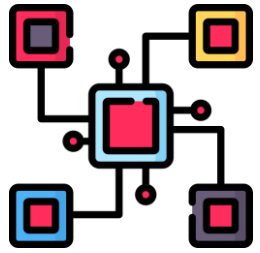




# K2's Automation For Increasing Personal Efficiency And Effectiveness



# Learning Objectives

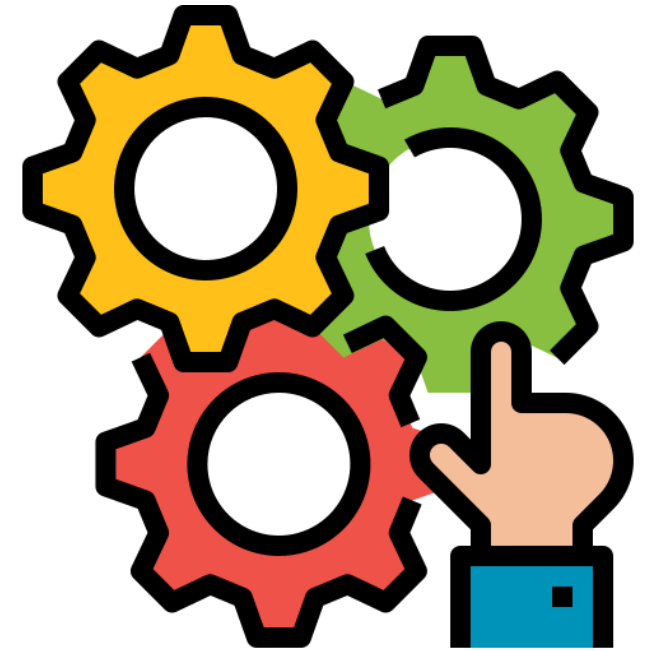


- Define automation and demonstrate different use cases
- Identify processes in your personal and professional life where you can use automation to save time
- Distinguish between various automation platforms
- Identify the steps necessary to establish an account with an integration-as-a-platform-service (iPaaS) provider and create automation workflows for daily tasks such as email, calendaring, and document management
- Leverage the power of the Elgato Stream Deck for the simple use of application hotkeys and launch an automation process with the touch of a button

