



"NO-CODE"
PRINCIPLES
FOR **WORK**
AND **LIFE**

 **aytekin tank**

automate your busywork

do less,
achieve more, and
save your brain for
the big stuff



Appendix

TO FOLLOW ARE a plethora of ways individuals and organizations can reduce their busywork. And a note to individuals: check out some of the options pitched to the employer, since you might want to recommend these functions to your organization. For example, if you're tired of tallying your expenses from business trips, you can request that they set up a travel and expenses management system. Then you can use a smartphone camera to scan receipts and map travel expenses to your individual travel ID and let the system take it from there.

There are a few caveats to keep in mind.

First, it's impossible to reliably recommend specific tools and apps because they emerge and disappear at a dizzying rate. So be sure to research your options via the keywords supplied at the end of each description. Note too that many of the solutions available are designed to integrate with other tools, so it's good to do thorough research before committing—especially if there's a cost for the software.

Similarly, given how fast technology develops, some automations that you'd need to actively implement today will likely get

added to future releases of tools you already use—such as your smartphone or operating system—or could be simplified and standardized into a new tool you could adopt. Software inevitably becomes more sophisticated over time.

Following along those lines, even though this is a fairly comprehensive appendix, it's by no means exhaustive. You can automate countless different tasks and actions. My goal is to give you a taste of what's possible. As your automation skills sharpen, I hope you'll ask yourself: I wonder if it's possible to streamline _____. The perfect solution might already exist!

Technology Review Platforms

These sites congregate or compare various tools, including the ones mentioned next. For example, GetApp.com is an “ecosystem of business app and software discovery platforms.” Other options include CrowdReviews, Crozdesk, G2.com, Software Advice, SoftwareSuggest, SourceForge, and TrustRadius.

Another research approach is to check out what alternatives exist for any particular app, using sites such as alternativeto.net and opensourcealternative.to.

To-Do Lists (Individuals and Teams)

Create and maintain digital to-do lists

You could start small with a tool like Trello and then build from there when you have time. Trello (which is a “Kanban”-style tool) is at first glance a digital bulletin board pinned with “cards” arranged in columns, but it offers much more functionality—and yet is easy to master. (One great function is that you can just email a task to a board and it will create a new card on that list.)

Be sure to check out online reviews of a variety of digital to-do lists and apps, which offer a range of options for creating simple or detailed to-do lists, starting with actionable tasks. These

can be standalone tasks or building blocks for larger projects. Then, you can organize and prioritize tasks, assign them to team members, and set reminders. (Note, many people appreciate the functionality of Asana.)

TOOLS: Asana, Trello, among others

KEYWORDS: to-do lists, task management, work management, project management

Manage project tasks

This one takes to-do lists to the next level. Automation platforms like Zapier can be programmed to automatically add important tasks to to-do lists, save files and media to the cloud, send new digests of completed Asana tasks to Slack channels, create issues from form responses, and countless other repetitive tasks.

TOOLS: Microsoft Power Automate, ProjectManager, Zapier

KEYWORDS: project management, checklists, team boards, Kanban, agile

Personal Development/Self-Management

Auto-update contact information

In the earlier Automate Your Communication section (page 150 in Chapter 5) I shared how those using tools like, say, Addappt will find that any time a contact's phone number is changed the info is automatically updated in their smartphone; any duplicate entries will also be removed. Apps like Evercontact offer the same for email.

TOOLS: Addappt, Evercontact

KEYWORDS: address book update, call book update, auto-update phone numbers, contact information update

Auto-open browser tabs

Automatically load specific tabs when you open a web browser.

TOOLS: Google Chrome (“On startup”), Mac Safari, Mozilla Firefox (“When Firefox starts”), among others

KEYWORDS: open specific webpages, web browser bookmarks

Save online reading material

For the web content that you want to read—but not right now—you can bookmark (and tag) the webpage to save it for later.

TOOLS: Instapaper, Pocket

KEYWORDS: Kindle, online reading, e-books, online books, e-reader

Delete extraneous files

You can use automation to read files and check for conditions such as the date you last opened the file, a download date outside a specific field, or a duplicate file. Any files that don’t meet these conditions are automatically deleted.

TOOLS: Power Automate, Python, shell scripts

KEYWORDS: scripting, low-code

Manage digital folders

The Mac tool Hazel maintains the order of the files and folders in your computer, using simple conditions to sort and organize data for easy retrieval. For example, the sample condition might be, “If the file name contains ‘invoice,’ make it green and save a copy in the Finance folder.”

