THE FUTURE OF PRODUCTIVITY
How Automation Can Boost Your Practice's Efficiency

Craig Spinks
Veteos Co-Founder & CEO

VSPA - November 10th, 2022

What is automation?
Making a process or a system operate automatically

WHY IS AUTOMATION RELEVANT NOW?

- ▷ **Easy-to-use tools are readily available**
- ▷ **Help productivity while short staffed**
- ▷ **Avoid things slipping through the cracks**
- ▷ **Wellbeing reminders and "habit stacking"**

Why I'm a fan of automation

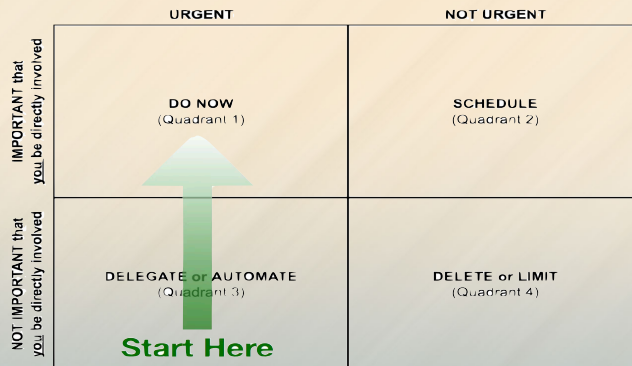## You already use automation!

IDENTIFYING AREAS FOR AUTOMATION

- ▷ Frequent tasks
- ▷ Recurring tasks
- ▷ Causes friction (or wastes time)

IDENTIFYING AREAS FOR AUTOMATION

TYPES OF TASKS EASIER TO AUTOMATE

- ▷ Anything you use an app for (smart devices)
- ▷ Tools with APIs (Application Programming Interface)

PROJECT/TASK MANAGEMENT

PROJECT/TASK MANAGEMENT

What is it?

Web-based and app-supported team project and task management platforms

---

PROJECT/TASK MANAGEMENT

How can it help?

- ▷ Allows teams to collaborate on projects and tasks, and helps ensure everyone stays on the same page
- ▷ Recurring tasks can be created to manage frequently repeated **tasks** or groups of tasks (e.g., end of the night checklists, processing payroll)
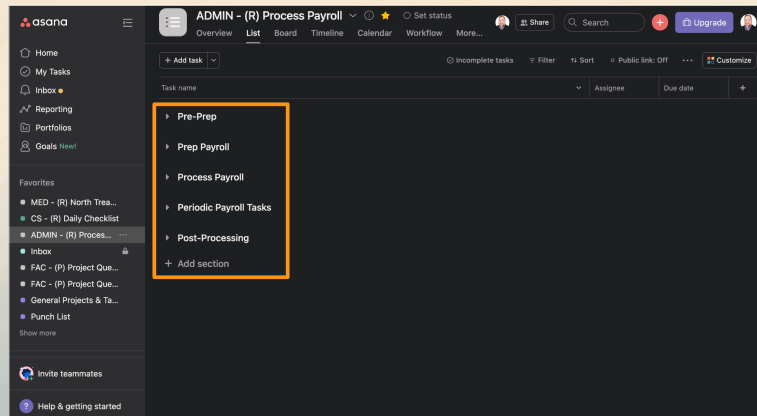

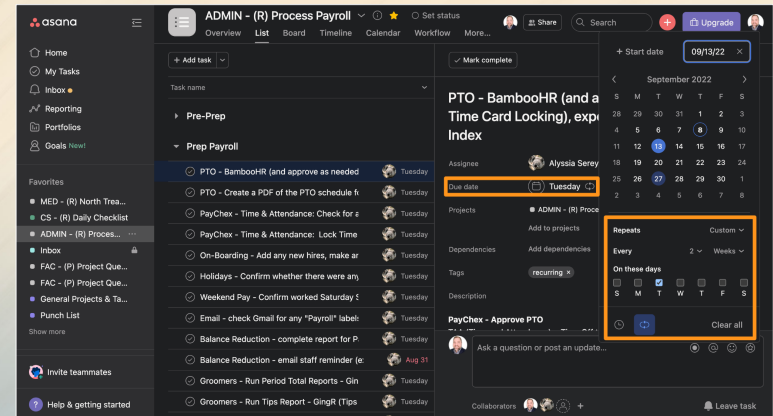## PROJECT/TASK MANAGEMENT

Tools Available

- ▷ Asana - asana.com
- ▷ Trello - trello.com
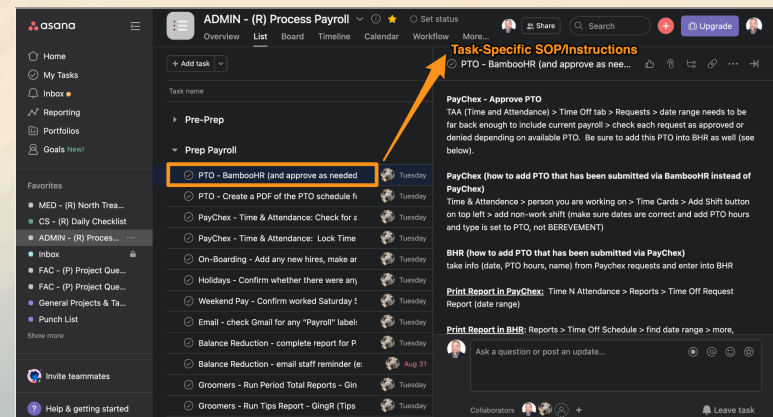
PROJECT/TASK MANAGEMENT