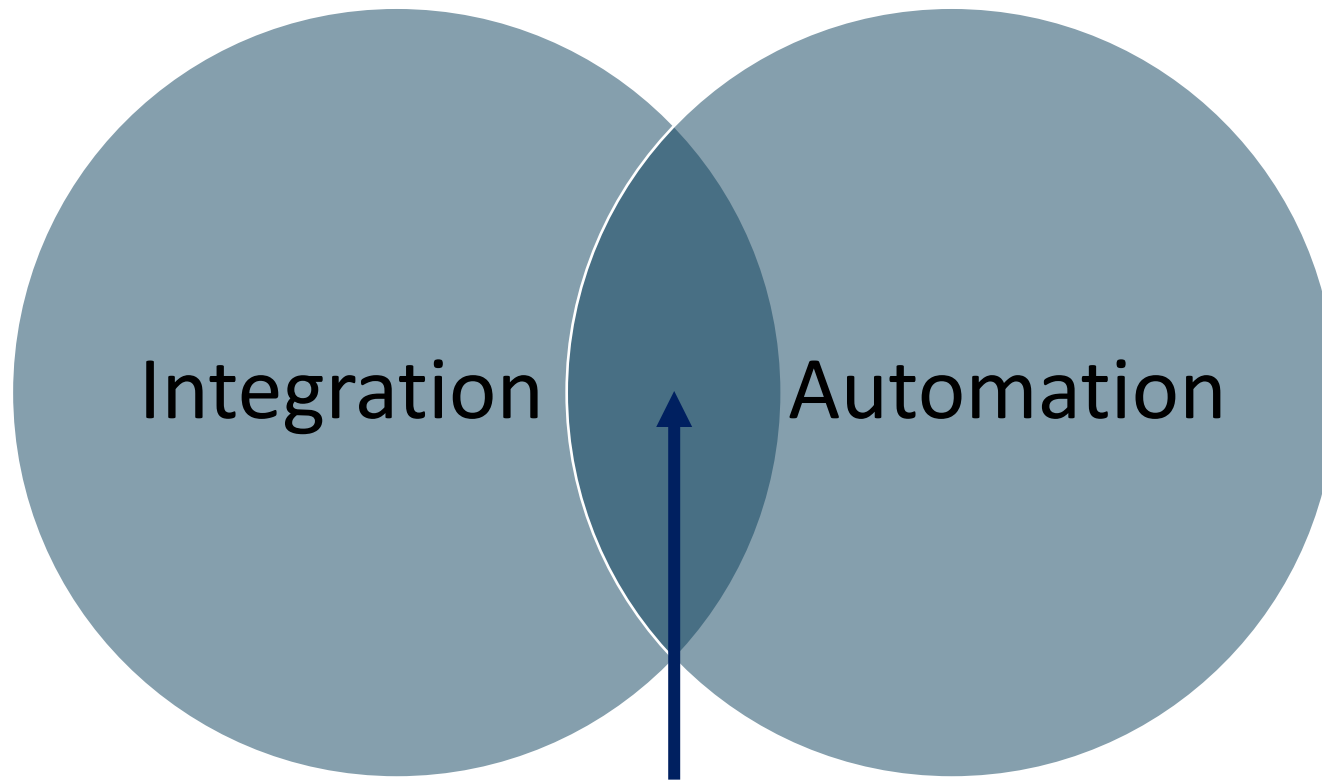
# Today's Topics And Agenda



- What are integration and automation?
- Exploring Integration Platform as a Service (iPaaS) tools and services
- Automation within tools you're already using today
- Using the Elgato Stream Deck for push-button automation and integration
- Intelligent virtual assistants (IVAs) for automation around the house.
- Techniques for improving time management



# Relationship Between Integration And Automation



**Let's explore this space. Where integration and automation come together.**

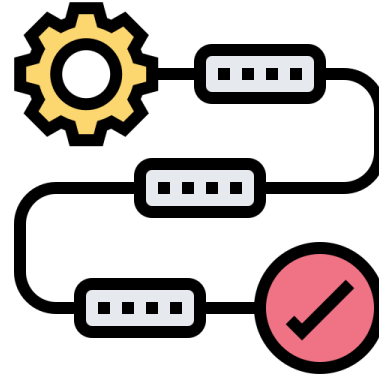
- We're going to explore topics that intersect integration and automation.
- We will hopefully give you the skills to simplify data sharing.
- We will discuss the various tools that can perform work on your behalf.
- Hopefully, you will learn new apps, services, techniques, and more to help you save time and effort.

# Disclaimer & Liability Acknowledgment



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The core foundation of efficiency and effectiveness

# **INTEGRATION AND AUTOMATION**

# What Is Integration?



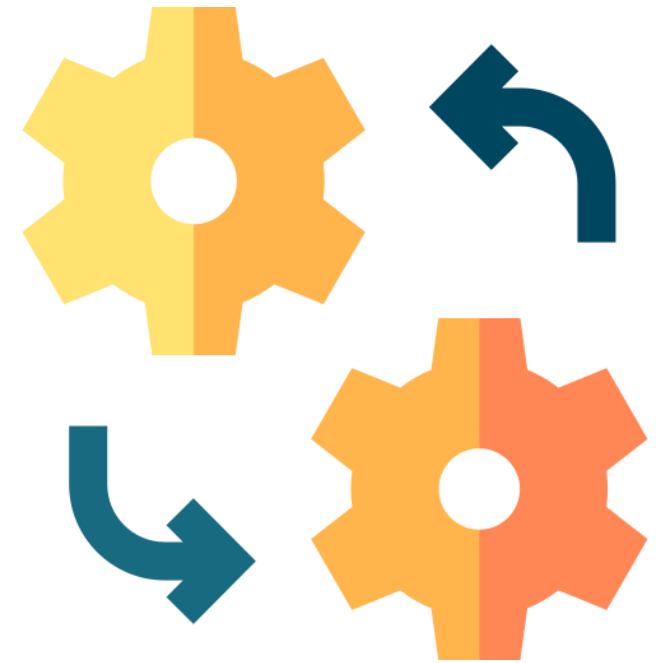
- Integration allows data/information to be easily shared between systems without human intervention.
- The integration process is usually automated and occurs on an “events basis” (e.g., issuing an invoice, creating a customer record) or on a “scheduled basis” (e.g., once an hour, once a week, etc.).
- Generally, integration programming follows the same workflow procedures as if a human operator had done the work themselves. It’s about moving data between systems.



