

Transforming Business Processes with an Agentic Mindset for Finance and Operations

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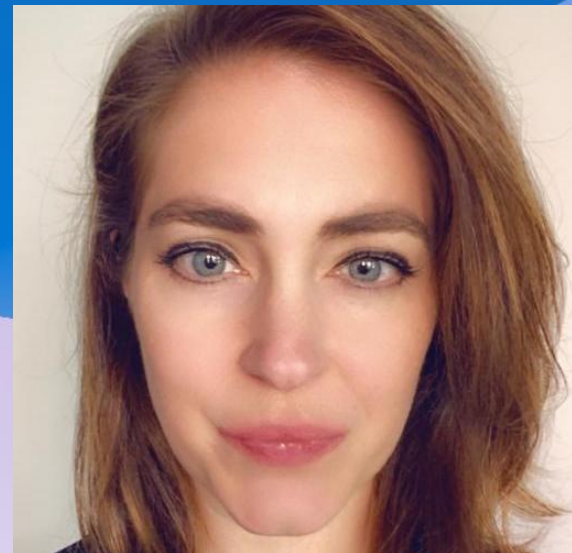


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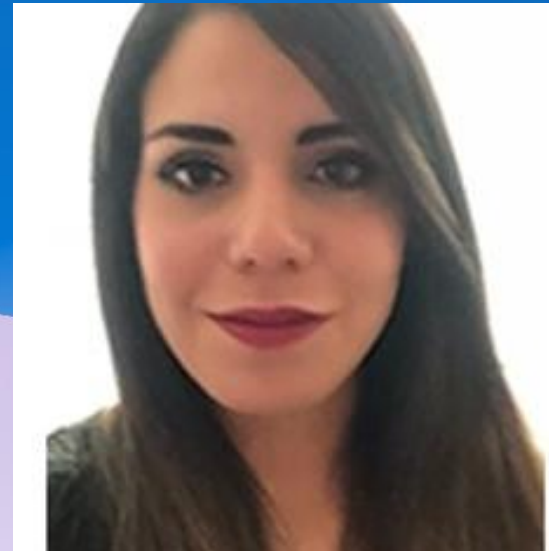
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Agenda

1. Introduction to business analysis with an agentic mindset
2. The anatomy of business processes
3. Reimagining business processes with AI
 - SCM
 - Finance
 - ProjOps
 - HR

Introduction to business analysis with an agentic mindset



The Role of the Modern Business Analyst



Holistic Process Focus

Map end-to-end workflows, handoffs, and decisions across roles



Progressive Maturity

Design from clarity through efficiency to intelligence and autonomy



Human + Automation Balance

Know where human judgment outweighs AI-driven automation

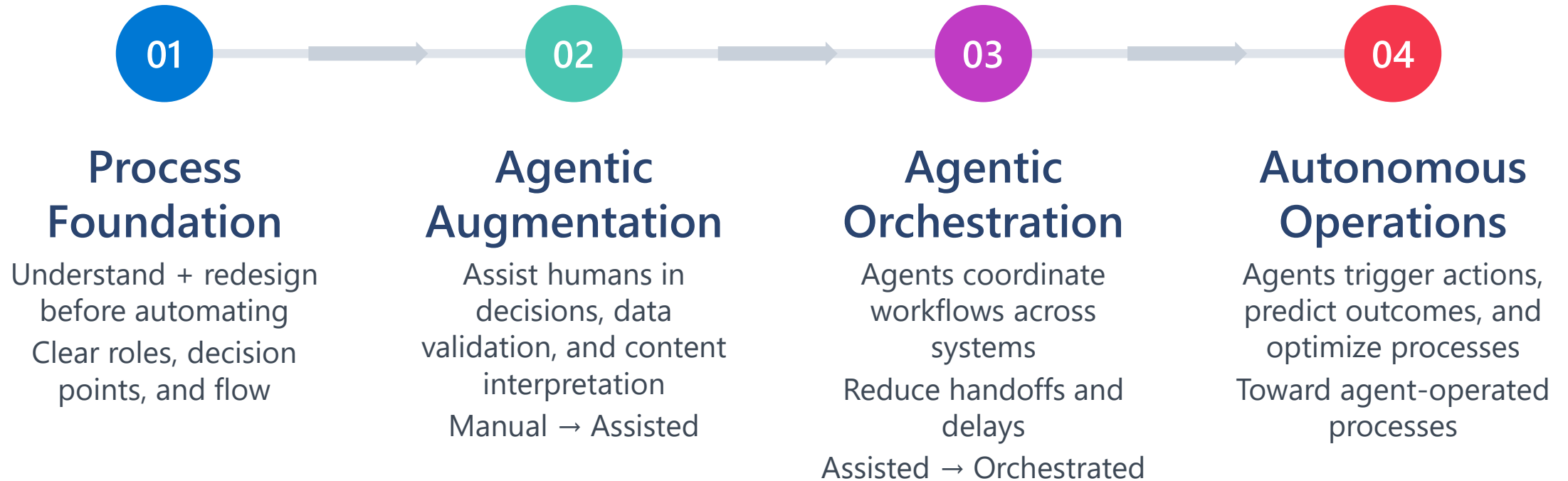


Transformation Leadership

Lead redesign for scalability, adaptability, and measurable value

Analysts must evolve from documentarians to transformation leaders who design intelligent processes

