Microsoft Power Platform for Process Intelligence

Introduction to a Task Mining workload with Velrada

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Business First.
Technology Second.

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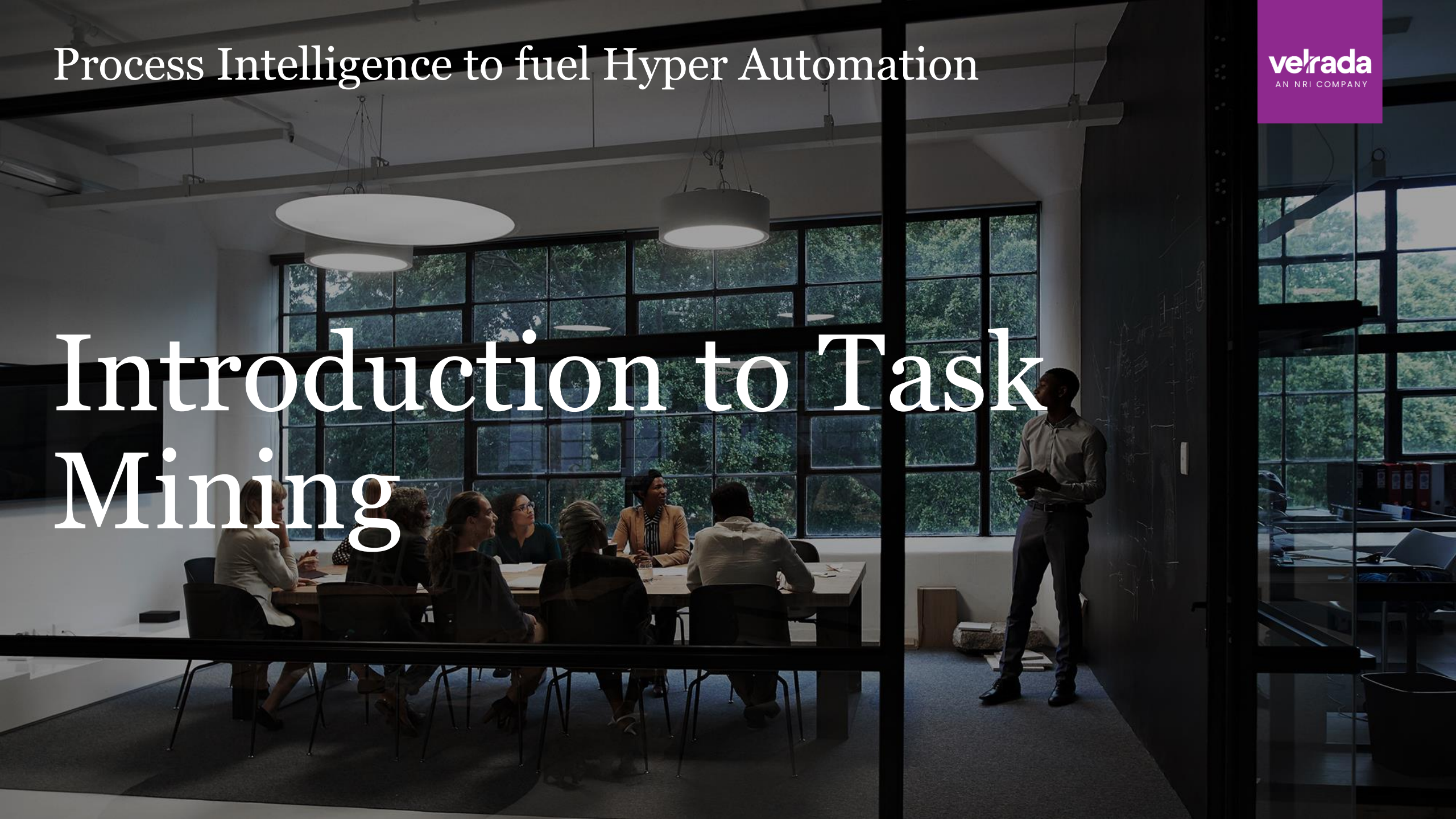
Process Intelligence to fuel Hyper Automation

