

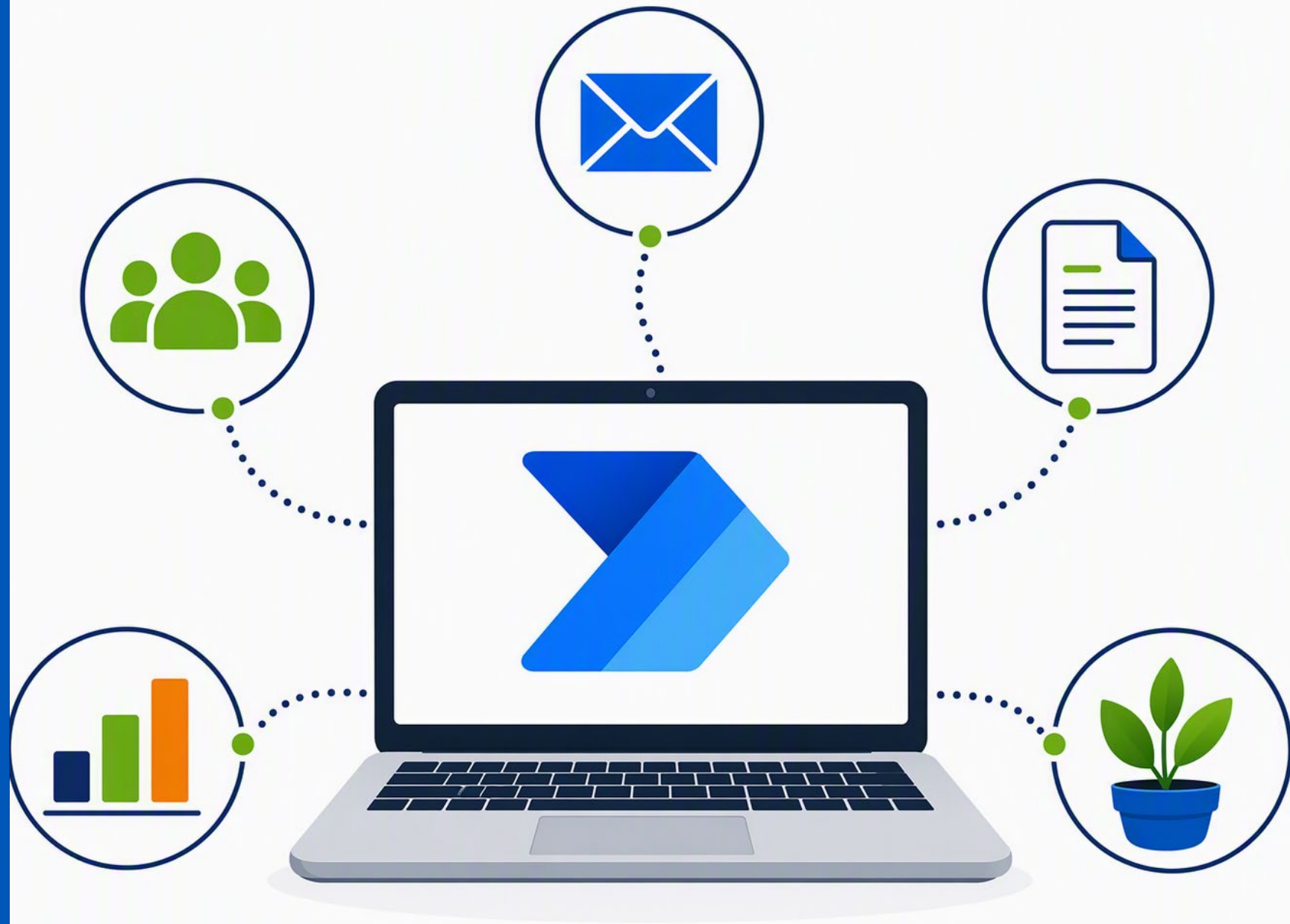


Power Automate in Action

Unlocking More for Your
Nonprofit

Connect more systems. Build
for the organization. Monitor
what matters.

Mat St. Cyr | Tech Impact



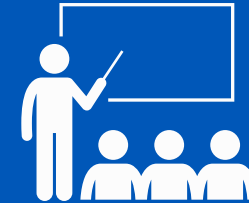
OUR MISSION IS TO LEVERAGE TECHNOLOGY TO ADVANCE SOCIAL IMPACT



Full-Spectrum
Nonprofit Tech Services



Nonprofit Educational
Resources and Webinars



Tech Career
Development Programs

Mat St. Cyr

Manager, Application Development

I am an Applications Development Manager at Tech Impact with more than 20 years of experience helping nonprofits and mission-driven organizations use technology to improve efficiency, strengthen governance, and expand impact. My work focuses on Microsoft AI, Power Platform, Dynamics 365, automation, and digital transformation initiatives that help organizations get more value from the tools they already own.



