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A Multinational Alcoholic Beverage Leader
**Automates its Conflict-of-Interest
Management Process**
on SharePoint Online

Our customer is one of the fast-growing alcoholic beverage companies in India, with operations spanning more than 30 locations. The organization markets its brands of alcoholic beverages through a strong network of vendors and suppliers.

Need to Implement a Centralized System to Manage Conflict-of-Interest (COI) Requests

As a part of its operations, the alcoholic beverage leader has to tackle various conflict-of-Interest (COI) instances. Such scenarios arise when an immediate family, friend, or relative is referred for a vendor/supplier opportunity or provides any services. It might also occur when certain unfair benefits are offered to an individual without any proper business purpose, or an existing employee is in concurrent employment.

The COI requests came in from different departments spread across multiple locations. These requests were processed further based on approvals from the management, who might be located at another site. Additionally, the information in the request forms and the approval processes were not standardized. Such an arrangement created many roadblocks towards smoothly processing all COI cases. To overcome such issues, the top management at the alcoholic beverage company wanted a common place to track and manage the requests related to COI.

> *We wanted a system with dynamic input forms and approval processes, along with effective governance and information security to streamline the conflict management process.*

Project Manager, Alcoholic Beverage Leader

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# Streamlining COI Management Process with A SharePoint Framework-based App

As a Global Systems Integrator and Microsoft Solutions Partner, AgreeYa has been helping organizations overcome their process complexities with its suite of award-winning services and solutions. Over the years, AgreeYa has been engaged with the customer across multiple projects and helped them overcome various technical challenges. Based on this relationship of trust, the customer approached AgreeYa to help streamline the COI management process.

Upon engagement, our team of experts held in-depth discussions with the top management to understand their expectations and assess the existing technology infrastructure. We suggested the development of a SharePoint Framework (SPFx) based app that would be used to capture user input and help maintain the various stages of the request process. The application would help users maintain data relationships while raising a new request and enable approvers to provide transparent feedback about their actions on the request.

AgreeYa's solution utilized the customer's existing SharePoint Online subscriptions to create an Intranet application that could automate the entire process and a Power Automate subscription to implement various scheduled notifications and reminders. Some of the essential features of the new solution include:

Solution Highlight

A dashboard for all users to have a clear insight into their COI requests, tasks, and participation information.

An option to raise a new COI request related to a user's affiliate only.

Data security across the user affiliates/entities.

Features to manage the master data and other administrative roles.

Option to download various reports based on available data in the application.

Dynamic and configuration-based approval process.

Dynamic request form based on an affiliate and related categories/sub-categories.

Notifications and reminders on regular and appropriate frequency for better communication