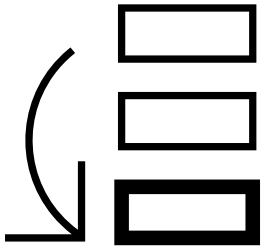


Introduction to Task Mining

Process Intelligence: Types of Mining

PROCESS MINING

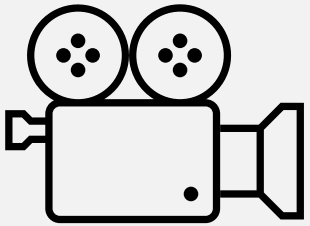
Utilise activity & event log files for in-depth understanding of organisation-wide processes.



- Identify inefficiencies & bottlenecks.
- Enhance transparency & compliance.
- Optimize resource allocation.
- Reduce operational costs.
- Drive data-driven improvements.

TASK MINING

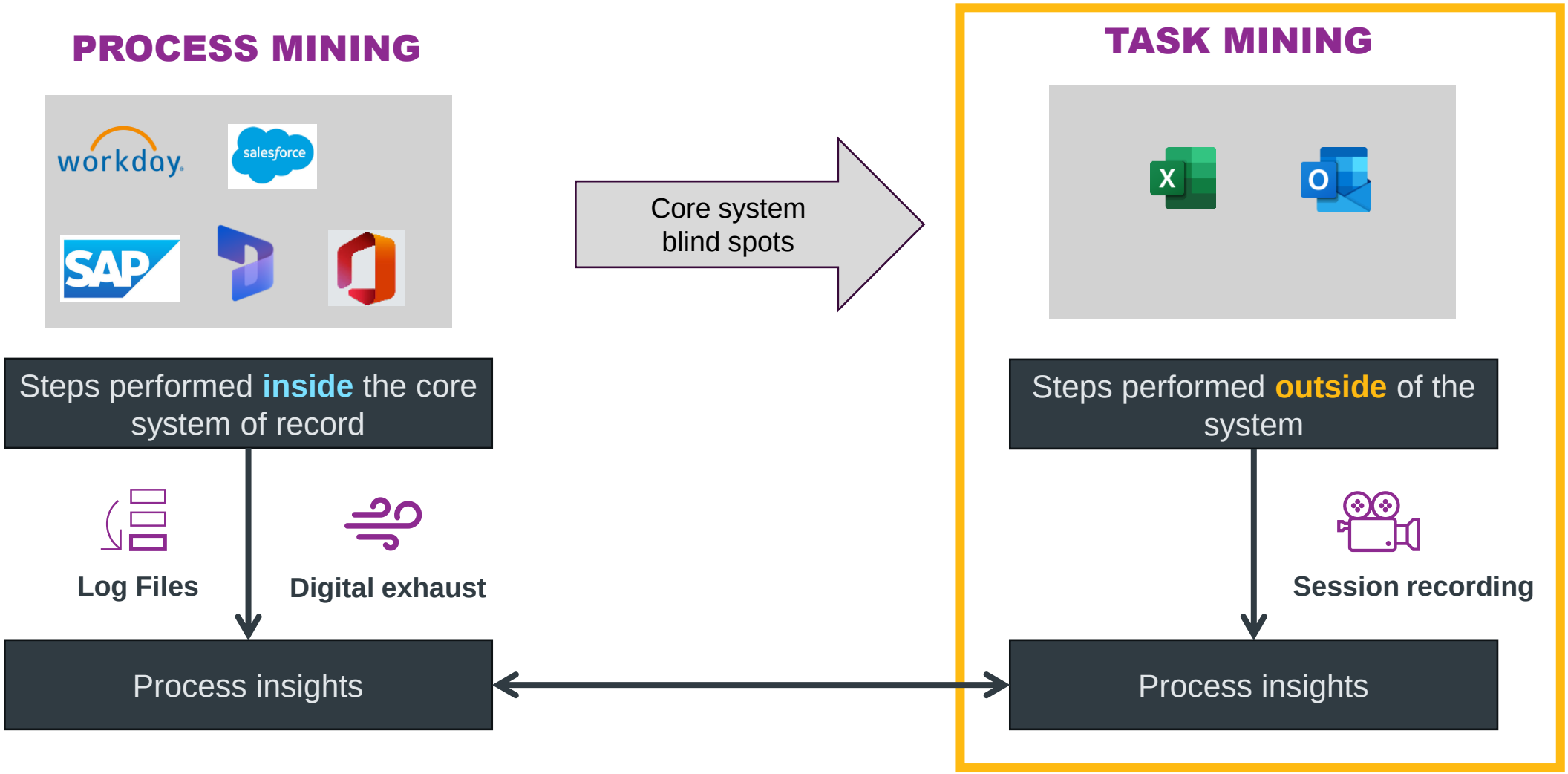
Capturing user interactions to gain insights into manual tasks and workflows.



