



# POWER PLATFORM COMMUNITY CALL

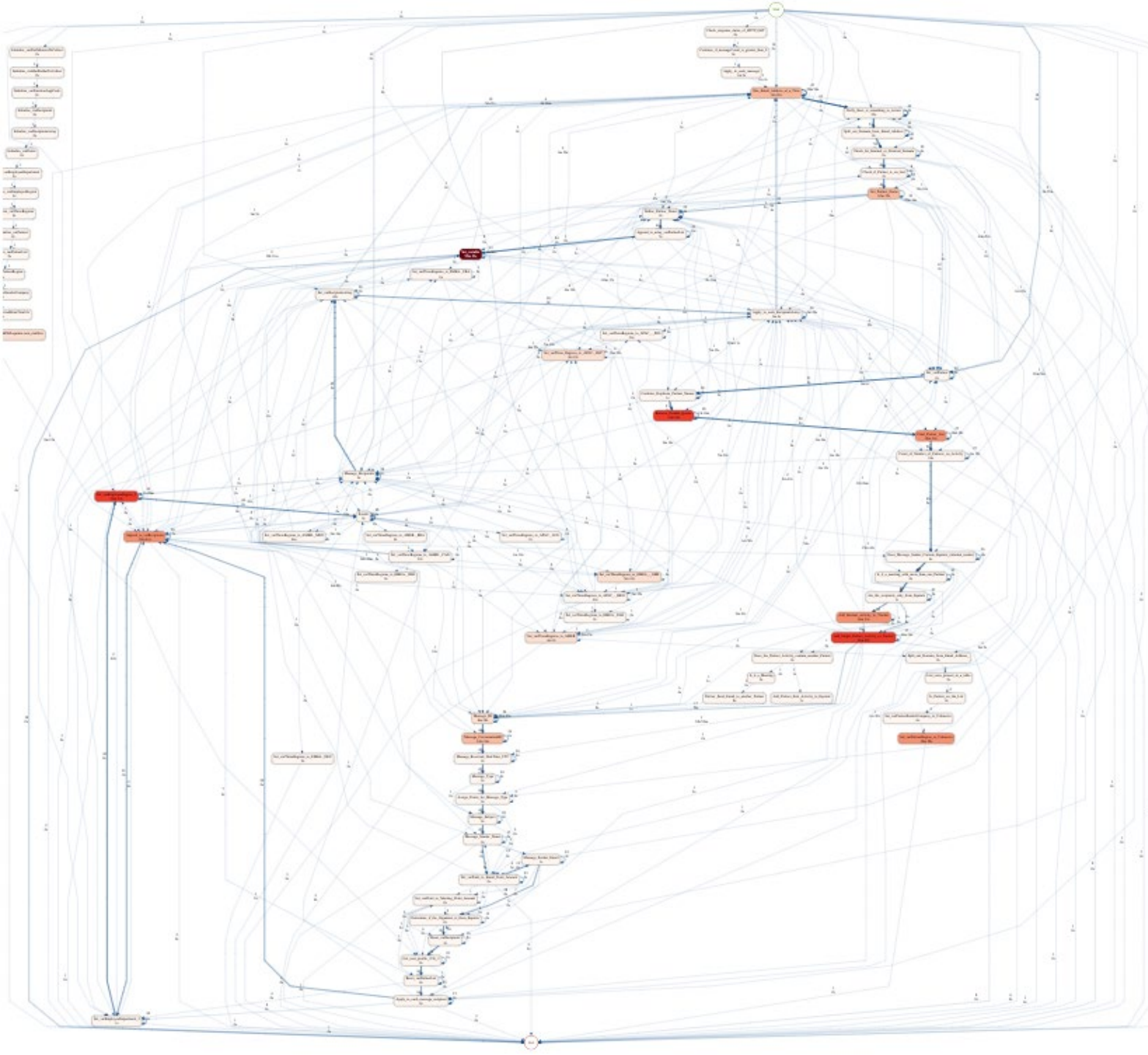
MARCH 15<sup>TH</sup> 2023



HI! I'M GIZZELLE









DEVELOPMENT JOURNEY

LESSONS LEARNED

WHY SALES WAS KEY



# PRE-TECHNOLOGY



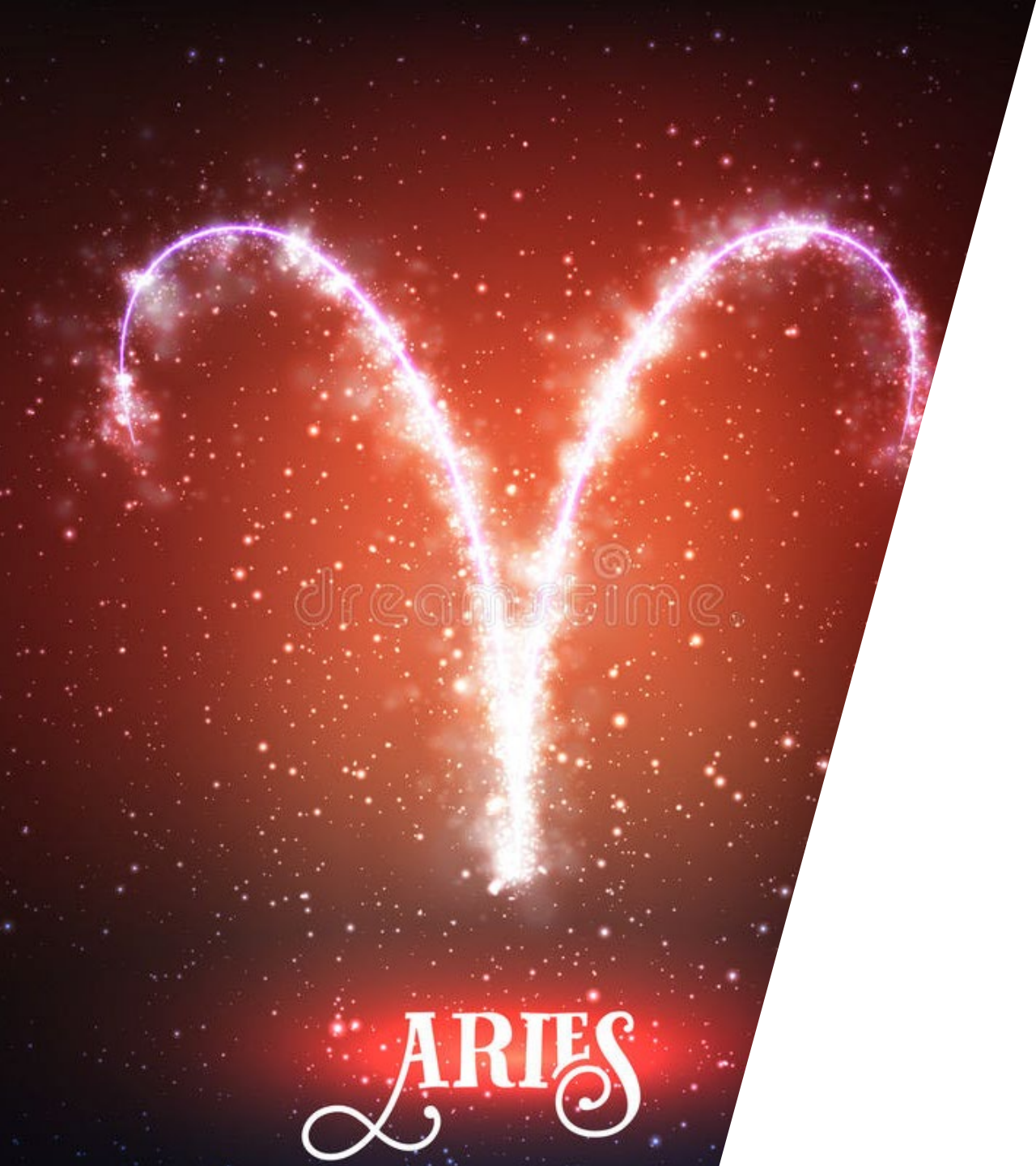
DONUTS



APARTMENTS



CLOTHES



