

## Case Study

# Modernization of CSR Governance with a Centralized Digital Monitoring Suite

Digitized end-to-end CSR lifecycle management for a leading private sector bank, enabling real-time visibility, audit readiness, and operational efficiency on Microsoft Power Platform.



## PROJECT OVERVIEW

Financial institutions are increasingly moving away from decentralized CSR operating models to improve governance, transparency, and impact measurement. As project volumes and compliance requirements grew, manual workflows and siloed reporting limited visibility into partner onboarding, fund utilization, compliance documentation, and impact metrics. To address these challenges, the bank partnered with Rishabh Software to implement a centralized CSR Monitoring platform built on Microsoft Power Platform and SharePoint. The solution unified CSR program management into a secure digital ecosystem, providing real-time visibility, streamlined governance, and stronger operational control across the CSR lifecycle.



Capability

Microsoft Power  
Platform



Industry

FinTech



Country

India

## KEY FEATURES

The CSR management solution establishes a centralized digital backbone for CSR operations, enabling structured governance, automated approval workflows, secure documentation management, and real-time performance insights.

### Unified CSR Operations Management

The CSR team now manages partners, projects, funds, and impact within a single CSR management system. No more chasing spreadsheets or email threads. Everyone works on the same latest information.

### Partner Approval Process

Proposals follow a structured, fully digital approval matrix with defined review stages. Teams have real-time visibility into pending actions and decisions, supported by a complete audit trail.

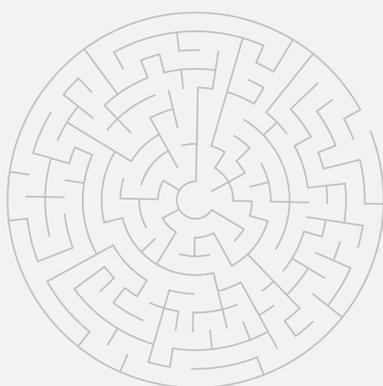
### Due Diligence & Compliance Management Automation

A structured partner due diligence framework digitizes document verification, regulatory screening, and multi-level approvals, ensuring only compliant partners are onboarded while strengthening audit readiness and risk control.

### Project Creation

Projects are digitally created within a structured framework aligned to approved proposals, defined objectives, timelines, and implementing partners. This ensures standardized project initiation with complete traceability from approval to execution.

## CHALLENGES



- CSR operations from partner onboarding to impact reporting were fragmented across multiple tools and offline trackers, driving inconsistent data and high coordination effort.
- Partner due diligence relied on manual reviews and email-based approvals, constraining scalability and making governance validation and audit evidence management cumbersome.
- The absence of a unified, real-time view of milestones, project progress, partner compliance, fund utilization, and outcomes limited proactive lifecycle oversight.
- Multi-level approvals were in place, but inconsistent routing, escalation, and decision traceability increased cycle times, reduced transparency, and weakened delegation control.
- Budget tracking was not systematically tied to milestone progress and supporting evidence, limiting early variance detection and making outcome-linked spend reporting difficult.

## SOLUTION

Rishabh Software followed a structured, governance-first approach to unify CSR operations on Microsoft Power Platform and SharePoint. End-to-end CSR workflows were digitized, and security with auditability was embedded by design and delivered through an MVP-led, sprint-based rollout without disrupting ongoing CSR programs.

### Centralized CSR Digital Backbone On Microsoft Power Platform

To move the CSR function from coordination to control, our team built a CSR management platform on Microsoft Power Platform. Dataverse became the system of record for implementing partners, initiatives, budgets, utilization, and impact, so leadership and program teams are working from the same facts across multiple geographies and programs.

### Security-First, Role-Driven Access Framework

Using Microsoft Entra ID, we set role-based access aligned to segregation of duties for CSR teams, implementing partners, reviewers, finance, leadership, and auditors, ensuring the right people see the right information and every action is traceable.

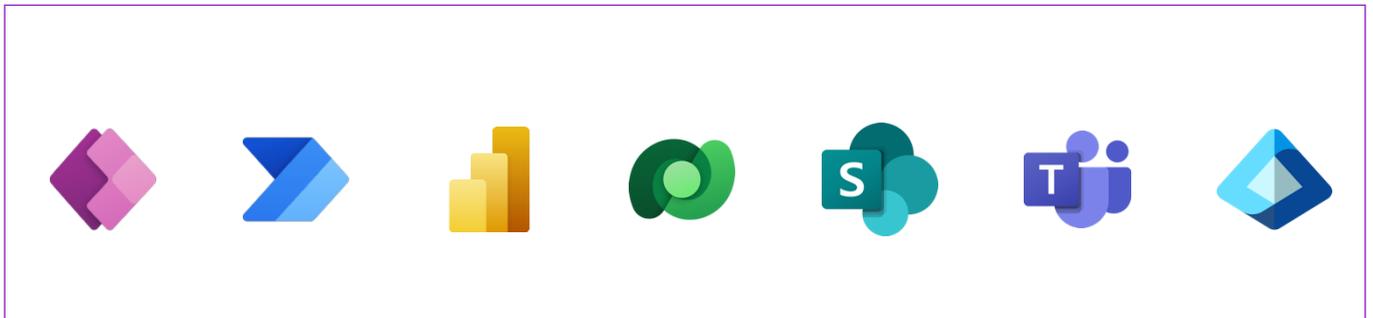
### Lifecycle Orchestration Across CSR Operations

We translated the full CSR lifecycle into one connected operating flow, from partner onboarding and due diligence through proposal evaluation, approvals, milestone execution, disbursements, utilization, and impact assessment. This replaced handoffs across email and spreadsheets with a repeatable cadence that makes progress, ownership, and next steps visible at every stage.

### Modular Architecture For Scale And Extensibility

We designed the platform as modular building blocks rather than a monolith, so new themes, workflows, and reporting needs can be added without reworking the foundation. This gives the institution room to scale program volume and geographic reach while keeping change effort predictable.

## TECHNOLOGIES & TOOLS



## Outcomes

**60%**

Reduction in CSR Operations Effort

**0**

Data Fragmentation

**100%**

Digital Governance

## ABOUT RISHABH SOFTWARE

As a Digital Engineering and Enterprise Transformation leader, we empower businesses to scale, innovate, and thrive in today's digital-first world through technology rooted in trust and transparency. We leverage emerging capabilities such as Cloud, Data Engineering & Analytics, AI, Automation and Application Engineering to drive digital transformation and unlock new opportunities. We have successfully served across 25+ countries, and we work towards customer delight as "WE CARE."

✉ sales@rishabhsoft.com

☎ +1-877-747-4224

