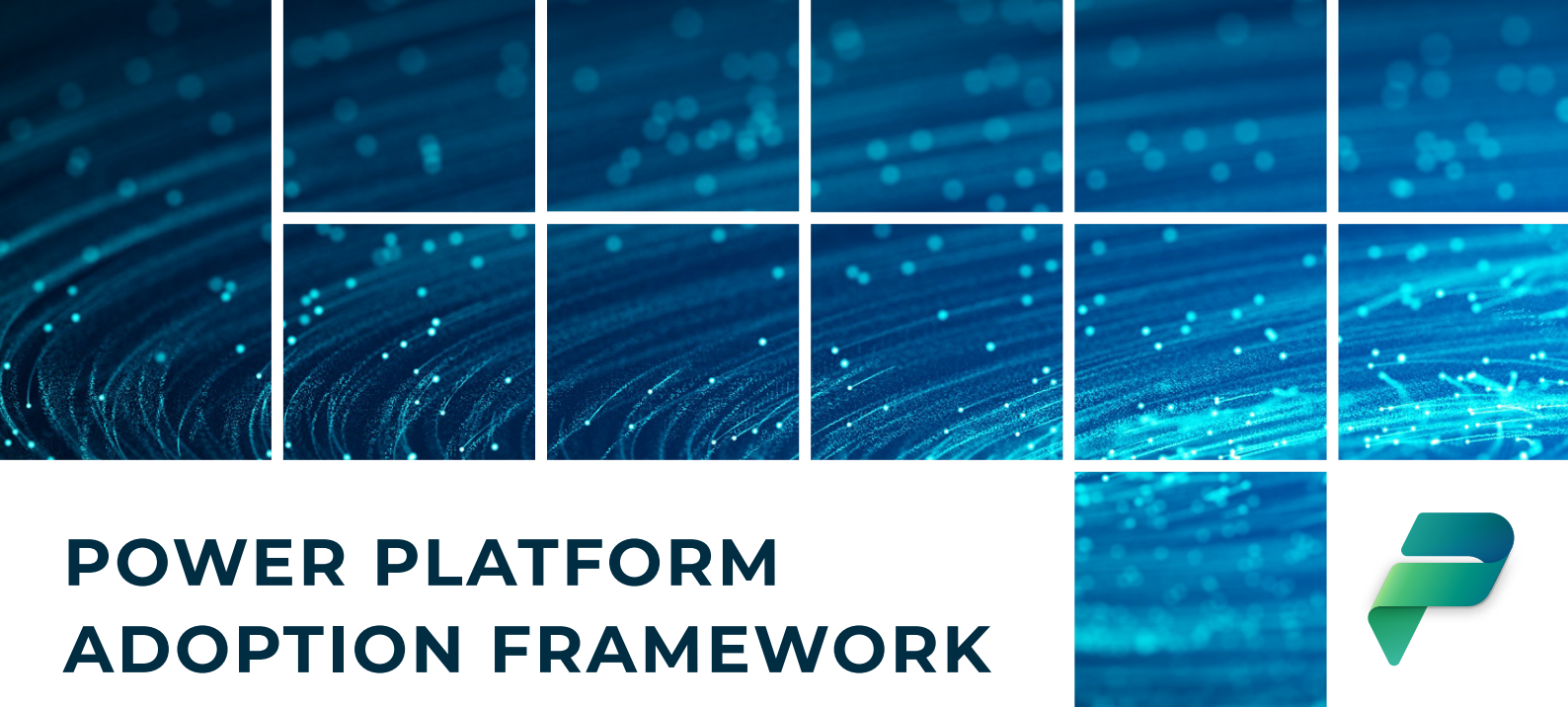




POWER PLATFORM ADOPTION FRAMEWORK

A playbook to guide you through successfully developing an innovation culture with Microsoft Power Platform





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Starting Your Journey

Microsoft's Power Platform is a suite of applications and services that allows anybody to quickly and easily create custom apps to fulfill their business needs. The suite includes five main products:



Power Apps: Used to create customized applications that are commonly used in organizations to build forms that can be used in business process improvements and automation.

[Download our Power Apps Playbook](#) 



Power Virtual Agents: Used to create powerful chatbots that mimic a live human agent's online chat conversation to help enhance the organization's business processes.



Power Automate: A workflow application that allows business users to automate their business processes.

[Download our Power Automate Playbook](#) 



Power Pages: With this tool you can build engaging, interactive, and low-code websites for your business.



