

MBA 614 | Alex Herd

VBA Final Project

EXECUTIVE SUMMARY

As a business professional, building and maintaining a network of contacts is an essential but daunting task that is often done poorly. This task becomes particularly important when one is looking for a new job. While I was hunting for my summer internship, I saw the critical value that key network contacts can provide. Because of the sheer number of people I was constantly being introduced to and reaching out to, the difficulty was in maintaining relationships with them as time went on. A lot of the relationships I built faltered and faded away because I lost track of individuals. As a new Sherpa for the incoming class of 2018 MBA students, I wanted to build a tool that would help them keep track of their network and help them maintain the relationships that they build, leading to an easier job search.

The system I built allows users to fill out key information about their contacts, such as company, role, contact info, date last contacted, date to contact again, and any notes about the individual or past conversations, with a button enabled user-form.

I created a macro that when run daily by Windows Task Scheduler, will send the user reminder emails whenever the day's date coincides with the 'date to contact again' field for each individual in the spreadsheet. If the 'date to contact again' field is empty, then it will automatically assign a date 30 days after the date of last contact. The reminder emails contain all of the information about the particular individual contained in the spreadsheet, so that it is easy to quickly send off a personalized email or text right after reading the reminder. If the user doesn't update the 'date last contacted' field within 2 days, the system will send out a more urgent email and a text to the user to remind them to contact the particular individual.

Implementation Documentation

The Custom Ribbon

I customized the ribbon with two buttons (Figure 1) in the Home tab. The “Edit Contact Info” button initializes a user form populated with the data from the row of the active cell. The “Send Reminders” button activates the primary macro which analyzes the dates in the spreadsheet and sends emails and text reminders to the user.

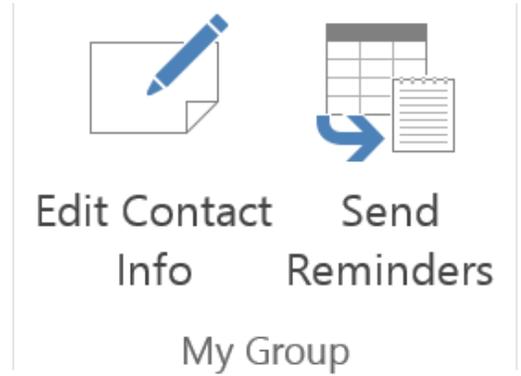


Figure 1

The User Form

Spreadsheets can be cumbersome to deal with when entering lots of text as users will be bound to do when writing in the notes section (Figure 2 shows a sample from the spreadsheet). I wanted the user to have an easy interface with the data contained in the spreadsheet, so I created a user form that allows for quick data entry, and the ability to see a large block of text for the notes (Figure 3).

Type of contact	Date to contact again	Notes (birthday, likes, dislikes, in person)
Email	4/4/2015	Really into rock climbing. We last
Email	5/3/2016	Big lover of the East Coast and tra
Email	4/30/2016	Loves BYU Football and Golf. Birtl
Phone	5/3/2016	He loves all things Texas, especiall
Email	4/20/2016	She just recently moved to Austin
In Person	4/6/2016	Frisbee golf is his thing, as well as
in person	4/9/2016	Loves to travel. Talked about his t
Email	4/3/2016	We talked a lot about the downhch
Text	4/27/2016	She is really into her job and is als