- Capture user interactions.
- Identify task patterns.
- Improve productivity.
- Automate repetitive tasks.
- Inform process optimization.

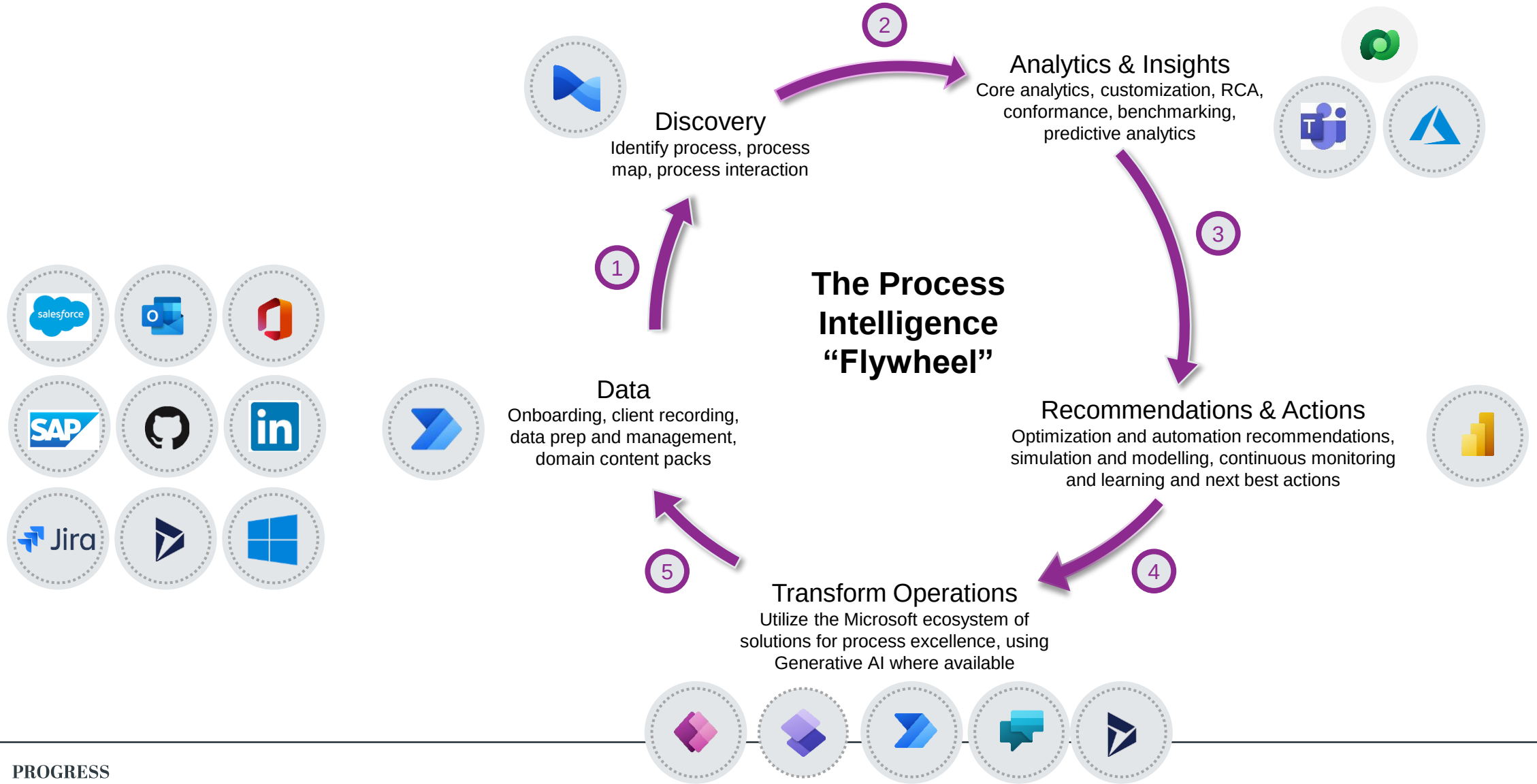
Outcome: Visualise the invisible.
Opportunity: Efficiency gains, cost reduction, informed decisions.

