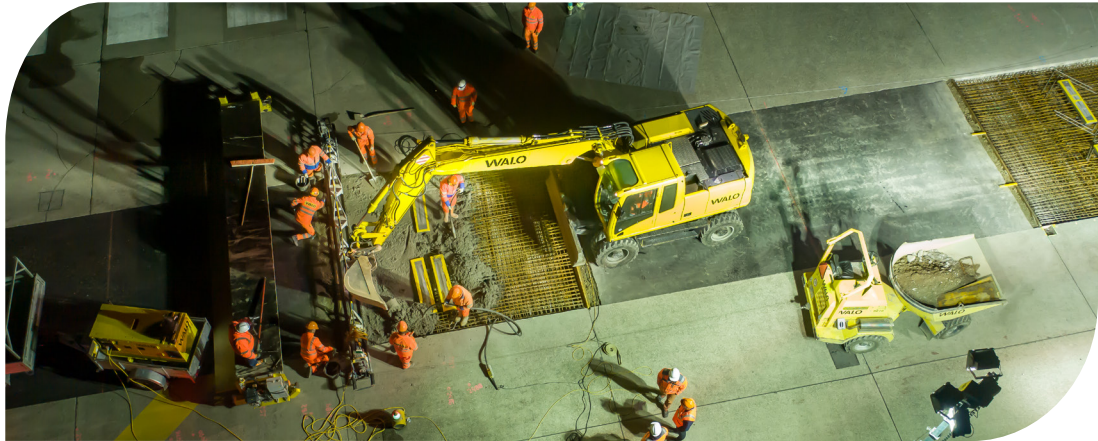


# Case Study

## Seamless workflow integration into the M365 ecosystem

### Company Profile

As a traditional family business, WALO Group has been operating for five generations and can look back on more than 100 years of experience in the construction industry. Starting in road and track construction, it has continuously expanded its areas of activity to include civil engineering, tunneling, dam and landfill construction, as well as underground construction. Overall, around 2,500 employees at 21 locations in three countries (Switzerland, USA, and the United Kingdom) successfully complete over 2,000 projects annually.

### Technologies

**#Power Apps**

**#Power Automate**

**#Azure DevOps**

### Challenge

- Necessary replacement of Lotus Notes processes due to End of Life
- The solution serves partially as a transitional solution but should be scalable and linked to the planned ERP system Abacus (from 2025)
- The solution tool should not incur any additional licensing costs

### Solution

- Implementation of 3 workflows with Power Apps and Power Automate
- Development of a general framework including governance as a basis for future workflows
- Creation of solutions that are scalable and adaptable
- Use of an agile methodology based on Scrum and Azure DevOps during implementation

### Benefit

- No additional costs due to coverage through M365 licenses
- Seamless integration into the existing M365 ecosystem including single sign-on
- Scalable framework enables extensions and customizations
- Free accessibility on all devices without VPN

Due to the EoL of Lotus Notes, WALO Group faced the task of finding a new solution to replace the existing workflows for various business processes. Since WALO was already working with Microsoft 365, the choice quickly fell on Power Platform, as this solution can be integrated seamlessly into the existing M365 environment. In search of an experienced partner, WALO discovered novaCapta, which has already won the Microsoft Partner of the Year Award multiple times in the „Power Platform“ category.

### **Pre-Project: Clarification of requirements and implementation options**

novaCapta initially began with a pre-project phase, where they conducted a detailed overview of the processes and gathered requirements from WALO. During this phase, it was also determined whether the workflows could be implemented with standard tools or if specific Dataverse solutions were needed. Based on this, a solution concept was developed, addressing the specific challenges: On the one hand, the implementation should not incur additional licensing costs in the form of premium licenses; on the other hand, a scalable solution was required, which currently serves as a transitional solution but is intended to be integrated with the new ERP system Abacus starting in 2025.

### **The new solution: Seamless and accessible from all devices**

To meet these requirements, novaCapta implemented three workflows using Canvas Apps and Power Automate – across developer, test, and live environments. The solutions are built on SharePoint as their data basis. This integration eliminates previous media breaks, as explained by Samuel Bernet, Head of Technology & Processes at WALO: „Previously, workflows provided individual results that had to be manually transferred to an Excel sheet and then further processed. With SharePoint, many more steps are now directly integrated into the workflow.“ Additionally, the solutions, powered by the cloud-based Power Platform, are accessible everywhere and from any device without the need for VPN – this was previously required due to the on-premises solution.

Alongside the three specific workflows, WALO and novaCapta established a general architecture for Power Platform workflows, including governance. This framework not only facilitated the migration of existing workflows but is also easily applicable to other applications, allowing for the automation of additional processes in the future. WALO chose to design the workflows to closely resemble the old solution to enable rapid and easy user adoption.

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**The pleasant collaboration with novaCapta was always at eye level and characterized by partnership and swift, transparent communication. We look forward to automating more processes together.**



**Samuel Bernet**

Head of Technology & Processes  
WALO Bertschinger AG

### **Special methodology: Azure DevOps and agile approach**

A notable aspect of the workflow implementation was the methodology used: For the first time, novaCapta applied an agile approach based on the Scrum method in a client project. All stakeholders worked in weekly sprints with full focus on clearly defined tasks, which were established during recurring Sprint Review meetings (including Sprint Planning and budget monitoring). This allowed for immediate implementation of optimization opportunities in the subsequent sprint, enhancing efficiency and quality and responding to change requests. Additionally, Azure DevOps was utilized to transparently track backlog items and upcoming task packages.

WALO Group is very satisfied with novaCapta’s work and has therefore engaged the team for additional Power Platform projects. These new projects will involve transitioning further workflow processes, previously handled through paper or email, into a digital environment. novaCapta’s service portfolio consistently includes consulting, workflow process implementation, and support.

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