TOOLS: AutoIT, Hazel (Noodlesoft)

KEYWORDS: folder management, file management

Manage passwords

Products like 1Password, LastPass, and RoboForm ensure you don't have to remember different passwords for all of your accounts by autofilling your login info.

TOOLS: 1Password, LastPass, RoboForm

KEYWORDS: password management, password security

Improve your writing

Automated typing assistants can review any kind of written material for spelling, grammar, punctuation, clarity, engagement, and delivery errors.

TOOLS: Grammarly

KEYWORDS: grammar, self-improvement, typing assistant, spelling

Take a break

Francesco Cirillo invented a time-management method that he calls the "Pomodoro Technique" on account of his tomato-shaped kitchen timer. He recommends working for 25-minute stints followed by 2-to-5-minute breaks (francescocirillo.com). Similarly, some health experts recommend we sit for 20 minutes, stand for 8 minutes, and then move around for 2 minutes.

TOOLS: Eye Rest Reminder, Focus To-Do, Pomofocus.io, Stretchly, Take a Break, Work & Rest, Work Break

KEYWORDS: break reminder apps, screen time

Communication: Incoming***Auto-reply to text messages***

Send auto-responses to messages to confirm receipt until you're ready to respond.

TOOLS: SMS auto-reply apps for Android, iOS feature

KEYWORDS: SMS, text messaging, SMS marketing, auto-reply

Auto-reply to Messenger notes

It's possible to program automatic responses to specific messages, such as answers to common questions (such as location or contact information), greetings to a person's initial contact, and requests for feedback.

TOOLS: Meta Creator Studio, WhatsApp

KEYWORDS: Facebook Messenger, direct messaging, online messaging, chat management

Auto-save attachments

You can automatically save all the attachments from incoming email into a designated folder or document library, so you can find what you need, when you need it.

TOOLS: IFTTT, Microsoft Power Automate, Zapier

KEYWORDS: auto-save, email attachments

Group and sort emails, senders, and incoming messages

Use automation to quickly group similar emails together (such as emails larger than a certain file size), emails older than one year, and more. You can also have a filter separate the emails sent by real people from those sent by automated systems, and set up filters in your email program to automatically sort incoming messages before they even arrive in your inbox.

TOOLS: Clean Email, Gmail, Apple Mail, Outlook, Thunderbird, among others

KEYWORDS: email grouping, subfoldering, email folders, email automation, inbox zero, email management, email filters

Set emails to read later

Set emails from specific senders to be sorted into a designated folder, without any notifications. You can also use “keep newest” functions to save only the latest editions of email newsletters.

TOOLS: Apple Mail, Clean Email, Gmail, Outlook

KEYWORDS: email management, time management, notifications, email sorting

Delete unwanted emails

Email platforms such as Gmail offer ways to customize your setup. For example, you can set the auto-delete filter to automatically delete old, spam, or unwanted emails from your inbox.

TOOLS: Gmail, Outlook, other email clients

KEYWORDS: inbox zero, email management, spam emails

Copy key data from emails

Use automation to recognize patterns in your emails, determine key data, and extract it into a spreadsheet. By setting up a parser mailbox and creating a custom parser template, you can determine exactly the type of data you want to extract.

TOOLS: Apple Mail, Excel, Gmail, Google Sheets, Outlook, Zapier

KEYWORDS: email parsing, email copy, data extraction

Convert emails to spreadsheets (and other formats)

Tools like Mailparser will extract and save important data from emails and completed form fields into spreadsheets or databases. From there the information is easy to process and filter, and all data will be automatically updated.

TOOLS: Front, Helpwise, LiveAgent, Mailparser, Rooftop, SMTP2GO

KEYWORDS: email tracking, email management, email export

Archive company or personal emails

Use a separate or shared email account to archive invoices, signed documents, or other important details. Simply forward emails to the account address and the information will be securely stored. Gmail's search tool also makes it easy to sift through messages and find what you're looking for.

TOOLS: Gmail, Microsoft Exchange Online Archiving, among others

KEYWORDS: email archiving, email encryption

Communication: Outgoing

Automate FAQ email replies

You can set up canned email responses (which can be customized before sending) to frequently asked questions.

TOOLS: Gmail, Apple Mail, Outlook, among others

KEYWORDS: email templates, email responses, email delivery, email automation

Get follow-up reminders

For emails that need a timely response, you can set up a follow-up reminder to "nudge" you to follow up a few days later.