Technology to illuminate the process unknowns



Enabling Continuous Process Improvement

INTEGRATED INTO YOUR EXISTING MICROSOFT INVESTMENT



What is Task Mining?

TOOLING TO RECORD & ANALYSE MANUAL PROCESSES

- Task Mining helps to identify the frequent workflows that application users perform day-to-day on their desktop machines.
- By recording the actions that they take to perform critical processes, it allows for the capture of steps, visualisation of workflow, and identification of metrics.
- It allows for the process improvement to occur over a wide range of everyday workflows for users. Such as:
  - A financial services customer to visualize their claims process and uncover inefficiencies.
  - A manufacturing customer to visualize their purchase orders and to find what influences their time to close an order to increase.
  - A healthcare services customer to visualize and optimize their order billing process.

Identify Processes
Setup a catalogue of key processes to commence the Task Mining to occur.

Record Actions
Leverage the Task Mining software installed on the user's PC to record the steps taken to perform particular tasks.

Generate Insights
View the process on a map, identify predecessor/successor pathways, calculate key performance metrics, and highlight variances.

Implement Recommendations
AI based recommendations to help triage potential problems and consider Power Platform solutions for improvements.

Work with Velrada

Outline of a Task Mining Workload

Engagement Overview

TASK MINING – INTRODUCTION & PRODUCTION PILOT SPRINT

Engagement Length

Delivered typically across 2 weeks:

- 1 week of technology introduction, preparation & performing
- 1 week of analysis, outputs, and handover

Investment

- Engagement start at AUD $26,000 (excl. GST)
- Available in both fixed-price and time & materials
- Not inclusive of Microsoft licensing

Session Delivery

Engagement can be delivered either:

- In person (your office or Velrada's)
- Remotely using Microsoft Teams

Pre-Requisites

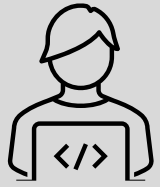
- Velrada require ability to develop Power Platform & Process Intelligence within your tenant
- Microsoft licensing to implement Task Mining examples
- Client must be prepared for participating in discovery & design

Client Participants

The engagement is collaborative & benefits from your input by:

- IT strategy & architecture leadership
- Current or future Automation CoE & Development team
- Critical process owners

Velrada Resources



Our experienced resources utilised in this engagement:

