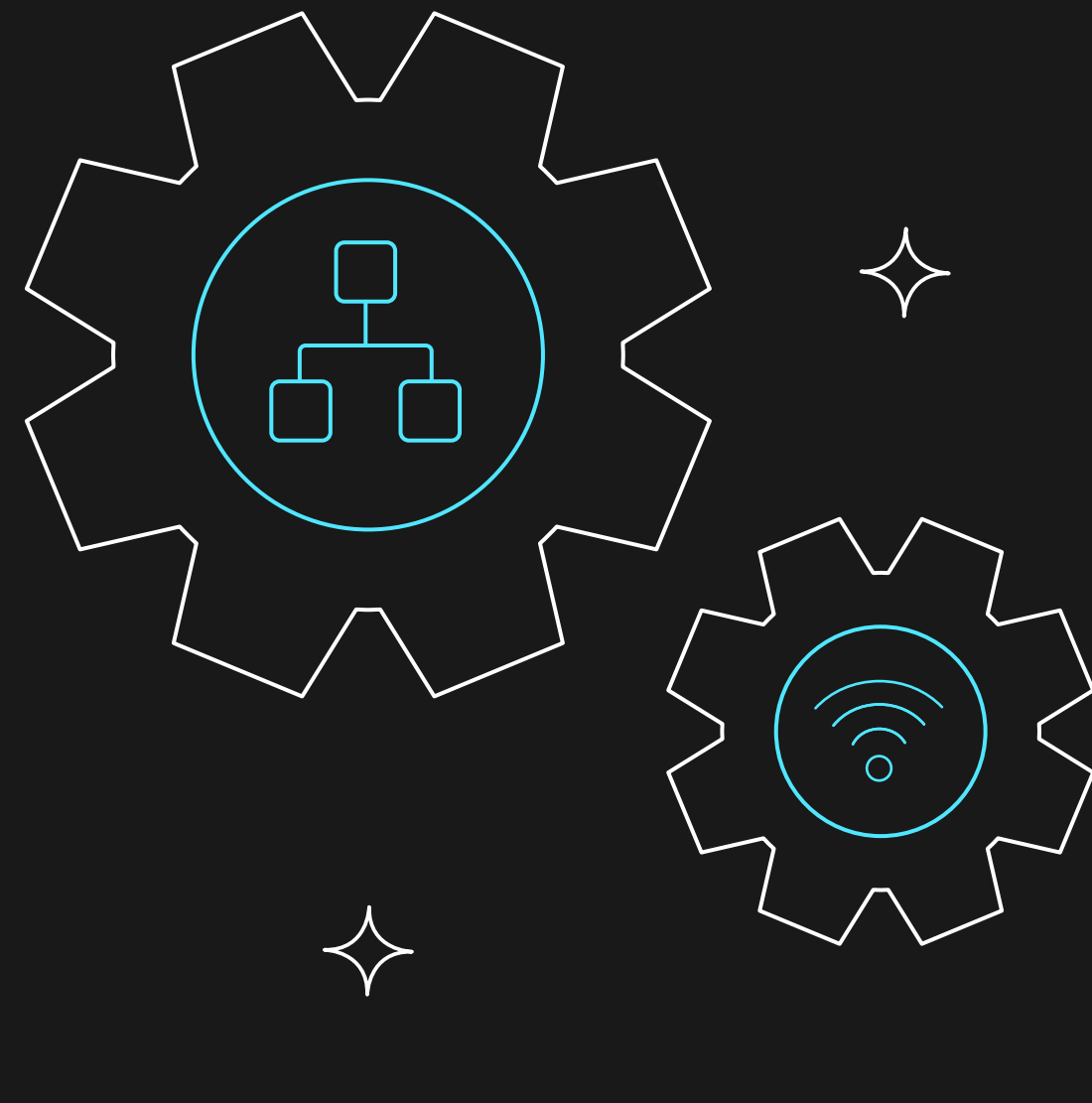


# Is your business primed for automation? A quick-start checklist



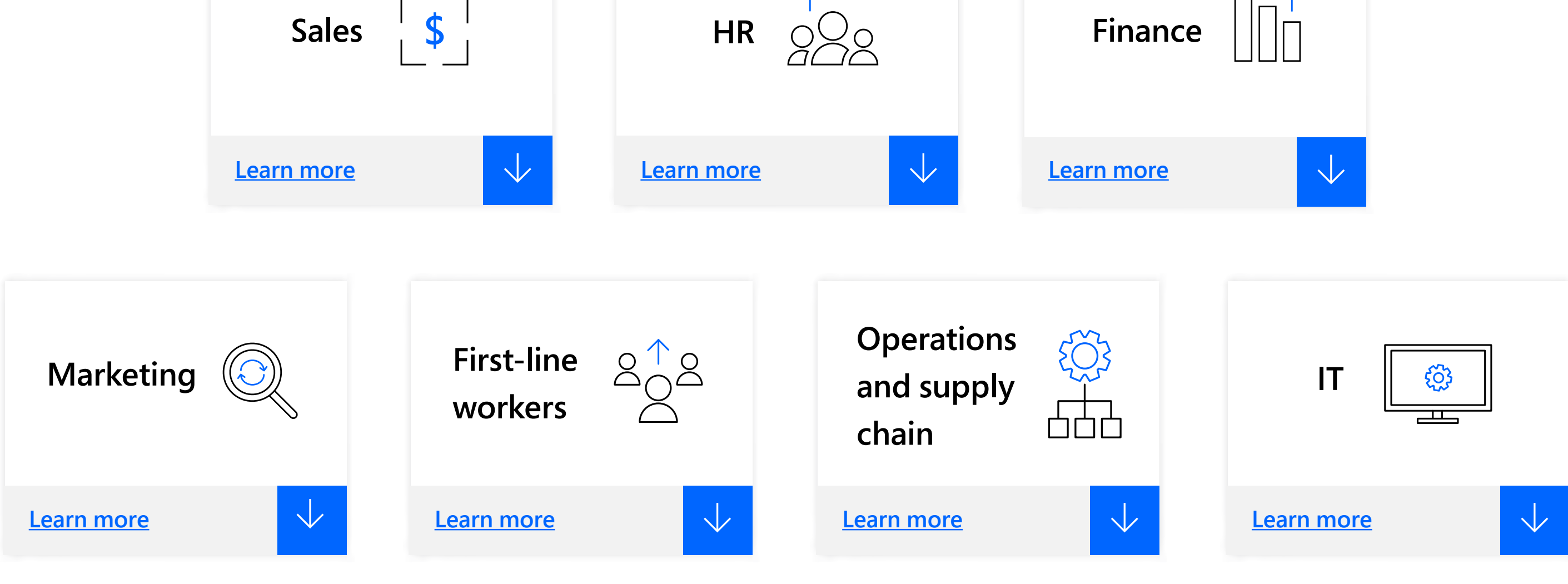
Digital technology makes automating business processes easier than ever. Yet many organizations think automation is beyond their abilities—or doesn't apply to their needs.

In truth, almost any business can gain efficiency and speed through automation—especially with a simple-to-use solution like Microsoft Power Automate. By digitizing paper-based processes, reducing errors, and getting faster results, Power Automate frees up your team to focus on what matters.

This checklist will guide you through typical business areas, enabling you to identify places where you could benefit from automation.

## Choose your challenge

Click on the arrows to learn how automation can help.



### To empower sales to build closer customer relationships...



Power Automate templates give you a head start on automating common sales tasks. Get started with this [collection of sales-focused solutions](#).

### To help HR focus on recruiting and retaining top talent...



Get ideas and inspiration with these Power Automate [templates for common HR tasks](#).

### To streamline finance processes and enable focus on business strategy...



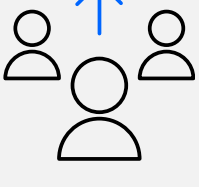
Read about the benefits of automating invoice processes in this [blog post from the Power Automate team](#).

### To enable more responsive, personalized marketing with data-driven decisions...



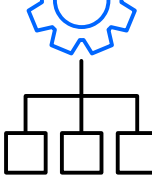
Discover new ways to improve marketing efficiency and effectiveness with this [collection of quick-start templates](#) for automating common tasks.