Agentic Transformation Pillars



“You cannot automate a process you don’t understand”

Agentic Value Measurement Framework

Productivity

Time + effort reduction

- Time per task
- Throughput
- Automation rate

Quality

Accuracy + consistency

- Error rate
- First-time-right %
- Rework rate

Efficiency

Process speed

- Cycle time
- SLA compliance

Experience

Human + customer impact

- CSAT
- Employee satisfaction

Adoption

Usage + trust

- Agent usage rate
- Override rate

Financial Impact

Business value

- Cost per transaction
- Revenue lift

Risk & Compliance

Control effectiveness

- Audit compliance rate
- Exception rate

Process Discovery Signals and AI Opportunities

Signal	Opportunity	Agentic Capability	Technology Examples
Repetitive tasks	Automation	Task execution	Power Automate, Logic Apps, RPA
Data inconsistency	Validation	Guardrails + policy enforcement	Copilot, Business Rules, Dataverse validation
Decision bottlenecks	Decision support	Human-in-the-loop agents	AI Agents, Copilot Studio
Unstructured input (emails, docs)	Interpretation	NLP + semantic understanding	Azure OpenAI, AI Builder, Cognitive Services
Cross-system work	Orchestration	Workflow coordination	Dataverse, Fabric, Power Platform
High manual handoffs	Flow optimization	End-to-end orchestration	Durable Functions, Process Mining
Knowledge gaps	Knowledge augmentation	Context-aware assistance	RAG (Fabric, Azure AI Search)
Delayed insights	Real-time intelligence	Predictive + proactive agents	Fabric Real-Time Analytics
Exception-heavy processes	Exception handling	Adaptive agents	AI Agents + rules + escalation
Compliance risk	Monitoring & governance	Policy-aware agents	Purview, Compliance Manager
Customer friction	Experience optimization	Conversational agents	Copilot, Omnichannel, Bot Framework
Low process visibility	Process mining	Insight generation	Process Advisor, Power Mining
Static workflows	Dynamic adaptation	Autonomous decisioning	Multi-agent orchestration

Agentic Value Measurement Framework

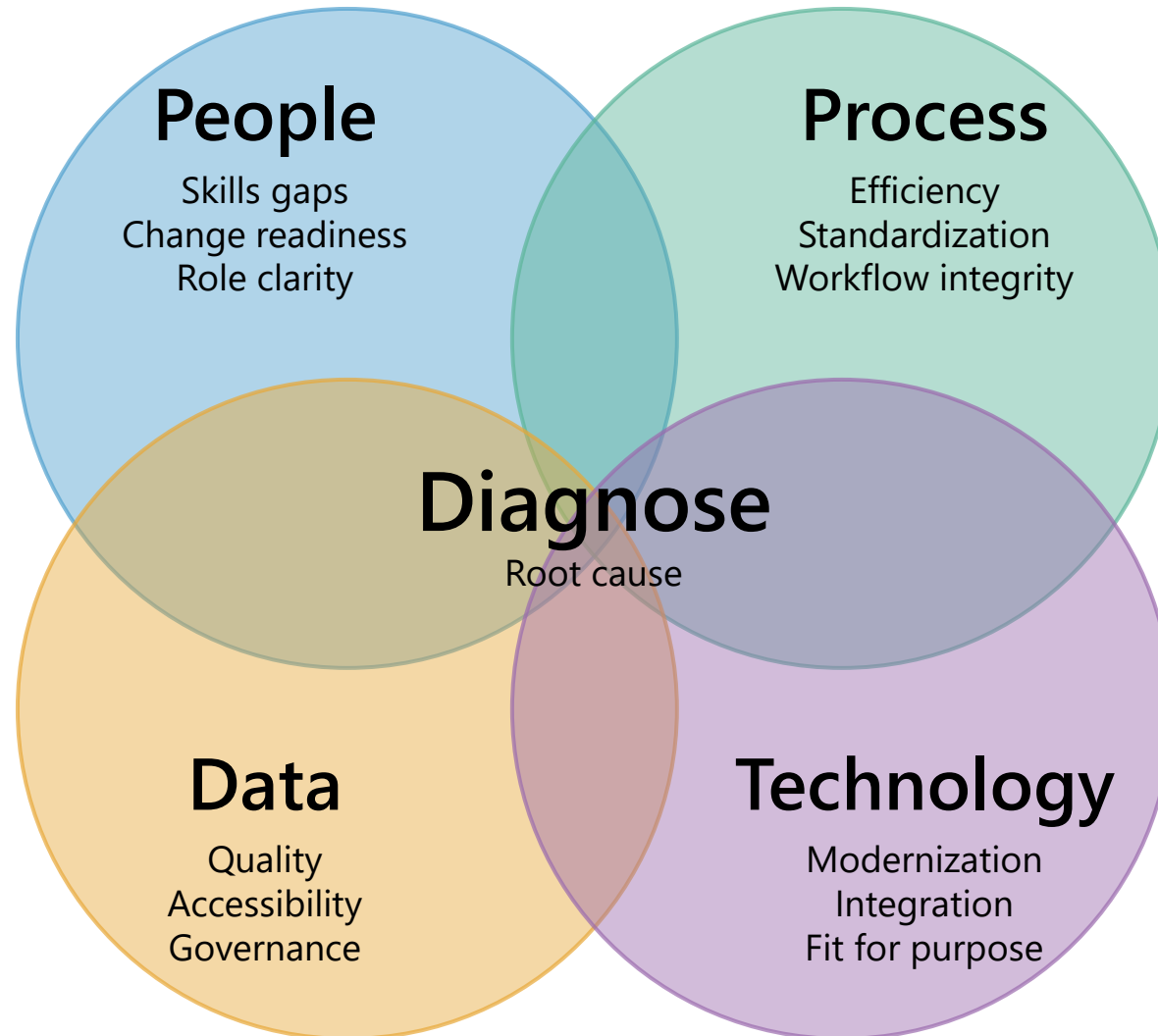
Metric Category	What to Measure	Example Metrics
Productivity	Time + effort reduction	Time per task, throughput, automation rate
Quality	Accuracy + consistency	Error rate, first-time-right %, rework rate
Efficiency	Process speed	Cycle time, SLA compliance
Experience	Human + customer impact	CSAT, employee satisfaction
Adoption	Usage + trust	Agent usage rate, override rate
Financial Impact	Business value	Cost per transaction, revenue lift
Risk & Compliance	Control effectiveness	Audit compliance rate, exception rate

