

# CREATING YOUR MICROSOFT POWER PLATFORM GOVERNANCE STRATEGY



# Introduction

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The Microsoft Power Platform is a platform that enables users with little to no experience with coding to build digital solutions. Consisting of four different tools - Power BI, Power Apps, Power Automate and Power Virtual Agents - users can generate reports, build/automate apps and even build chatbots. With access to more than 300 data connectors, any solutions made with these components can connect to multiple services, from Microsoft or other organisations.

While this a great advantage, with such wide-ranging access comes certain challenges, especially when it comes to governance. Without proper processes in place, your data can become cluttered and difficult for users to work with. Therefore, it's imperative that organisations using the Power Platform implement a strong data governance strategy to ensure the security of their data, and to be confident these tools are being used appropriately and responsibly.

In this guide we cover everything you need to know about creating a sound Power Platform strategy and organising your environments for the best results.

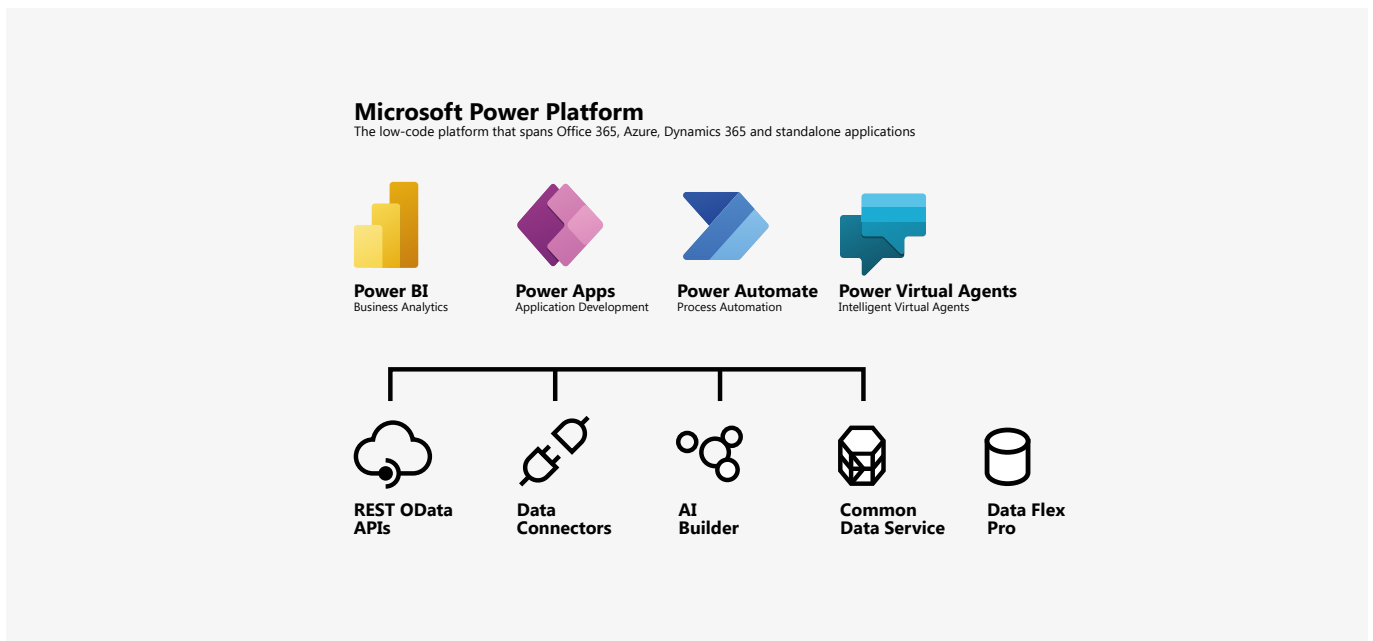
## **THIS DOCUMENT COVERS:**

- › **An introduction to Power Platform**
- › **Why governance is needed across the Power Platform**
- › **Power Platform governance**
  - › Governance introduction
  - › Governance environment
  - › Managing data loss prevention
  - › Application lifecycle management [ALM]
  - › Governance process and review
  - › Governance application matrix
- › **Training, adoption and culture**
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# An introduction to Power Platform

The Microsoft Power Platform is a family of products that delivers innovative business solutions across one seamlessly integrated platform. This platform includes Power BI, Power Apps, Power Automate and Power Virtual Agents which allow any business to analyse & visualise real-time business performance, quickly and easily build custom apps, automate workflows and integrate AI capabilities.

