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SAMPLE

Adoption Toolkit for the Microsoft Power Platform

Take Power Automate and Power Apps company-wide

Workbook | Four Word templates | Kickoff presentation | Measuring success

Original pages from the 34-page handbook: contents, introduction, the seven-step approach, and the chapter on measuring success. The other pages are omitted; the page numbers refer to the complete handbook.

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01

Welcome

Many companies already have licenses for Power Automate and Power Apps. Often, however, only a few self-taught experts use them. Broad adoption rarely happens on its own: companies lack a shared goal, points of contact in the business units, time to learn, and a way to demonstrate the benefits.

In my free guide "Microsoft Power Platform Adoption," I describe what needs to be done. It divides the rollout into three phases with 18 steps, from introduction through adoption to scaling. This toolkit makes the guide actionable. For each step, it provides a template, a method, and a workbook that calculates instead of inventing figures.

The toolkit is designed for companies of any size. Each building block works in a lean version with one responsible person and a few champions, and in an expanded version with a core team and champions in every business unit and location.

The toolkit does not replace advice on your specific situation. If you would like to assess your starting point or discuss your strategy with me, you are welcome to book my free initial consultation (chapter 16).

I wish you every success with your rollout!

Reiner Keller
Microsoft Power Platform expert
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Who it is for

Anyone responsible for rolling out Power Automate and Power Apps: IT management, digital transformation, the core team or CoE, project management, and in smaller companies, the managing director.

What you need

Microsoft Excel, Word, and PowerPoint. For measuring in the Power Platform admin center, the appropriate roles (chapter 13).

What you get

An agreed strategy, a champions program, a communication and training plan, assessed ideas, and a measurement series with demonstrated benefits.

04

Seven steps to results

From the starting point to the report to management: this is how the workbook and templates guide you through the rollout.

1	2	3	4	5	6	7
Clarify the starting point	Define strategy and goals	Launch with management	Recruit champions	Enable	Collect and implement ideas	Measure, report, and adjust

1 Clarify the starting point

Starting point, Maturity, Stakeholders

Fill in the fact sheet in the Starting point sheet and enter the business units and locations. They later appear as selection options in the Champions, Training, Ideas, and Benefits sheets.

In the Maturity sheet, assess where your company stands today and where it should be in twelve months. In the Stakeholders sheet, record everyone involved with their influence, interest, and position. If there are no rules for makers yet, clarify them first.

2 Define strategy and goals

Adoption strategy, Goals, Measurement plan, Measurement series

In the Adoption strategy template, formulate the vision and the goals with key results. In the Measurement plan sheet, choose the metrics and measure the baseline values before you start (Measurement series sheet).

Align the strategy with management. Without visible support from management, the rollout remains a hobby of a few individuals.

3 Launch with management

Kickoff presentation, Communication

Adapt the kickoff presentation. Management announces the initiative (K01), sends the invitation to the kickoff (K02), and opens it. The communication plan calculates all dates from the kickoff onward.

4 Recruit champions

Champions program, Champions

Invite suitable people, agree on the role and time budget with the champion and their manager (Champions program template, Appendix A), and maintain the register. The Champions sheet shows which business units still have no active champion.

5 Enable

Training, Formats

In the Training sheet, define the learning modules per target group, welcome new makers (K04), and start the office hours. The Formats sheet calculates the next date of each format.

6 Collect and implement ideas

Workshops and hackathons, Ideas, Hackathon

Collect ideas in the idea workshop and assess them by benefit and feasibility in the Ideas sheet. Implement the quick wins first, and use the rank for comparison. A hackathon builds momentum and makes talent visible.

7 Measure, report, and adjust

Measurement series, Benefits, Overview

Measure according to the measurement plan, enter the values in the measurement series for each reporting snapshot, and demonstrate the benefits of improved processes in the Benefits sheet. The Overview provides the figures for the report (K12) and the strategy review with management. Adjust the strategy and actions to what you measure and hear.

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Measuring success

Back up your claims: measurement relies on Microsoft's built-in tools, surveys, and measured times.

Power Platform admin center: Usage

In the Power Platform admin center, usage figures are under Manage › Usage. The page is currently marked as a preview. It shows tiles with flow-run counts for Power Automate and active-user counts for Power Apps, with daily and monthly views, plus a list of the most-used flows and apps. It requires the Power Platform Administrator role. Microsoft Learn describes a 28-day period. Names and scope may change.

Read the values on a fixed reference date and note the date and the view. Before recording the baseline value, check both views: in a small tenant, the monthly view showed no values yet during testing, while the daily view did. After that, stick to the same view and record it in the measurement plan. Do not add these figures up to monthly or quarterly totals.

Power Platform admin center: Inventory

The inventory under Manage › Inventory shows the tenant's apps, cloud flows, and agents in one place; it does not include desktop flows. The Microsoft Entra roles Global Administrator, Power Platform Administrator, Dynamics 365 Administrator, and Global Reader see the full scope. If possible, have someone who already has one of these roles provide the figures, and record which environments you evaluate.

The list includes information about each item's name, type, owner, modification date, and environment. For the metric "People in the Owner column," limit the evaluation to the agreed canvas apps and cloud flows. Count each individual person in the Owner column once. For canvas apps, these are the recorded owners; for cloud flows, they are currently the people who created them. Report technical identities separately. Model-driven apps have no owner. This metric is neither a complete count of makers nor reliable evidence of everyone who has created apps. Report totals only.

CoE Starter Kit

Microsoft has not actively maintained the CoE Starter Kit since May 2026. According to Microsoft, many of its features are now available natively in the Power Platform admin center. The toolkit therefore does not require the CoE Starter Kit.

Surveys

The questionnaire in text template K11 provides two metrics: maker satisfaction (average of question 3) and the share of makers who feel well supported (answers 4 and 5 to question 4). Only people who answer "yes" or "started" to question 2 count, and only answers from 1 to 5. State the number of valid responses and stick to the same questions so that the quarters can be compared. My guide recommends the first survey about six months after the kickoff and quarterly after that.

Demonstrating benefits

Microsoft distinguishes between tangible benefits, which can be expressed in time or money, and intangible benefits such as lower risk, better data quality, or a better experience for employees and customers, assessed by type and magnitude. The Benefits sheet extrapolates the time saved to one year from the minutes per transaction before and after and the transactions per month. The result is an extrapolation, not proof of hours already saved. Check how often the solution is actually used, whether the volume is representative, and whether the same savings are already counted in another case.

Reporting rule: report metrics based on measured processing times and justified transaction volumes as an extrapolation. Show pure estimates separately and clearly label them as estimates. They do not count toward the metric based on measured times.

Hours per year (extrapolated) = (minutes before - minutes after) × transactions per month × 12 ÷ 60