# What Is Automation?



- In business, automation is focused on the performance of a task without the need for human labor.
- Humans design automation procedures, but the work is performed between systems. Once initiated, it will continuously run on its own until intervention is required.
- An example of simple automation would be the thermostat in your home or fridge. It will maintain the temperature once set.
- A complex automation would be your car's traction control system that automatically adjusts based on multiple real-world conditions.





# Why Are Integration And Automation Important And Useful?



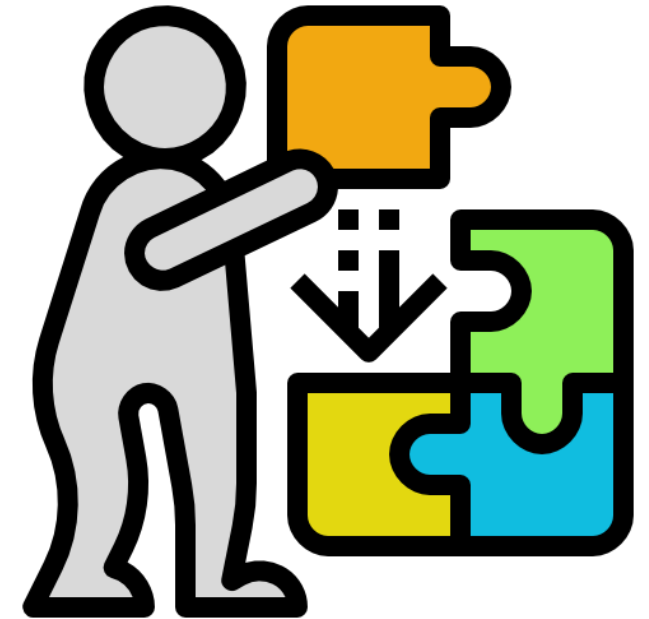
- **Cost Savings.** Integration between systems helps reduce cost in the long run as it reduces manual effort.
- **Error Reduction.** The integration will automate your data workflow. It will do exactly what you tell it to do every time.
- **Scalability & Efficiency.** Data sharing will help your organization scale faster and automate low-value tasks.
- **Standardization.** Integrating the various systems across your organization will encourage you to streamline and standardize your operations/data.
- **Security.** Automation is excellent at keeping information private as humans aren't generally involved.



# Opportunities For Personal Integration



- Using Outlook rules to categorize, label, and organize your email Inbox.
- Using Alexa to turn off the lights in your home at the end of the day as you get in bed.
- Using Amazon or HP to order replacement toner/paper for your printer when running low.
- Using Microsoft Power Automate to automatically process changes from your accounting system to your various other company systems.
- Using a Stream Deck to launch your favorite applications at the push of a button.
- **Any frequently done task is a great candidate for automation and integration.**



# When Should You Not Integrate And Automate Your Data



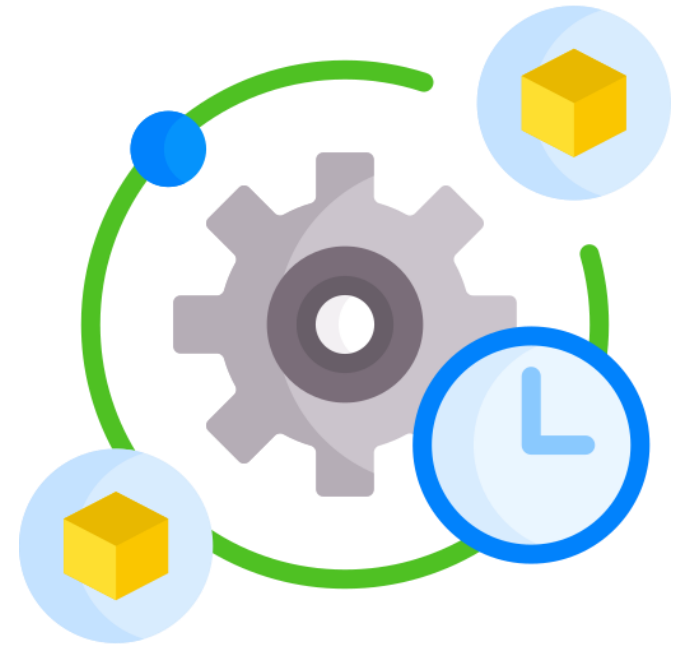
Generally, integration between systems is considered a good thing. However, there are some exceptions. Some things to consider:

- **Highly Manual & Complex.** Transactions that are highly varied and require substantial human review. For example, evaluating artwork or listening to audio.
- **Not Standard.** When the data format isn't consistent and can't be standardized.
- **Some Systems Don't Support Integration.** Some older and legacy systems don't have the necessary components to allow data to be systematically imported or exported.
- **Changing Requirements.** Generally, you don't want to start integrating data until all the requirements are established and agreed to.
- **Upfront Costs.** Integration projects can have a higher up-front cost. Generally, these costs are one-time and fixed. However, the price can be cost-prohibitive for some projects.