Power Platform provides a low-code interface for any user to quickly create custom apps while simultaneously providing robust tools for pro developers. This makes it possible to integrate innovative solutions across Azure, Modern Workplace, Dynamics 365 and standalone applications. At the heart of these products lies digital transformation - giving users the power to innovate anywhere, while unlocking value everywhere.



The Power Platform includes several key concepts and components and here are the key ones you should be aware of:



**Power Apps** - Power Apps is the toolset for low-code app development. There are three styles of applications: canvas, model-driven and portals. Power Apps canvas applications can also be embedded into SharePoint, Teams, Power BI and model-driven applications. Portals enable users to build low code, responsive websites which allow external users to interact with the data stored in the Common Data Service.



**Power Automate** - Automated workflows that orchestrate across services using connectors. Automations can be triggered to run when events occur in other systems and services or scheduled to run at a specific time. Users can start instant flows on demand from within the mobile app on the go or from the context of selected items in other apps.



**Power BI** - A suite of business analytics tools, Power BI takes business intelligence to the next level. With Power BI, you can easily connect to your data sources, visualise and discover what's important, and share the data with anyone in your organisation.



**Power Virtual Agents** - Power Virtual Agents empowers teams to easily create powerful bots using a guided, no-code graphical interface without the need for data scientists or developers. It eliminates the gap between the subject matter experts and the development teams building the bots, and the long latency between teams recognising an issue and updating the bot to address it.

# Why governance is needed across the Power Platform

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## Sprawl

One of the most important reasons why your organisation needs governance is the issue of sprawl. Left undealt with, sprawl can negatively impact user adoption, the ability to collaborate on projects and to find the resources they're looking for, which is why you need to get a handle on things before they get out of control.

Sprawl is the idea that the use of apps and services can multiply to the point where growth is out of control. An accumulation of both sprawl and other resources gather to create an abundance of clutter. The need to de-clutter is essential for organisations that want to reduce costs, increase productivity, and remain agile in an ever-changing world. Without proper rules and governance, it is very easy for documents, SharePoint sites, Spreadsheets and Teams groups to grow and grow until it's unclear what ones you should be using for what.

## Citizen developers

Providing guidance to citizen developers can go further than telling them about your governance model. You need to keep in mind that citizen developers are the business users building components on Power Platform in service of their full-time job functions, but they're not necessarily full-time working on the platform. They don't always work in IT. There are real threats in allowing novice programmers, with no formal training and certifications, to build solutions together. Here are just some of the areas you need to be aware of:

### Greater chance of data and security breaches

In the modern workplace, most users work both in the office as well as remote. Allowing citizen developers access to modify applications on the unknown or public network increases the potential risk of data exposure, exfiltration, and breach.

There are excellent tools out there to manage risks or alert an organisation about anything suspicious. Although these tools are great they are unable to identify the application code. This means that by the time your system recognises the issue, it is too late.

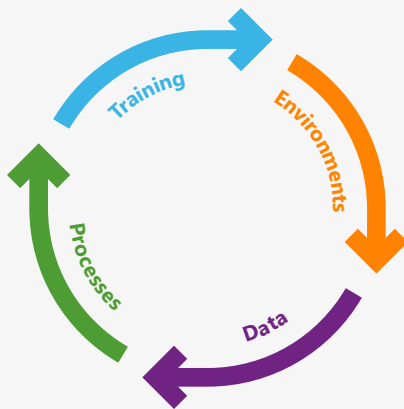
### Lack of training and expertise

While trained software developers have formal training when building and customising apps, this is not always the case for citizen developers. Citizen developers are often focussed on making the apps work by using informal processes. This could include finding snippets of code online, or using useful hacks. Formal processes don't always apply as the outcome is to make apps work rather than being concerned with the issues that come with performing a standard software deployment.

### Standardisation and control

Citizen developers are often given permissions to make customisations to logins, passwords and user accounts. As the citizen developers aren't always provided formal guidelines and standardised processes when it comes to handling data of this nature, this can pose huge threats to the business.

# Power Platform governance



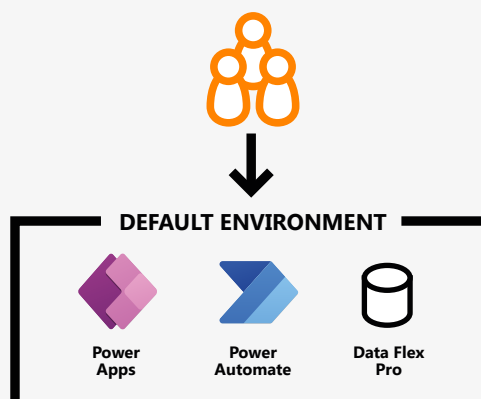
When your employees are using whichever tools and devices they want, having a sound governance strategy becomes essential - ensuring that your systems and data are secure. But when and where do you begin the governance planning process?