Power BI: A business intelligence tool that is used to analyze data with interactive dashboards for self-service analytics.

[Download our Power BI Playbook](#) 

The Microsoft Power Platform also includes technologies that can be used to create a more intelligent and connected experience such as:



AI Builder



Fx



Dataverse

Adopting the Power Platform 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 always easy and can be full of potential pitfalls.

The Smartbridge Power Platform Adoption Framework is developed to meet users at their skill level. It is a summarized, yet exhaustive, template that will help you identify the major decision points and steps along your journey and provides guidance based on best practices and lessons learned.

The Power Platform framework is important for an organization to align around business goals rather than individual department metrics



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

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.

The Smartbridge Power Platform Adoption Framework

The framework in its full glory consists of these areas:

Skills Maturity

Who are the administrators and low-code strategy teams, what are their skill levels, and how do we train them?

Foundation and Governance

Establish a multi-step approach on security, monitoring, administrative management, and application lifecycle management.

Best Practices and Guidance

Implement the strategies necessary for your organization to succeed with the Microsoft Power Platform.

Steering Committee

Identify the leadership and team that will provide strategic review and direction of approved Power Platform initiatives.

Adoption Roadmap

Learn what you should consider for a successful adoption and digital transformation.

Getting You Started on the Right Foot

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

- Adoption Roadmap
- Best Practices and Guidance
- BONUS! Fabric and Copilot Capabilities

If you would like to learn more about our full Power Platform adoption playbook and how it can be tailored for your organization, [please reach out to us](#).



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Power Platform Adoption Roadmap



The Microsoft Power Platform is an innovative suite of products that anyone and everyone can use. Because of this, an adoption roadmap can be useful in helping your organization along its Power Platform journey.

Overview

People



1. When your organization adopts the Microsoft Power Platform, you'll want to consider how you'll nurture your community of makers (ref pg. 4). You want to ensure they're using the tools you've invested in to further the goals of your organization.

Processes



1. Learn how low-code can underpin your successful digital transformation and scale the Microsoft Power Platform adoption to your entire organization.

Technology



1. Governance is the first step to creating the right basis for a Power Platform adoption –It requires a focus on several aspects, including security, monitoring, management, and application lifecycle management.
2. Use these resources to secure, govern, and monitor the Microsoft Power Platform in your organization.

Getting Started

Strategy and Vision

You're already an expert in your business. Low-code application development gives your organization the ability to take that expertise and solve business problems with automation and apps tailored for you.

Admin and Governance

Everything is governed and authenticated through Azure Active Directory (AAD), meaning users need to sign in with your organization's O365 to use this service.

Admins have full visibility of everything your makers and users do — it's governable, automatable, auditable, and manageable by default.

Nurture and Educate

Understanding what's important to those within the organization, what they are trying to achieve, and how they're trying to grow will enable an organization to connect business needs with the needs of individuals to become effective in implementing their vision.

Support

As you define your support process, it's important to review how both makers and users will learn about support options available inside the organization, how you will support your makers, how your help desk will acquire the skills required, and how applications graduate through different support options.

Building Champions

Champions are essential to driving awareness, adoption, and education in your organization. A champion is someone who has embraced low-code to create change and impact within their organization using the Microsoft Power Platform. They are continually building and sharing their knowledge even if it's not an official part of their job role. They should be on-boarded with the maker role and granted access to the tools that will help make them successful and influential.

- **Champions create enthusiasm to promote improved ways of working, and evangelize the Microsoft Power Platform and its value across teams.**
- **Champions build a circle of influence among their teams and help people in their circle understand what is in it for them.**
- **Champions bring new ways of working to life across teams.**
- **Champions identify business challenges and possible solutions.**
- **Champions provide feedback to the CoE team and sponsors.**



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Engage Your Org

When your organization adopts the Microsoft Power Platform, you'll want to consider how you'll nurture your community of makers to ensure they're using the tools you've invested in to further the goals of your organization.



