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AI Driven Digital Process Automation Bootcamp with Microsoft 365

Map It in Teams. Analyze It in Excel. Automate It with Power Automate.

FA-0059

Automation, RPA & Power Platform

Introduction

This bootcamp is designed for professionals who need to improve how work actually flows across Microsoft 365—not just design processes on paper. Learners will use familiar tools such as **Teams, Excel, SharePoint, Word, Power BI, Power Automate, and Copilot** to discover inefficiencies, redesign workflows, and deploy governed digital automations. The focus is practical, hands-on, and enterprise-ready. The instructor brings **over 30 years of real industry experience**, ensuring the content reflects how automation programs operate in modern organizations rather than academic process theory.

Learning outcomes

By the end of this bootcamp, learners will be able to:

- Identify inefficiencies in real workflows using Microsoft 365 data and collaboration tools
- Map and redesign processes using practical artifacts created in Teams, Word, and Visio-style diagrams
- Analyze process performance and ROI using Excel and Power BI
- Build multi-stage, reusable automations using Power Automate and standard connectors
- Use Microsoft Copilot and AI tools to accelerate discovery, documentation, and testing
- Produce enterprise-grade documentation using Word and SharePoint

- Apply governance, change control, and rollout strategies using Microsoft 365
- Deliver a complete Digital Process Automation project as a final assessment

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Prerequisites

Participants should have:

- Working knowledge of Microsoft 365 (Teams, Outlook, Excel)
- Basic understanding of business processes and workflows
- Access to Power Automate, Power BI, SharePoint, and Copilot (where available)
- Interest in automation, operations, or digital transformation roles

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Training outline

1. Digital-First Operations Using Microsoft 365

- How work flows across Microsoft 365 in modern organizations

  Mapping real operational journeys across:

  - Outlook, Teams, SharePoint, Excel, Power Automate
- Identifying where work breaks down between tools
- Role of AI (Copilot, chatbots) in supporting operational work

2. Process Discovery Using Microsoft 365 Tools

  Capturing process knowledge using Teams

  - Chat histories, meetings, channel conversations
- Using Copilot to summarize meetings and extract process steps
- Reviewing email and SharePoint activity to detect inefficiencies
- Documenting current-state processes in Word and SharePoint
- Creating a structured process inventory

3. Advanced Process Mapping (Hands-On)

- Building swimlane diagrams based on real M365 usage
- Mapping roles, systems, and handoffs across Teams, SharePoint, and email
- Creating RACI matrices in Excel

Capturing process metrics

- Cycle time, volume, error rates using Excel

- Designing future-state processes aligned to digital-first execution

4. Backlog Management, Metrics & ROI

- Creating an automation backlog in Excel or SharePoint Lists
- Scoring and prioritizing processes using Excel models

  ROI calculations using Excel

  - Effort saved, error reduction, throughput improvements
- Visualizing backlog and ROI using Power BI
- Creating an automation roadmap aligned to business value

5. Automation Design with Power Automate

- Translating process maps into Power Automate designs

  Designing multi-stage flows

  - Trigger → processing → approvals → notifications → logging

  Modularization techniques

  - Reusable child flows
  - Standard connector patterns
- Designing automations that work across Teams, SharePoint, Outlook, and Excel

6. Building & Deploying Automations

- Building cloud flows using standard connectors

  Integrating:

  - SharePoint Lists and libraries
  - Teams notifications and approvals
  - Excel-based data inputs and outputs
- Error handling, retries, and run tracking
- Using Copilot to assist with logic validation and expression drafting

7. Documentation & Governance Using M365

Creating SOPs in Word

- Usage instructions, ownership, escalation paths

Creating runbooks stored in SharePoint
    - Monitoring, recovery, and incident handling
- Maintaining a governance register in Excel or SharePoint
- Change control workflows using Power Automate approvals
- Using Copilot to keep documentation current

8. Testing, Rollout & Stakeholder Enablement

- Testing automations with controlled datasets in Excel
- User Acceptance Testing supported through Teams
- Capturing feedback using Forms and SharePoint

  Rollout strategies
    - Pilot users, phased deployment, organization-wide release
- Stakeholder training using Teams, SharePoint pages, and walkthroughs
- Measuring adoption and performance using Power BI

9. Assessment & Capstone Project (Primary Focus of Day 4)

- Selection of a real business process spanning multiple M365 tools
- Process discovery using Teams, Copilot, and SharePoint artifacts
- Current-state and future-state process mapping
- ROI analysis using Excel and visualization in Power BI
- Building a multi-stage Power Automate solution
- Creating SOPs, runbooks, and governance records in Word and SharePoint
- Testing and rollout planning
- Final project demonstration and assessment review

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