Hi and welcome everyone to the 62’th episode of CRM Rocks.

This is Markus Erlandsson and today’s podcast will be about Flow vs Workflow and with me today I have Britta Rekstad from MacGyverCRM

**BIO**

Britta is a 3 time Microsoft MVP as well as an independent consultant and trainer on Microsoft Dynamics 365 and earlier versions of CRM. In her spare time she hosts a class for people looking for make the leap into careers into Dynamics.

Welcome Britta!

# Smalltalk

CRM is all about managing a customer relationship, so what is a good customer relationship to you?

Every organization has a reason they exist. Whether they are for profit or non profit there is something that group of people has all joined forces to do. To me, a good customer relationship is clear when that organization can take really good, proactive care of their customer and the staff is freed up to do their best work for the customer, instead of wasting time on small, menial things.

Who are your customer?

For me that looks very different from day to day. Sometimes my customer is the company I am building a CRM for, other days my customers are students that I am training or a training company that I am writing content for.

What is it that you do?

I work with all kinds of organizations, usually in the small to mid size.

I play many roles in my work but I've found where I am happiest is when I am coaching. That may be coaching a customer on how to be a good customer and get all of their needs prioritized and met appropriately. It may be coaching users on how to get the most out of the system that was built for them. Often it is coaching consultants or future consultants on all of the technical skills and non technical skills that they need to be successful.

What is your last memorable customer experience?

Last week I had the pleasure of spending my week training brand new technical sales professionals and preparing them for their new role. One of my favorite things about my job is seeing the exact moment when the power of this platform clicks in someone's mind, like a light bulb turning on. I got to see a lot of that last week.

# Show

What is flow?

What are some main difference between flow and workflow?

Flow

* Outside CRM but can access crm data
* Templates
* Connectors
* Working with specific CRM records can be a little confusing to learn at first

Workflow

* Inside CRM
* can Access crm data
* Solution Aware
* Necessary for On Premise
* can see it in CRM
	+ both activated processes
	+ And might see run processes log
* Synchronous workflows have any advantages
* A bit easier admin, smaller world of possibilities
* Included in CRM license and resources within CRM
* Longer community history with the tool so there are better resources on how to solve a problem with Workflows

How do you as an admin “control” of Flow?

The best way that I know how to administrate flow is to have your flows be "Team" flows so that other people in your organization can see the flow, make changes if necessary or take care of it if you leave the company.

Admin of workflow? (not really an issue since most are organization, but I guess you could create personal once to automate your own work)

Usually this is the System Administrator or someone with the System Customizer role. I strongly advise against giving users the ability to right workflows because you can't contain the damage they can do. It is an all or nothing privilege.

Things in Azure and Flow as well do change really fast,

 Growth of flow, its changing so fast.

What are the changes?

Common good scenarios for:

It is all about process, CRM is just a tool

Flow? When you want to include data and processes outside CRM without an integration Flow is a great fit. It is also a great way to trigger processes that start outside CRM.

Workflow? Great for processes that happen entirely inside CRM. The list of reasons to use Workflow instead of Flow keep shrinking as the product matures.

Both? Using both tools can really help you when you need to start in one place and end in another, such as being triggered by something outside of CRM but then running a process largely in CRM.

Neither?

* Processes where you want to interact with the user on the form arent always best for Flows or Workflows. I usually pair Business Rules or Business Process Flows if I need to interact with the user in the process.
* You should know all of the out of the box tools you have, including Calculated and Rollup fields, to pick the right tool for the job. Sometimes Workflows are overused because the other tools arent understood.

## End

**Where do I go if I want to know more?**

* <https://flow.microsoft.com/>

Choose between Flow, Logic Apps, Functions, and WebJobs

<https://docs.microsoft.com/en-us/azure/azure-functions/functions-compare-logic-apps-ms-flow-webjobs>

* Follow PNWAdventureGuy for the best flow tips and inspiration

**Where are you going to be next?**

**Links self-promotion etc.**

Blog: Macgyvercrm.com

Twitter: @Macgyvercrm

Podcast: <http://implementthis.org>