Community

- Find and support champions in your organization
- On-board new makers
- Create an internal wiki and community
- Share your own templates and reusable components



Evangelism

- Share success stories
- Organize hackathons



Training

- Set training and upskilling strategy for makers
- Provide internal training events
- Offer solution envisioning workshops

Secure Your Environment

As with many IT initiatives, setting up digital guardrails and governance is not a single step. It requires focusing on multiple aspects:



Manage

- Designate the Microsoft Power Platform admin role
- Manage users
- Plan and manage license and capacity
- Establish an environment strategy
- Manage Microsoft Dataverse for Teams environments



Secure

- Establish tenant and environment level Data Loss Prevention (DLP) policies
- Set up Azure AD conditional access
- Enable cross-tenant isolation



Monitor and Alert

- Report on resource usage
- Track user access
- Monitor Microsoft Dataverse usage
- Monitor new connectors
- Set up sharing alerts and mitigations
- Don't start from scratch, take advantage of the Power Platform Center of Excellence Starter Kit

Train Your Org

It's important to think about your upskilling strategy for makers—what will be available for new, intermediate, and advanced makers to ensure they are able to learn constantly and can get powered up.



Training and Upskilling Strategy for Makers

- Microsoft Learn content for Microsoft Power Platform 
- Microsoft Power Platform Fundamentals (Certification) 
- Microsoft Power Platform documentation
- Business Applications communities
- Find a local user group



Internal Training Events

- Running App in a Day workshop internally
- Lunch and Learn
- App in an Hour
- Q & A Sessions



Solution Envisioning Workshops

- For colleagues who have attended a Power Platform training event but don't know where to start.
- For colleagues that have an idea in mind, but perhaps haven't fully thought through all the details they need to create an app.
- Use the materials from “Planning a Power Apps Project” to teach how to convert an idea into a fully working solution by using Power Apps.

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 the Power Platform.

Overview

People



1. Establish product owners as more people get involved in the app development process.
2. Identify people who will work well together, but also come from different roles and competencies with various skills and experiences. Individuals who are proactive, enjoy learning new skills and problem solvers are who you are looking for.

Processes



1. Focus on delivering applications that bring value to the organization without overly complicated builds. Look for quick wins and processes that have been a source of frustration that you can solve in a short amount of time.
2. Implement digital guardrails so that people working with organization data follow patterns that prevent data leakage, as well as meet corporate guidelines for design, usability, and supportability.

Technology



1. The Center of Excellence (CoE) drives innovation and improvement and brings together like-minded people with similar business goals to share knowledge and success while providing standards, consistency, and governance.
2. Utilizing the collection of components and tools provided in the CoE will help you get started with developing a strategy for adopting and supporting the Power Platform, with a focus on Power Apps and Power Automate.

Establish a Center of Excellence (CoE)

A Center of Excellence is the first step in fostering greater creativity and innovation across the organization by empowering business units to digitize and automate their business processes while maintaining the necessary level of central oversight and governance. A key principle is to clarify why you're setting up a CoE, what you aim to accomplish, and the key business outcomes you hope to achieve. Then get started, learn, and evolve along the way.



People

Typically, the following people or departments are key drivers or stakeholders when establishing a Center of Excellence:

- App and flow makers
- Application lifecycle management and DevOps users
- Central IT
- Support and training engineers
- Business change management



Technology

There are a few guides developed by Smartbridge to help you with your CoE strategy:

- Power Platform CoE Starter Kit
- Innovation Backlog
- Demand Management Playbook