MAT@TECHIMPACT.ORG

You are already closer than you think

Most nonprofits already have the tools, process knowledge, and staff experience. Premium adds reach, structure, and reliability.



Already doing

Email, files, forms,
spreadsheets



A little more

Premium connectors,
Dataverse, solutions



So much more

Connected, manageable,
dependable

Included

Expanded

Operational

We will show the step up, not just describe it.

Start with the automation you already have

Approvals

Request, review, and sign-off

Intake

Forms to email, SharePoint, Excel, or Teams

Documents

Routing, naming, archiving, and reminders

Communication

Email and Teams updates triggered by events

The licensing model, without the fog

Included with Microsoft 365

Standard connectors across familiar Microsoft 365 services.

Best for work that stays inside the included ecosystem.

Licensing still depends on connector classification and context.

Power Automate Premium

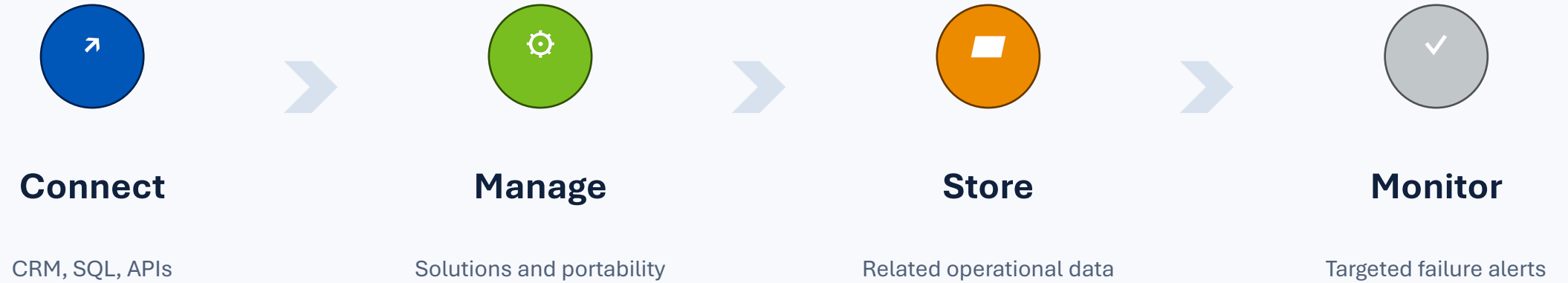
Premium connectors and custom connectors.

Dataverse, solution-aware development, and broader integration patterns.

Adds capabilities, not automatic immunity from connection or licensing issues.

Confirm connector classification and current licensing guidance for the exact scenario.

What “a little more” unlocks



Premium is valuable when it removes a system boundary, reduces risk, or makes ownership clearer.

Build automation for the organization, not one person



Package the solution

Keep flows, tables, connection references, environment variables, and related components together.

