



## CASE STUDY

PROCESS AUTOMATION

MODERN WORKPLACE

# Reimagining a better way to collaborate

How one medical association is leveraging SharePoint Online, Teams, and Power Automate to run meetings more efficiently in a virtual environment.

One of the largest, not-for-profit medical associations in the nation hosts regular meetings for their **House of Delegates (HOD)** to set medical policy. Several committees collaborate during these meetings to prepare draft reports on various topics, including amendment suggestions to be submitted and reviewed by the counsel before presenting to the delegates for approval.

Facing Covid limitations for in-person conferences and the **disruptive shift to remote work**, the Association took to reimagining their policy development process to allow remote participants and virtual meetings to operate under regular meeting procedures.

Our client engaged PSC to recreate their submission and review of amendment process leveraging **SharePoint Online** integrated with **Microsoft Teams** with automated **workflows** and a remote-accessible interface.

Our collaborative partnership produced a scalable and extensive solution that supports the Association with a secure, virtual platform enabling remote participation and allowing amendment submission and review in real-time.

## The Process

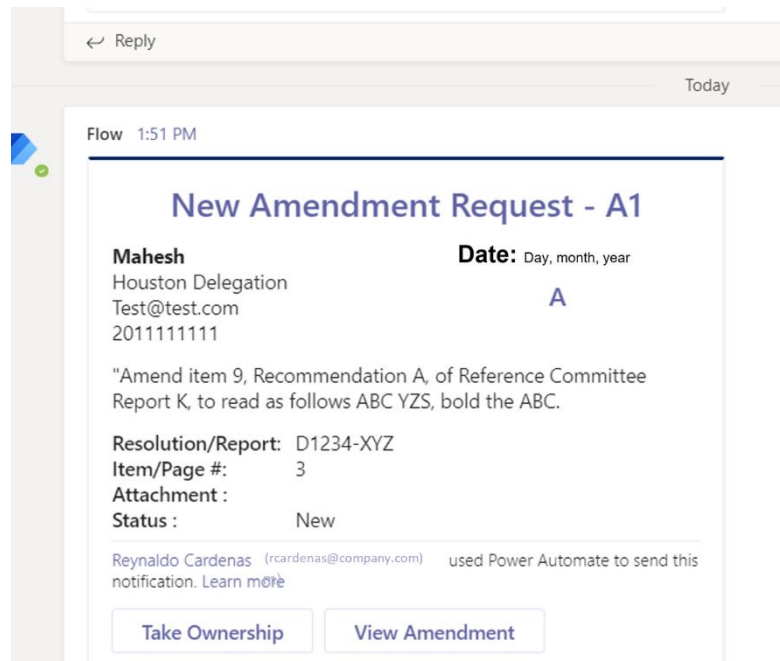
The existing process relied on in-person attendees to manually deliver proposed amendments to counsel for review and provided them to the on-site meeting facilitators. PSC broke ground with **frequent stakeholder reviews**, engaging key business executives to ensure evolving requirements were captured.

PSC **uncovered 3 distinct workflows** required to fully support the submission and review of amendments **spanning across multiple devices and reviewed by several committees**.

## The Team

PSC delivered this project using **our** transparent delivery approach that provides clients flexibility to adjust scope while maximizing their budget.

**PSC Way** teams ensure quality and transparency with project management, business analysis and quality assurance workstreams.



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## The Engagement

After the PSC team presented prototypes to the Association's key business stakeholders, **Microsoft Teams** and **SharePoint Online** empowered our development team to rapidly iterate on implementing the chosen solution.

- We held frequent **solution demos** for client stakeholders, providing feedback channels after each iteration.
- Azure DevOps tracked **Application Lifecycle Management** from user stories to automated deployments and testing.
- We hosted regular **Stakeholder Review** meetings with executive leadership from PSC and our client, providing an opportunity to speak candidly about team performance and project direction.
- We provided user training and backlog metrics to keep projects on time and on budget.

## The Results

Stakeholders across the association now possess an easy-to-use platform, effectively engaging remote contributors in a virtual set up to submit and review reports, resolutions and amendment requests.

At the start of every draft report prepared in **Microsoft Teams**, each workflow progresses automatically at its own pace while collecting approvals and routing submissions to associated counsel and facilitators.

PSC implemented a complete process that was well received by the client and is in current use for their **House of Delegates** meetings. With the new system in place, counsel members are able to process multiple amendment requests asynchronously to be more responsive while the meeting is conducted, taking care of upwards of 50 amendments per meeting. A process that was once solely run on-site, now extends to allow online, limitless collaborative capabilities so meetings stay productive and follow normal procedures without skipping a beat.

## The Solution

The **HOD** amendment process solution was built using Microsoft 365 platform tools. The meeting participants require virtual access to review and edit the amendments.

Leveraging **SharePoint Online**, PSC built an online form to allow virtual attendees to draft and submit an amendment for review. The completed forms were then submitted to a **Microsoft Teams Cards** to store the request in a SharePoint List and automatically create a notification to counsel members about the request. Members can interact with the notification to accept the SharePoint amendment request item and assign it. Once approved by counsel, a second workflow sends the amendment to a message queue, prompting facilitators to present the amendment in the virtual meeting.

The new solution pairs a flexible, remote-friendly **process** with a sophisticated backend business logic and integration engine built on **SharePoint, Teams, and Power Automate**.

### Pains

- Remote attendees to the virtual meeting needed to be able to draft amendments.
- Proposed amendments needed to be reviewed by association counsel.
- Reviewed amendments needed to be sent to the meeting facilitators for display and discussion.
- The existing process relied on in-person attendees to manually propose amendments to counsel for review and provided them to the on-site meeting facilitators.

### Gains

- PSC built an online form to allow virtual attendees to draft and submit an amendment for review.
- The completed forms were then submitted to a Microsoft Teams Card for review and approval by association counsel.
- Once approved by counsel, a second workflow sends the amendment to a message queue. The message queue is used by the meeting facilitators to present the amendment in the virtual meeting.
- The entire process was constructed to allow amendments in real-time while the meeting was in progress.



At PSC, **It's all in the way we listen**®.

Founded in 1990, PSC Group, LLC focuses on helping our clients grow and improve their business. Our unique approach to consulting engagements delivers our clients a greater return on their technology investment. We build client relationships on a foundation of integrity honesty and mutual respect.