# Features Of Good Integration



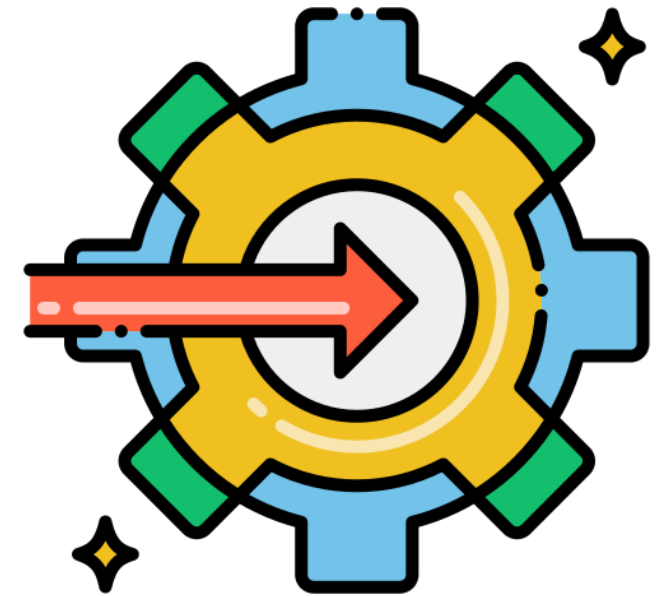
- **Scalability in the Future.** Can it grow with your organization?
- **Complete Traceability.** Can you trace a transaction from start to finish? Can you see where the data is going?
- **Failure Recovery.** Are there safeguards to ensure the system can recover and data isn't lost?
- **System Upgrades.** Can you change systems inside your organization without causing significant disruption? For example, changing accounting systems.
- **Change in Business Process.** Can your integration change as your organization changes? Is it flexible enough to deal with minor changes to the data without requiring significant alterations?
- Learn more about the features of good integration at <http://bit.ly/2IRxUnB>



# What To Look For When Integrating



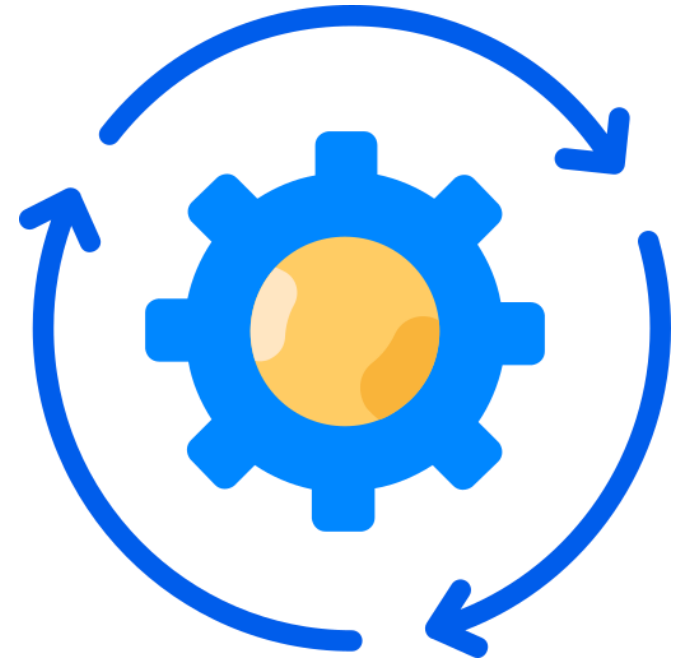
- **Repetitive.** Tasks that are done a lot or in high frequency.
- **Simple.** Tasks that are clearly defined and standardized.
- **Timely.** A task that needs to be done on a schedule where timeliness matters.
- **Prone to Error.** Tasks are usually prone to clerical or human errors.
- **Security.** Tasks involving sensitive data that would not be suitable for humans to be involved (e.g., storing a password, charging a credit card, etc.)
- **Stored in a System.** Tasks that are already contained inside a system and a database.
- The 25 things every business should automate.  
<http://bit.ly/2w7dT9M>