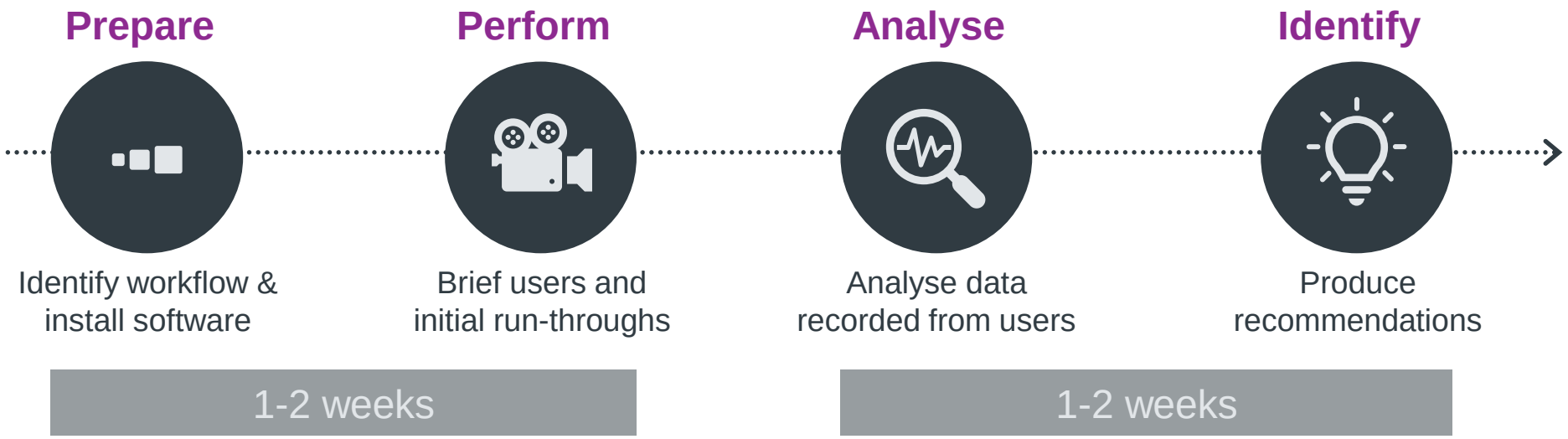
- Delivery Manager
- Power Platform Architect
- Power Platform Developer – *Automation specialisation*

