

5 Power Platform Quick Wins

ols. Here are five painful workflows we have fixed more times than we can count, each one ready to ship in a week or less.

TRUNORTH DYNAMICS



INSIDE
START WITH THE PAIN,
NOT THE PRODUCT LIST

Let's Build Something.

You have Power Platform in your Microsoft 365 plan. You have not built anything with it yet. **You are not alone.**

Most teams we meet are in exactly the same place. The fastest way to get value is to pick one painful workflow and ship a fix in a week. Here are five we have built more times than we can count. Each one is small, practical, and tied to a very specific friction.

The five quick wins at a glance

01	Approvals that should not live in email Power Automate approval flow with a real audit trail	3-5 days
02	Expense tracking without spreadsheets A canvas app, routed approvals, one clean record	1 week
03	Customer service triage app A simple queue with priority and routing logic	4-5 days
04	A sales dashboard you can trust One source of truth over your CRM, refreshed nightly	1 week
05	A vendor request form that does not get lost One form, one flow, procurement and finance aligned	1 week

THE RULE

Start with the business pain, not the product list. Map the workflow on paper first, then build the fix from that map. Never start from a generic template.

01

Approvals that should not live in email

POWER AUTOMATE · APPROVALS

THE PAIN
INBOX CHAOS

PTO requests, expense approvals, and purchase requests bounce around inbox threads. Nobody knows the status. Nothing is auditable.

The build

A Power Automate approval flow that notifies approvers where they already work, and writes every decision to a record you can actually audit.

■ Power Automate approval flow

■ Teams or Outlook notification

■ SharePoint / Dataverse record optional audit trail

TIME TO SHIP

3-5 business days

For a working first version.

WHERE TO START

Pick the single most common approval your team runs. Map the steps on paper. Build the flow from that map, not from a template.

QUICK WIN

02

Expense tracking **without spreadsheets**

POWER APPS · POWER BI

THE PAIN
LOST RECEIPTS

Expenses tracked in shared spreadsheets. Receipts buried in inboxes. Reconciliation takes days.

The build

A canvas app to submit, a flow to route the approval, one clean record per expense, and a report the controller can trust.

■ Power Apps canvas app

■ Power Automate routing

■ Dataverse record

■ Power BI report

TIME TO SHIP

1 week

Working pilot with five users.

WHERE TO START

Submit the next ten real expenses through the new app. Iterate based on what felt clunky, then widen the rollout.

QUICK WIN

03

A customer service triage app

POWER APPS · COPILOT STUDIO

THE PAIN
ONE SHARED
INBOX

Inbound cases land in one inbox. Whoever is fastest grabs them.
Nobody sees priority. Some cases sit for days.

The build

A triage app with a simple queue and routing logic, so priority is visible and nothing slips - with an optional bot for first-pass acknowledgement.

■ Power Apps triage app

■ Queue + routing logic

■ Copilot Studio bot optional acknowledgement

TIME TO SHIP

4-5 business days

For a working version.

WHERE TO START

List the three case types your team gets most often. Build the queue around those three. Everything else can wait.

QUICK WIN

04

A sales dashboard **you can trust**

POWER BI · CRM / CE DATA

THE PAIN
WEEKLY
REBUILDS

Sales reports get rebuilt every week in Excel. Reps and managers argue about whose numbers are right.

The build

A Power BI dataset over your CRM or CE data, with one executive view and one rep view, refreshed automatically every night.

■ Power BI dataset over CRM / CE

■ Executive view

■ Rep view

■ Nightly refresh

TIME TO SHIP

1 week

First version. Iterate over 30 days.

WHERE TO START

Agree on the three numbers leadership actually wants to see. Build for those first, and resist the urge to add more.

QUICK WIN

05

A vendor request form that does not get lost

POWER APPS · POWER AUTOMATE

THE PAIN
EMAIL LIMBO

New vendor requests come in by email. Procurement chases approvals. Finance asks the same questions twice.

The build

A form for the request, a flow that routes it through procurement and finance, and one record that captures the answer the first time.

■ Power Apps request form

■ Power Automate approval flow

■ SharePoint / Dataverse record

TIME TO SHIP

1 week

Including procurement & finance sign-off.

WHERE TO START

Pull the last ten vendor requests. Build the form from the questions you actually had to ask each time.



WHAT TO DO NEXT

Pick one. Block a week. Ship it.

The hardest part is starting. If you want a partner who has built each of these dozens of times, we can scope the first one with you. Fixed-fee, no surprise change orders.



Ready to streamline your activities?
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