# SECRETS TO SUCCESS

LET'S DIVE IN



# Microsoft Flow Online Conference 2019

#FlowConf2019



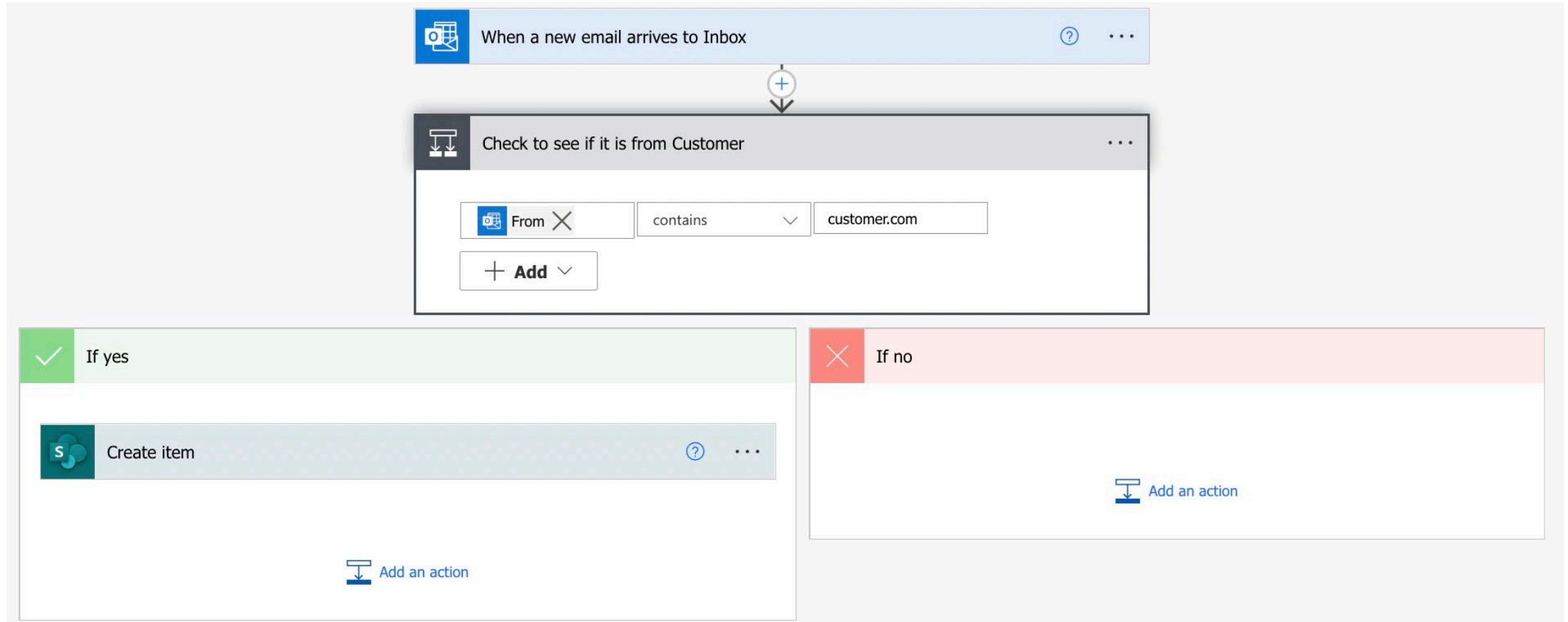
SEPTEMBER 10TH 2019







# MY FIRST FLOW- CONTACT TRACKING



- **Use Case:** Document Contact Information for customers for Marketing Department use/Engagement Tracking
- **Previous Solution:** Manually enter each contact into CRM or manually add each contact to an Excel spreadsheet that was sent to Marketing Monthly or Quarterly



{ NOW }  
IS THE  
TIME TO  
SELL!

CREATING  
DEMAND



# YOU NEED POWER AUTOMATE!





BUT CAN  
IT.....??