TOOLS: BambooHR, Gmail

KEYWORDS: reminders, notifications, email nudge, follow-up

Schedule text messages to be sent later

You can draft text messages in advance and schedule them to be sent at a later time.

TOOLS: MessageDesk, SimpleTexting, Text-Em-All

KEYWORDS: message scheduling, messaging automation

Schedule emails to be sent later, whether one-off or recurring messages

You can draft an email in advance and schedule it to be sent at a later time. Similarly, you can create an email template—such as a reminder to complete quarterly performance reviews—and schedule it to be sent at specified intervals.

TOOLS: Gmail, Apple Mail, Outlook, among others

KEYWORDS: email scheduling, email client, email automation

Automate your bulk emails to improve open rates (and stay out of the spam folder)

Automatic checks and verifications can ensure your bulk emails reach their intended recipients instead of getting marked as spam. These workflows can also improve your email open rates, click rates, and sales conversions.

TOOLS: Clearout, Make, ZeroBounce

KEYWORDS: bulk email verification, email deliverability, mass emails

Automate email marketing campaigns

Many tools can enable you to create email lists, schedule and send campaign emails, and then track the results.

TOOLS: ActiveCampaign, Constant Contact, Drip, HubSpot, Mailchimp, MailerLite

KEYWORDS: marketing automation, newsletter automation, email marketing, campaign management, email marketing automation

Add webinar attendees to email marketing systems

You can connect webinar attendance lists to your email marketing system to automatically add new attendees to your email marketing database.

TOOLS: Automate.io, Mailchimp, Make, Zapier

KEYWORDS: webinar management, webinar automation, email marketing, email marketing automation

Alerts and Reminders

Snooze an email for your future self

When I want to revisit something on a later day, I'll write myself an email and "snooze it"—schedule it to be sent at a specific time, like the Monday after a holiday or a long weekend. That way I can focus on other things knowing it will resurface when I need it.

TOOLS: Gmail, Apple Mail, Outlook, among others

KEYWORDS: email reminders, email notification setup, reminder management

Schedule reminders/meeting alerts

You can set alerts to go off at intervals that work for you—days before, minutes before, or even at the time of the event.

TOOLS: Google Calendar, iCal, iPhone, Thunderbird, Trello

KEYWORDS: alerts, reminders

Schedule multiplatform meeting alerts

You can set up automatic meeting reminders by connecting your calendar events to chat platforms such as Slack or Microsoft Teams.

TOOLS: Google Calendar, Microsoft Teams, Slack, Zapier

KEYWORDS: automatic reminders, meeting automation, calendar management, calendar automation

Customize notifications

You can choose which notifications you want to receive. With Outlook, for example, you can create mail desktop alert rules to disable notifications for specific accounts. You can similarly customize which notifications your smartphone or operating system sends you (usually under the “notification” settings).

TOOLS: Outlook, various operating systems

KEYWORDS: notification management, alert management, alert automation

Meetings and Events***Share only your available meeting slots***

By connecting your email client to applications like Calendly or YouCanBook.Me, you can send calendar links that show only your available meeting times, no matter how often your schedule changes.

TOOLS: Calendly, YouCanBook.Me, Zapier

KEYWORDS: availability, calendar integrations, email, meetings

Find meeting rooms and times

Instead of searching for available spaces in your building or campus, enter meeting start and end times, and the attendee list.

The system will find an available room that fits every attendee's schedule.

TOOLS: Outlook (Scheduling Assistant and Room Finder)

KEYWORDS: meeting management, event management, meeting scheduling, event scheduling, meeting automation, event automation

Confirm meetings and send video links

Zapier integrations can connect videoconferencing software with email contacts and email providers. Whenever you create a new meeting, it can automatically email a video meeting link to the attendee list.

TOOLS: Gmail, Apple Mail, OnceHub, Outlook, Zapier

KEYWORDS: meeting automation, online meeting platforms, schedule management

Create meeting-specific shared documents

Every time you have a meeting on your calendar, tools like Zapier can create new communal folders, documents, or spreadsheets.

TOOLS: Dropbox integration, Google Meet/Google Drive, etc., Microsoft Teams, Zapier, Zoom In-Meeting integration

KEYWORDS: file-sharing integration, in-meeting integration

Automate meeting notes

There are a number of ways to simplify note-taking. For example, you can click "record audio" in OneNote and then type your notes in OneNote. Your notes will be linked to the audio, so you can later complete your notes with whatever text you missed. There are also voice-to-text and handwriting-to-text automation tools, as well as apps that automatically extract summaries,

keywords, word clouds, and live transcriptions. Deep-learning algorithms and natural language processing (NLP) can convert audio recordings to usable text. And a photo translator can detect and extract text from images; simply take a photo of important presentation slides and the automation will convert them into usable notes.