Separate configuration

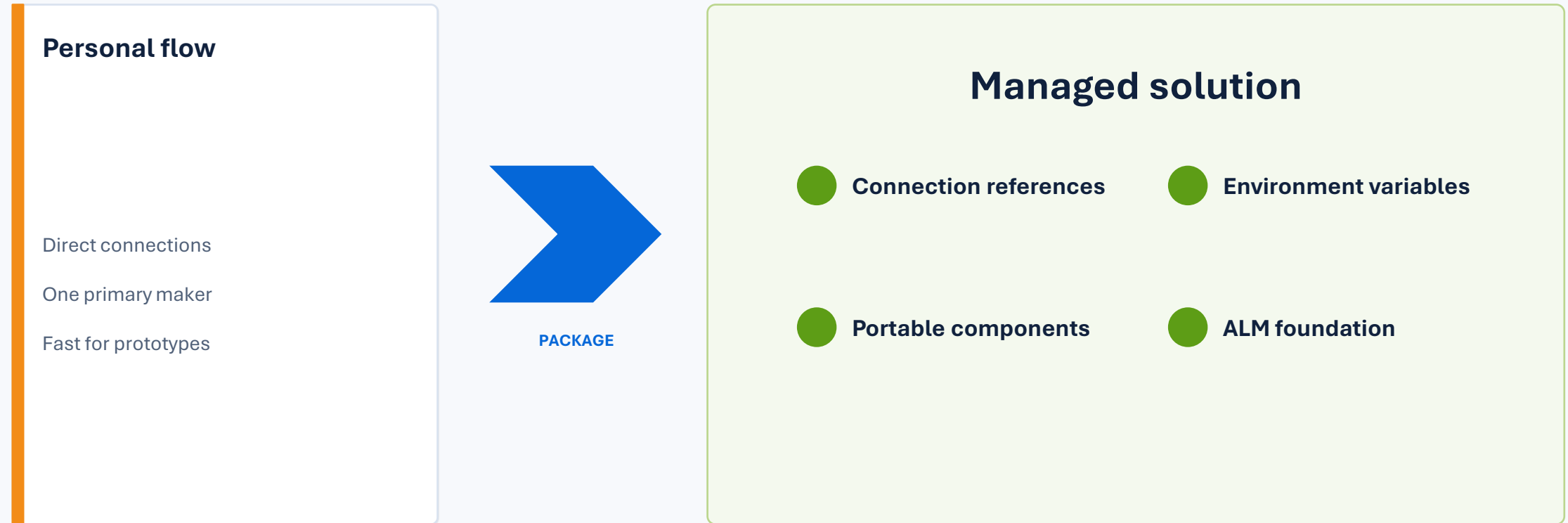
Avoid hard-coded personal settings.

Plan ownership intentionally

Use co-owners or operational identities where supported.

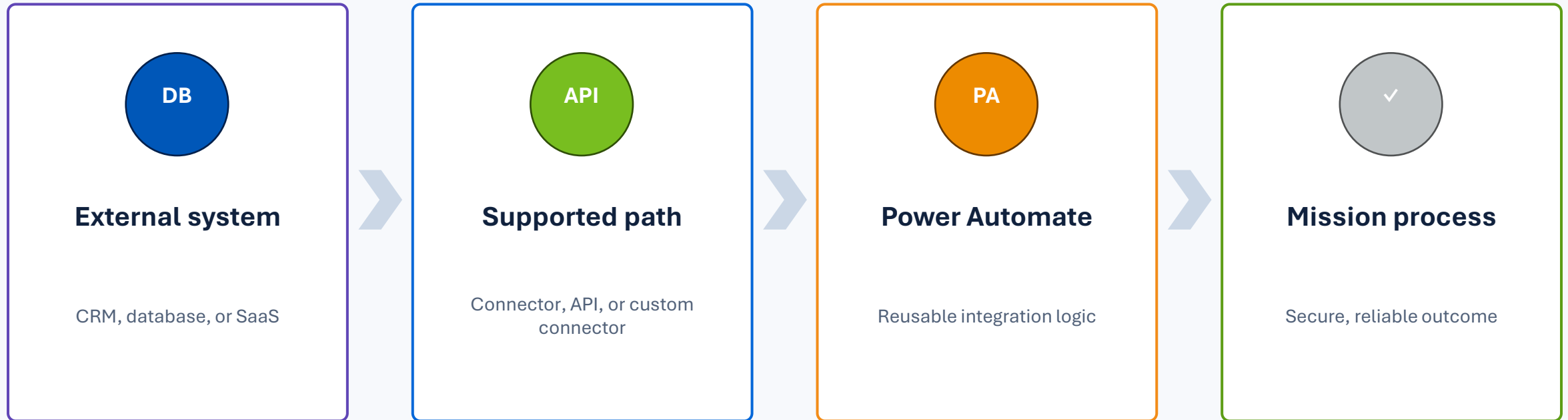
Solutions are the management foundation. Identity, connections, permissions, and licensing complete the design.