The time to begin is right now, and the first step is to assess your current content governance policies and procedures and identify what is, and what is not working. The goal of this whitepaper is to help you better identify where content sprawl may be happening inside of your organisation and provide some best practices for building your governance strategy.

## Know your governance environments

The concept of environments within the Power Platform can be often overlooked, however it should be one of the first stages to review when deploying Power Apps and Power Automate.

So, what is a Power Platform environment? Within the Power Platform, environments are containers where apps are developed and published. Every tenant has a 'default environment' where everyone on the tenant with a license has maker access. We recommend this is only used for personal productivity apps as it is designed to be an open environment that allows users to extend Office 365 and trusted applications or to build personal productivity applications that don't affect many people. Any flows created using SharePoint are also hosted here.



Microsoft 365 Tenant

By default, there are no restrictions on environment creation which as you can imagine, can lead to some problems. If anyone can create an environment, this soon leads to an increase in the number of unused environments or environments that can tie up system resources that would be best used elsewhere. This can make it difficult for admins to effectively monitor system use and the quality of the deployed applications.

This is where we recommend establishing a process for requesting and approving a new environment. Such a process should consider the business case, any security requirements and available capacity. On approval, the environment could be automatically created without further IT/admin involvement.

For larger and more critical apps, it is good practice to separate the dev and test process from the live deployment using multiple environments. This is so the live app can be protected from accidental changes and contamination with test data. Using Azure AD security groups to manage user permissions can be useful here as changes in personnel can be easily managed independently of the app environment as people move around the organisation.

### **Prevent data leakage with data loss prevention policies**

As an administrator, your organisation's data will be one of the most important assets you are responsible for safeguarding. While most users will have good intentions when building apps and solutions, users can sometimes overlook data leakage to audiences that shouldn't have access to your data. For example, if someone within your organisation uses an Excel sheet to create a solution without a policy in place, there is nothing stopping them from taking that data and exporting it to another platform and putting that data at risk. This is where data loss prevention policies can help.

You can create data loss prevention [DLP] policies that can act as guardrails to help prevent users from unintentionally exposing organisational data. DLP policies can be scoped at the environment level or tenant level, offering flexibility to craft sensible policies that strike the right balance between protection and productivity. For tenant-level policies you can define the scope to be all environments, selected environments, or all environments except ones you specifically exclude. Environment-level policies can be defined for one environment at a time.

DLP policies enforce rules for which connectors can be used together by classifying connectors as either business or non-business. If you put a connector in the business group, it can only be used with other connectors from that group in any given app or flow. Sometimes you might want to block the usage of certain connectors altogether by classifying them as blocked.

DLP policies are created in the Power Platform admin centre. They affect Power Platform canvas apps and Power Automate flows. To create a DLP policy, you need to be a tenant admin or have the environment admin role.

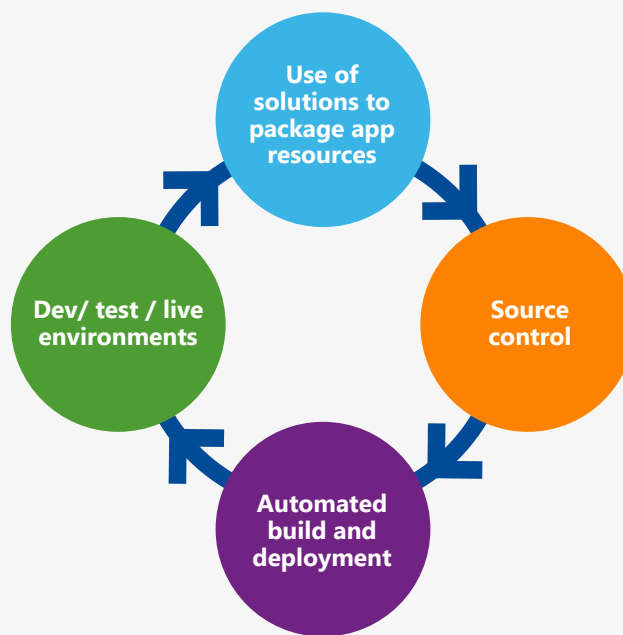


## Application lifecycle management with Power Platform

Throughout this guide we have touched on how easy it is to create apps and solutions, but a healthy application lifecycle process is critical if you want to manage these effectively. This is where application lifecycle management [ALM] is important.

