Elevate Efficiency with **Automation**

AI Powered Workflows

YourAcademy
.AI

Questions to prompt systems thinking

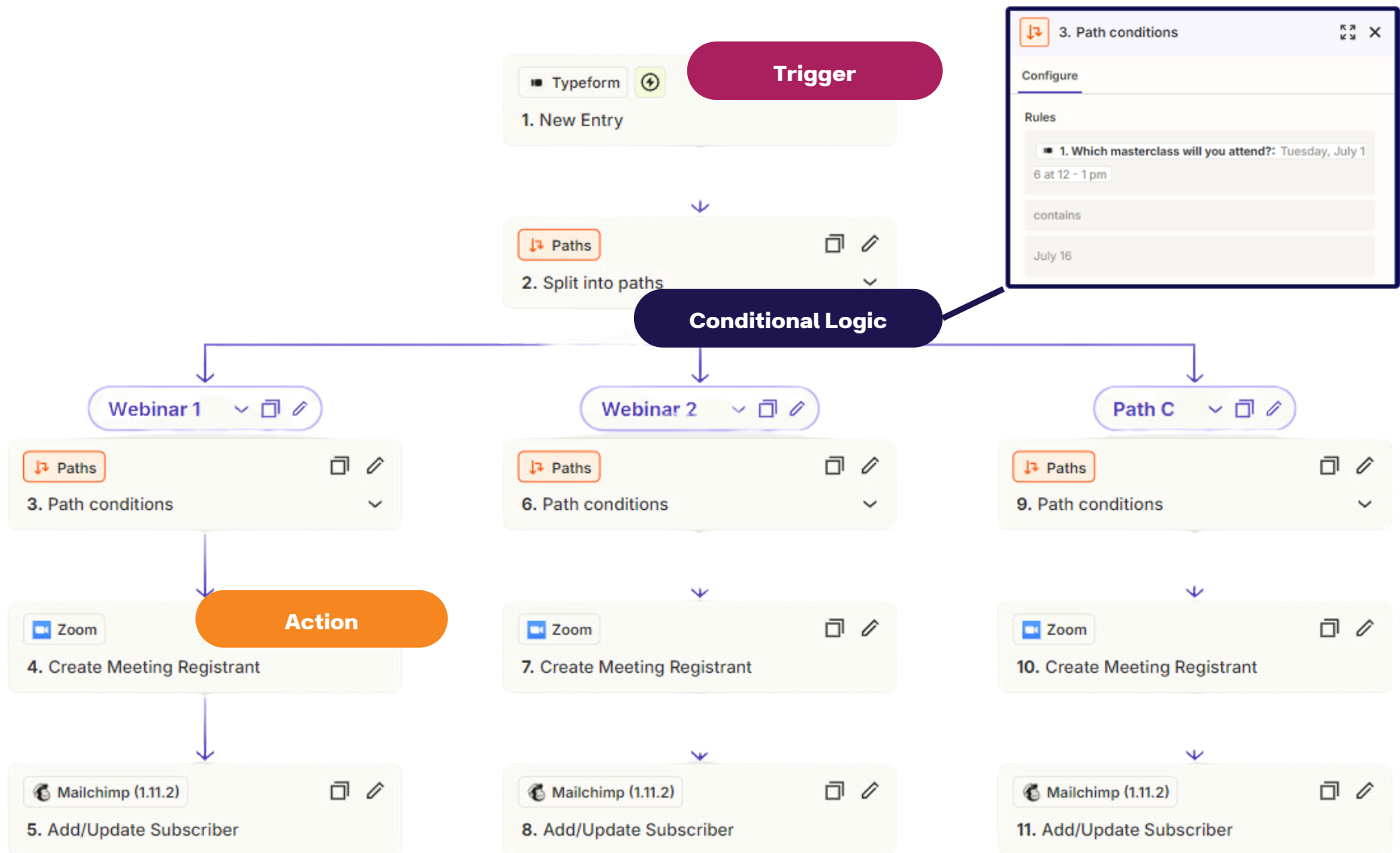| Question	Response
How does this decision affect other parts of the organization?	
Are there any unintended consequences?	
What relationships and patterns exist that I might not see right away?	

In the Chat

What **automations** are you already using in your work?