Solutions help automations grow up



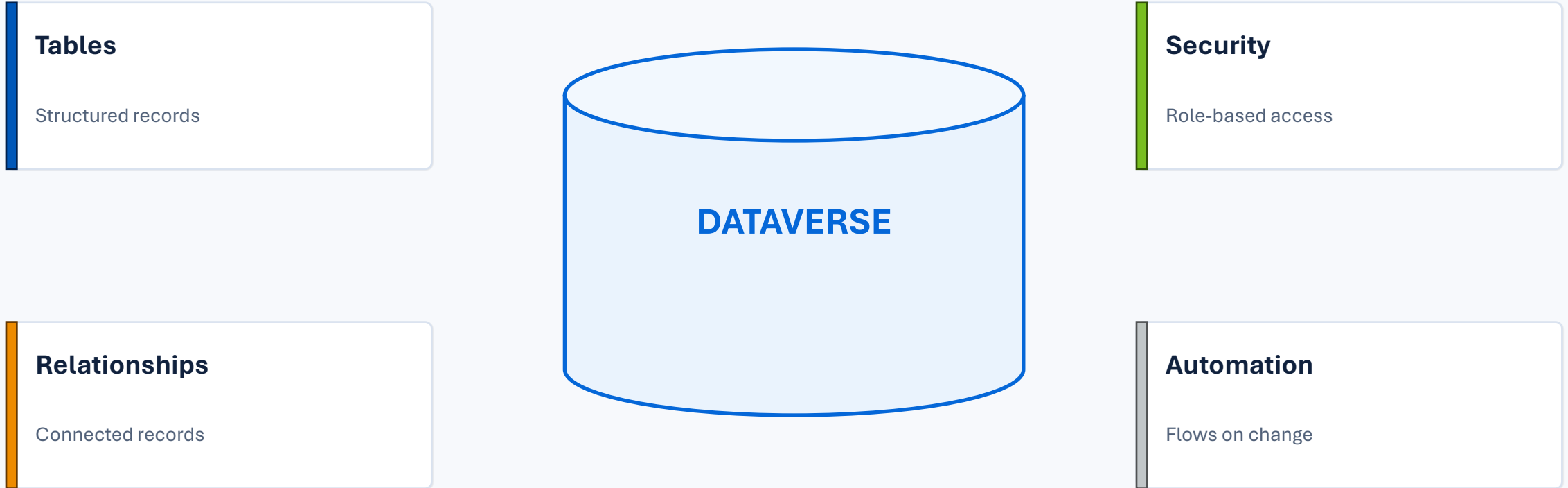
Connection references improve portability, but authenticated connections still need care.

Connect external databases and SaaS without unnecessary friction



Choose the simplest supported integration pattern that meets security, reliability, and maintenance needs.

Dataverse gives small projects a real data layer



Use Dataverse for related operational records, not as an unlimited data warehouse.

From familiar spreadsheets to a connected data model

Tables

Separate Excel sheets



Purpose-built tables

People, Programs, Enrollments

Relationships

VLOOKUPs, copied IDs, manual matching



Lookup relationships

A participant can connect to many services

Security

A shared file or separate copies



Role-based access

Staff see appropriate records

Automation

Scheduled checks and manual follow-up



Flows triggered by changes

Follow-up begins when status changes

The goal is not to replace every spreadsheet. It is to give connected, operational data a stronger home.

Three nonprofit scenarios where connected data helps

Program delivery

People

Programs

Enrollments

Service
interactions

Connect a person to multiple programs without duplicating the person record.

Grant management

Funders

Grants

Deadlines

Deliverables

Keep ownership, due dates, and reporting obligations connected to the grant.

Volunteer operations

Volunteers

Training

Availability

Shifts

Match qualified volunteers to opportunities and trigger follow-up.

Good Dataverse candidates have related records, shared ownership, access rules, or meaningful events to automate.

Monitoring turns “hopefully running” into a dependable service

Grant operations

A deadline or routing flow fails silently.