**CHALLENGE ACCEPTED.**







# PROBLEM SOLVING



# PROSPECTING EVENT

## EVENT 1

**Perform an activity**

then

**Manually enter the  
activity into CRM**

## EVENT 2

**Perform ALL the  
individual activities**

then

**Manually enter each of  
them into CRM**

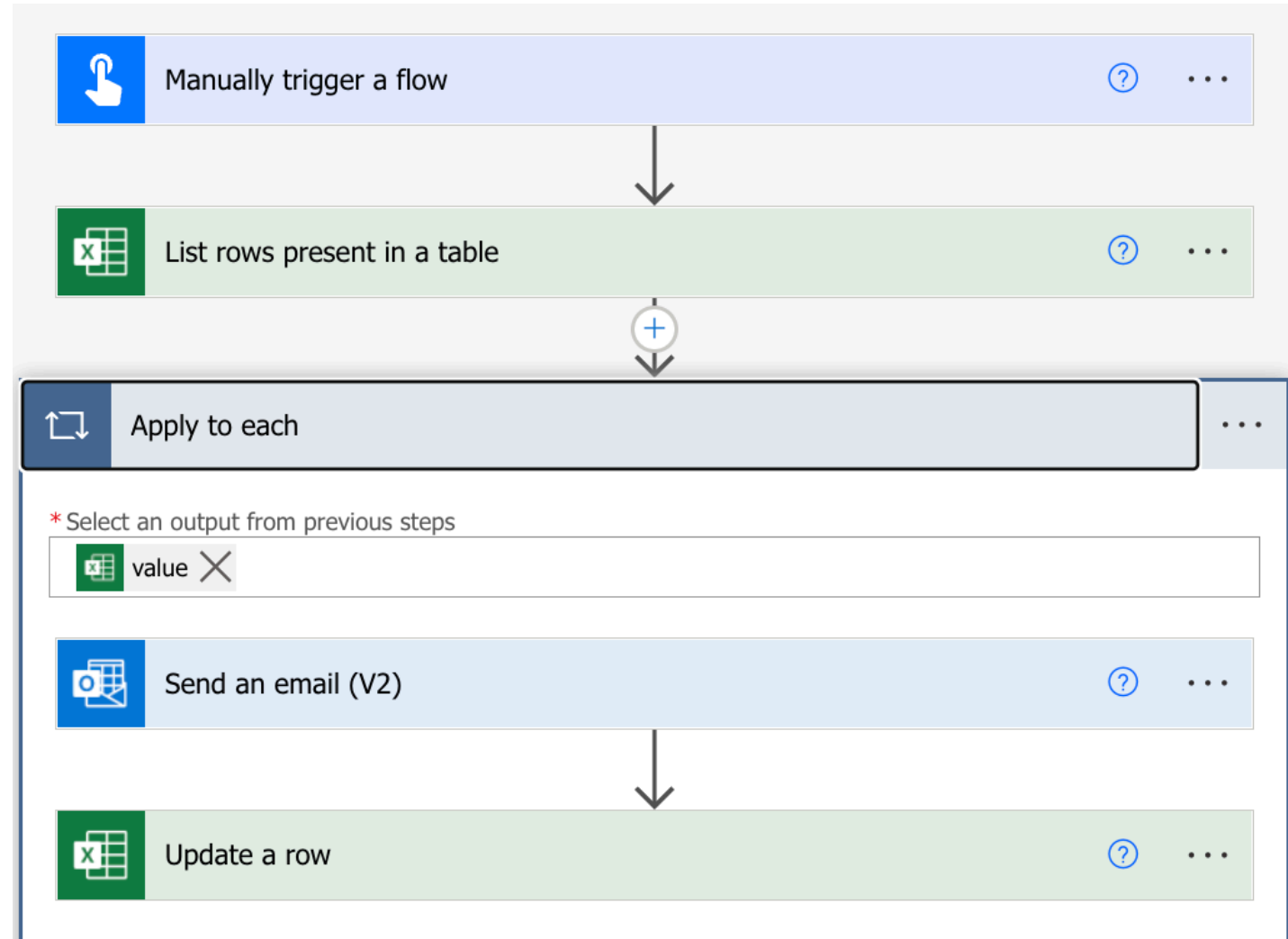
.(with the help of friends)

## EVENT 3

**WE CAN AUTOMATE THAT!**

# FLOW #1: SEND LOTS OF EMAILS

- **Use Case:** Users need to send custom emails to numerous contacts in a short period of time
- **Previous Solution:** Emails were sent to contacts one by one via Outlook if any custom content was needed or Emails were sent with numerous people on BCC if no customization was needed





