

Council Process And Records Automation Assessment

Three weeks mapping your high-volume workflows and the Power Platform estate around them, with retention treated as a design input.

3 Weeks

DISCOVERY TO CASE

From \$20k

FIXED SCOPE

Business Case

Funding Ready

"Every automation someone builds quietly becomes a records problem for me."

WHY THIS HAPPENS

Council processes are slow for structural reasons

Property acquisitions, development applications and permit approvals move through several hand-offs, and each is a chance for delay. They also sit under recordkeeping rules a quick automation can breach.

WHAT TO EXPECT

Three weeks, three stages

WEEK 1

Process discovery

Workshops with process owners to map high-volume workflows end to end, counting the hand-offs, delays and manual effort.

WEEK 2

Environment and governance review

A look at your Microsoft 365, SharePoint and Power Platform estate, covering sprawl, governance gaps and recordkeeping.

WEEK 3

Roadmap and business case

Opportunities sized and ranked, then a staged roadmap and business case for your executive.

What you get after the session

- ✓ **Process maps** for the workflows we assess, showing how they run now and how they could run
- ✓ **A governance and record keeping review** of your environment with actions against what we find
- ✓ **A ranked automation roadmap** ordered by value and risk, with indicative effort against each item
- ✓ **A business case** you can put through internal funding approval



Recordkeeping is a design input, not an afterthought

State archives legislation applies to whatever you build. We design retention and capture in from the first workshop, not once the automation is running.

PROOF

Examples of projects delivered inside Australian councils

RC

A regional council POWER PLATFORM

Power Platform had grown across seven environments with little governance.

We reviewed the setup and supported the changes that tightened it.

- ✓ Governance across 7 environments
- ✓ 1,400 monthly runs under control

CC

A coastal council SHAREPOINT ONLINE

Teams and SharePoint had grown without structure.

We built a document management system with automated site provisioning.

- ✓ 54 SharePoint sites organised
- ✓ 206 document sets structured

CT

A shire council RECORDS MGMT

Property acquisition process was slow & complex, with delays and inaccuracies at each step.

We mapped the process end to end, then automated it with Promapp, Nintex and SharePoint Online.

- ✓ Acquisitions move faster
- ✓ Less errors and progress visible in real time

WHY CG TECH

Who you are buying from



Brisbane based, Australia wide

An Australian team you can meet, delivering across Australia and the Pacific.



Right tool for the job

We work accross Microsoft, OpenAI, Anthropic, Perplexity and Open Source solutions.



Approved government supplier

On Federal, State and Local Government ICT and Professionl Services panels.

BEFORE YOU COMMIT

The questions we get asked

Will this create a records compliance problem?

The opposite. Retention and capture are designed in from the first workshop, and the review tells you where your current automations already fall short.

We already have an EDRMS. Does that rule us out?

No. We assess what you have and design around it. Where a different path is genuinely better value, you get the comparison rather than a recommendation to rip and replace.

Do we have to replace our Power Platform environments?

Almost never. Most of what we find is structure, ownership and policy rather than rebuild.

SCAN TO BOOK



or call (07) 5641 1440