitoring and Maintaining Flows

It's important to monitor environments, flows, makers, connectors, and logs to mitigate any issues that might arise. Having a dashboard, like a **Power Platform CoE Dashboard**, can help organizations identify flows at risk, what flows are being widely shared, and which flows to archive.



Assess Cloud and Desktop Flow Risks - Some examples of risks a dashboard can help assess:

- Overshared or overused resources
- Suspended flows due to Data Loss Prevention (DLP) violations
- Flow details (runs, history, anomalies)
- Unused flows and archiving
- Flows using non-production words ("test", "sample", or "demo")
- Multiple flows with the same name

Prevent Widely Shared Flows - Often apps or flows are shared with the entire organization because it's the easy option. However, flows shared with multiple individuals can pose risks. It is recommended to share role-specific apps with an Azure AD group instead.

Archive Flows - By using a flow monitoring dashboard, admins can identify unused flows and be assured that the resource can be safely archived.

Want to learn more about our Power Platform CoE services or how to monitor your Power Automate deployment?
Contact Us >>

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Best Practices and Guidance



As with any technology, there are best practices you can follow for a successful adoption. Here we will cover a few to help guide your organization with Power Automate.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Development Best Practices

Benefits from a low-code tool like Power Automate have incredible potential with proper practice and the implementation of general guidelines. Repetition is key. Following each of these best practices while creating automations, no matter the type of flow, will ultimately help users produce and maintain efficient automations.

- Low-code, no-code does not mean no practice required.
- Ensure IT is involved during the development process to provide insight where needed.
- Utilize scopes to better organize code segments.
- Label/name flows, steps, selectors, actions, elements and/or variables using consistent naming conventions.
- Become familiar with data type conversions – i.e., Dates, Integers, String, Arrays, etc.
- Always save your work. Then save it again. While Power Automate recently added integrated source control, it is still a new functionality and should be tested but not be depended on.

Continued...

Copyright © 2024 Smartbridge, LLC. All rights reserved.



- Always phrase conditional statements in the affirmative.
- Keep automations as simple as possible where complexity is not needed.
- Test your automation throughout development especially the start/stop scenarios.
- Add notes to actions to understand the purpose of each for future reference.
- Limit the amount of drilling down within code. Avoid nested IFs and try to create a sub flow for multistep processes.
- Use templates where needed. If no template is available, create one for future use.
- Always have a diagrammed outline of the process being automated before doing any programming.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Reusable Components

With the Components Libraries feature, components can now be easily saved independently of and reused across multiple solutions. Resuable components are great for multiple reasons:

Improve Efficiency

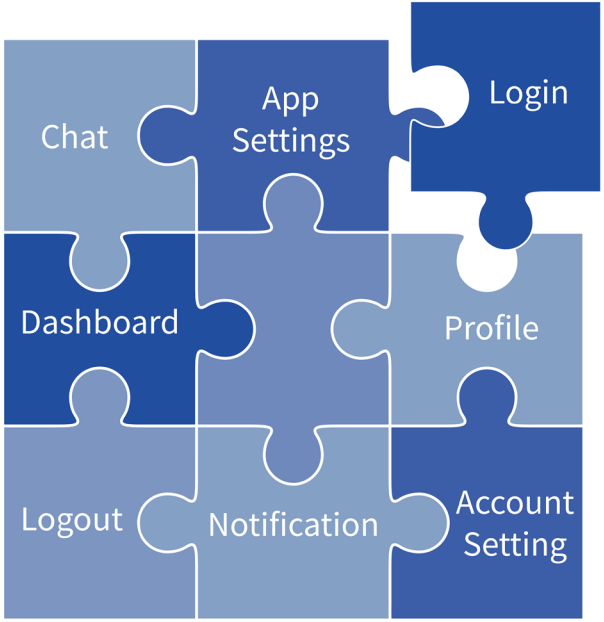
With 90% of the work done, the entirety of the project can be completed faster and more cost effectively. Having a shared database of components in a very large organization prevents duplicity across teams.

Improve Consistency

Multiple iterations of these components allow for the primary functions to be fully tested. This allows greater control and scalability for those building the apps and a more consistent experience for the users.

Easier to Test

Because the code is proven to work, the base functionality of features have already been tested. At this point, you are testing to make sure the entirety of the code works together.



Copyright © 2024 Smartbridge, LLC. All rights reserved.

Error Handling

With proper error handling, you'll be able to help flow execution to resume or stop, if necessary, when interrupted.

Action Level

- Action level error handling comes into effect if action-specific errors occur. Error rules are prioritized in the order they are arranged from first to last.
- Action level error handling can be set within the specific action's "On Error" panel. You can activate the preset values or add new rules.
- Each action has specific errors that can be produced, so the default types will differ on a case-to-case basis.
- Adding frequent "wait" steps throughout the process (i.e. wait for image, wait for text, wait a number of seconds, etc.) will allow you to more-easily drill down where specific errors are coming from.
- If an error happens more than 2 times, then more drastic measures should take place (i.e. stop the automation).

Block Level

- Block level exception handling is for cases where you cannot be certain which action is at risk of failing.
- It is an independent action that will encompass a group of actions when implemented.
- If any error occurs within this block, then the subsequent actions will not be run and the error rules will begin to execute.
- Generally, unexpected errors should be treated as system exceptions and the process should be stopped immediately.