PROJECT/TASK MANAGEMENT

PROJECT/TASK MANAGEMENT

Tip

Use task descriptions or details to directly outline the steps and resources to complete the task (SOP) or link to an external SOP reference

PROJECT/TASK MANAGEMENT

SCHEDULING TOOL

SCHEDULING TOOL

What is it?
Scheduling tools allow users to professionally and efficiently schedule meetings without the normal back-and-forth hassle of proposing dates and navigating scheduling conflicts

SCHEDULING TOOL

How can it help?
▶ Easily schedule meetings with vendors, staff
▶ Access to your availability without visibility of your calendar
▶ Create as many meeting types as needed - each with its own type, duration, location

SCHEDULING TOOL

Tools Available
▶ Calendly - calendly.com
▶ Doodle - doodle.com

SCHEDULING TOOL

SCHEDULING TOOL

Tips

- ▷ Avoid sounding pretentious
  - ▷ "Want to find a time using this scheduling link that works in your schedule?"
- ▷ Be sure to keep your calendar up to date
- ▷ Balance unscheduled/blocked time

WORKFLOW AUTOMATION

WORKFLOW AUTOMATION

What is it?

Workflow automation allows you to integrate common web apps and services to create automated workflows using "triggers" and "actions" ("if this happens, then do that").

WORKFLOW AUTOMATION

How can it help?

▷ Connect web apps that normally wouldn't talk to each other

▷ Set up multi-step workflows to automate tasks

WORKFLOW AUTOMATION

Tools Available

▷ Zapier – zapier.com

▷ Make (formerly Integromat) - make.com

▷ IFTTT (consumer integrations) - ifttt.com

▷ Jotform - jotform.com

▷ Formstack - formstack.com

WORKFLOW AUTOMATION

Special Order Request Automation Demo

SCHEDULING TOOL

Tips

▷ At first, use the tools you have

▷ Avoid fiddling after set up - easy to create errors

▷ Don't overcomplicate unless it's truly helpful

NEXT LEVEL EMAIL

NEXT LEVEL EMAIL

What is it?
Increase the functionality of your email workflow by scheduling emails and leveraging third-party tools for advanced features like recurring messages, track views/clicks, and automatic inbox management

NEXT LEVEL EMAIL

How can it help?
▷ Scheduling email to send at a future date and time
▷ Email reminders (return a message to your inbox later)
▷ Recurring/automated emails
▷ Read/click tracking (has your email been read by the recipient, did they click on a link, etc.)
▷ Automate your inbox

NEXT LEVEL EMAIL

Tools Available
▷ Scheduled send functionality is built into many popular email clients (e.g. Outlook and Gmail)
▷ Boomerang for Gmail - boomeranggmail.com
▷ Sanebox - sanebox.com
▷ Google "gmail email tracking extensions"
  ▷ e.g., Mailtrack
▷ MixMax - mixmax.com

