INTAKE MANAGEMENT MADE EASY AND COST-FREE

Harness the benefits of Microsoft Power Automate.

Intake management is the process by which organizations receive and record information or requests from clients, customers, or internal users. It involves efficiently capturing and organizing data to ensure each request is appropriately addressed. Effective intake management is crucial for streamlining operations, enhancing customer service, and maintaining accurate records for future reference and analysis. In today's fast-paced business environment, any increase in productivity can drastically improve your outcomes. Intake management is a great area of opportunity to realize that productivity increase. While there are paid tools available, such as ServiceNow and other Intake Management tools, Microsoft Power Automate provides a good alternative for organizations and business segments handling smaller volumes of issues. With its wide range of benefits and user-friendly features, Power Automate offers a streamlined solution for intake management.

KEY ADVANTAGES OF MICROSOFT POWER AUTOMATE COMPARED TO OTHER TOOLS

Several comprehensive intake management systems already exist, which may be better options for larger organizations with more resources available to commit to licensing costs and configuration activities. ServiceNow, Zendesk, and Jira Service Management are a few popular options. A pre-made solution may be the best route for your organization. However, for smaller organizations or business segments that don't need complex solutions or handle high volumes of requests, Power Automate may be a better alternative for these reasons:

1. **Cost:** It's free! You can integrate with Microsoft tools like Outlook, Planner, SharePoint, and Teams for no cost. This is the key advantage for smaller organizations looking for a quick and easy solution.
2. **Ease of setup / customization:** You can likely stand up an intake management system using as few as one developer. The interface is intuitive and plenty of documentation exists online, so true development experience is not a requirement. In comparison, going live with ServiceNow or Zendesk would take significant time and resource allocation to accomplish.

It's not a long list, but these two reasons could be deal-breaking for your organization. The advantages of the other intake management tools mentioned above compared to Microsoft Power Automate are:

1. **A comprehensive out-of-the-box solution:** These tools are designed specifically for intake management, and thus have built-in functionality that would require additional effort using Microsoft Power Automate.
2. **Top-of-the-industry support:** This may be a requirement if you need guidance on best practices and configuration.
3. **Continuing enhancements:** As with most Software as a Service (SaaS) / Platform as a Service (PaaS) tools, these provide ongoing improvements to their tools and listen to feedback from their customers.

Ultimately, the choice comes down to whether you have the time and money available to invest in a full SaaS intake management tool. The costs of these tools are significant and could even be prohibitive.

WHAT MAKES MICROSOFT POWER AUTOMATE GOOD FOR INTAKE MANAGEMENT?

What sets Power Automate apart is its user-friendly interface and customization options. Although there are advanced, code-based customizability options available for use, individuals with limited coding knowledge can easily set up and customize the tool according to their specific needs. Power Automate provides the building blocks of code and simplifies them in such a way that is intuitive to a non-coder. I personally have very little coding experience, and I was able to set up a distribution mechanism (which required parsing a JSON payload and constructing an array) for certain categories of requests, which allowed us to apply varying start/end dates, assignments, and tags. There is also a wide array of comprehensive documentation available on YouTube, Microsoft Forums, and other sources that further facilitates the learning process and provides solutions to common challenges. Odds are, you aren't the first group to experience a given need, and there are plenty of forums online on which people discuss solutions to your issues. Additionally, Power Automate integrates with other popular Microsoft applications such as Outlook, Teams, SharePoint, and Planner, as well as some non-Microsoft applications, making it even more potent and flexible.

Power Automate has a few great customization options that you'll likely want to use for your Intake Management tool. Users can create category buckets, enabling easy organization and prioritization of intake requests. Automatic assignments based on predefined rules or parameters ensure that tasks are assigned to the right team or individual. Automatic start and due dates can be set based on custom questions, category buckets, or other relevant factors. This enables efficient tracking and timely completion of tasks. The integration with Teams and Planner allows users to manage and organize intake requests directly within these collaborative platforms, facilitating real-time communication, re-assignment, tagging, commenting, and file attachments.

OTHER AUTOMATION OPPORTUNITIES

While the free version of Power Automate does have certain limitations, such as restricted access to some actions and integrations, upgrading to the paid version unlocks a wide range of additional capabilities. The paid version offers expanded functionalities, such as enhanced customization options, advanced integrations with third-party applications, and increased capacity for handling a higher volume of requests. Below are some specific examples of integrations that are enabled with Premium:

- Initiate a UIPath Job
- Create and send a DocuSign envelope
- Invoke an HTTP Request (used to get emails from a shared inbox, which is particularly useful for Intake Management)
- Create and modify Jira issues
- Execute an Oracle or SQL query and insert, get, or update database rows
- Get, create, or modify Salesforce records

Power Automate can also be leveraged for other purposes, such as approval flows, automated reminders, daily digests, and more. The tool provides pre-built templates that offer inspiration and guidance for various automation scenarios, further expanding its potential applications. These templates just scratch the surface of what you can do with Power Automate. Check out these pre-made templates from Microsoft: https://powerautomate.microsoft.com/en-us/templates/ .

In conclusion, Microsoft Power Automate is a valuable tool for organizations seeking a cost-free and efficient solution for intake management. Its ability to streamline tasks, reduce errors, and customize workflows makes it a great asset,

especially for teams handling small volumes of requests. By harnessing the benefits of Power Automate, businesses can optimize their intake processes, enhance collaboration, and improve overall productivity.

If you or your company would like help with your Microsoft Power Automate efforts, please reach out to our Advisors **here**.

This TIP was written by Patrick O'Neil. Patrick welcomes comments and discussion on this topic and can be reached at patrick.oneil@trexin.com.