Diagnosis before
design – not every
problem needs AI



Root Cause Analysis Framework

AI amplifies what exists — diagnose across four dimensions before designing any solution



***You cannot
automate a
process you do
not understand.***

From Problem to the Right Solution

Technology is rarely the first answer — diagnose root causes before prescribing solutions

Symptom	Knee-Jerk Reaction	Actual Root Cause	Right Solution
Reports take 3 days	<i>"Automate reporting with AI"</i>	5 siloed spreadsheets	Centralize data first, then automate
Slow customer response	<i>"Deploy a chatbot now"</i>	No access to order history	Integrate CRM + order system
Bad sales forecasts	<i>"Add ML prediction models"</i>	No standard sales process	Standardize methodology first
Rising data entry errors	<i>"Add more validation rules"</i>	Staff untrained on new ERP	Training program + user guides

The Evolved Business Analyst

From documenting requirements to diagnosing root causes and guiding transformation

4 Dimensions

Diagnose across People, Process, Data, and Technology before recommending any solution

Amplification Effect

AI magnifies what exists — good patterns become great, broken foundations become expensive failures

Strategic Judgment

Know when to recommend process over automation, training over tools, governance over dashboards

The New Mandate

Diagnostic rigor + strategic judgment = analysts who ensure intelligent solutions address actual problems, not just automate symptoms. Master the four-quadrant framework and become the indispensable guide your organization needs.

The anatomy of business processes



Business Process Catalog — F&O Project Starting Points

Each Dynamics 365 product maps to a core end-to-end business process

SUPPLY CHAIN MANAGEMENT

Source to Pay

Accounts payable & Procurement and sourcing

FINANCE

Record to Report

General ledger & Costing

PROJECT OPERATIONS

Project to Profit

End-to-end project delivery

COMMERCE

Order to Cash

Retail & Sales and marketing

FIELD SERVICE

Service to Deliver

On-site service delivery and scheduling

PRODUCT-CENTRIC

Design to Retire

Product information management and pricing

SERVICE-CENTRIC

Concept to Market

Service item management and pricing

Start with problems. Then processes. Then technology.



THE REALITY

No single product cleanly aligns to one end-to-end business process. Real implementations span multiple products and process areas.



