

### UNLOCK YOUR CUSTOMER DATA

# CRM & POWER PLATFORM CUSTOMER DAY 2023

Starting My Journey With Power Platform + Best Practise

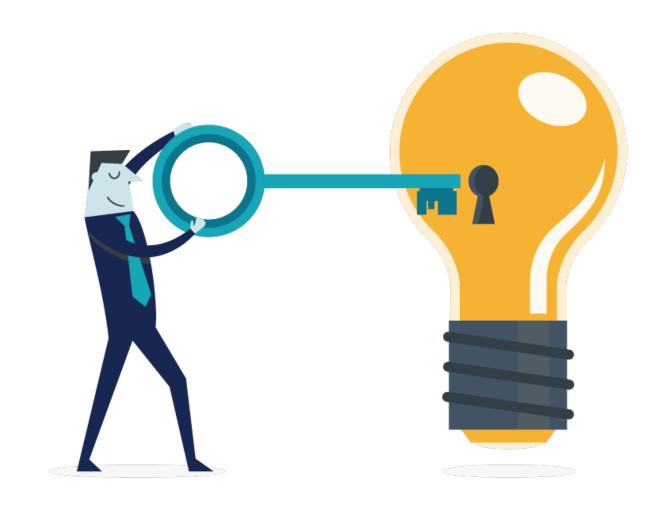


## Hi! Jason & Zak

### What we'll cover

### We've only got 45 minutes

- 1. Defining Your Makers & Community
- 2. Upskilling
- 3. Finding A Need
- 4. Admin & Governance
- 5. Support & Evolution
- 6. Centre of Excellence





### **Define Your Roles**



## **App Makers & Citizen Developers**

#### App Maker

The App Maker creates and enforces business processes, structures digital collection of information, improves efficiency of repeatable tasks, and automates business processes. The App Maker uses the Maker tools of Power Platform to solve business problems.

#### Citizen Developer

A citizen developer is an employee who creates application capabilities for consumption by themselves or others, using tools that are not actively forbidden by IT or business units. A citizen developer is a persona, not a title or targeted role. They report to a business unit or function other than IT.



## **Defining Your Community**

- Not everyone is a App Maker/Citizen Developer
- People still have a day job too
- Business process knowledge is good
- Creating a working group to discuss, design and manage
- You can make an app, but what about support and evolution
- It can provide 'opportunity'



## Upskilling



## **How Should You Upskill**

#### **External Training**

- Partner Training
- Partner Consultancy

#### **Internal Training**

- System Landscape
- Business Process
- Business Policies
- Champions

### Self-Taught

- MS Learn
- YouTube
- Community Forums



## Finding A Need



### Just because you can, doesn't mean you should

#### Do

- Identify challenges that affects multiple people, multiple times
- Consider if you already have the solution, or if there is something to 'buy' off the shelf
- Seek stakeholder buy in
- Do look at cost of licenses and time to build (storage too)
- Do consider amount of ongoing maintenance required

#### Don't

- Look in to a problem in isolation, disparate system landscapes aren't what you want
- Don't buy the wrong licenses
- Keep ideas to yourself
- Build, test and refine individually
- Go live without stakeholder approval



### **PRODUCTIVITY**

Does your idea solution reduce effort Does your idea enable more output

### **RISK**

Of not putting something in place Of putting it in place

### **COST**

Licenses
Time to build, test, train and deploy
Cost to maintain

### **USER EXPERIENCE**

Simplicity is key



### **Admin & Governance**



## **Create A Strategy**

### Manage

- Number of environments
- Testing Policy
- Automated <u>Tests</u>
- Release Cycles

