

Date: 15/09/2025

Lab Practical #14:

Automating Stakeholder Communication with Make.com.

Practical Assignment #14:

You are managing a small IT project with three key stakeholders. Your responsibility is to plan and automate weekly communication updates using Make.com. The update must include the project status, key accomplishments, upcoming milestones, and concerns.

Description:

Implement the exact scenario shown (Scheduler → Google Sheets → Tools → Gmail)

Assumption: You will upload the weekly_project_updates.xlsx file to Google Drive and open it as a Google Sheet (or copy its structure into a Google Sheet). The Make.com module you used in the screenshot is the Google Sheets connector.

1) Prepare and upload the workbook

1. Open Google Drive and **Upload** weekly_project_updates.xlsx.
2. Right-click the file → **Open with** → **Google Sheets** → then save as a Google Sheet (e.g., weekly_project_updates).
3. Confirm the tabs Updates, Stakeholders, Config exist and contain the sample data. Edit sample rows to match your real project.

2) Create a new scenario in Make.com

1. Sign in to Make.com and click **Create a new scenario**.
2. Choose the modules in this order: **Scheduler**, **Google Sheets (Search Rows / Get Rows)**, **Tools (Text aggregator)**, **Gmail (Send an email)**. (You can add more modules later — e.g., an Update Row step to mark Last Sent.)

3) Scheduler (trigger)

1. Add the **Scheduler** module as the first module.
2. Configure:
 - **Type:** Custom (Weekly)
 - **Repeat:** Every 1 week
 - **Day:** Friday
 - **At:** 17:00 (5:00 PM)

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- **Timezone:** Asia/Kolkata (IST)

3. Save.

4) Google Sheets — read the week's row

1. Add **Google Sheets** → **Search Rows** (or **Get rows**).
2. Connect your Google account and select the spreadsheet `weekly_project_updates`.
3. Select **Sheet name** = Updates.
4. Strategy A (one-row-per-week): Search for the row where Week Start == current week date:
 - Use Make's date function for the search value: `format Date(now; "YYYY-MM-dd")` (or compute week start as needed).
 - If your process uses a single "master row" for the current week, use that exact date string in Week Start.
5. Strategy B (simpler): Use **Get rows** to fetch the last N rows and then filter in Make:
 - Set a filter after the Google Sheets module to ensure non-empty ProjectStatus.
6. Important: Include a column StakeholderEmails (comma-separated addresses) in the Updates sheet so you can directly map it to the Gmail To field. (Alternate: add another Google Sheets module to fetch Stakeholders and build the recipient list dynamically.)

5) Tools — build the email body (Text aggregator)

1. Insert **Tools** → **Text aggregator** (or Text formatter) and connect it to the Google Sheets output.
2. Configure to build a nicely formatted email body. Example template (put this as the aggregator input using variable mapping from the Google Sheets row):

Weekly Project Update — {{ProjectName}}

Project Status: {{ProjectStatus}}

Key Accomplishments:

- {{Accomplishment1}}

- {{Accomplishment2}}

- {{Accomplishment3}}

Upcoming Milestones:

- {{Milestone1}} (Due: {{Milestone1Due}})

- {{Milestone2}} (Due: {{Milestone2Due}})

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■ Concerns / Issues:

- {{Concern1}}

- {{Concern2}}

📝 {{Notes}}

Reported by: {{Updated By}} at {{Updated At}}

3. Output: a single formatted text block that you will map into the email body.

6) Gmail — send the email

1. Add **Gmail → Send an email** module (or Outlook if you prefer).
2. Connect your Gmail account.
3. Map fields:
 - **To:** Stakeholder Emails (from the Google Sheets output) — Make will accept comma-separated addresses.
 - **Subject:** Weekly Project Update — {{Project Name}} — {{format Date(now; "DD/MMM/YYYY")}}
 - **Body:** Use the aggregated text created by the Tools module (map the aggregator output).
 - Optionally tick HTML body if you want richer formatting and build the aggregator output as HTML.
4. (Optional) Attach a document: Use the Google Drive module to export the Updates row or sheet as PDF, and attach the PDF to the Gmail module.

7) (Optional but recommended) Update the sheet after sending

1. Add a **Google Sheets → Update a Row** module after Gmail to write back:
 - Set Last Sent = {{format Date(now; "DD/MMM/YYYY")}}
 - Set Santo = Stakeholder Emails
 - This gives you an audit trail in the sheet that the message was sent.

8) Error handling

1. Add a router or error handler branch:
 - If Google Sheets returns no row for this week → send a notification to the project manager (your email) explaining “No update row available for Week Start = ...”.
 - If Gmail returns an error → log error or send a Slack message to the PM.

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2. Make.com has scenario-level “Error handlers” — configure “On error” to notify you and optionally retry.

9) Test the scenario

1. Click **Run once** in Make.com to manually trigger the scheduler flow and watch each module’s execution.
2. Inspect module output:
 - Google Sheets must return the row.
 - Tools must produce the formatted text.
 - Gmail must show the message was delivered to recipients.
3. Check the inboxes of the sample stakeholder addresses (or use your own addresses for tests).

10) Turn scenario ON and monitor

1. After successful tests, toggle the scenario **ON**.
2. Monitor the scenario executions for the first couple of weeks to ensure everything runs smoothly.