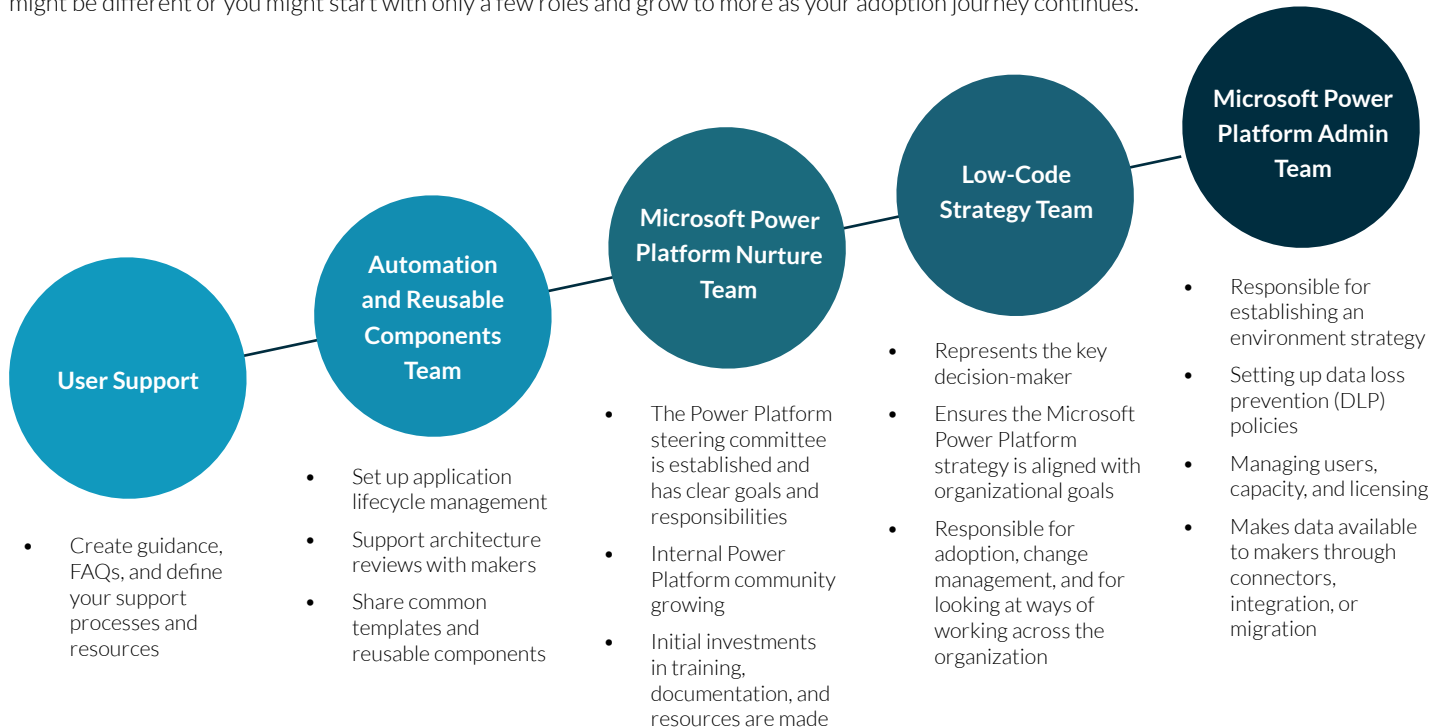
Process

We encourage you to understand where you are in your adoption journey and invest accordingly.

- Secure by establishing data loss prevention policies, managing licenses, and access to data sources.
- Evangelize by providing a community space on Teams, Yammer, or SharePoint, with a collection of links for people to start their learning.
- Monitor your usage, see who is creating apps, what apps are being created, and how they are used.
- Evolve your CoE strategy with those learnings.

Roles and Responsibilities

We recommend including the following roles and responsibilities when establishing a Center of Excellence. In your organization, these might be different or you might start with only a few roles and grow to more as your adoption journey continues.



Delivery Models

Depending on the size of your organization, you want to formalize your Microsoft Power Platform adoption approach by implementing a structure organization model.

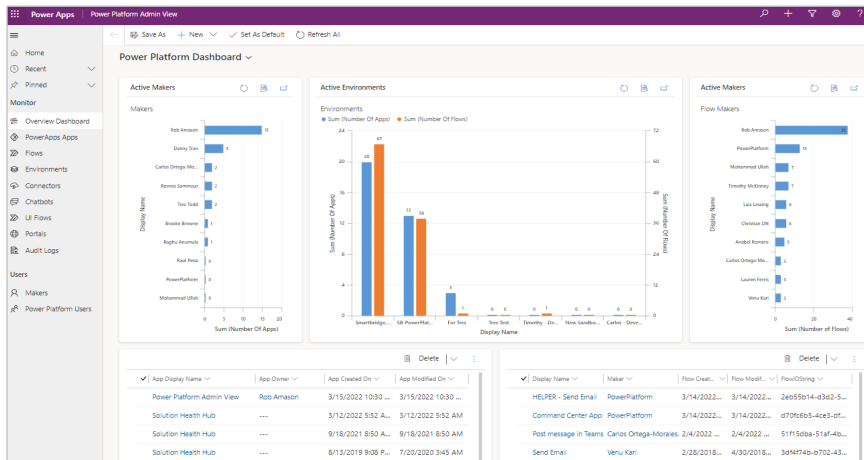
The Microsoft Power Platform has four delivery models: **Centralized**, **Decentralized**, **Matrix**, and **BizDevOps**. However, organizations can have a variation of multiple models.

These models can help you consider what your current software delivery model is and how the Microsoft Power Platform might overlay into it, or how your current model might evolve to accommodate the rapid development capability enabled by the Microsoft Power Platform.

