

ONLINE BUSINESS SYSTEMIZATION



GUIDE 6:

Systemization Using
Automation Tools

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As a small business owner, you are losing approximately 10 to 15 percent of your time when you don't automate simple tasks like posting to your business's social media accounts. Business automation aims to improve a company's performance by reducing costs, increasing the accuracy of data, and minimizing delays.

Most standard small business functions can be handled with software solutions. Once a company automates its primary tasks, they will notice that other aspects of their business will begin to work more efficiently. Here are some of the best automation tools that your business can start to utilize to systemize your business today.

Zapier

Zapier (<https://zapier.com>) is one of the leaders in task automation. Zapier connects all your apps and allows you to automate your workflows by automatically moving info between your web apps so you can focus on your most important business tasks.

You can integrate more than 1,000 apps like Slack, Asana, and Google Docs.

- Features a visual designer that allows you to set up integrations and administer integrations without having to use code. The easy to use visual interface makes setting up your integrations a snap.

- Easily connect almost any application programming interface (API), to another API. Use logical functions and multi-step algorithms for your connects to avoid triggering specific workflows when they aren't needed.

Flow

Microsoft's Flow (<https://flow.microsoft.com>) turns your company's repetitive tasks into multistep workflows. The automated workflows that you create between your favorite apps and services will send you notifications, automatically synchronize files, collect data, and much more.

- Create, use, and share automated approval workflows to respond quickly and process and approve everything from time off requests to travel plans to sales opportunities and documents.
- Connect securely to your cloud base services and on-premises data so you can make the most of the data you already have.

Pipedrive

A CRM and pipeline management tool, Pipedrive (<https://pipedrive.com>) helps you focus on actions that matter. The visual sales pipeline prompts you to remain organized, take action, and stay in control of your complicated sales process by bringing all the sales data into a single place.

- The mobile app gives you access to your contact and deal information when you're on the go. Schedule activities, take notes during a call or meeting, save call logging activities easily when you're

away from the office.

- Use Pipedrive's reporting feature to understand where you're losing deals, forecast results, and identify opportunities for improvement.

TextExpander

TextExpander (<https://textexpander.com>) lets you instantly insert snippets of text from a collection of emails, boilerplate, and other content, as you type. Using the quick search feature or an abbreviation you can recall your best words instantly.

- You can share your snippets with your team so that they can stay on track and on message. Access all your snippets from any device with a TextExpander account so you can give your entire support team the current answers to all your customer inquiries.
- You can also streamline your email and use the fill-in-the-blank feature to create custom forms with multiple filed types and sectors.

Alfred

Alfred (<https://alfredapp.com>) is an award-winning app for Mac OS X. It's a workflow automation tool and a hotkey tool that allows you to navigate your interface with your keyboard rapidly. You can create and automate complex workflows that you trigger from a hotkey.

- Launch applications and find files on your Mac and the web. Alfred learns how you use your Mac and prioritizes the results, saving you

countless hours.

- Alfred's Powerpack feature uses powerful workflows to perform tasks more efficiently, allowing you to cut down on the repetitive manual tasks that eat up your valuable time.

IFTTT

IFTT (<https://ifttt.com>) stands for If This Then That and is the free way to get all your apps and devices talking to each other. With IFTT you can bring the Internet of Things (IoT) into your pocket with mobile-based automation tools.

- Use widgets to run specific Applets with the simple touch of a button on your iOS or Android devices.
- Automate tasks between a wide array of apps, services, and devices. Their web and mobile app are easy to use and support IoT devices and voice assistants like Google Assist and Amazon Alexa.

Shortcut

Shortcut (<https://shortcutapp.com>) allows you to navigate your screen with your keyboard, effectively rendering your mouse useless. It helps you to boost productivity by removing the need to take your fingers off the keyboard.

- It leverages the Accessibility API, which is supported by all applications that are included with Mac OS X and many other

applications.

- The program lets you keep your hands on the keyboard to click, which saves you both time and energy.

Robotask

Robotask (<https://robotask.com>) is a powerful tool for PC users who are committed to automating their workflow. The program allows you to automate repetitive tasks on your PC that range from launching applications to checking email.

- With Robotask you won't have to create batch files or write complicated scripts to develop simple or complex automation tasks. It uses its visual interface to allow you to select and combine actions to fit your needs.
- Create automated tasks and automatically execute them when certain conditions apply.

Tallyfy

Eliminate the chaos from your business processes with Tallyfy (<https://tallyfy.com>). This workflow software turns your daily tasks and approvals into automated, repeatable processes. It eliminates the pain of emails, calls, papers, forms, and spreadsheets.

- You can easily map existing flowcharts or SOPs into Tallyfy templates and simplify your work into actionable steps that reflect real-life

workflows.

- Its open API allows you to connect to most of your existing tools.

Intercom

Catch, convert, and keep more customers with Intercom

(<https://intercom.com>). Intercom is a customer messenger platform that allows your customers to get in touch with you straight from the web. It's perfect for sales, marketing, and support.

- Use bots and live chat to automatically qualify, route, and convert more leads in less time.
- Send targeted emails and push and in-app messages to quickly onboard and engage customers, turning more signups into paying customers.

Delivra

Delivra (<https://delivra.com>) is a results-driven email marketing automation platform that makes it extremely easy to engage your audience and increase revenue.

- With its marketing automation, you can deploy smarter email campaigns that are more efficient and customized for your audience. You can create triggered responses, easily segment subscribers, send emails based on consumer behavior and create dynamic content.

- With weekly reports delivered directly to your inbox, you can keep track of the progress and performance of each email campaign. The weekly insights will provide you with subject line analysis, the top-performing content, and the number of social shares by channel.

Autopilot

Spark new customer relationships and rekindle old ones with the simple and straightforward Autopilot (<https://autopilothq.com>) program. Engage with your customers at the right time with personalized emails, SMS, in-app messages, and postcards.

- Use the program to connect to your apps and automate tasks to capture a richer view of all your contacts and engage with them based on their behavior.
- Easily track your performance to get insights into which messages convert, how your messages are trending, and what is driving sales. Quickly visualize your revenue funnel and optimize your process on the fly with real-time results.

mHelpDesk

mHelpDesk (<https://mhelpdesk.com>) automates your customer contact, scheduling, billing, communications, and everything in between. The program was designed to supercharge your repetitive, manual business processes so you can focus on what really matters.

- Track every stage of the job with complete visibility of your workflows. You'll be able to see the progress of every job in real-time. See every change in a job that has occurred using the Activity Log feature and holds your team members accountable for their actions.
- Save yourself time and money and speed up your cash flow. In less than 60 seconds you can start accepting Visa, MasterCard, American Express, and Discover with the easy to set up payment processing system.

As you start to put stable systems in place in your online business, consider adding one or more of these powerful and easy to use automation tools.

Automating the repetitive and repeatable business tasks will free up your time so you can focus your time and energy on the essential functions required to grow your business.