### To empower first-line workers in retail, healthcare, and field service...



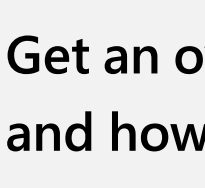
Discover how one retailer used Power Automate to [respond to customer product requests](#).

### To enhance the agility of your operations and supply chain...



Learn how Power Automate helped a manufacturer achieve an [intelligent supply chain](#).

### To empower IT to focus on adding value rather than just keeping the lights on...



Get an overview of how Power Automate works and how it connects with existing solutions in our beginning [learning module](#).

Check the box for each scenario that could apply to your business.

- ☐ Increase the speed of sales order workflows that progress to the next step with one-click approvals.
- ☐ Inform sales professionals of changes to lead status based on multiple data sources.
- ☐ Deliver customer insights in time for upcoming meetings and events.
- ☐ Consolidate customer data from multiple systems without manual effort so salespeople can focus on customers.
- ☐ Send customer surveys at key relationship moments then analyze and report on the data automatically.

Check the box for each scenario that could apply to your business.

- ☐ Streamline document and data capture throughout the hiring and onboarding processes.
- ☐ Request and capture employee referrals with one click.
- ☐ Provide a seamless experience for recruits that positions your company as a desirable modern workplace.
- ☐ Improve communication and collaboration with simplified ways to work together.
- ☐ Track hours, expenses, and resourcing more efficiently with less effort from management.

Check the box for each scenario that could apply to your business.

- ☐ Simplify accounts payable and accounts receivable by removing manual steps and paperwork.
- ☐ Apply AI-based fraud detection tools to reduce risk and protect customers.
- ☐ Transfer data among finance and operations systems seamlessly with one click.
- ☐ Automate vendor and client communication to reduce time-to-revenue and close books faster.
- ☐ Reduce errors to increase accuracy, simplify auditing, and get a data-driven picture of the business.

Check the box for each scenario that could apply to your business.

- ☐ Get up-to-the-minute information and alerts from your favorite social media, news sources, and more.
- ☐ Capture mentions of your company, products, important industry news, or other opportunities.
- ☐ Simplify approval of campaigns and content with streamlined workflow processes.
- ☐ Harvest leads across platforms and coordinate customer outreach efforts.
- ☐ Create account-based marketing campaigns that respond to customer actions and behaviors.

Check the box for each scenario that could apply to your business.

- ☐ Connect first-line workers to customer and business data wherever they are.
- ☐ Simplify customer data capture, account creation, and onboarding.
- ☐ Streamline scheduling and staffing with unified communications and notifications.
- ☐ Deliver proactive alerts when customers need help or information.
- ☐ Efficiently manage work across individuals, teams, and organizations.

Check the box for each scenario that could apply to your business.

- ☐ Link information from multiple systems and platforms into a central location for total visibility.
- ☐ Enable one-click approvals for process steps and maintenance requests.
- ☐ Eliminate paper-based and manual processes to speed production and make operations more efficient.
- ☐ Capture inventory information and share it in real time to reduce stockouts and bottlenecks.
- ☐ Empower factory and warehouse workers with insights they need to respond to changing conditions.

Check the box for each scenario that could apply to your business.

- ☐ Capture and consolidate data from multiple IT systems to provide a unified view of their overall health.
- ☐ Create custom alerts based on changes to IT systems that help staff proactively manage infrastructure events.
- ☐ Manage support and service requests efficiently and align them with available resources.
- ☐ Streamline management of IT projects with automated approvals and workflows, and reduce time-to-value.
- ☐ Capture user experience information for actionable insights into solution improvements.

## Get started with intelligent automation

In a fast-changing environment, maximizing efficiency and reducing risk are more important than ever. Whatever your business's size or industry, the power of digital automation is within reach, helping you adapt faster and focus on what matters.

Power Automate democratizes intelligent automation by empowering everyone—from end users to experts at the forefront of technology—to seamlessly build secure, automated solutions that bring together robotic process automation and digital process automation into a single cloud-based solution.

Learn how your business can serve customers more effectively, empower employees, and optimize operations with Power Automate.

Buy now

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