# Discover Your Repetitive Tasks

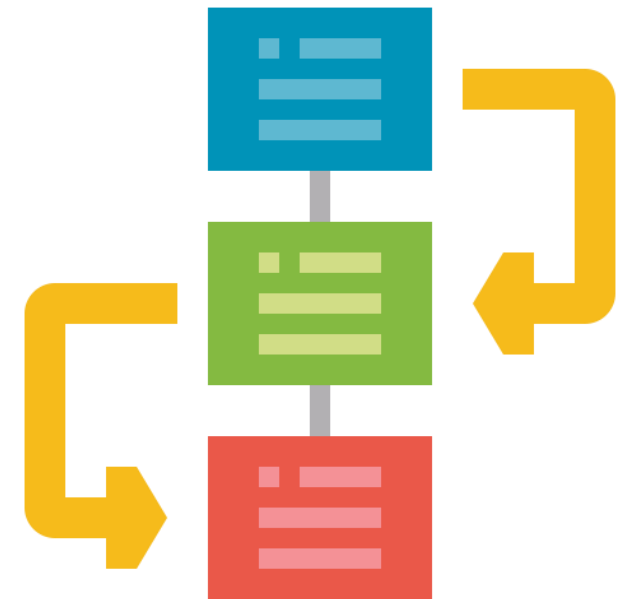
- Make a list of daily, weekly, and monthly tasks
- Determine how many times each task is completed per day
- Are those tasks completed the same way every time?
- What are the requirements of tasks?
  - What do they require to be completed?
- Who is responsible for completing that task?





# Evaluate Your Repetitive Tasks

- Determine what would be gained by automating the task
- Will automation reduce errors?
- Will automation save time?
- Will it allow a workflow to be tracked more easily?
- Will a human double-check still be required?
- Analyzing why you want to automate a task helps you find the right tool to automate the task with

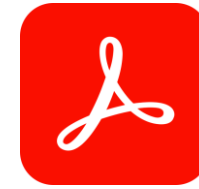


# Getting Started With Integration And Automation For Personal Work



There are several tools and services which you can start using. From the novice to the expert, there is a toolset for you.

- **Integration Platforms.** IFTTT, Zapier, and Power Automate, n8n, Zoho Flow
- **Desktop Tools.** Excel, Word, Outlook, Adobe Acrobat DC, Calendly, Liscio, and more
- **Intelligent Virtual Assistants.** Amazon Alexa, Google Home, Microsoft Cortana, and Apple Siri



Power Automate







Integration Platform as a Service

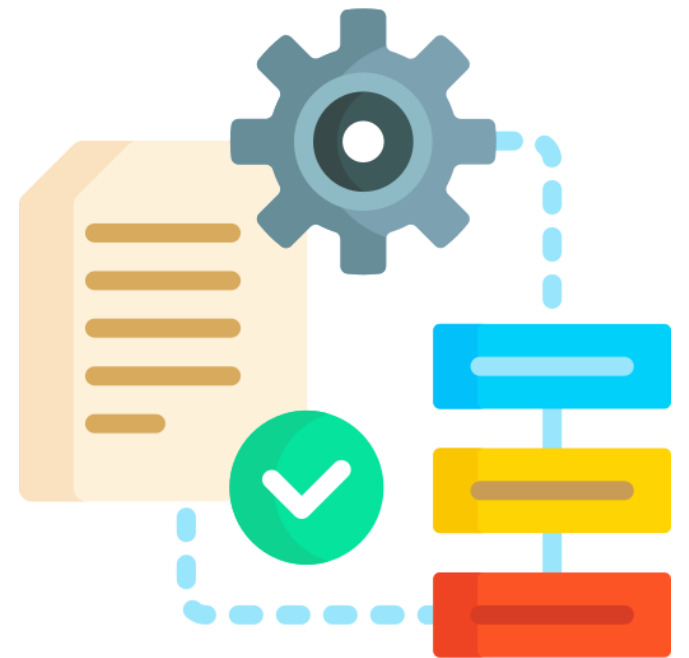
# IPAAS TOOLS

# Integration Platform As A Service



## *Trigger and action workflow tools*

- Will have a “trigger” that will initiate a series of actions in other systems.
- Web and app-based integration tools allow for data sharing and integration with minimal technical and coding expertise.
- Virtually all configuration is done on the mobile handset or a webpage using your favorite browser.
- The tool takes care of all the security, authentication, and data management. To you, it’s a black box.
- Great option for simple integration projects, just getting started or exploring options.
- Virtually all the logic and programming needed to connect services are provided to you. No need to learn any programming, but it will help.