TOOLS: Notes Plus, Otter.ai, Python NLP, Shortcuts app on Mac, Speechnotes.co, Zapier

KEYWORDS: voice-to-text, transcription, automated note taking, note taking, meeting minutes, meeting notes, meeting automation

Manage calendar events from a spreadsheet

By connecting your calendar with spreadsheet software, you can plot out all your events in a spreadsheet, and they'll be automatically added to the calendar.

TOOLS: Excel, Google Calendar, Google Sheets, Apple Calendar, Apple Mail, Outlook, among others

KEYWORDS: calendar-spreadsheet integration, digital calendar, events, spreadsheet software

Managing People

Deepen engagement

Bots for online chat platforms such as Slack and Discord can automatically post questions and collect answers, such as asking how a meeting went and how many people attended. These bots can also run stand-up meetings, collect surveys, post updates to team channels, and more.

TOOLS: Geekbot, Integrately, Qlik Sense, Standup Alice, Zapier

KEYWORDS: cross-team collaboration, remote team management

Automate approval flows

When you need to collect information from coworkers, you can create and send a digital form that they can either sign and approve or return with a request for more information.

TOOLS: Jotform Approvals

KEYWORDS: approvals, workflows, approval workflows, business flows, business process management, approval management, business processes

Automate requests and complaints

Whenever a team member submits a request, complaint, or suggestion with an online form via a digital team workspace or internal chat platform, it automatically triggers a notification email that's routed to the appropriate person or department for follow-up.

TOOLS: Confluence, Jotform Approvals, Microsoft SharePoint, Notion, Slack, Workflow platforms

KEYWORDS: internal communication automation, workflow automation, approvals

Create a knowledge base

Automatically capture frequent questions or discussion points from a digital chat platform, like Slack, to support your customers and keep them engaged. Answer public queries and add the replies to an online team workspace.

TOOLS: Asana, Confluence, Microsoft SharePoint, Notion, Slack, Trello

KEYWORDS: communicate with customers, knowledge base, team workspace, team sites

Measure time and performance

Monitor, measure, and analyze how individuals and teams spend their time at work.

TOOLS: DeskTime, Hubstaff, Time Doctor

KEYWORDS: performance management, time management, performance tracking, performance monitoring, team management

HR Concerns***Post job descriptions to multiple sites***

You can send job descriptions to more than 100 job sites with one click.

TOOLS: Monster, ZipRecruiter

KEYWORDS: recruitment, recruitment automation

Pre-screen job candidates

Automatically rank and grade candidates to pre-qualify those who are a good fit, then move them forward in the interviewing and hiring process.

TOOLS: Ceridian, Harver

KEYWORDS: screening, candidate screening, hiring automation, hiring management

Create hiring workflows

After online job applications go through HR, they can be automatically routed to the potential manager who either approves or rejects the candidate. Next, the workflow schedules an interview and, ultimately, notifies the applicant to make a formal offer or to convey that the application was not successful.

TOOLS: Bamboo HR, Jotform Approvals, PandaDoc Proposals

KEYWORDS: HR workflows, HR processes, human resources automation, hiring workflows

Automate employee onboarding and training

You can establish a workflow that will initiate, run, and complete employee onboarding and training programs. Every time an employee starts, the automation initiates the process, assigning onboarding tasks that new hires can complete on their own time and at their own pace.

TOOLS: BambooHR, Jotform Approvals, Otter.ai, TalentLMS

KEYWORDS: employee onboarding, new hire onboarding, onboarding automation, orientation

Automate requests and complaints

Whenever a team member submits a request, complaint, or suggestion with an online form via a digital team workspace or internal chat platform, it automatically triggers a notification email that's routed to the appropriate person or department for follow-up.

TOOLS: Confluence, Jotform Approvals, Microsoft SharePoint, Notion, Slack, Workflow platforms

KEYWORDS: internal communication automation, workflow automation, approvals

Money and Finances (Personal and Business)

Autopay/auto-refill repeating bills, charges, or purchases

Many recurring personal or company charges can be paid automatically; check out what “autopay” options are offered by your credit cards, insurance, subscriptions, utilities—even rent

payments. Similarly, you can set up “auto refill” for various sundries you need regularly, including medications.