ALM is the lifecycle management of applications, this includes governance, development and maintenance. ALM tools provide a standardised system for communication and collaboration between software development teams and related departments, such as test and operations. These tools can also automate the process of software development and delivery.

ALM combines the disciplines concerned with all aspects of the process to achieve the goal of driving efficiency through predictable and repeatable software delivery.



Here is a possible framework you can use to implement ALM effectively:

**Use of solutions to package app resources** - First rule of ALM - Use Solutions. Solutions allow makers to package all the components and resources together for importing and exporting to other environments and source control.

**Source control** - Lets you manage code base and configurations and allows makers to develop new features and bug fixes in parallel without disrupting live deployments.

**Automated build and deployment** - Automating of build and deployment processes has a number of advantages including consistency of process, acts as a quality gate [a milestone in an IT project that requires that predefined criteria be met before the project can proceed to the next phase] and reduces manual errors.

**Dev/Test/Live environments** - Once you have checked in code to source control, checked for errors and built the solution, you can deploy to a test environment check against the quality gates until testing has been signed off then promote the solution to live.

When it comes to test environments, it's useful to have separate environments as development and testing can be separated from production and it allows different user groups [developers/testers/users] and reduces the risk of data contamination.

## Governance process and review

Last but by no means least from a governance perspective is setting up internal processes that can be used to help manage the platform. Here are a few areas to consider:

**Environment creation process** - To start you need a solid environment creation process. If anyone can create an environment, this can soon lead to chaos which is why we recommend a process that considers the business case, any security requirements and available capacity.

**New solution process** - You should also have a new application process in place which will help you keep track of who is doing what and where.

**Solution categories** - Another useful way to review governance within your organisation is using solution categories. In the past we have recommended that clients categorise solutions into bronze, silver and gold depending on the complexity, scope or business importance and publish the requirements for each to assist both makers and approvers alike. This allows tracking of resource usage and ownership as well as deployed solutions.

**Feed back into review processes** - Data from these processes can then feed into a review process to ensure your tenant is kept healthy and resource efficient.

## Governance application matrix

We recommend using a governance application matrix when going through the different stages of the app build process. As stated above, we recommend categorising your solutions into bronze, silver and gold depending on their complexity, scope or business importance. For example, at bronze level you would be dealing with a personal productivity app, silver would be a whole business area or department and gold would cover a company wise or mission-critical application.

Here you would cover topics such as how many environments are needed [dependent on the category], connectors required, additional licensing and ALM considerations.



## Centre of Excellence

### Ensure control with the Centre of Excellence [CoE]

As we already know, the Power Platform is an impressive suite of business applications that allow users with little to no coding experience to create incredible solutions. However, with these unlimited opportunities can come many risks when it comes to adoption across an organisation. This is where we would recommend looking at the Centre of Excellence [CoE].

The CoE, is a team, or governance program that is responsible for nurturing the growth of the platform within an organisation, while applying the right administrative boundaries and governance. When designing a Power Platform CoE, it's important to capture the governance principles that are important to your organisation and create a reference framework to base all decisions on.