Figure 2

Figure 3

Sending Reminder Emails

The macro I created cycles through the entire list of contacts on the spreadsheet and if for any row, the “date to contact again” field is the same as the date the macro is being run, then the program will send out a reminder email to the user using a Gmail account that I set up strictly for this purpose. The message is composed using a text file template stored in the same folder as the workbook (**Figure 4**).

```

Good day!

Here's a reminder to send a message to <contactname> today!

<contactname> works at <companyname> as a <rolename>.

You last contacted <contactname> on <contactdate>. The type of contact was: <contacttype>.

Phone number: <contactphone>

Email Address: <contactemail>

Notes about <contactname>: <contactnotes>

Maintaining your network is key to your success.

Have a wonderful day!

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Figure 4

The appropriate information from each cell in the particular row replaces the placeholder words in the template and a customized message is sent (**Figure 5**).

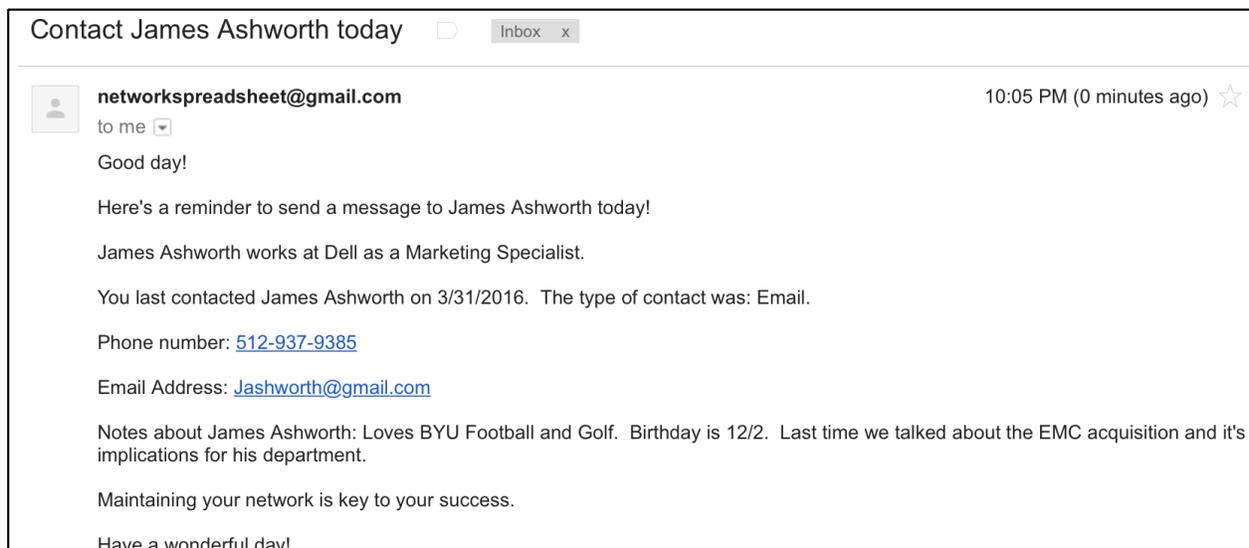


Figure 5

Sending Additional Reminders

If the difference between the “date last contacted” field and the “date to contact” field is greater than 35 days, then the system will send the user a more urgent reminder email (**Figure 6**) as well as a text message. Once the user makes contact with a particular individual, he or she should update the “date last contacted” field to avoid receiving further reminders.

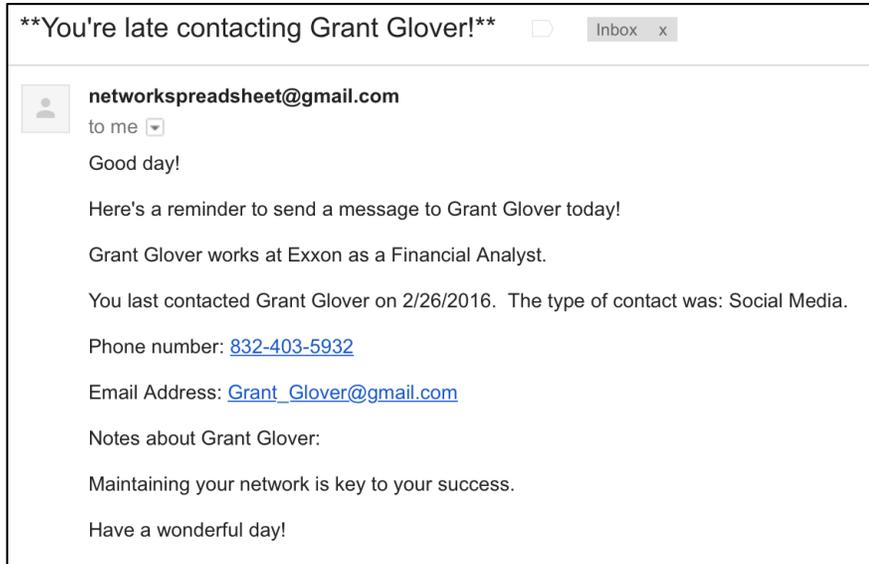


Figure 6

Discussion of Learning

I thoroughly enjoyed working on this project and learned a great deal as I went through it. I used a lot of concepts and tools that we had used in class, but didn't have assigned homework or projects on, such as sending emails and texts and customizing the ribbon. It was extremely beneficial for me to solidify these concepts in my mind as I discovered how to change them for my own unique purposes. At first, it was challenging to integrate the logic in my macro with the send Gmail function, and finally with the custom button in the ribbon. However, I was able to do it and learned a lot by simply problem solving on my own.

The most important thing I discovered as I went through this process, was how much I have learned in this class. I started out with little to no programming experience and I realized that I am now equipped with the necessary skills to do quite a number of things with VBA, and more importantly, I know how to search out and figure out what I don't know how to do.

Assistance

I didn't receive any help on this project outside of the class videos and examples posted on Learning Suite, and Google. The class videos were particularly helpful and I am grateful to have them as a resource moving forward.