THE CATALOG

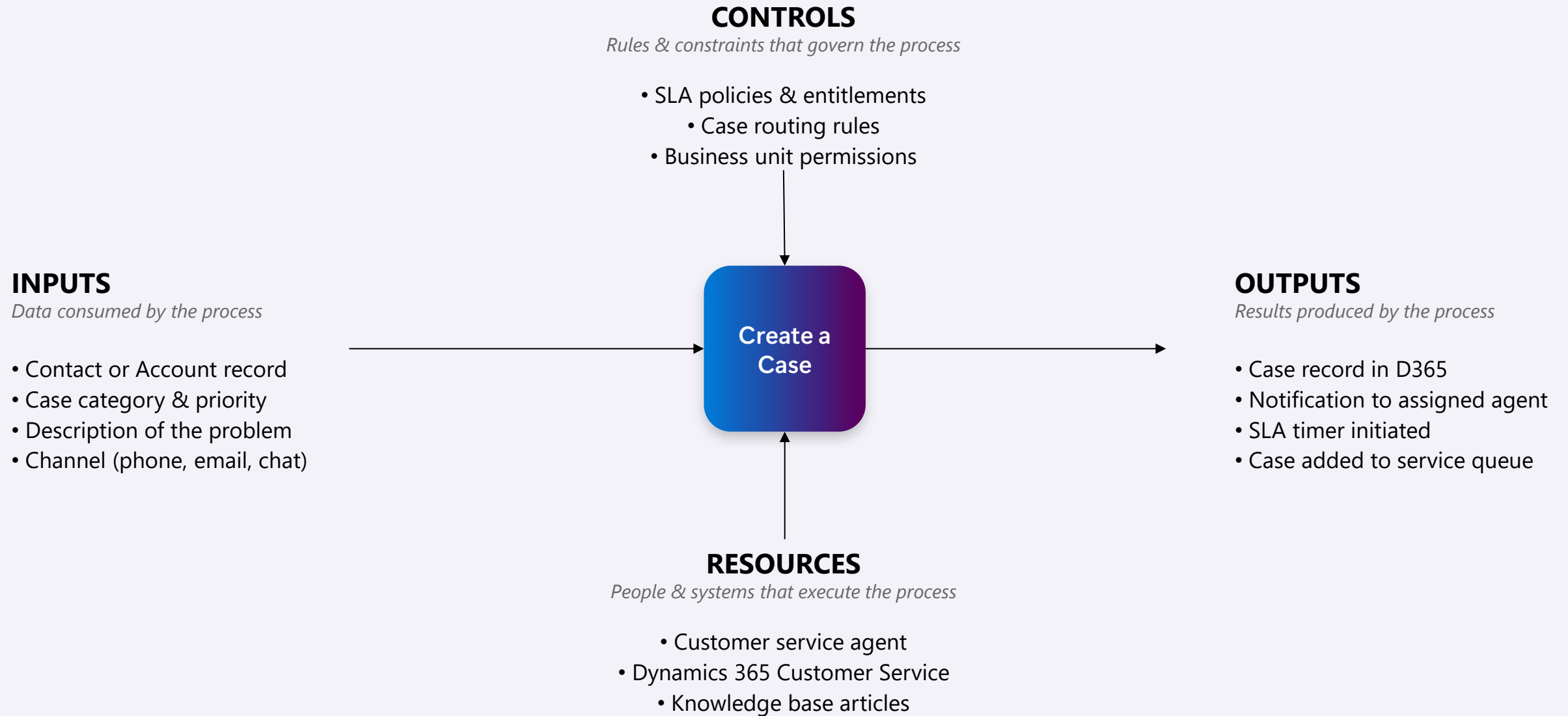
You can filter the business process catalog by application family or product — but don't let the filter define your scope.



THE APPROACH

Don't start with products. Start by identifying business problems, map the processes that address them, and then select the right technology.

What makes up a process?

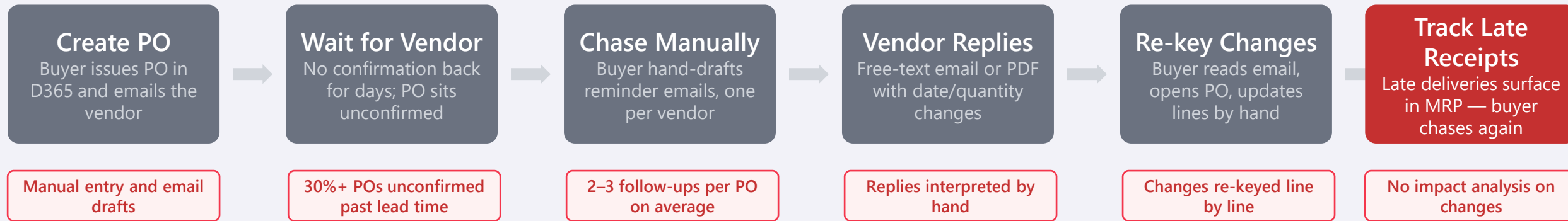


Reimagining processes



The Reality: A Broken Open Purchase Order Process

Contoso Manufacturing — 12 buyers, 600+ open POs, goal: cut purchaser follow-up time by 70% and confirm POs on time



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What the Business Analyst Found in Discovery

Manual Vendor Follow-Up

Purchasers chase unconfirmed POs and late deliveries by hand-drafting one-off emails, vendor by vendor.

Unstructured Inbox Replies

Vendor confirmations and change requests arrive as free-text email or PDF. Someone reads, interprets, and re-keys them into the PO.