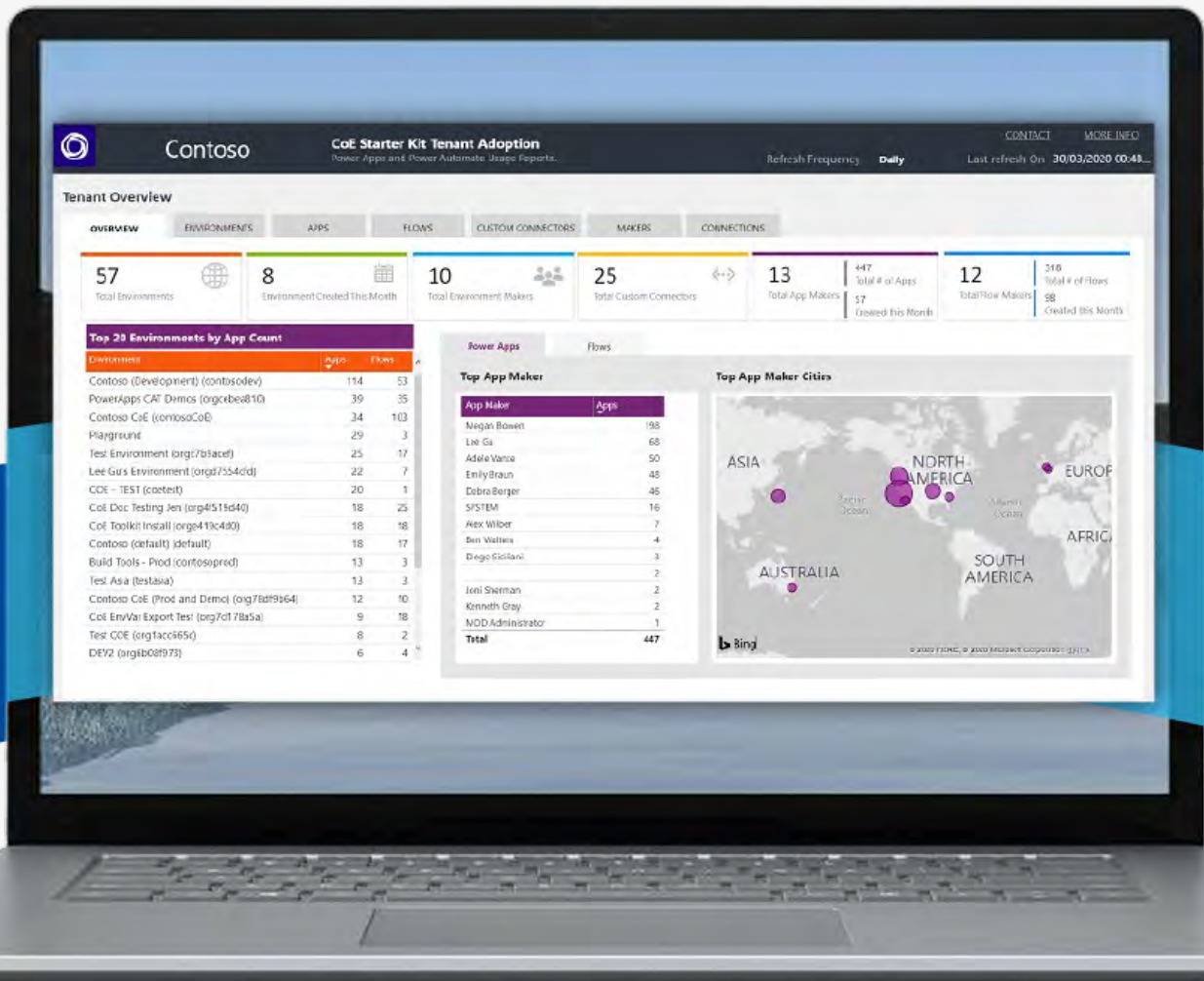
The Power Platform Centre of Excellence should be responsible for managing a range of things including:

- › Application audit process
- › Managing application ownership
- › Provide best practice and training
- › Manage the connectors and data available to users



## The CoE starter kit

While knowing where to start can seem like a minefield, you'll be pleased to know that you don't have to start from scratch. Consider downloading the Power Platform Centre of Excellence [CoE] Starter Kit. A collection of free templated best practices, designed with administration and governance in mind.



## Solutions users can lift and shift

Here are some of the solutions that users can lift and shift from environments and can work across tenants.



**Core solution**



**Governance solution**



**Nurture solution**



**Theming solution**



**Innovation solution**



**Audit log solution**

**Core solution** - Provides components for core [admin] functionalities and reporting to get started with the CoE. The solution contains Flows which collect information about all your resources including apps, Flows, makers etc into Dataverse tables.

**Governance solution** - Helps to aid with auditing and compliance processes, this solution will help you gather additional information about the apps created in your tenant. The tools within the solution can also streamline auditing of specific connectors or app usage.

**Nurture solution** - Enabling users with the right tools and practices to do the job is a key part of the Nurturing solution. The components will help you to create an internal community of makers where best practices and templates can be shared. An assets section is also included, which can help develop a strategy for standardising approaches across admins, makers, and end users.

**Theming solution** - To create consistency across your applications, there are theming components which allow you to set collections of styles [colours, fonts, borders etc]. These styles are then automatically applied to controls and components when makers choose to use a themed template app when creating a new app.

**Innovation backlog solution** - This solution is great for asking users to submit ideas for apps and flows that need building within your organisation. It can be used to help identify pain points and look for key areas of improvement. The tool can then be used to calculate a Return on Investment [ROI] and complexity score which is made up of measures such as tools used, and time spent.

