

Circyl help outsourcing specialists drive business process change



afp

Established in 2002, AFP provides outsourced Finance and Operations services, running their clients' day-to-day essential operations allowing companies to focus on what they're good at.

Over the last 20 years AFP has grown their business through the provision of the highest level of service to their clients, innovation, and the expansion of service offerings. As part of their future proofing, AFP recently made the decision to migrate their data storage to the Cloud, fully adopting the Microsoft platform to ensure they have the technical 365 infrastructure to support future growth.

The organisation operates under the ethos of continuous development for both their customers and their internal processes and systems. Client information, like their clients businesses, had grown and so it was time to find a more growth-focused solution.

AFP were looking for a digital solution that leveraged their existing investment in Microsoft 365 and in particular their familiarity with Teams. Whilst one option would have been to deploy a point solution to solve this specific issue, AFP's preference was for a modular long-term solution that could be adapted as the business continued to grow, allowing future processes

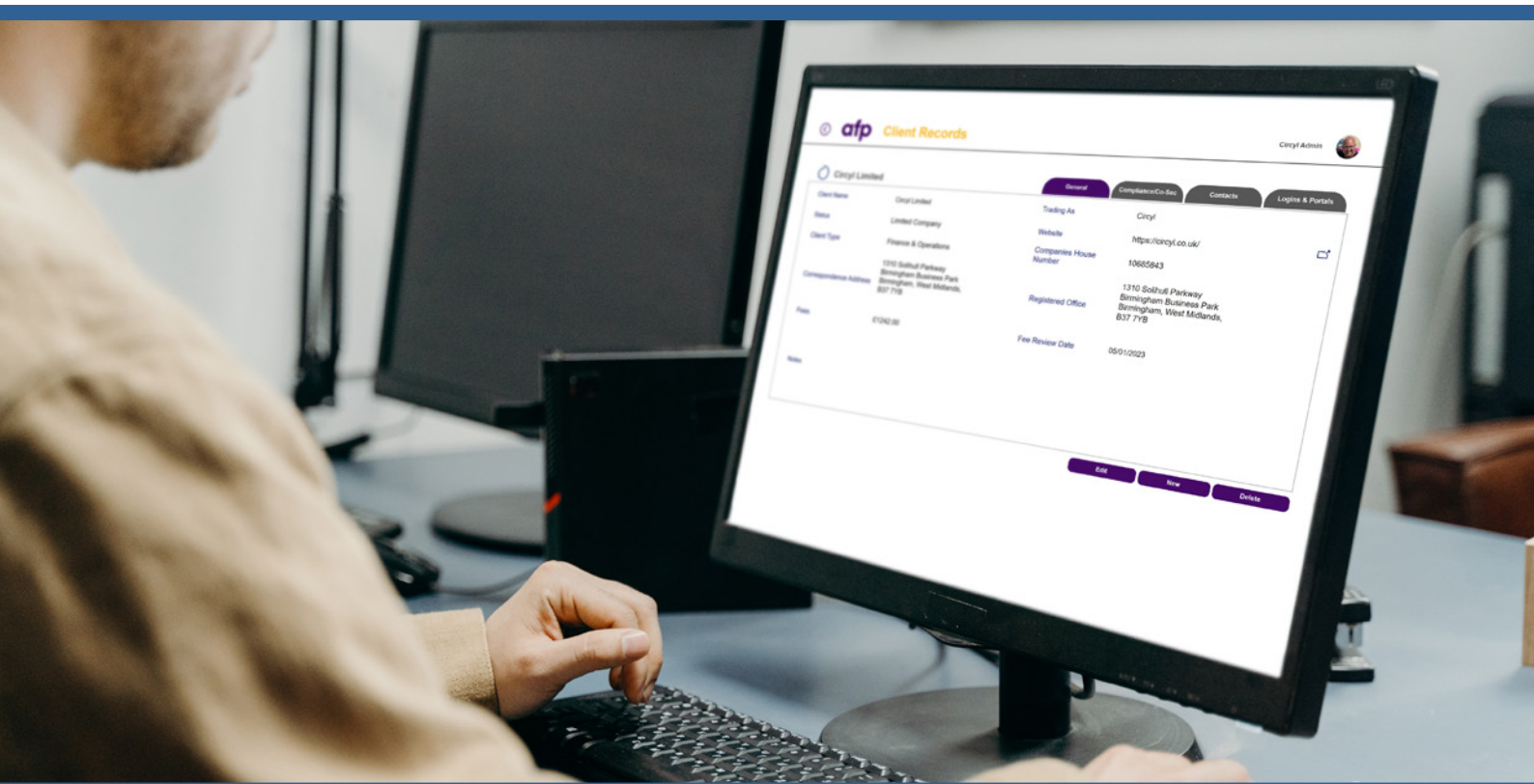
"In our business we are always looking for ways to improve our service to our customers and deliver the most efficient and accurate service possible. Circyl really took the time to understand how we think and operate and how we deliver services to our customer."