# FLOW #2: TRACK ALL THE POINTS

- **Use Case:** Individual Email and Meeting activities need to be logged for event Point Scoring/Tracking
- **Previous Solution:** Each individual email or meeting had to be added into CRM with the appropriate activity type and data was collected into central leaderboard

When a New Email or Meeting Arrives  
(to a central Office 365 Groups Email address)

Initialize a bunch of variables

Add Activity Detail to SharePoint List  
(with appropriate points score)

Lookup User on Excel "Points Leaderboard"

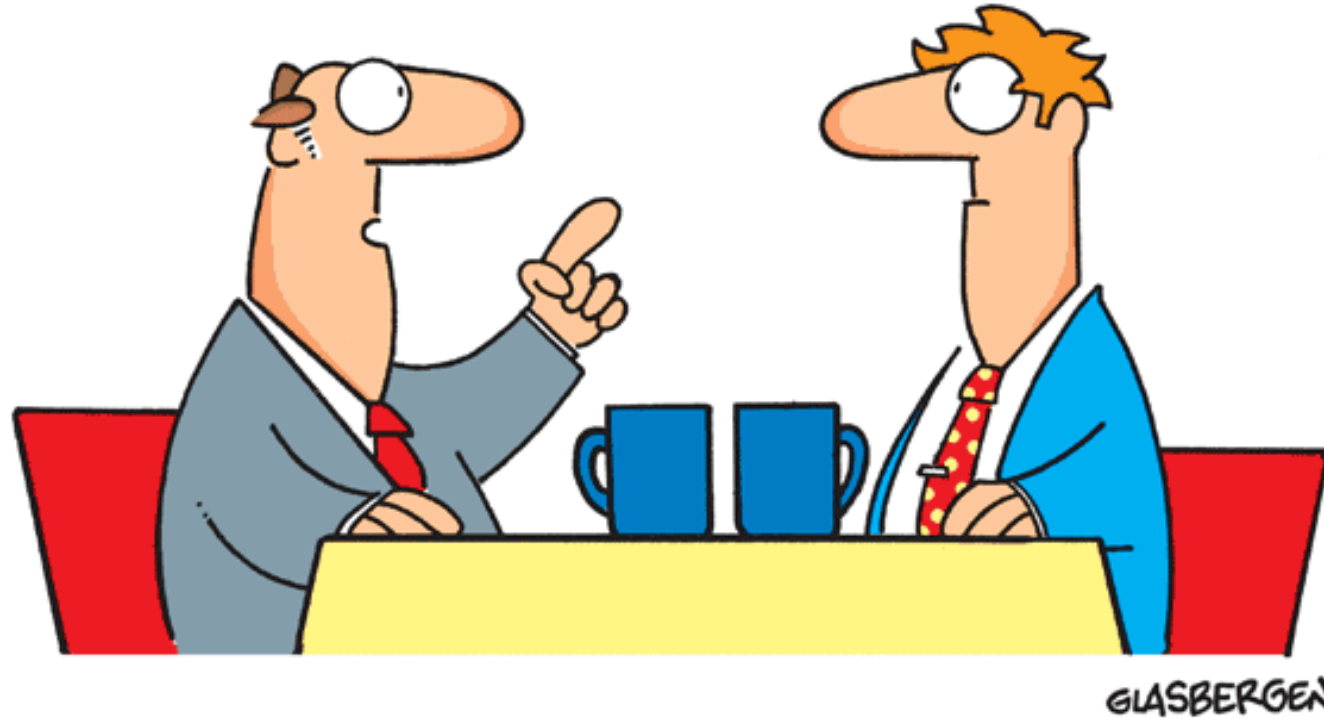
Assign User Points



# SELLING THE SOLUTION



# THIS IS HOW YOU WILL BENEFIT



**“Rule #1: Always let the client have his way.  
After you’ve convinced him that your way is his way!”**



**MAKE IT HAPPEN**



**SHOCK EVERYONE**



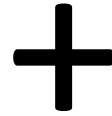


Failure is a  
vital part of  
scientific  
endeavor!