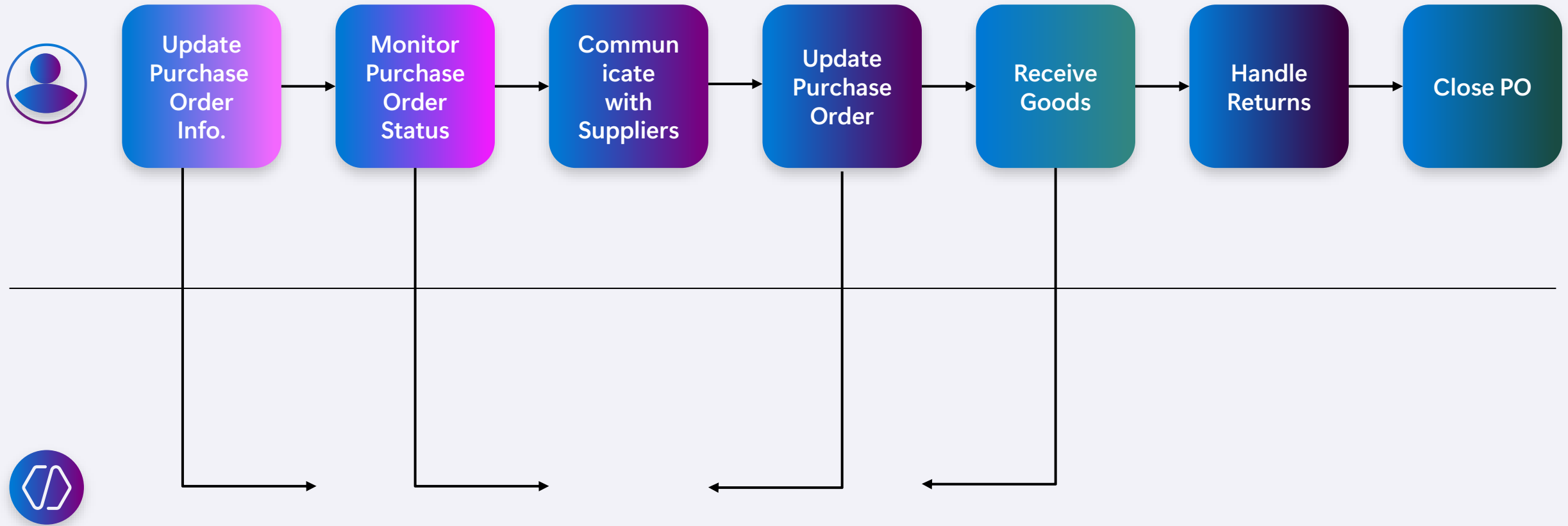
Hidden Downstream Impact

Supplier-initiated date and quantity changes ripple into safety stock, production, transfers, and customer commitments — unseen until later.

The Business Goal

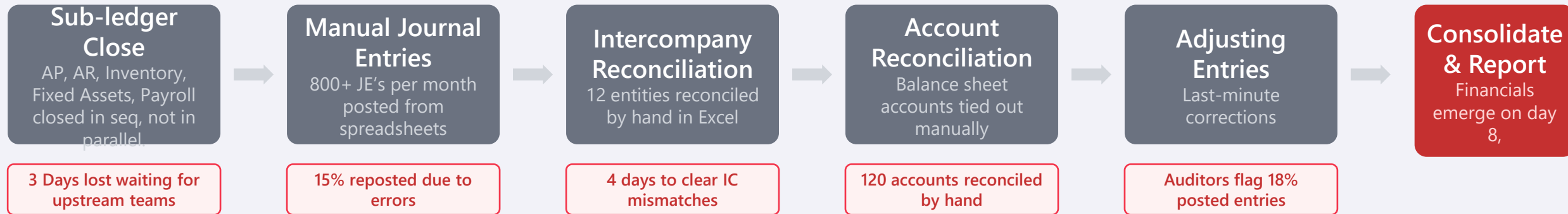
Cut purchaser time on routine follow-up by 70%+, ingest vendor replies automatically, and surface change-request impact before the buyer accepts.

From Tasks to Agents: Manage Open Purchase Orders



The Reality: A Broken Finance Process: Month-end close

Manufacturing Co — 12 LE, 4 countries, 18 Accountants who owned the month-end close. It takes 8 Business days to close. The CFO gets consolidated financials on day 9. Too late.



The Reality: A Broken Finance Process: Month-end close

Goal: reduce close time to 3 days, manual JEs -70%

What the Business Analyst Found in Discovery

Disconnected Sub-Ledgers

AP, AR, Inventory, FA closed in series; no orchestrator triggers the next step when the prior one is clean.

Logic lives Off-system

Adjusting entry logic lives in senior accountant's heads and Excel macros, not in policy or D365.

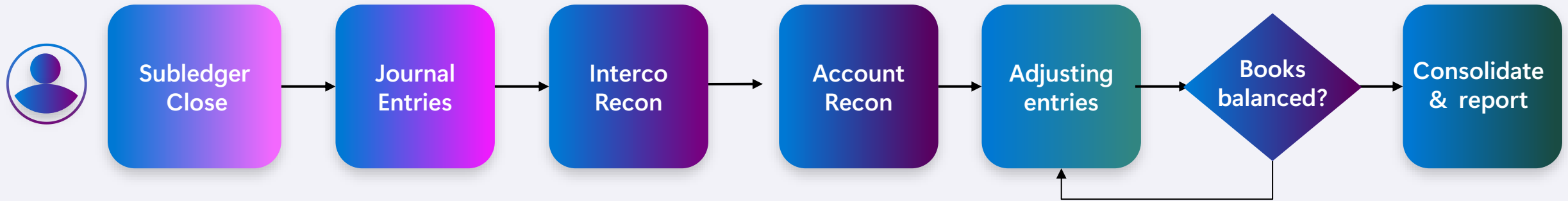
Audit Surprises

Exceptions found by external auditors, not internal controls; rework lands in +1 day

The Business Goal

Close 8→3 days, manual JEs -70%, 95% first-time-right posting. Audit-ready by close+1. Shift team mix to 70% analysis / 30% mechanical.