"They looked at how we could automate our processes and developed a tailored workflow application that really helps us manage our customer interactions in the short term, but gives us scope to future develop further workflows as we need them to meet the needs of our clients"

**- Richard Peel
Director, AFP**

to be managed efficiently. AFP were also keen to ensure the security of information held and compliance with GDPR.

As part of this drive for process improvement the team focused on the development of its technology strategy and in a bid to leverage the benefits that workflow, validation, and automation can deliver, AFP engaged Circyl for guidance and assistance.



Project

Given the organisation's desire to maximise its investment in Microsoft technologies, it had reviewed its current and future business and technology requirements. Through this process, they had identified that the first business process and workflow that would benefit from a new solution would be the access of client information.

A solution with context based tailored structure was required so information about the account and personal information for any contacts could be saved including the ability to tailor data fields for several types of contact.

AFP had a key list of deliverables for the new solution that included:

- Secure and compliant repository for client information
- Ease of access and sharing and better knowledge exchange and communication across the organisation
- Data backup and disaster recovery
- Increased speed of response to client requests
- A framework for future development and innovation

Circyl's tried and tested Agile methodology enabled timescales to be met within budget, whilst ensuring user adoption and success of the new information management solution.

AFP's team clearly understood what they wanted when they engaged with us initially which enabled us to deliver a solution at pace for them.

Once the adaptability and flexibility of our Agile approach were recognised, the team's continuous engagement with the AFP stakeholders ensured a tailored solution, with all the functionality they wanted was delivered."

**- Roger Peacock
Business Development Manager, Circyl**

The agreed solutions core principles were:

- Adopting innovative design
- Ensuring best practice development principles are adhered to
- Keeping a firm focus on total cost of ownership
- Fostering a relationship that imparts knowledge to AFP
- Engendering a level of user self-service
- Remove manual tasks and implement automation wherever possible

Solution

Using Circyl's Agile methodology for project delivery ensured that all the initial needs and requirements could be met. This approach to project delivery meant that an initial version of the solution was presented to AFP for review and feedback to ensure that the development met the expectations of the business before completion and ensured that AFP were continually involved in the development and configuration of the solution.

Following comprehensive requirements capture and an initial design phase Circyl developed a web / mobile application harnessing the Microsoft Power Platform.

The Microsoft Power Apps tool allowed Circyl to rapidly prototype a low code, and highly customised app respondent to the customers' requirements as well as implementing industry standard User Experience (UX) practices.

A clear application hierarchy, consistent theming, and typography as well as ease of use features such as field validation, field highlighting and drop downs, delivered a fluid, intuitive application making everyday activities easier to achieve for the customer.

Furthermore, built in connectors in the Power Apps platform to well established SharePoint lists allowed Circyl to easily develop a supporting relational database using their current software investments. This meant Circyl could still provide standard database features such as table security and data export while continuing to meet the customer requirements.

Crucially the use of Microsoft technologies means the customer data becomes available to the whole suite of Power Platform products. This business critical data can now be easily harnessed in tools such as Power Automate for business process automation and Power BI for the creation of rich, interactive reports.

The highly customisable nature of the Microsoft 365 platform means that future requirements can be added to help evolve the solution over time.

Following its development, the solution delivered the following services:

- Intuitive ease of use
- A single source of truth ensuring client information is always accurate and up to date
- Enhanced search capabilities to relevant teams within the business, allowing users to find relevant information quickly and efficiently
- Secure data storage and back up



Technologies utilised

During the project, Circyl leveraged the following technologies:



Power Apps: PowerApps is a service used for building and using custom business apps that connect to your data and work across the web and mobile, without the time and expense of custom software development.



Microsoft Teams: Microsoft Teams is a business messaging application within an organisation that is designed for real time collaboration and communication, meetings, file, and app sharing all in one place.



Microsoft SharePoint: SharePoint is a web based collaborative platform that integrates with Microsoft Office, enabling organisations to manage and store documents efficiently. It is highly configurable, and solutions can be tailored to meet the unique needs of any organisations.