**Audit log solution** - By connecting to the Office 365 Audit Log [Security and Compliance Centre] via a custom connector, you can record audit events such as Launch App, Delete App, and Delete Flow.

# Training, adoption and culture

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Now that you have a clear governance strategy, the next step is an effective roll out within the organisation and this all starts with a good training strategy. By building training into a governance strategy, both business and technical users have a clearer idea of the skills and knowledge necessary for their roles, thus reducing one-on-one training time and having an overall better understanding of the processes. We recommend the following steps when getting started:

**Focus on the why** - Make sure employees know why the change is happening, what's in it for them, and why they're being asked to change.

**Use real work scenarios** - Use tasks or business processes that are familiar to your audience to draw them in to learning how to use the technology.

**Use multiple formats** - Training end users should take on multiple forms to accommodate different learning styles, geographical barriers, and resource constraints.

**Reinforce** - Make the training stick with reinforcement options such as on-demand training, lunch & learn sessions, and new employee training options.

## Adoption by different types of users within an organisation

At the heart of growth is a community of people who should be able to collaborate, share ideas and discover new ways to achieve more. Organisations that experience successful adoptions create a digital culture that fosters an environment of ongoing learning as well as provides tools such as forums, regular events, and speaking opportunities. They make sure that every person in the organisation can come together at regular intervals to socialise, share their knowledge, and explore new possibilities.

**Super users** - End users who are respected among their peer group and get extra training so they can

- › Assist in end-user adoption efforts
- › Support peers through training
- › Provide dedicated support for their peers when going live
- › Serve as an ongoing go-to person for system questions or concerns
- › Serve as a liaison between their dept

**Business user** - Have access to the key resources and tools. Business users would be expected to play an integral part at helping change the culture and driving success at the heart of the operation.

**Champion** - Help build, grow and sustain the M365 rollout and solutions. This would be done by promoting the benefits of the modern technology. Passionate about the role they play and the technology they are promoting and keeping up to date with the changes that are coming down.

**Developer** - Key to helping the organisation build people-centric, cross-platform productivity experiences. What I mean by cross-platform is integrating things like SharePoint with Teams by using Power Automate. By doing this will help drive adoption and organisational solution wins that redefine the way you collaborate and work smarter.

**IT Professional** - Their role is to help deliver an always available modern workplace solution that fits into the organisation. The dynamics of always available and connected have never been so important. Key to discovering what is available and future releases which can be deployed. Their role isn't to help with coding issues within applications that are being built.



## Case studies

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### Edrington

Edrington, one of the largest spirit companies in the world, had identified Microsoft's Power Platform as a technology solution that they wanted to roll out across the business. They were looking for support on the best way to do this and engaged Bridgeall.

To help with this process, we delivered our Power Apps and Power Automate Quickstart package to help develop a framework for success for the team and get them quickly up and running. Edrington saw the benefit of early implementation of ALM processes and practices as part of Power Platform adoption and sought advice on the best way forward

Through consultation and workshops, processes for ALM were put in place including environment strategy, DLP policies, source control integration and automated build & release pipelines



### Age Scotland

Age Scotland, a leading charity, had identified Microsoft's Power Platform as a technology solution that they wanted to roll out across the business. The team were looking for support on the best way to do this and engaged Bridgeall.

To help with this process, we delivered our Power Apps and Power Automate Quickstart package to help develop a framework for success and get the team quickly up and running, delivering solutions.

Age Scotland identified the possibilities of the Power Platform and wanted to ensure they followed best practice before starting to govern and build.

Through a series of workshops and the installation of the CoE, we developed ALM strategy and governance documentation. We then used this to secure their tenant and started developing their first Canvas App.

## What next?

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### **POWER PLATFORM BRIEFING**

Get started with a Power Platform briefing. Our Microsoft certified consultants will focus on your requirements and discuss how the Power Platform could benefit your business.

[FIND OUT MORE](#)

### **POWER APPS AND POWER AUTOMATE QUICKSTART**

Harness the power of your organisation's data and create better experiences for your employees and customers with Power Apps and Power Automate.

With our Quickstart package we help you to get up and running with Power Apps and Power Automate, develop a framework for success and give you the tools to start developing low code solutions. We'll work with you to foster an environment where your users are empowered to identify opportunities and develop solutions quickly and securely.

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Glasgow Head Office  
George House  
50 George Square  
Glasgow, G2 1EH