#### Secure

- Creating environments
- Permissions
- Environment data loss prevention

#### Monitor

- Capacity
- Usage



### **Environments**

**Solutions & Publishers** 

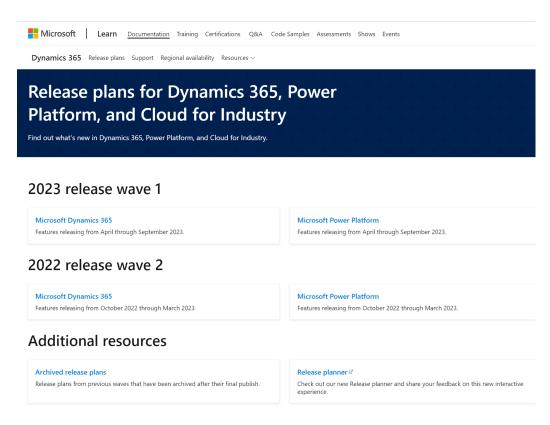
Comments & Documentation (+ DevOps)

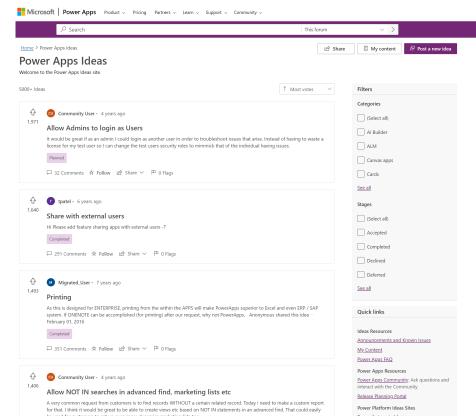


## **Support & Evolution**



## The Technology Doesn't Stand Still

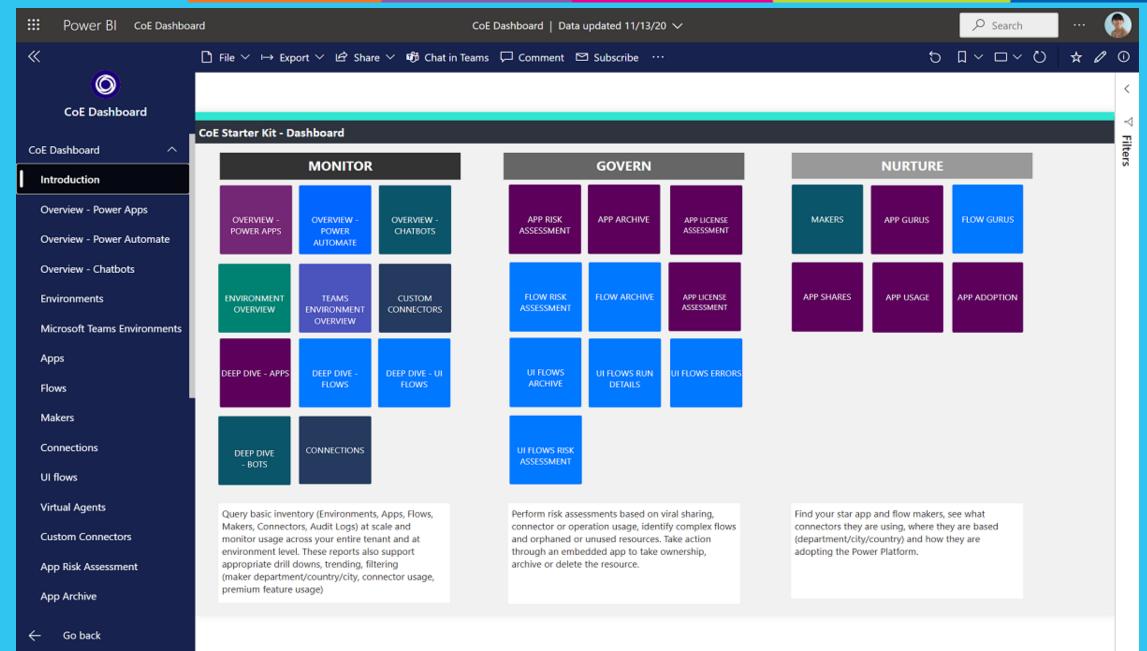






### **Centre of Excellence**





## Thank you.