TOOLS: payment portals of various vendors; online payment options via your financial institution; online payment providers such as PayPal, Venmo, Zelle, etc.

KEYWORDS: autopay, auto-refill, bills management, purchasing automation, billing automation, finance workflows, accounting workflows

Managing employee travel and expenses

These solutions can reduce the hassles related to employee travel: from booking flights and lodging to employees submitting their expenses to completing the reimbursement process. According to TravelPerk, “a comprehensive travel and expense management solution helps both the travel manager and the finance manager create more cost-effective travel programs.”

TOOLS: ITILITE, Rydoo, TravelPerk, Zoho Expense, among others

KEYWORDS: travel and expense management

Automate finances

Accounting software products like QuickBooks, Xero, and FreshBooks automate processes such as bill paying, invoicing, expense categorization, and expense reconciliation.

TOOLS: FreshBooks, QuickBooks, Xero

KEYWORDS: accounting software

Automate payroll

Some payroll automation solutions include calculating employee bonuses and allowances, prepping compensation at set intervals,

scheduling bank payments, distributing statements, and gathering signed receipts—as well as integrating payroll and accounting platforms and automating state and federal tax filing.

TOOLS: ADP, BambooHR, Gusto, and many others

KEYWORDS: payroll automation, online payroll software solutions

Content Development and Information Management

Consolidate data

Gather data through an online form and connect form submissions to a spreadsheet or database. Set organization rules to arrange information alphabetically, by date, and more.

TOOLS: Airtable, Google Sheets, Jotform, Zapier

KEYWORDS: data automation, data consolidation, data sorting, data management

Aggregate survey results

Use online surveys to gather feedback from customers and clients and then create aggregated, automatic reports. No more combing through the data!

TOOLS: Jotform, Zendesk

KEYWORDS: surveys, online forms, survey management, survey automation, feedback automation, surveying

Get Google search trends in a spreadsheet

Automatically receive daily Google Trends—Google’s search trends feature—in a spreadsheet ready to be analyzed for search and search engine optimization (SEO) trends.

TOOLS: Axiom AI, Google Trends, Zapier

KEYWORDS: Google Trends, keyword analysis, search engine optimization, SERP analysis

Catch variations in contracts

Analyze contracts—including third-party nondisclosure agreements—against a database of World Commerce & Contracting Principles to pinpoint variations of legal clauses.

TOOLS: ThoughtRiver

KEYWORDS: document management, document automation

Prepopulate form fields

Automatically prepopulate the fields of forms you send out to increase completion rates and reduce human error.

TOOLS: Jotform Prefill, RoboForm

KEYWORDS: form automation, prefilled online forms, online form automation

Personalize gifts and badges

Automatically connect personalization data, such as names and positions, with an on-demand print company to create branded gifts and welcome materials—no manual work needed.

TOOLS: Excel, Giftbit, Google Sheets, Zapier + Pwinty, Zazzle

KEYWORDS: employee onboarding, welcome kit, workplace management, customized products

Manage multiplatform content

A headless content management system (CMS) stores and distributes content from a single platform. Updates are automatically

extended to multiple devices, and content is provided as data over an API (application programming interface) rather than remaining fixed to a specific output, such as a webpage rendering.

TOOLS: Ghost, Strapi

KEYWORDS: content management, content automation, content management systems, content marketing, headless CMS

Export new subscribers to a spreadsheet

With email marketing and automation tools, new subscribers can be automatically added to a spreadsheet to populate your own records and databases.

TOOLS: Excel, Google Sheets, Mailchimp, Make

KEYWORDS: spreadsheets, data exporting, subscription automation, email marketing

Generate content with AI

The autoregressive language models in easy-to-use AI tools use deep learning to produce text that sounds like it was written by a real person. You can use the automatically generated text as a first draft, saving your time for research, keyword analysis, and edits. Produce more content in less time, with no writer's block.

TOOLS: Copysmith, Jasper.ai, OpenAI GPT-3, ChatGPT

KEYWORDS: open AI, AI content generation, copywriting

Manage document approvals

Build a custom-document and file-approval workflow to streamline how documents are routed, tracked, and saved. With tools like Jotform Approvals, you can create a workflow

that's triggered by a single action and continues on with no manual input.

TOOLS: Google Docs, Integrify, Jotform Approvals

KEYWORDS: workflow automation, digital approvals, document management

Ensure General Data Protection Regulation (GDPR) compliance

To comply with the GDPR framework you can use automation to find and delete unsubscribed users across multiple systems by setting up a custom automation with webhooks.

