

Automation Finder Worksheet

The trick to identifying processes that can be automated is to look for repetition. Anything that happens more than once or that you do for more than one person can often be automated. One example might be sending intake documents to patients, which could be done automatically after the patient applies using an online application, rather than sending them individually each time via email.

REPEATED TASKS

Make a list of any actions/tasks that you repeat regularly. These could be anything from writing a check for the rent to packing a bag for a trip. Not all of them can be automated. But many, if not automated, could be delegated, or at the least, turned into a system or checklist to make them easier and faster in the future.

Repeated Tasks	Ideas
	<ul style="list-style-type: none"> ▪ Paying monthly bills ▪ Filtering your inbox ▪ Checking voice messages daily ▪ Ordering office supplies online ▪ Delegating customer support issues ▪ Scheduling meetings ▪ Posting to social media ▪ Backing up files

RESOURCE

IFTT.com (“If This Then That”) is a unique piece of technology that can connect various online services and computer software programs that you may use regularly to streamline and automate common, repetitive tasks. For example, you could set up what they call a “recipe” to automatically send your Google alerts into Evernote and tag them for future reading.