From Tasks to Agents: Month-end close



Agent

Mavim Finance demo - Reconcile Ledger and Sub Ledger

Reconcile ledger and subledger

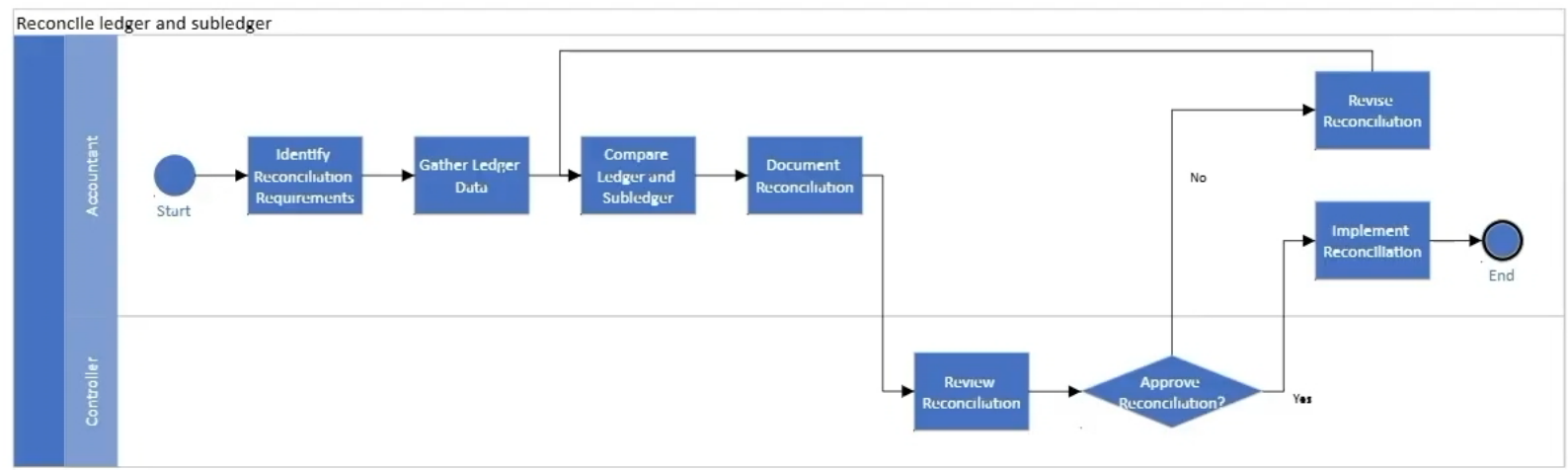
Charts | Description | Fields | Relationships | Subtopics

Charts

Classic Modern

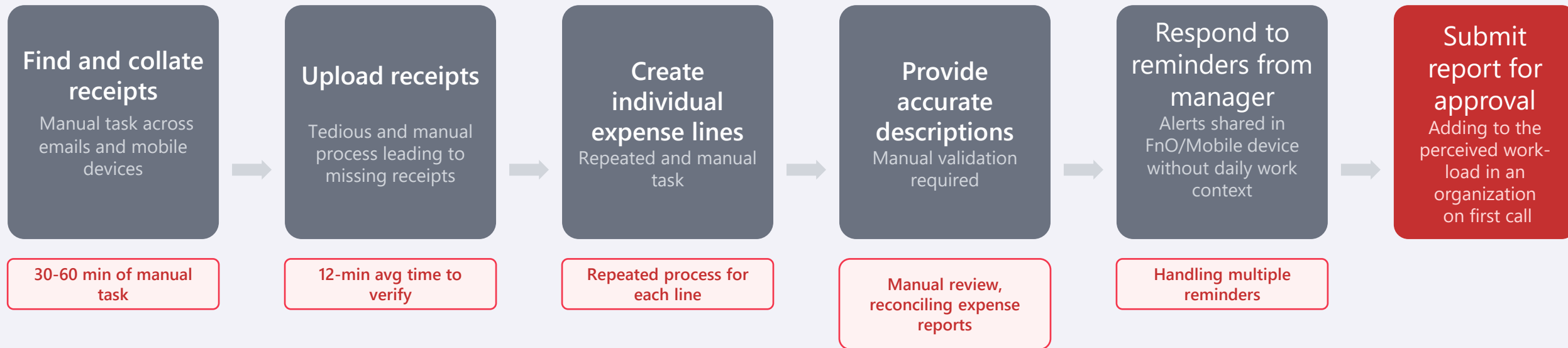
BPMN 2.0 Model

Reconcile ledger and subledger



The Reality: A Broken Project Operation process: Track project expenses

Contoso Consulting USA is a professional services company who implement ERP for various organisation. Their employees processes thousands of expense reports, and manual reporting delays submissions and approvals.