TOOLS: SQL, Zapier

KEYWORDS: GDPR, user data deleting, privacy, compliance

Create custom integrations

Software engineers can use automation to create custom integrations for each client, at scale. For example, use Zapier to add new GitHub issues to Pivotal Tracker as new stories, create Trello cards from GitHub pull requests, copy JIRA issues into GitHub, invoke AWS Lambda functions with new webhooks, and more.

TOOLS: IFTTT, Make, n8n, Zapier

KEYWORDS: workflow automation, workflow automation tool, workflow integrations multilevel workflows

Resize and optimize images

Instead of adjusting images one by one, automation tools can resize or optimize images in batches.

TOOLS: Batch Resize, Birme, BulkResize

KEYWORDS: resize images, resize tool, bulk image resizer

Online Presence

Schedule social media posts

Create multiplatform social media posts in batches, then use a scheduling tool to publish them at specific or recurring dates and times.

TOOLS: Hootsuite, Sprout Social, TweetDeck

KEYWORDS: Twitter automation, tweet automation, social media management, social media marketing, influencer marketing, tweet scheduling, Twitter management, Instagram marketing

Write blog posts

Smart automation tools can automatically convert audio files into written text ready to be used to create blog posts, video transcripts, and other digital materials.

TOOLS: Otter.ai, Python

KEYWORDS: content creation, content automation, voice-to-text

Schedule publication of blog posts

You can schedule your blog posts to be published to your website at specific dates and times.

TOOLS: Airtable, Hootsuite, WordPress

KEYWORDS: social media posting, social media publishing, social media management, social scheduling, social media planning

Shorten URLs

Shorten URLs in bulk and create hundreds of UTM links—the code snippets attached to the end of a URL—from a spreadsheet.

You can also create branded shortened URLs with a custom domain.

TOOLS: Bitly, Excel, Google Sheets

KEYWORDS: link shortening, bit.ly, URL management

Automate website conversations

Use chat tools and smart conversational platforms to engage with people who visit your website. Provide on-demand information, book meetings, transfer chats to a live agent, create support tickets, share forms in the chat, and more.

TOOLS: Crisp, Drift, Freshchat, HubSpot, Intercom, User, Zendesk Chat

KEYWORDS: chatbots, live chat, customer support, online chat, customer relationship management, ticket management, support systems

Monitor Twitter content

You can use automations to find any Twitter content that contains particular keywords, even if they don't include hashtags or @mentions. With this knowledge you can get to know your target market, track competitors, watch industry trends, and more, so you can better understand audience needs and interests.

TOOLS: Audiense, F5, Python, Visualping

KEYWORDS: social media management, twitter management, social media monitoring, social listening

Monitor Twitter DMs

You can track Twitter direct messages to learn who's following a Twitter account, what they like about the content, and how they discovered the account.

TOOLS: Crowdfire, SocialOomph, Twitter API

KEYWORDS: social media management, Twitter automation, social listening

Track brand mentions

You can set up automations to keep you apprised of mentions and comments about specific topics or brands—including on which social media platforms or websites these mentions occur—in order to follow social conversations, collect feedback, and watch for trends.

TOOLS: Make, Mediatoolkit, Mention

KEYWORDS: competitor tracking, market research automation, price tracking, Twitter monitoring, media monitoring, social listening

Receive content alerts

You can painlessly monitor the web by setting Google Alerts to inform you of specific content, such as an author's latest release, or breaking news on topics important to you.

TOOLS: Ahrefs, BuzzSumo, Semrush, Google Alerts

KEYWORDS: content research, market research, competitor analysis, competitor tracking automation, Google Alerts

Monitor website changes

Similarly, you can set parameters in order to track price changes, status changes, or version changes on any website; you'll then receive an email alert when the automation detects a change.

TOOLS: ChangeTower, Distill, Visualping

KEYWORDS: competitor tracking, website tracking, website monitoring

Get automated reports

Smart reporting tools enable you to create and share organizational reports at specific time intervals using continually updated data.

TOOLS: datapine, Jotform Report Builder

KEYWORDS: reports automation

Generate live dashboards

Create simple, visual dashboards and determine the metrics you want to see on a daily, weekly, monthly, quarterly, or annual basis.

TOOLS: datapine, Jotform Report Builder

KEYWORDS: live dashboards

Get Google search trends in a spreadsheet

Automatically receive daily Google Trends—Google’s search trends feature—in a spreadsheet ready to be analyzed for search and SEO trends.