Automation	Purpose	Tools Used

Key Terms
Consider these elements

Workflow

Trigger

Typeform ⊕
1. New Entry

3. Path conditions ⤢ ✕

Configure

Rules

⬚ 1. Which masterclass will you attend?: Tuesday, July 16 at 12 - 1 pm

contains

July 16

↳ Paths 🗐 ✎
2. Split into paths ⌄

Conditional Logic

Webinar 1 ⌄ 🗐 ✎	Webinar 2 ⌄ 🗐 ✎	Path C ⌄ 🗐 ✎
↳ Paths 🗐 ✎	↳ Paths 🗐 ✎	↳ Paths 🗐 ✎
3. Path conditions ⌄	**6. Path conditions** ⌄	**9. Path conditions** ⌄

Action

📹 Zoom	📹 Zoom 🗐 ✎	📹 Zoom 🗐 ✎
4. Create Meeting Registrant	**7. Create Meeting Registrant**	**10. Create Meeting Registrant**
🐵 Mailchimp (1.11.2) 🗐 ✎	🐵 Mailchimp (1.11.2) 🗐 ✎	🐵 Mailchimp (1.11.2) 🗐 ✎
5. Add/Update Subscriber	**8. Add/Update Subscriber**	**11. Add/Update Subscriber**

Key Terms

Consider these elements

Trigger	A trigger is like a start button that sets off a chain of events.	• Receiving an email • Adding a new row to a Google Sheet
Action	An action what happens after the trigger is set off, its the task that follow	• Automatically sending a reply • Creating content based on the new Google Sheet row
Workflow	Automations consist of workflows—sequences of steps from trigger to action. These workflows can be simple (one trigger, one action) or complex (multiple steps and conditions).	• Lead generation from a downloadable PDF on a landing page
Conditional Logic	You can introduce if-then statements to make workflows operate with increased specificity and efficiency. You can include several branches of logic to support more complex workflows.	• If a customer inquiry is received after business hours, then send a 'we'll get back to you' message.

Tools and Tech

No code / low code options

What to look for

- Visual interfaces
- What you see is what you get (WYZIWYG)
- Drag-and-drop features
- App integrations

ZAPIER
App connector

MAKE
Flexible, visual automation

SLACK
Workflow automations

AIRTABLE
Trigger-action workflows

What tool(s) might you try?

Creating an Automation

Step by step

STEP 1	STEP 2	STEP 3	STEP 4
Identify the task to automate	Choose your tools	Define triggers and actions	Visualize the workflow

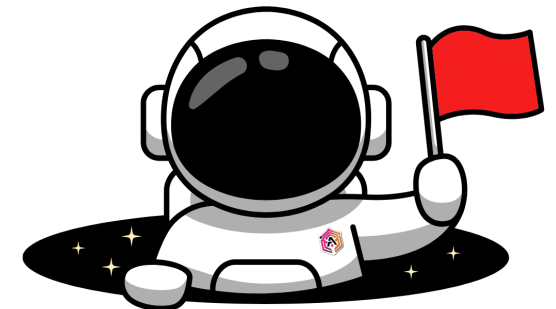# Common Pitfalls

Avoid these traps

- **Failing to Plan**
- **Overcomplicating the Workflow**
- **Choosing the Wrong Trigger**

Your turn to try and apply.

35 Minute Activity

Instructions

Design an automation mockup

You'll be assigned a "table" on the Miro board. With your tablemates, select a task you'd like to automate.

Leveraging low fidelity (LoFi) tools, such as Miro or Slides, mockup the workflow, triggers and actions, and conditional logic required to run your desired automation.
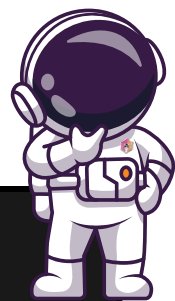
Consider and document potential impacts to the wider system / work environment.

Mockup Your Automation

Sketch your workflow below or use a low fidelity tool (e.g., Miro, Google Slides, or MS Powerpoint).

Experiment **Reflection**

Step	Response
What automation did you design?	
How do you feel about the result you achieved?	
What potential system impacts are you predicting, should your solution be implemented?	
Anything else you want to discuss about the experience?	