# MAIN CHALLENGE

## Flow 1:

Sends Thousands of Emails with a click of a button



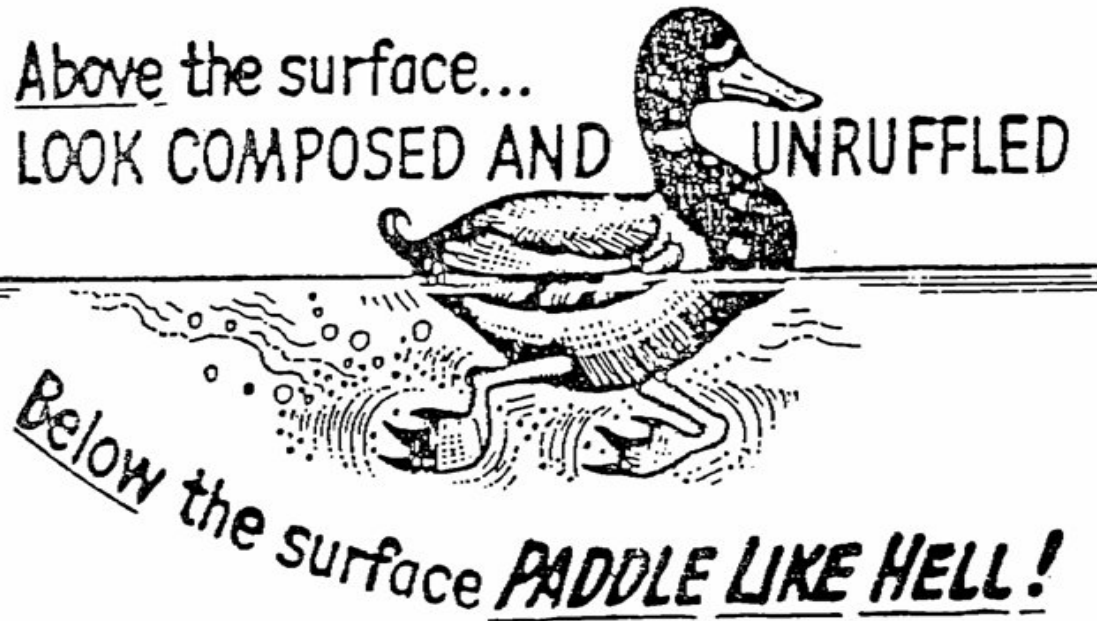
## Flow 2:

Office 365 Groups Mail Connector can handle up to 100 requests every 60 seconds





# BE LIKE A DUCK :



## USER EXPERIENCE IS EVERYTHING

- Freeze up and almost cry
- Turn Off Frozen Flow
- Duplicate and Turn on New Flow
- Determine time stamp when flow failed
- Determine time when I noticed it
- Manually add each of the activities from the Inbox during that time period



# CELEBRATE!





# LEARN & GROW





# TRACK ALL THE POINTS V2

- **Use Case:** Solve for Office 365 Groups Mail Connector Limitation while still providing great User Experience
- **Enhancements:**
  - HTTP Get for Mail/Event information provided performance improvement and eliminated previous limitation
  - Autotagged company the outreach was to
  - Autocalculated the number of companies on each outreach activity
  - Autopopulated user country, region, and department
  - Connected to Power BI for a live(ish) leaderboard

Every 30 minutes, pull last 60 minutes of mailbox

Assign meeting/email details to so many variables

Determine the sender and recipient company based on Domain

Assign points based on all information

Add item to Excel used as PowerBI Dataset

# ALWAYS BE LEARNING

- Double Quotes in Subject Lines
- Excel Lookup of Companies/Domains caused performance lag



Big achievements come one  
small advantage at a time, one  
step at a time, one day at time.

Jim Rohn

 quote fancy





# THE POWER!





# THINGS TO REMEMBER

## EVERY ROLE IS A SALES ROLE

But it helps to have someone with that skillset on your side

## USERS WANT TO LEARN AND BE PART OF THE SOLUTION

Enable them with what they need to be successful

## DON'T LET "PERFECT" GET IN THE WAY OF GOOD

Incremental improvements are steps to something amazing

## ANYONE CAN MAKE AN IMPACT!

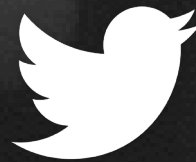
Give it a try!



# THANK YOU



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