TOOLS: Axiom AI, Google Trends, Zapier

KEYWORDS: Google Trends, keyword analysis, search engine optimization, SERP analysis

Import Google Analytics

You can set up Google Analytics reports to be automatically imported to spreadsheets—filtered to eliminate the data, graphics, and metrics you don’t care about.

TOOLS: Google Analytics, Make

KEYWORDS: Google Analytics, web analytics, website visitor tracking

Sales and Marketing

Automate sales and marketing routines

The functionality within AI assistance is remarkable. For example, as I'm writing, the Zia app can analyze sales patterns to recommend products or services to cross-sell to customers; suggest the best time to contact each client (based on their activity); and notify you of sudden changes in the market. It will even identify patterns in your own activity and suggest ways to automate your routine processes. There are many AI options available, so be sure to research which would be best for you.

TOOLS: Zia Intelligence, Zoho

KEYWORDS: sales AI assistant, Zoho Zia alternatives/
comparison

Enrich sales leads

Pull quantitative and qualitative data—such as when a prospect notes a job or title change, engages with your content, or shares a personal story that relates to your products and services—from LinkedIn based on keyword searches.

TOOLS: Clearbit, Demandbase, HubSpot

KEYWORDS: lead enrichment, lead management, demand generation, sales automation, account-based marketing

Update and organize your CRM

Notify business development managers in realtime when a potential lead comes in, and automatically email leads when they meet certain criteria. Create and update contacts from CRM systems including HubSpot and Salesforce.

TOOLS: Pipedrive, Zapier

KEYWORDS: CRM management, sales funnel automation,
CRM automation

Track and manage leads

Stay on top of your sales funnel, manage accounts, track performance, and automate follow-ups with CRM tools.

TOOLS: Salesforce, Zoho

KEYWORDS: lead management, nurturing, lead tracking

Automate competitive analysis

You can monitor your competitors' social media channels (or platforms of interest) by industry, product, or keyword. If any of these terms are mentioned in social media platform comments, you'll automatically receive a notification.

TOOLS: Brandwatch, BuzzSumo, Google Alerts, Rival IQ, ThinkAutomation

KEYWORDS: competitive analysis, social media management, social media trends

Get automated reports

Smart reporting tools enable you to create and share organizational reports at specific time intervals using continually updated data.

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KEYWORDS: reports automation

Generate live dashboards

Create simple, visual dashboards and determine the metrics you want to see on a daily, weekly, monthly, quarterly, or annual basis.

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KEYWORDS: live dashboards

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TOOLS: Axiom AI, Google Trends, Zapier

KEYWORDS: Google Trends, keyword analysis, search engine optimization, SERP analysis

Transfer sales data to a spreadsheet

Automatically import sales data from Shopify, Squarespace, or other sales platforms to a spreadsheet, then generate reports.

TOOLS: Airtable, HubSpot, Make, Parabola, Zapier

KEYWORDS: sales management, e-commerce automation, e-commerce systems

Implement chat marketing

Use no-code automation tools like Landbot to add a customer service chatbot to your website or other digital channels, like WhatsApp. Connect with potential customers, collect lead information quickly, and provide service that can translate into sales.

TOOLS: Chatfuel, Landbot.io, Manychat, MobileMonkey

KEYWORDS: chat marketing, live chat, chatbot, customer support

Automate sales demonstrations

Record visual sales and product demos that you can share directly with potential customers and leads.

TOOLS: Loom, Zoom

KEYWORDS: sales demos, sales pitch, sales pitch automation, sales demo automation, product demonstrations

Create a flexible catalog

Develop a digital repository of frequently cited products and services that you can access to automatically generate proposals and quotes.

TOOLS: Google Docs, Notion, MS Word, PandaDoc (Catalog)

KEYWORDS: product catalog, document automation

Add Shopify products from a spreadsheet

Every time you add a new product (row) to a spreadsheet, it will automatically be added to Shopify, where it's ready for customers to purchase. This also works for bulk product additions.

TOOLS: Excel, Make, Shopify

KEYWORDS: catalog management, e-commerce automation, product listing

Scan barcodes to Google Sheets

Barcode scanner automation tools can connect, filter, and automate data between check-in and check-out sheets to update inventory spreadsheets.

TOOLS: Sheetgo, Smartsheet

KEYWORDS: barcode scanner, barcode automation

Order Fulfillment/Customer Service**Automate purchase orders**

Digitize and automate the purchase order (PO) process to reduce bottlenecks, increase speed, and minimize errors.