Donor data

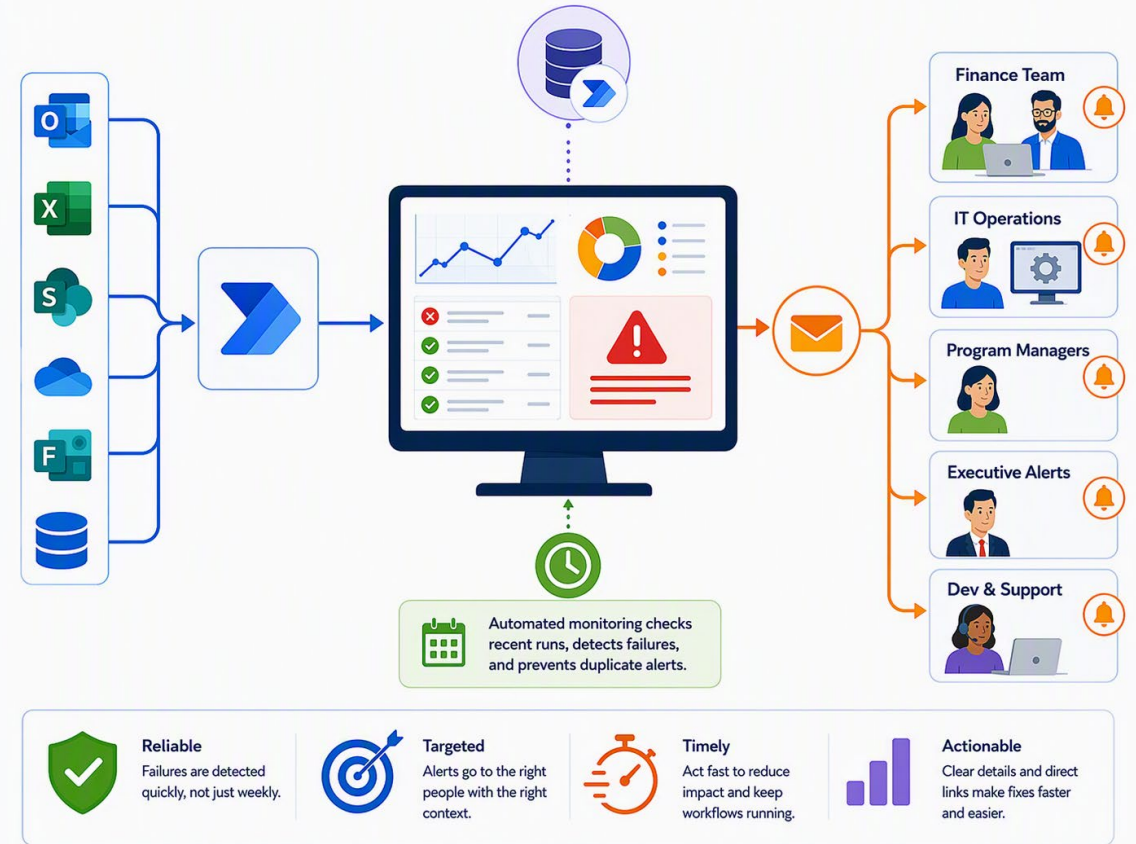
An integration stops before updating the CRM.

Finance

An approval stalls without reaching the owner.

Client services

Staff learn about failure from an end user.



Detect sooner. Route clearly. Respond with context.

A donor gift stalls before reaching the CRM



WITHOUT TARGETED MONITORING

Staff may discover the issue only after a donor asks about the missing acknowledgment.

WITH A TAILORED ALERT

The right team receives what failed, when it failed, the error details, where to investigate, and who owns the response.

Monitoring protects the mission outcome, not just the automation.

From weekly digest to targeted response

Built-in notifications

Per-run alerts cover certain known, fixable issues.

A cooldown can limit repeat alerts.

A weekly digest summarizes failures.

Owners and co-owners receive alerts.

A tailored monitoring layer

Query recent failed runs.

Filter for important workflows.

Prevent duplicate notifications.

Route details to the right operational owner.

The goal is not more alerts. The goal is faster ownership with enough context to act.

Build a smarter failure alert

1

Create a known failure

2

Find the run in Dataverse

3

Filter and deduplicate

4

Enrich with useful context

5

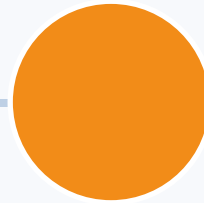
Route and verify



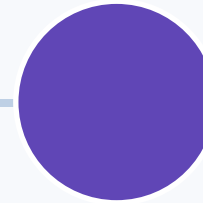
FAIL



FIND



FILTER



ENRICH



ROUTE

Use narrow test filters and a dedicated failure flow during the demonstration.

Make alerts specific enough to act on

Filter

Status = Failed

Created after last check

Selected workflow IDs

Environment scope

Exclude notified runs

Enrich

Friendly flow name

Failure timestamp

Error code and message

Direct run URL

Business owner

Route

Finance flow to finance owner

CRM integration to database team

Critical process to escalation

Development flow to lower-noise support

Useful alerts answer: what failed, when, why, where to investigate, and who owns the response.

Production considerations

Enable

Cloud flow run history in Dataverse

License

Use appropriate user or Process licensing

Scope

Start small and tune the query window

Secure

Use least privilege and protect error context

Deduplicate

Track notified runs or checkpoints

Observe

Monitor the monitoring flow too

Treat alerting as part of the operational service, with the same care as the workflows it protects.

HELP US BETTER CURATE OUR RESOURCES AND TRAININGS



Please take our post-session survey to help us
improve our material, presentations, and processes.

Start simple. Add Premium where it reduces operational risk.

You already have the foundation. Premium adds reach, structure, and confidence.



Q&A

What would create the most value for your organization?

CONNECT • MANAGE • STORE • MONITOR

