**Executive Summary:**

Caution Check Automation Summary Report

The current process of conducting manual caution checks is highly time-consuming and inefficient, requiring substantial employee hours. Our transition to automated searching has demonstrated a significant increase in efficiency, accelerating the process by a factor of four. To further streamline this operation, we recommend upgrading to Power Automate Premium. This upgrade will enable non-technical staff to interact seamlessly with our data and will provide a foundation for broader automation initiatives, such as centralizing our scattered data sources into a structured, easily accessible format over the coming months.

**Tools in Current Use:**

* **Free Power Automate**: Limited in scope, primarily handling local data interactions.
* **Python Scripts**: Effectively automate caution checks but constrained by current data access limitations.

**Caution Check Statistics and Impact:**

* **Manual Process**: On average, processing 15 caution checks requires 4-7 hours, depending on the staff member’s familiarity and expertise. This equates to nearly a full workday, representing a notable expenditure in employee time and costs.
* **Automated Solution Performance**: The automated script, when tested alongside manual checks over a two-week period, demonstrated flawless accuracy, completing searches across 15 databases in 120-200 seconds. This is a substantial improvement compared to the manual approach, where each database must be accessed and searched individually.
* **Operational Efficiency**: Considering caution checks are a daily requirement, the automation effectively frees up considerable time that can be redirected towards higher-value activities.

**Current Limitations without Premium Power Automate:**

* **Restricted Database Access**: The existing setup only allows searches on local databases, which excludes critical online databases such as the A19A database. This limitation hampers our ability to fully automate the caution checks and integrate with our main data sources.
* **Single-User Access**: The present method allows only one person to access the local databases at a time, which is impractical given the current and projected workload. This constraint significantly reduces efficiency and poses a bottleneck in our daily operations.

**Justification for Power Automate Premium:**

* **Seamless Access to Online Databases**: Upgrading to Power Automate Premium will allow for direct integration with online databases, ensuring that all necessary data sources are included in the automated caution checks. This will not only improve efficiency but also reduce the risk of data access delays.
* **Enhanced User Accessibility**: Power Automate Premium offers an intuitive interface, allowing non-technical users to interact with automated processes. This democratizes access to automation, reducing reliance on specialized staff and enhancing overall productivity.
* **Broader Automation Capabilities**: With premium access, we can extend automation beyond caution checks to encompass tasks such as database loading, data compilation, and synchronization across various departments, ensuring a unified and efficient data environment.

**Power Automate Premium Pricing Options:**

* **Per User Plan**: $18 USD per user per month​
* **Per User Plan (Annual):** $15 USD per user per month​

For a team of **10 users**, the monthly cost would be **$180 USD** and for **40 users**, the cost would be **$720 USD** per month under the Power Automate Premium plan monthly.

The yearly cost would be **$1,800 USD** and **$7,200 USD**, respectively for the month-to-month plan.

The yearly cost would be **$1,500 USD** and **$6,000 USD**, respectively for the annual plan.

The annual salary of a Grade II Employee is **$16,058 USD.**

These figures demonstrate the cost-effectiveness of automation when weighed against the time saved on manual caution checks.

**Future Outlook:**

In the coming months, our goal is to consolidate all scattered data into a structured and centralized system, leveraging the enhanced automation capabilities that Power Automate Premium provides. This approach aligns with Republic Bank's broader initiative to implement an end-to-end data connectivity system, integrating all data into a unified, centralized platform. By using this temporary solution, we will not only improve our current data retrieval and decision-making processes but also ensure that our consolidated data can be seamlessly integrated into the new system being developed by the bank. This will facilitate a smoother transition, resulting in significant time and cost savings, reducing the backlog, and mitigating the operational strain that CCU has been experiencing.