# Example Using QuickBooks And HubSpot CRM



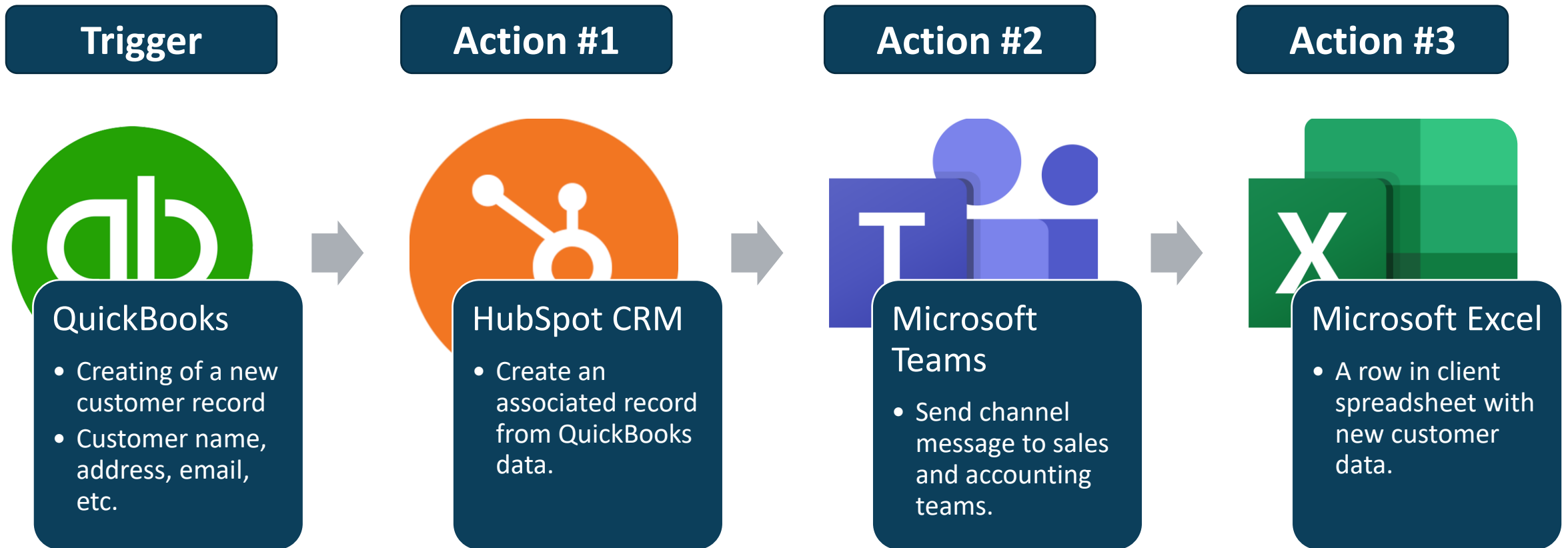
## *Easily push and pull data between systems*

iPaaS tools can be used to automate several routine business functions around the accounting system. For example:

- Trigger, a new customer is created in QBO. Action, iPaaS tool creates the customer record in HubSpot.
- Trigger, the sales team updated the customer address in HubSpot. Action, iPaaS tool updates the customer address in QBO.
- Trigger, a new invoice is created in QBO. Action, iPaaS tool posts a message in Teams to let the sales team know.
- Trigger, an invoice is paid in QBO. Action, iPaaS tool updates the customer record showing the invoice as being paid in QBO and updates an Excel workbook tracking AR.



# Triggers & Actions With iPaaS Tools



# Examples Of Triggers And Actions



## Triggers

### Start the automation workflow

- A new order is placed on your company's e-commerce system.
- A row is updated on a commonly used spreadsheet.
- An email is received in your Inbox.
- A new customer record is created in your accounting system.
- A new lead requests a meeting with your sales team.

