



[WM]^{P2} WorldMax

**USING FORMS
&
POWER AUTOMATE
TO UPGRADE YOUR
CUSTOMER
ONBOARDING
EXPERIENCE**

HELLO
my name is

**Mary
Myers**



- Located in Bradenton, FL
- Football / Golf
- Tech industry for 4 years
- Chief Maximizer @ WorldMax
- I ♥ SMB's



What Is Customer Onboarding?





Problem

Problem

- Inefficient
- Inaccurate
- Inadequate

Business Downfall

- First Post Sale Interaction
- Negative Impact on Cash Flow
- No ability

Solutions

Solution

- Microsoft Forms
- Power Automate
- Dataverse, or CE, or BC, or F&O

Business Success

Seamless professional experience for customer from sales to completion

More time to build customer base and scale

Increased cash flow and less errors.



DEMO





Let's Connect

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