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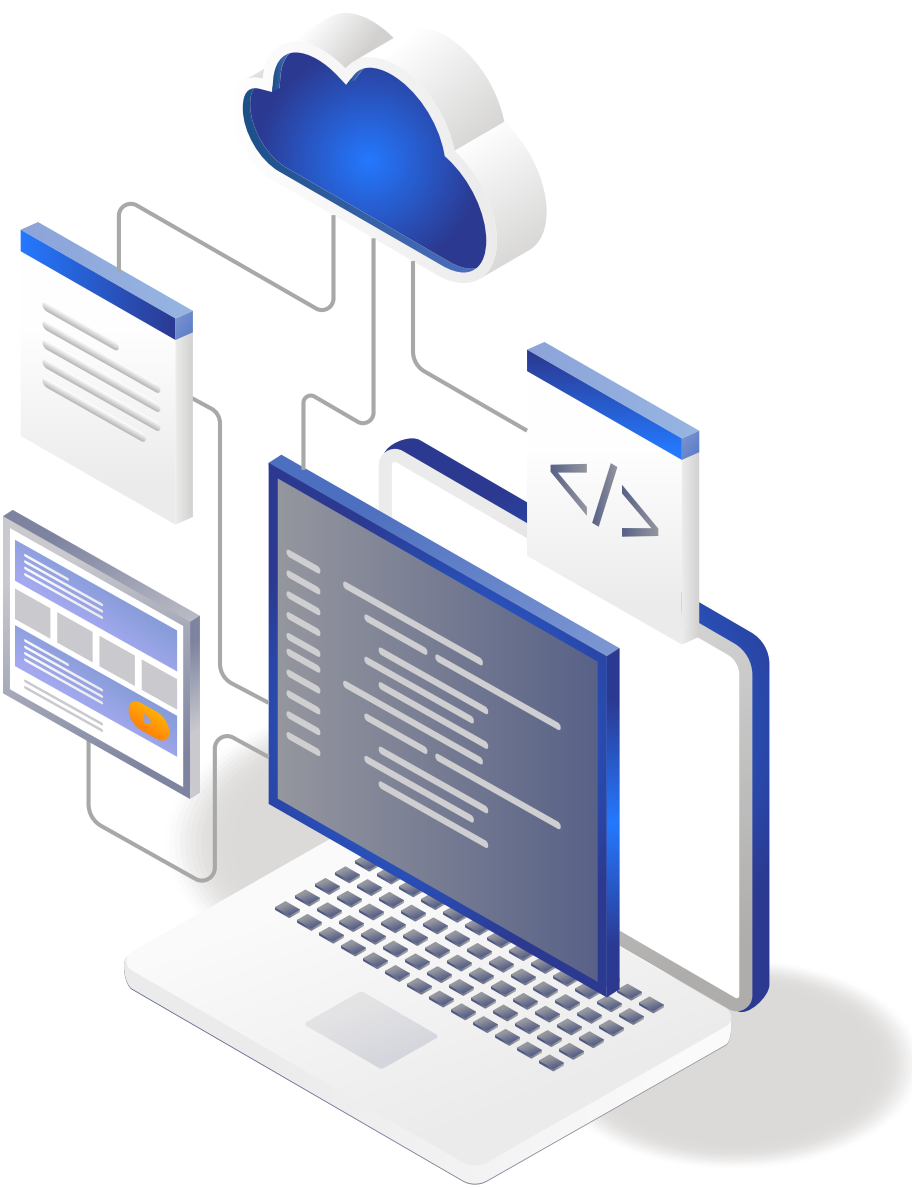
Streamlining Conflict-of-Interest Management

After successfully implementing the solution, the customer was able to ensure affiliate-wise data security. Authorization rules set up in the application allowed access to defined application modules. The application provided users with a common platform to raise and track the status of their requests, and related approvers were notified about their tasks as soon as they were assigned to them. Additionally, approvers received reminders in case their tasks were overdue. The application's administrator users could manage the master data and delegate activity to affiliate administrators as needed. The turn around time (TAT) report could be downloaded using real-time data, and an option to download a custom report based on various parameters was also available. Some of the other discernable benefits of the solution delivered were:

Improved efficiency and connectivity of resources

Enhanced transparency in conflict resolution

Increased data security and segregation for user affiliates

Reduced cost of platform licenses by utilizing existing subscriptions

Short learning curve for end users resulting in quicker adoption

Enabled real-time tracking and reporting of tasks and requests

Configurable input forms and approval processes for increased flexibility

Streamlined data management interface for administrators

Agile methodology resulted in reduced time to market and improved ROI.

> " *AgreeYa used an Agile methodology to develop the application and was able to deliver the application in a short span of time.* "
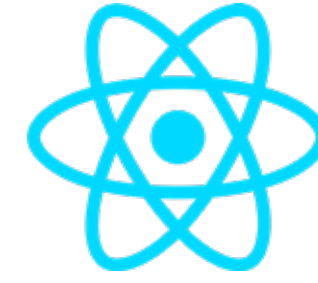>
> **Project Manager, Alcoholic Beverage Leader**

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Technology Stack

SharePoint	VS Code	React	TypeScript	Power Automate

About AgreeYa

AgreeYa Solutions is a leading global provider of software, solutions, and services to global Fortune 100, medium, and small organizations. Founded in 1999 and headquartered in Folsom, Calif., AgreeYa has over 2,200 professionals helping clients across US, India, EMEA and Mexico, in their digital journey. Leveraging our technology enabled, consultative approach, and diverse talent, we serve clients across various industries to meet changing market conditions, stimulate growth, optimize costs, and create lasting value. Our solutions around modern workplace, smart analytics, intelligent automation, AI/ML, cloud transformation, mobility, and talent management deliver value of digital transformation for our clients. AgreeYa has received considerable recognition in the industry for its technology leadership, quality processes, employee best practices, customer success, and giving back to the community. Some key recognitions include certifications like Microsoft Legacy Gold Partner and Cloud Solutions Provider; AICPA SOC 2 Type 2, SEI CMMI, and ISO 9001:2015; and awards including Dream Company to Work for, and Best Employer Brand.

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