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PROCESS AUTOMATION IN HEALTHCARE LEVERAGING THE CAPABILITIES OF POWER PLATFORM, SHAREPOINT LISTS AND POWERBI

Background to the project

The customer was is in the process of moving its legacy estate to a more cloud-based and agile way of working utilising Office 365. They needed a partner to help them understand their estate and make the most of their Office 365 investment to streamline processes and move to a more effective way of working in key areas.

As part of the consultation, Trustmarque ran a Microsoft funded **Business Productivity Assessment** (BPA) in which we identified an isolated proof of concept to transform their HR platform and processes.

The paper-based process for starters, leavers and contract changes was a manual and time-consuming process. It relied on multiple systems and touchpoints, which had a negative impact on the audit trail. It was not easy to identify where someone was in the contract termination journey and who was responsible. As a result, there was a significant delay in someone leaving and HR being notified, placing a financial burden on the organisation.

Our customer contact, Senior Project Manager for Digital Transformation, explains: "As it was all managed manually offline, it was difficult to determine who was responsible for the form and it would get held up in the process and sometimes not reach the right person. The biggest challenge we had was claiming back overpayments after staff had left our employment. We knew we needed to be more accountable, efficient and have complete transparency."

About the Customer

The customer is one of the largest acute healthcare organisations in England, serving a population of over 720,000 people. The organisation comprises four hospital sites which provide a range of inpatient and outpatient services.

Why Trustmarque was Selected as a Partner

Trustmarque was working with the customer as a LSP (Licensing Solutions Provider) and they were highly satisfied with the support received to maximise Microsoft Enterprise Agreements. They recognised the value Trustmarque could bring to their broader Microsoft 365 and digital transformation vision. We are a highly respected partner of many healthcare organisations, possessing deep knowledge of the intricate challenges. We're an accredited Microsoft partner with 14 gold competencies and we operate one of the leading SharePoint practices in the UK, having delivering SharePoint based business solutions since the launch of SharePoint in 2001.

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The Solution

Automation of HR starters and leavers process with Power Platform, SharePoint Lists and PowerBI

With cost reduction in mind, the initial priority was to digitalise the leavers forms so that the organisation could mitigate overpaid salaries. Utilising Power Platform and PowerBI, Trustmarque was able to create custom dashboards in SharePoint which automate the entire process online.

Our customer contact, Senior Project Manager for Digital Transformation, comments: "With the automation we have a dashboard of the whole process. We can see when a person hands in their notice, when HR is notified and when the person leaves. We can see where the issues or the bottlenecks are. I am hopeful that managers will be more accountable in the future as the whole process is now transparent."

They added that the organisation has been highly impressed with the solution and the ability to feed into the design via an Office 365 Steering Group who were fundamental to the project success.

"The technical lead who built the form was very accommodating and would come on site and work with our user group to custom-build the solution to our spec. It was a highly adaptable approach," they added.

The project also included bespoke training delivered by Trustmarque's Lead BI Consultant to ensure the customer's Information Team can self-serve and is able to realise the full potential of PowerBI, now and in the future.

Key benefits

Fully automated, online solution
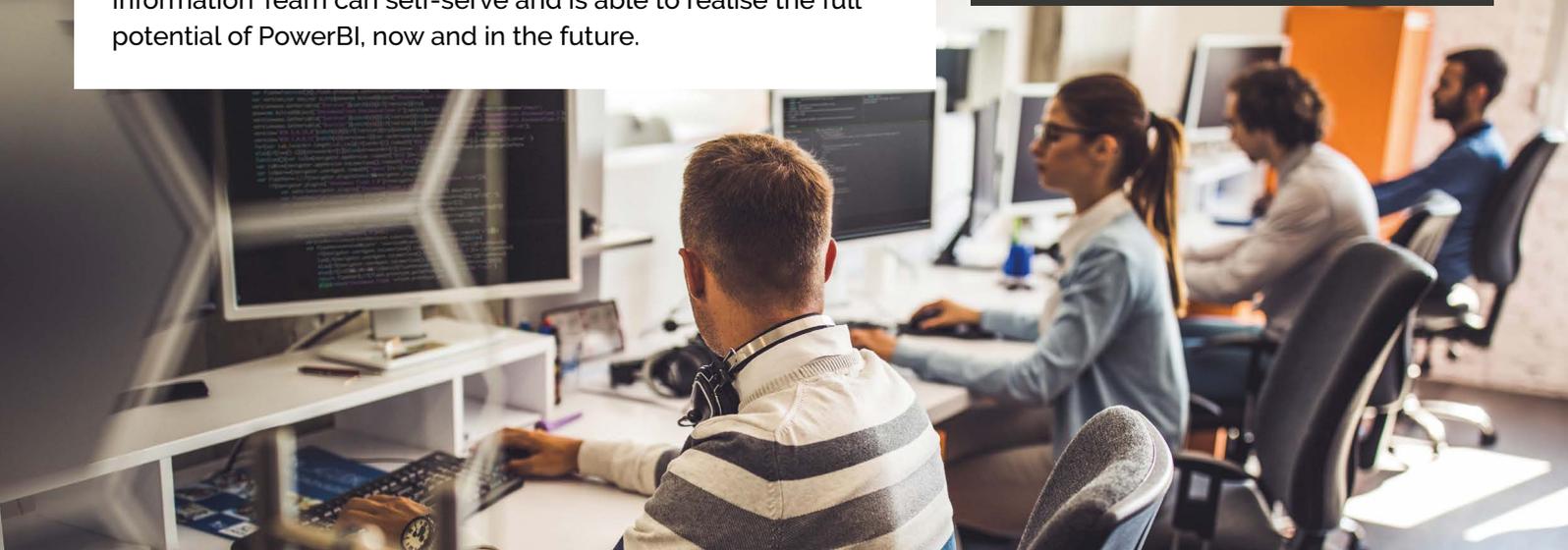
Improved visibility and accountability

Custom dashboards to serve the right data, to the right stakeholders

Reduced administrative burden

Prevent over-spend on void salary payments

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Outcomes and next steps

The whole leavers process has been streamlined and provides an efficient and effective way for them to manage leavers, saving them substantial amount of money in void salary payments. The next steps are to migrate and automate the processes for starters and contract changes, so they have an end-to-end online HR solution.

The Head of Technical Services commented: "The online forms have been rolled out to all line managers across the organisation. We have had great feedback on its use and people are happy we are starting to modernise our processes. We are now hoping to extend the success to other areas."

The HR process automation was just the first step in their bigger digital transformation vision with the intention to use the project as a "catalyst" to optimise other areas including SharePoint, Teams and email via Trustmarque's FastTrack Ready Service.

"All these solutions combined are enabling us to move to a more modern, secure, flexible environment that can support the move to electronic health records while making everything more visible and accessible. Now we have the foundations, we will see the benefits: agile working, resilience and greater security," confirms the customer.

Empowering Digital Transformation Vision

The HR process automation is part of a broader Digital Transformation vision that Trustmarque is supporting the customer to achieve including a wider transition to Office 365. The comprehensive solutions introduced by Trustmarque has enabled the organisation to optimise its current Microsoft 365 licensing position and leverage key business applications and services like SharePoint lists, Power Apps, Power BI and InTune to lay the foundation for sustainable digital transformation.

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