Centralized	Decentralized	Matrix	BizDevOps
			
A central team of product owners who own the low-code delivery of departmental solutions from around the organization's business units.	Multiple teams that can run autonomously, and split and grow in a cellular fashion.	Have a centralized team of trained and certified Microsoft Power Platform specialists to assist multiple local teams. You can scale into the thousands of people working on app creation.	A holistic relationship between app makers and operations that works in a continuous loop. Rapid application development is supported and accomplished while reflecting changing business needs.

Power Platform Dashboard

The Power Platform Dashboard is a model-driven app that provides an interface used to browse items in Dataverse custom tables. It provides access to views and forms for the custom tables in the solution.



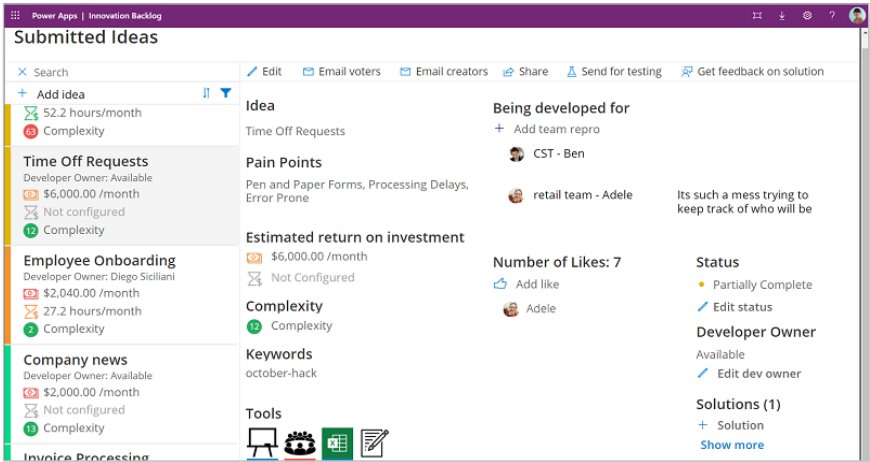
- Get a quick overview of resources in your tenant.
- Learn about your makers, connectors, apps, and flows.
- Find out who apps are shared with.
- Add additional information, such as notes and risk assessments to your resources.
- See and set approved capacity and add-on information per environment.
- Complete app audits.

Innovation Backlog

The Innovation Backlog is an app that is a part of the Power Platform CoE starter kit. Use the Innovation Backlog Power App as a place for your users to document and prioritize their desired list of digital innovations. Users can submit ideas for apps and flows that need to be built and/or describe pain points with the current process.

As users describe the process, they will provide information about personas involved, tools used, and measures for improvement. All of the data from the idea is used to calculate an ROI and complexity score. The Power Platform steering committee can then evaluate and decide the most impactful ideas for your development team to build, or select them for an upcoming hackathon.

Other users can vote on ideas or add their own scenarios to an existing idea. Developers can additionally request feedback and testimonials to build their portfolio.



Microsoft Fabric & Copilot

Smartbridge's full Power Platform 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.



Microsoft Fabric

Said simply: Fabric is a SaaS product aimed at unifying data silos across your enterprise. It's a high-performance unified analytics platform for all data professionals and business users. Users store, create, edit, explore, build with, and collaborate on data projects and products.

Microsoft took all the necessary data tools for data engineering, warehousing, monitoring, science, visualization, and analytics and unified them in a lakehouse architecture. On top of this, Fabric integrates nicely with outside sources through so your business can keep using previous infrastructure.



Microsoft 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.

Fabric for Power BI



- Quickly generate reports with data you've pulled. Type your desired report description into Copilot's chat and it will create some options based on your input. This reduces a lot of clicking around and searching for the right settings!
- Generate and edit DAX calculations. Let Copilot do the heavy lifting.
- Create narrative summaries. You can ask Copilot about your data just like a chatbot and get instant answers to help you make decisions faster.

Copilot for Power Automate



- 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

Copilot for Power Apps



- Build apps through conversation
- Continue editing your app through Copilot
- Add Chatbot control and Copilot control to a canvas app
- Take advantage of Azure OpenAI Service in AI Builder

What's Next?

While we dug deep into a few topics for a successful Power Platform 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 security guard rails and role-based access that makes sense for your organization.
- Develop standards, templates, and reusable components.
- Establish and measure near and long-term goals and KPIs by the deployment phase.

Partner With Us



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

Smartbridge partners 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 the Microsoft Power Platform.

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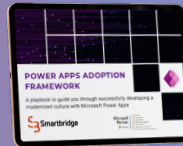
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