TOOLS: frevvo, Kissflow, Zoho Books

KEYWORDS: PO management, PO workflow, purchase order processing

Automate notifications

Enrich and schedule mobile push notifications to smartphone customers with images, buttons, video, and more.

TOOLS: OneSignal, WonderPush

KEYWORDS: mobile push notifications

Track deliveries

Tools like the Google Maps API and LogiNext can give you and your customers mobile geolocation services. The automation tracks the order and provides real-time dispatch and delivery notifications.

TOOLS: Google Maps API, LogiNext, Python

KEYWORDS: Delivery, dispatch, tracking, geolocation, logistics, mobile, field service management

Enhance customer support

Use artificial intelligence (AI) to create and continually enhance customer support ticket responses. AI can learn from past tickets to automatically suggest fields for new tickets—providing more consistent responses and decreasing manual workloads.

TOOLS: Freshdesk, Intercom, Zendesk, Zoho Desk

KEYWORDS: customer support, ticketing system, online support, support team

Route customer support tickets

With automated customer support tools, you can assign tickets to the right agent or employee based on individual skills and workloads, or distribute them equally among the whole support team.

TOOLS: Freshdesk, Microsoft Teams, Slack, Zendesk, Zoho Desk

KEYWORDS: customer support, support ticket system, support management, task management

Automate customer support with chatbots

With no-code chatbot technology you can automate predictable, routine conversations and quickly answer frequently asked questions.

TOOLS: ChatBot, Jotform Support

KEYWORDS: chatbots, AI, live chat, conversational AI, virtual agent

Automate WhatsApp messages

Automate WhatsApp communication to answer questions and send shipping alerts, new product information, promotional messages, appointment reminders, and more.

TOOLS: ChatBot, Python, Respond.io, WhatsApp click to chat

KEYWORDS: WhatsApp, messaging automation

Miscellaneous Management and Automation

Automate supply deliveries

Use an automation solution to select and order the office supplies you need. Monitor inventory with real-time data to avoid under- or overstocking and use auto-replenishment to ensure you never run out of essential items.

TOOLS: Amazon Echo, Google Assistant, WorkFridge

KEYWORDS: office supply management, event management, auto-replenishment, ordering

Back up data

Once you configure the systems and data that require backup, data and applications can be automatically copied, transferred over the network, and stored on a backup device or in the cloud.

TOOLS: Carbonite, Redstor, Veeam, among others

KEYWORDS: system backup, system restore, automated backup

Automate system controls

Ensure public-facing technical systems are working properly, without any critical bugs. Monitor multiple systems and receive notifications if services, tools, applications, or application performance interfaces (APIs) are down, running slow, or encountering issues.

TOOLS: Freshping, Pingdom, WebGazer

KEYWORDS: website monitoring, system performance monitoring

Test software

Developers can repeatedly run and edit automated tests of web, mobile, or desktop applications as they complete the development process.

TOOLS: PractiTest, SmartBear TestComplete, TestRail

KEYWORDS: test automation, development testing

Create a workflow with customizable scripts

Make the same changes to multiple files—such as changing filenames, adding dates, or resizing images—by creating a custom, no-code workflow.

TOOLS: AutoHotkey, Mac Automator

KEYWORDS: automation with scripting, integration connection

Connect automations

Drag and drop the apps you want to connect and share content (such as social media posts) across multiple platforms. For example, an integration automation product like Zapier can take seemingly unconnected tools, select an action from one of those tools, and then use it to trigger an action on another tool. As a result, you can connect two disparate tools to produce a desired automation—and use two products as one.

TOOLS: Make, Zapier

KEYWORDS: apps automation, automation integration

Monitor your automations

You can set up an automation tool such as Dead Man's Snitch to monitor your automations. Systems (including workflows) run on simple scripts called “cron jobs,” which can occasionally hit a glitch. When a program runs successfully, it lets Dead Man's Snitch know. But if no notification is sent, Dead Man's Snitch notes the absence, and lets users know that something is awry.

TOOLS: Dead Man's Snitch

KEYWORDS: automation monitoring

About the Author

AYTEKIN TANK is a founder, productivity expert, and automation enthusiast. His entrepreneurial passion and firm belief in creating tools to make organizations more productive led him to build Jotform, a bootstrapped global SaaS company providing powerful online forms to tens of millions of users, where he's served as the CEO since 2006. Aytekin frequently contributes to *Fast Company* and *Entrepreneur*, providing insights on leadership, productivity, and using SaaS technology within workflows.

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