NEXT LEVEL EMAIL

NEXT LEVEL EMAIL

NEXT LEVEL EMAIL

This message is automatically sent every month on the 7th
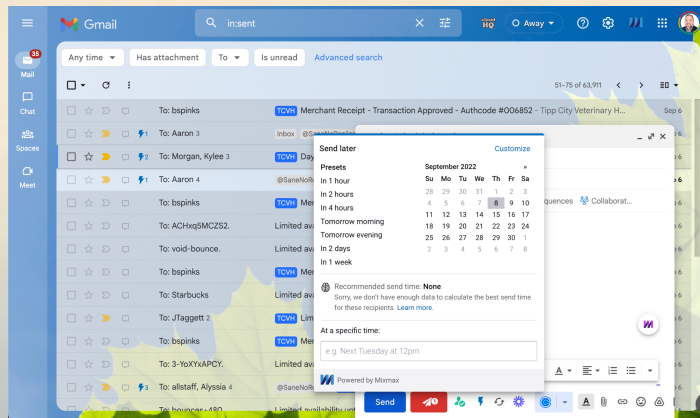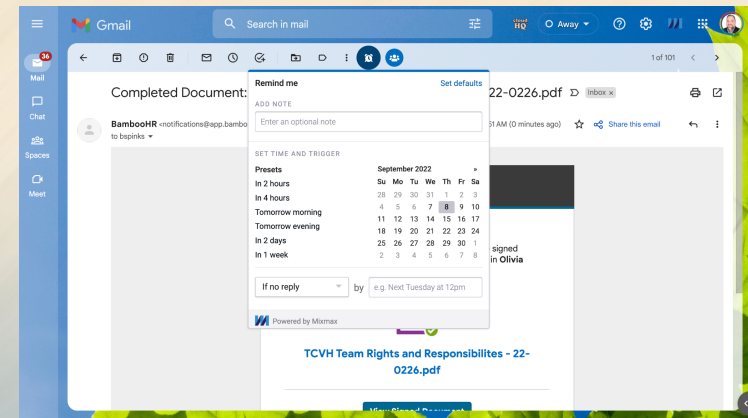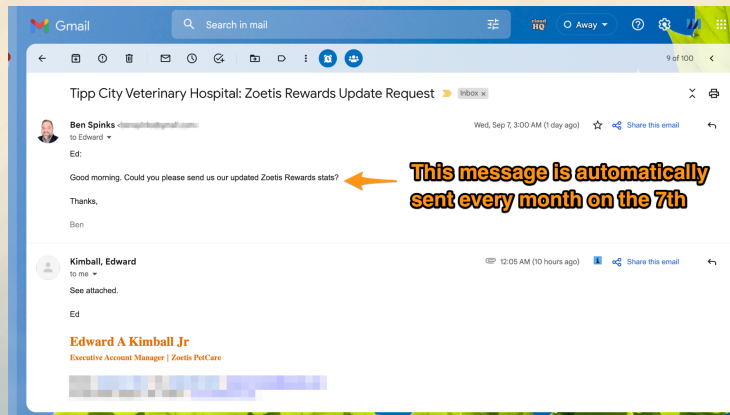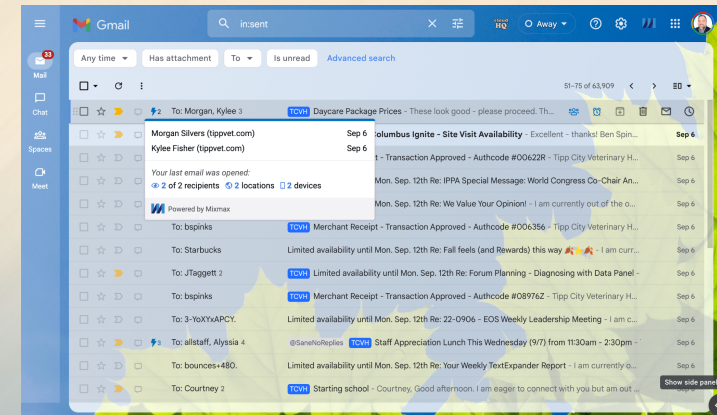

NEXT LEVEL EMAIL

NEXT LEVEL EMAIL

Tip
Use these tools to strategically think ahead and make things easier for yourself in the future

PASSWORD MANAGER

PASSWORD MANAGER

What is it?
Password managers are apps that store all of your passwords, so you don't need to remember them. Once logged into the password manager with a 'master' password, it will generate and insert your passwords and other secure information wherever needed.

PASSWORD MANAGER

How can it help?

- ▷ You don't have to memorize all your passwords anymore - or god-forbid, keep reusing the same passwords
- ▷ Generates strong and unique passwords for every login
- ▷ Sync passwords between devices and people/team (if one person updates a shared login, all users are automatically updated)
- ▷ Quickly insert stored information into login screen and web forms
- ▷ Two Factor Authentication (2FA) management
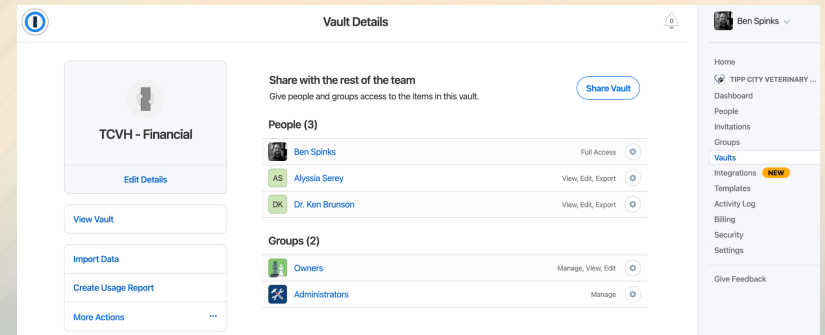- ▷ Be alerted to hacked sites and unsecure login information

PASSWORD MANAGER

Tools Available

▶ 1Password - 1password.com (PC/Mac)

▶ Bitwarden - bitwarden.com (PC/Mac)

PASSWORD MANAGER

SCHEDULING TOOL

Tips

▶ Think beyond passwords (e.g., upload commonly use documents like a voided check)

▶ Password managers can be part of your practice's continuation plan in case you become incapacitated (other practice leaders will have secure access to vital information)

Next Steps

HOW TO GET STARTED

- ▷ Pick a simple automation to get started (keep it simple)
- ▷ Develop automations over time as you identify opportunities
- ▷ Prioritize automations that will save the most time and make life easier

WHERE TO LEARN MORE

- ▷ Google/YouTube
    - ▷ "Connecting 'tool 1' with 'tool 2'"
- ▷ Zapier University
- ▷ Asian Efficiency

THE FUTURE OF PRODUCTIVITY
How Automation Can Boost Your Practice's Efficiency

Craig Spinks
Veteos Co-Founder & CEO

craig@veteos.com