## Actions

### Steps in the automation workflow

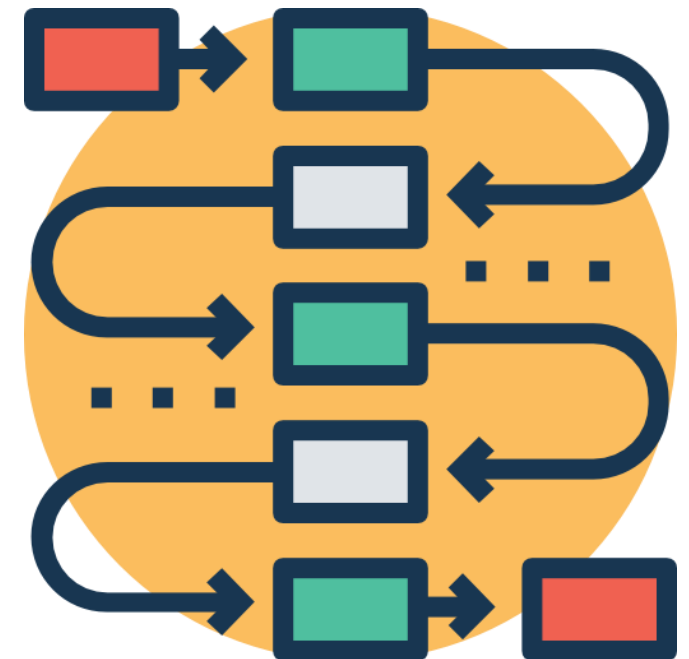
- A new invoice is created in QuickBooks with the order information.
- A message is sent on Teams or Slack.
- An email attachment is copied to SharePoint or Google Drive.
- A calendar invitation is created and sent to relevant parties.
- A specific spreadsheet is updated with new information

# Integration And Data Sharing Tools



## *Major examples of this category of tool*

- **Power Automate.** A powerful tool to connect resources inside and out of the Microsoft ecosystem of products.
- **If This, Then That (IFTTT).** A fantastic option for the home, IoT, and personal projects.
- **Zapier.** Great option when many integration touchpoints are required and mostly web-based.
- **n8n (pronounced n-eight-n).** An awesome option that utilizes FREE and open-source technology.
- **Zoho Flow.** A great option for users who are already leveraging the power of Zoho.



# Comparison Of Integration Tools



	Power Automate	IFTTT	Zapier	N8n	Zoho Flow
Primary User Case	Business	Personal	Business	Personal and Business	Business
Price (month/user)	\$15 to \$500	Free and Paid Plans	Free up to \$599/Month	Free and Paid Plans	\$10-24
Number of Integrations	Hundreds	Hundreds	Thousands	Hundreds	Hundreds
Ease of Use	Medium	Easy	Medium	Medium	Medium



Take care of what's essential. Automate the rest.

# **MICROSOFT POWER AUTOMATE**

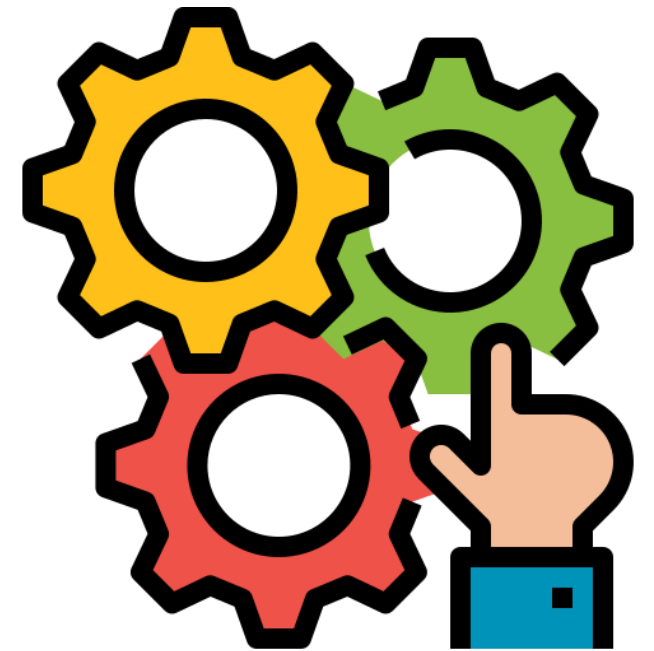


# Microsoft Power Automate (PA)



## *Turn outdated into automated*

- **Automate quickly and more securely.** Empower everyone to build automated processes with flows in Power Automate. Use low-code, drag-and-drop tools and hundreds of pre-built connectors that automate repetitive, mundane tasks with ease.
- **Boost efficiency.** Record and visualize your end-to-end processes with a [process advisor](#), providing guided recommendations for creating flows and deep insights that take the guesswork out of what to automate.
- **Enhance workflows with AI.** Make your automation even smarter with [AI Builder](#). Quickly process forms using document automation, process approvals, detect images and text or create with prebuilt models.
- Learn more at <https://powerautomate.microsoft.com/>

