

Case Study

SharePoint Online and Power Automate Integration for Client Reference Approval Workflow Automation

COMPANY

V-Soft Consulting is headquartered in Louisville, KY, with strategic locations throughout the United States, Canada, and India. As a trusted partner, V-Soft has extensive experience across various technology stacks, enabling businesses to successfully accomplish their IT goals. With a substantial in-house team of experts and access to on-demand talent through their IT staffing division, V-Soft offers a diverse range of expertise. The company's commitment to excellence is recognized through multiple awards as an outstanding employer, further solidifying its position as the preferred choice for both employment and partnership within the enterprise sector.

CHALLENGES

Because of the manual nature of approvals, lack of a centralized management and the over-reliance on email follow-ups with different teams, the client-references approval process was disorganized and required regular follow-ups and coordination tying up leaders in cumbersome tasks.

- Manual approval processes introduced inefficiencies and potential errors requiring each team to individually review and approve requests, necessitating meticulous coordination.
- Approvals were scattered across various departments in a disparate manner, leading to delays and occasional miscommunication.
- Lack of centralized platform made tracking approvals challenging.
- Clear audit trail and timely responses were hard to maintain.
- Automated task management ensured minimal resource utilization.
- Manual tasks hindered workflow speed and there was a risk of overlooking critical details.





SOLUTION

Leveraging our experience and expertise in automating workflows across platforms, our team of experts used agile methodologies to integrate SharePoint Online and Power Automate for addressing critical challenges within the client reference approval process. We used SharePoint Online for document management, collaboration, and workflow centralization along with Power Automate for automating the workflow. The seamless integration of these tools solved multiple challenges in the existing client-reference approval process, such as:

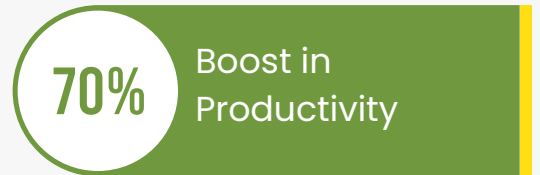
- SharePoint Online’s centralized document management and collaboration features offered transparency and visibility across teams.
- Power Automate’s automated notifications replaced the tedious email follow-up processes and coordination issues.
- Automation replaced manual approvals and decentralization, eliminating delays and persistent errors.
- The integration ensured uniformity in the approval process, fostered collaboration, and established a traceable workflow.
- These enhancements successfully addressed inefficiencies, fostered a more efficient and error-resistant system for client reference approvals.



RESULTS

The successful implementation of the client reference approval initiative delivered tangible benefits, including:

- Enhanced operational efficiency and effectiveness of the organization.
- The integration of SharePoint Online and Power Automate resulted in significant time savings in the approval process.
- By automating workflows, decisions were expedited, leading to a notable reduction in approval cycle times.
- The solution fostered improved collaboration and communication among participating teams.
- The centralized platform enabled seamless updates in real-time, minimizing the risk of errors and misunderstandings.
- The introduction of a transparent and traceable workflow bolstered accountability by establishing a clear audit trail for each client reference request.
- The solution garnered higher user satisfaction, thanks to automated reminders and notifications that minimized the occurrence of overdue approvals and enhanced overall process visibility.



Technologies Used

- SharePoint Online
- Power Automate