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What the Business Analyst Found in Discovery

Employees delay submitting expense reports

Manual expense reporting is time-consuming, leading to delayed submissions, processing backlogs, and reduced financial visibility.

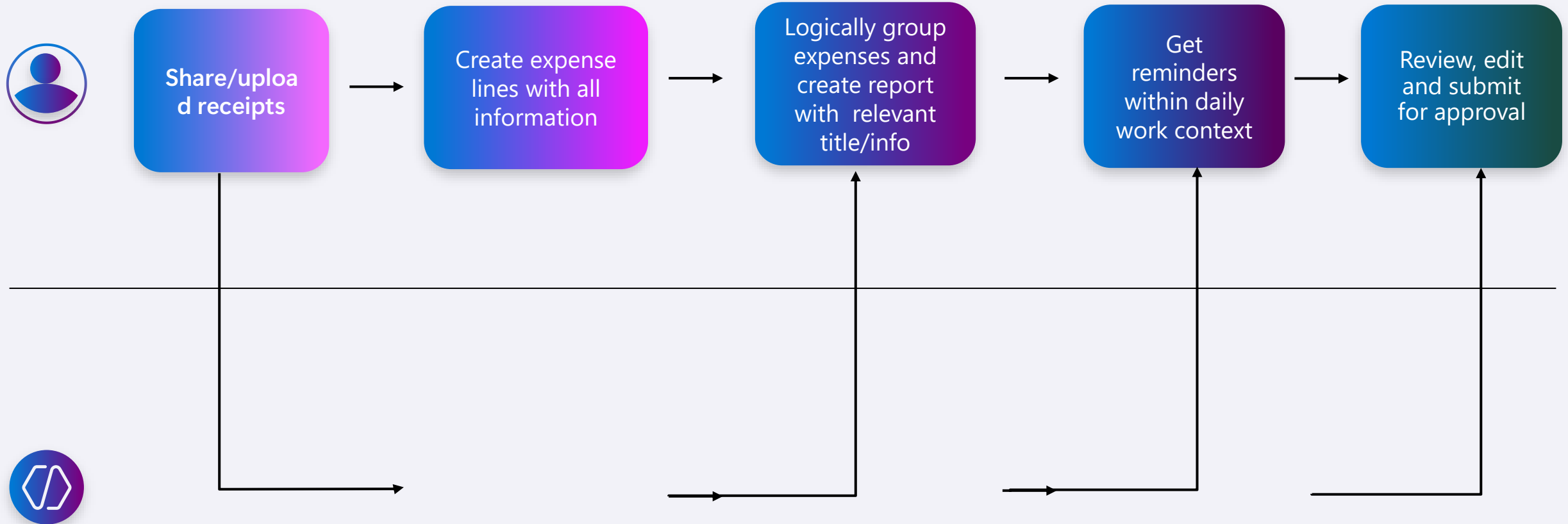
Multiple receipts from flights, hotels, transportation, meals, ...

Managing travel receipts across categories and systems makes expense reporting complex, error-prone, and time-consuming.

Administrative overhead for finance teams

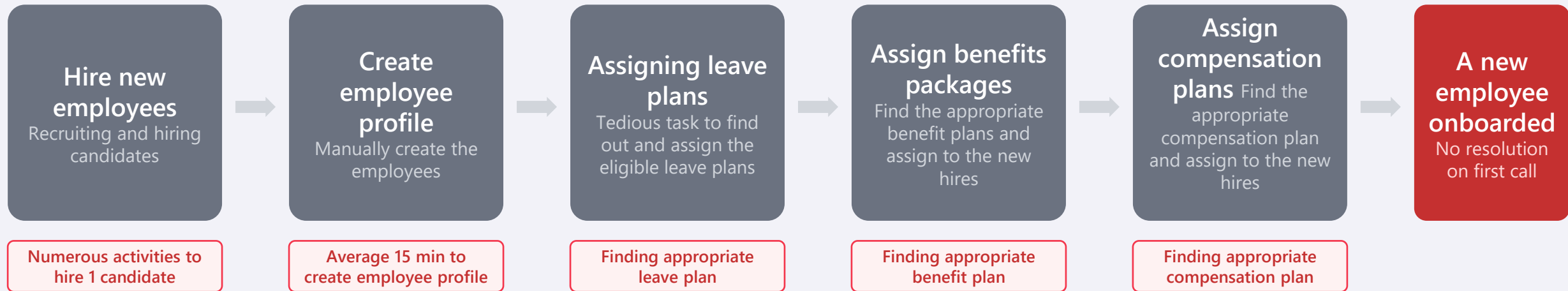
Manual expense reviews increase administrative effort, slowing approvals and raising the risk of errors and policy violations.

