



Dynamic Workflow Solution
Empowering US-based **IT
Security Corporation**

About the Client

The client is a leading innovator in SaaS-based Zero Trust cybersecurity solutions, providing global enterprises with a unique set of products and services for securing applications, data, and users across cloud and hybrid environments. In addition, they focus on helping businesses assess and improve their security posture dynamically.

Business Challenges

- Manual management of 20 different workflows (emails and spreadsheets)
- Lack of transparency about requests generated by various employees falling into several different categories
- Inefficient management and approval of crucial requests due to requests getting lost or forgotten.
- Difficulty in prioritizing requests thereby leading to late deliverables and pushing client deadlines
- No clarity to users concerning the progress of individual requests
- Absence of KPIs to track business process efficiency & performance
- Misplacement of key documents & miscommunication amongst different departments



Solution Provided

- Configurable workflow engine, wherein option to configure - Approvers, Supporters, Processor and their sequence.
- Option to configure the steps based on business rules.
- Cost-efficient software built using their existing Office 365 license
- Based on SharePoint Online, Power Automate, the platform was easily integrated with MS Teams.
- Workflow configuration based on Request form data
- Dedicated discussion forum for each workflow request
- Section to upload supporting documents and comments about the particular requests
- Capture and Log all the events around workflow request
- Instant email notifications and reminder emails for concerned users in the workflow process
- Dynamic progress bar, which indicates the current status of the request and the life-cycle of any request
- Configurable SLA, Reminder Emails based on SLA
- Option for delegation if a person is going on leave or not available.
- Option to raise a request on behalf of another user



Business Impact

- Efficiently track and manage 20 critical business process workflows
- Eliminate human error from request generation, approvals, and management
- single interface to track every application and part of the process
- Ability to validate every inquiry and swiftly collect more information from the stakeholder
- Enabled seamless collaboration within different departments such as sales, delivery, governance, etc.
- Quickly check approval from stakeholders (governance team), enabling the sales team to service the customer effectively.





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