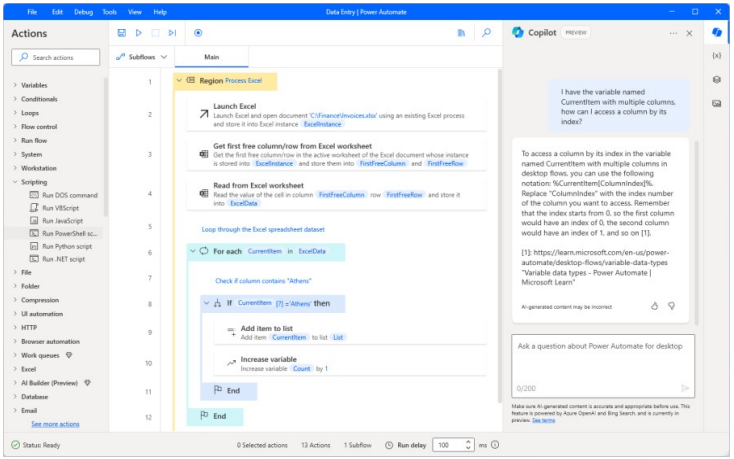
Copyright © 2024 Smartbridge, LLC. All rights reserved.

Microsoft Copilot

Smartbridge's full Power Automate Adoption Framework always takes major product enhancements into consideration when guiding organizations on best practices for optimized usage. Starting in 2023, Microsoft has invested heavily in the Power Platform by bringing artificial intelligence, automation and advanced data engineering features and integrations into the fold. While every version release requires re-tooling of your skills and processes, nothing has been more momentous in the history of the Power Platform than this infusion of AI-led capabilities. Here's an overview of these features that you should factor into your Adoption Framework ASAP.

What is Copilot?

With Microsoft Copilot, users can experience a whole new level of productivity and efficiency. Imagine having a virtual assistant by your side, ready to assist you with any task or challenge you may face. Whether it's writing code, troubleshooting issues, or even brainstorming ideas, Copilot is there to provide valuable insights and suggestions. This tool takes collaboration to a whole new level, enabling users to work smarter and faster than ever before.



Copilot in Power Automate. Image courtesy of Microsoft

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Copilot with Power Automate



Since the launch of Copilot, Microsoft has been gradually infusing it into every product available, including Power Automate! From creating and refining cloud flows to assisting in data ingestion for process mining as well as helping with desktop flows and analyzing automation activity, Copilot is here to assist you with all your Power Automate needs. Here are just a few of the features you can look forward to using:

- Receive step-by-step guidance and information
- Generate scripts when using 'Run PowerShell', 'Run VBScript', 'Run JavaScript', 'Run DOS command', and 'Run Python' actions
- Allow automation stakeholders to easily analyze the health and performance of their automations by simply using natural language
- Create a flow by describing what you need through multiple steps of conversation with Copilot in cloud flows

Microsoft Copilot can be seamlessly integrated into various software development environments, making it accessible to a wide range of users. Whether you're a seasoned developer or just starting out, this tool can enhance your workflow and make your life easier. It's designed to assist you throughout the entire development process, from writing code to debugging and testing.

In conclusion, Microsoft Copilot is an incredible tool that brings a new level of productivity and collaboration to the table. Its ability to understand context and provide relevant suggestions makes it a valuable asset for any developer or professional. With Microsoft Copilot by your side, you can accomplish tasks more efficiently and bring your ideas to life faster than ever before.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

What's Next?

While we dug deep into a few topics for a successful Power Automate adoption, we can dig even deeper still! Contact us to learn about our full framework and how we can customize it for your organization.

Curious as to what Smartbridge does to help you deploy this framework? Here's a quick overview:

- Define the right roles, responsibilities, and level of engagement for the steering committee to provide direction, mentorship, and support.
- Establish governance and environment management for data storage and consumption at the department level (Sales & Marketing, HR, Finance, Operations, CRM, etc.).
- Assess skills and setting upskill support plans with training and workshops at all levels. Plan for continued education on latest changes such as Copilot AI features.
- Establish the right security levels and permissions by roles.
- Develop standards, templates, and resuable components.
- Establish and measure near and long-term goals and KPIs by the deployment phase.

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Partner With Smartbridge

Microsoft Solutions Partner
Data & AI
Azure

Microsoft Solutions Partner
Digital & App Innovation
Azure



Smartbridge focuses on simplifying business transformation. We apply thought leadership and innovation to bring our customer's digital agenda to reality.

Smartbridge has been providing automation services for years, and in the course of our vast project experience, we have seen Power Automate become a go-to automation solution. We partner with customers in their journey from vision to adoption, and with an empathetic approach, we work to understand their challenges and pain points to provide a solution fit for them. Smartbridge is committed to fueling your innovation with Power Automate.

CONTACT US

877-627-8274
innovations@smartbridge.com
smartbridge.com/automation/contact

Copyright © 2024 Smartbridge, LLC. All rights reserved.

Want More Power?

Download our other Power Platform eBooks!



Power BI
Adoption Framework

GRAB THE EBOOK



Power Apps
Adoption Framework

GRAB THE EBOOK



Power Platform
Adoption Framework

GRAB THE EBOOK

Copyright © 2024 Smartbridge, LLC. All rights reserved.