From Tasks to Agents: Track project expenses example



The Reality: A Broken HR process: Recruit and onboard talent

Contoso, a mid-sized company expanding its workforce globally by 10%, faces onboarding challenges due to fragmented processes that require significant HR effort and time per hire.



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What the Business Analyst Found in Discovery

Time consuming with manual onboarding

Manual onboarding is time-consuming and inefficient, increasing administrative effort and delaying employee productivity.

Fragmented Processes

Disconnected onboarding systems create fragmented workflows, unclear handoffs, and inconsistent tracking, leading to inefficiencies and delays.

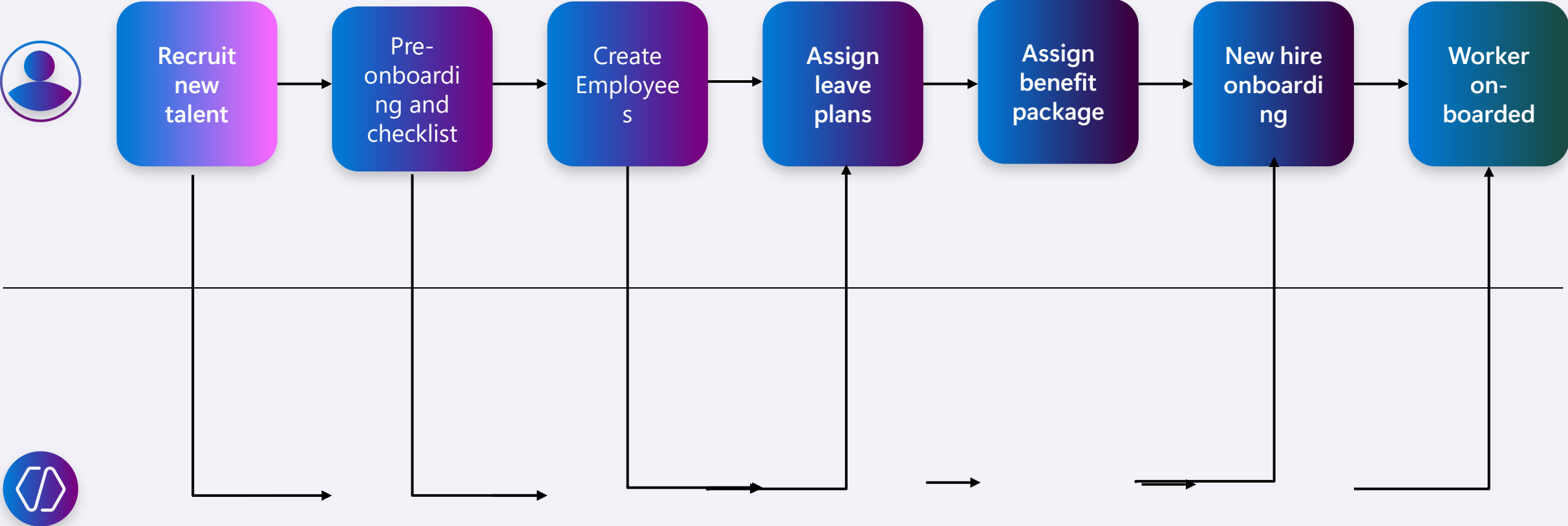
Limited visibility & insights

Lack of centralized tracking limits onboarding visibility, making it harder to monitor progress, identify bottlenecks, and improve efficiency.

Lack of personalization

Generic onboarding lacks personalization, causing disengagement and slower employee ramp-up.

From Tasks to Agents: Recruit and onboard talent example



Resources and recommendations



Microsoft Business Process Catalog Resources

- <https://aka.ms/businessprocesstechtalks>
- <https://aka.ms/oneguidance>
- <https://aka.ms/businessprocesscatalog>
- <https://aka.ms/businessprocesscatalogrequests>
- <https://aka.ms/businessprocesscatalogtemplate>
- <https://aka.ms/businessprocesscatalogsubmit>
- <https://aka.ms/businessprocessflow>
- <https://aka.ms/businessprocesscatalogfeedback>
- <https://learn.microsoft.com/en-us/dynamics365/get-started/contribute>
- Reach out to the team: bizprocessguides@microsoft.com

Microsoft and Mavim BPE Resources:

- [Microsoft Business Process Catalog in Mavim Free Preview](#)
- [Success by Design with the Dynamics 365 business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)
- [Navigate the business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)
- [Microsoft and Mavim Dynamics 365 Business Talks](#)
- [Unlocking Transformation Synergy: Mavim & Microsoft Process Catalog](#)
- [Introduction to the business process catalog in Mavim - Dynamics 365 | Microsoft Learn](#)

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QUESTIONS

Next TechTalk...

Transforming Business Processes
with an Agentic Mindset for Azure
and Fabric

Thursday, June 4th

7:00-8:00am PST

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Business Process - Dynamics 365 -
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Děkuji **Tak** Dank u **Tānan** Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo הודות. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Aċiū Благодарам ありがとうございます
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga
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Microsoft Dynamics 365