Typical Velrada Engagement

TASK MINING – INTRODUCTION & PRODUCTION PILOT SPRINT

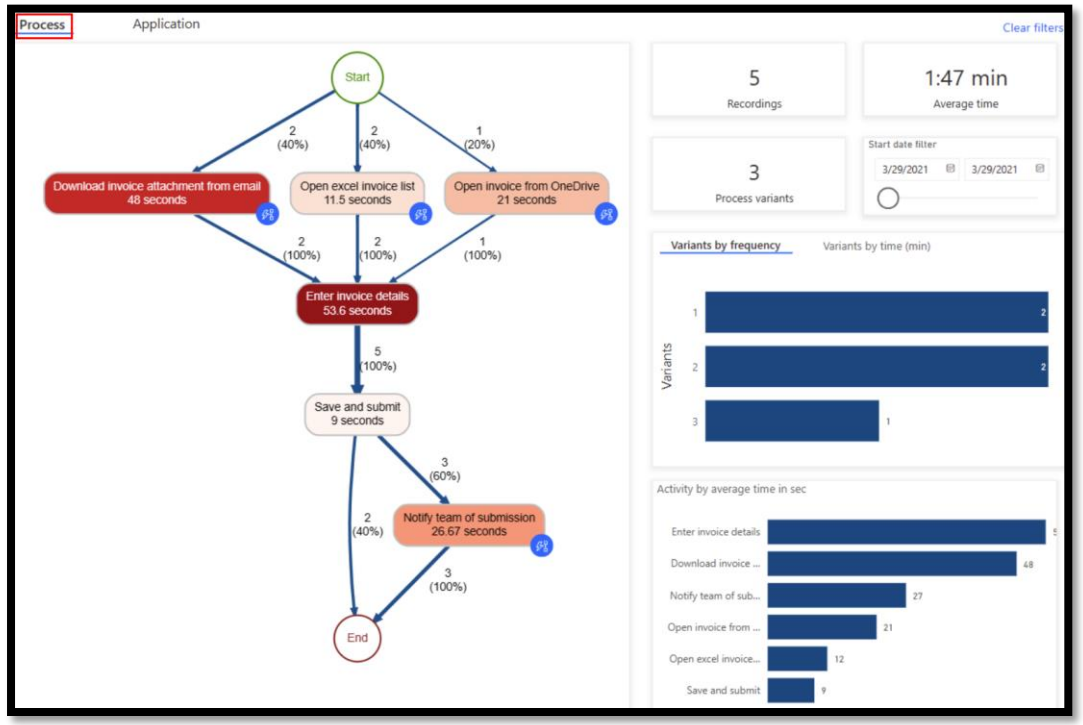
Engagement Overview

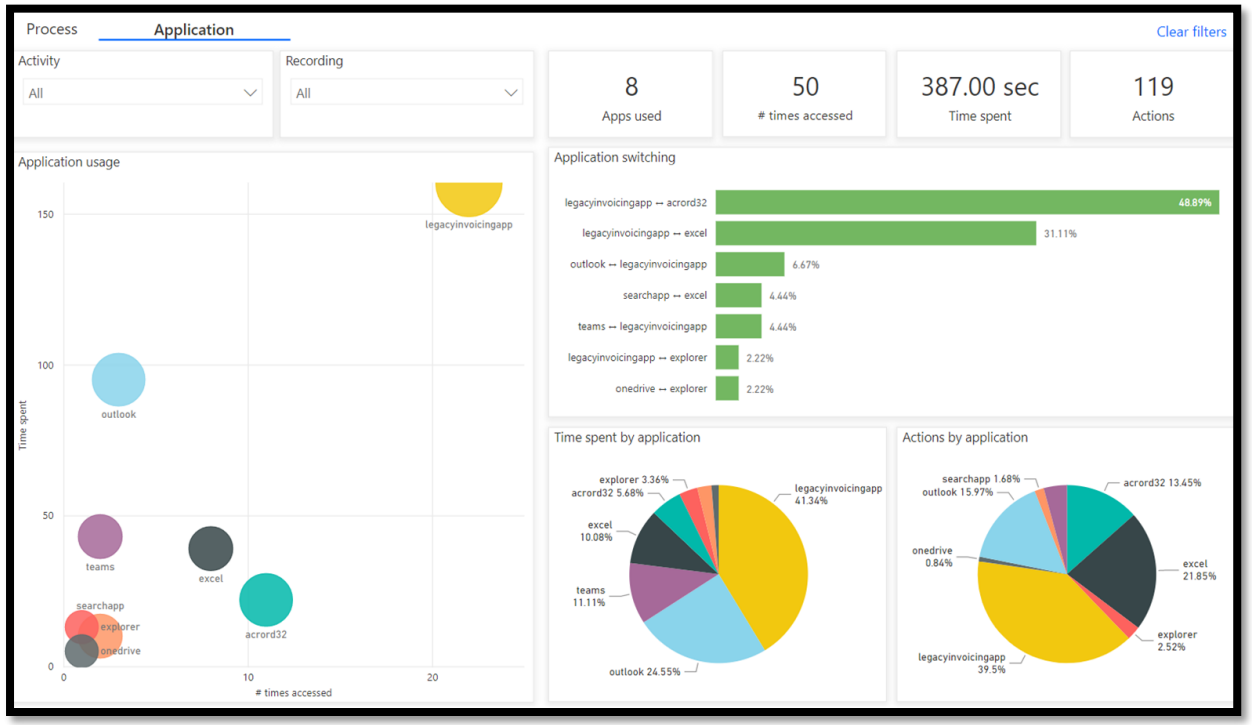
- Velrada can introduce your organisation to Task Mining through a pilot-sprint.
- Leveraging the expertise of our Power Platform consultants, we will showcase an end-to-end demonstration of the solution within your Microsoft tenant using data derived from your pilot users.
- The engagement will include 3 short workshops to kick-off technical enablement, brief participants to record workflows, and playback the findings.
- We would work with a process SME and aim for the engagement to be completed within 2-3 weeks (depending on the type of process being explored & client SME support).



Task Mining Outcomes

VISUALISE THE PROCESS & APPLICATIONS USED IN WORKFLOWS





Progress is impossible without change.

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