

# Carlisle Companies Incorporated Driving Value With Power Platform's Measurable Results

Carlisle Companies Incorporated, a building products company, has been partnering with Compass365 since 2014 to design and implement business process automation solutions. In 2020, Compass365 began a new project with Carlisle, delivering a Power Platform/SharePoint based engagement request, tracking and planning solution to streamline the vendor onboarding process for the organization. The success of the VMO solution led Carlisle to envision other process improvements using the Power Platform and Microsoft 365.

This case study spotlights the relationship between Carlisle and Compass365, working together to automate a labor-intensive manual process of feeding data into Carlisle's line of business systems (including Oracle and SAP) using the Microsoft Power Platform. The resulting solutions saved Carlisle time and money and improved oversight of the data being ingested, while taking full advantage of the Microsoft Power Platform.

## THE CHALLENGE

Last year, Carlisle engaged Compass365 in a discussion to explore if/how the manual process of feeding data into ERP solutions could be accomplished using Microsoft 365. Users across the globe access the Carlisle Oracle Data Management systems to modify data. The manual data modification process was labor intensive and required additional licenses.

Like many enterprise organizations, Carlisle relies on trusted partners to support their commitment to their culture of continuous improvement and innovation. Carlisle and Qais Gharib, Compass365 Practice Manager and Solutions Architect, collaborated to architect a solution to automate the ingestion of data into the Oracle Data Management system. In the process, they

## SUCCESS METRICS

1. Eliminate a labor-intensive process
2. Provide oversight to data modification in mission-critical applications
3. Eliminate the need for additional Oracle end user licenses
4. Deliver on a tight deadline and stay within budget

## INDUSTRY

Manufacturing

## PLATFORMS AND SOLUTIONS

- Microsoft Power Apps
- Microsoft Power Automate
- Microsoft SharePoint Online
- Oracle and SAP Line of Business Solutions

*"The time and energy Compass365 put into this work is unparalleled. I know I can rely on them to bring a solid, quality solution that we have agreed upon and is consistent across the board."*

Brian Pierce, Director of IT, Finance & Vendor Management, Carlisle Companies Incorporated

## ABOUT COMPASS365

Compass365, a Microsoft Gold Partner, combines our years of SharePoint and Microsoft 365 expertise with proven methods to improve the way companies work, operate, and confidently get the value from their Microsoft investments.

established a solution pattern that has been repeated several times to automate the data ingestion process to other line of business solutions, including other Oracle and SAP enterprise solutions. These solutions provide a high return on investment and are improving the oversight of data in the Line of Business systems.

## THE INVESTIGATION

Compass365's discovery process determined the solution would need to meet the following requirements:

- Put an approval process in Carlisle's Enterprise store and then allow users to export formatted data from the approved requests into the target system.
- The process must include a submission to request a change, review and audit of the data change, approvals, data transformations, and an automated export of the requested change to be ingested by the target Line of Business system.
- A process to structure different workflow paths based on the type of update that is tracked and auditable.

With these requirements in mind, Carlisle's vision for improving the data ingestion process could be accomplished with a Microsoft Power Platform solution. The request would be initiated through a Power App, and management of the request in terms of approving changes and tracking history would be handled by Power Automate.

## THE SOLUTION

Once the solution requirements were vetted and approved by Carlisle, Compass365 created a dynamic and scalable service request solution using Power Apps, Power Automate, and SharePoint Online. The application will grow with the business over time to include new request

types, and at the time of this case study publication, two additional solutions have been created using the established pattern and procedures identified as best practices. The solution includes request triage, milestone management, approvals and notifications. Requestors and administrators can easily track the current status of requests as well as drill down for a deeper dive into the history of a specific request.

The ultimate payout of the solution is the reduction of manual labor hours and improvement of data integrity that results from automating an export of formatted data that can be easily ingested into the target system.

## INNOVATIONS AND IDEAS THROUGH WORKING TOGETHER

The measurable success of Power Apps and Power Automate solutions is envisioned, solutioned and implemented by Carlisle, with the help of their partners at Compass365, delivering real value throughout the organization.

Projects that launch with only a simple checklist between client and provider usually end poorly. In contrast, the most successful projects take the time, like any good relationship, to go deep, ask the hard questions, maybe multiple times, until both sides see the true north of goals and problem solving.

Consistent solid solutions are the result of doing the work, looking for ways to improve business processes with technology, from deep discovery and learning throughout the creation process. In partnership with Compass365, Carlisle continues to raise the bar, digitally transforming its back-office process by continuously implementing innovations to benefit their employees and shareholders.