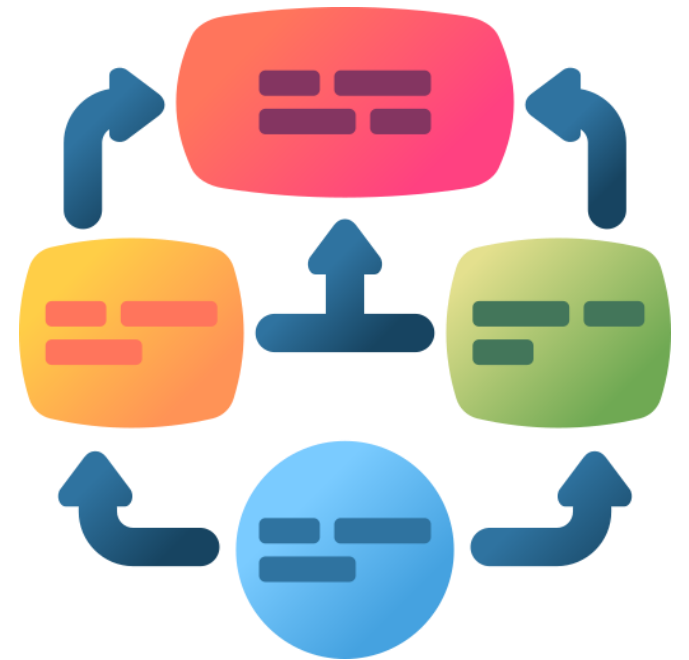


# Power Automate Connectors



*Connect power automate with anything!*

- PA works with hundreds of popular web applications from Microsoft 365 to Mailchimp.
- Especially powerful for integrations from, to, and between Microsoft services.
- Allows connectivity to both cloud and on-premise technologies using a data gateway.
- Allows you to connect products and services which would not normally “speak to each other.” Instead, these products speak with Power Automate, and it moves the data between the connectors.



# Benefits Of Power Automate



## *Compelling reasons to choose the platform*

- **Inside the Microsoft ecosystem of products.** PA is part of the Power Apps product line from Microsoft. It can easily be added to your existing 365 licensing.
- **Easy integration with Azure.** Is your business using Azure for its Cloud? If so, you can easily access your data and applications with PA.
- Built with **solid security** and privacy.
- **Fantastic pre-built templates** to help you get started. There are hundreds of prebuilt templates connecting all types of applications to help you harness the power of the application.

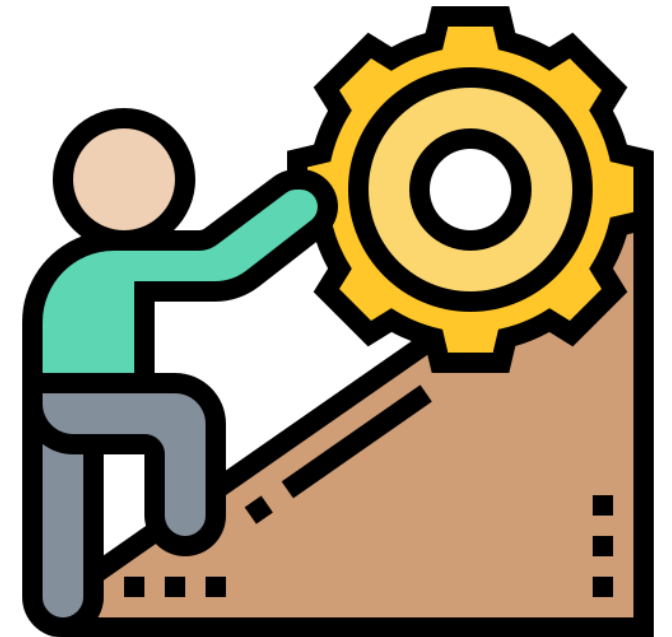


# Challenges Of Power Automate



*Limitations to acknowledge before getting started.*

- As with all iPaaS tools, it can be a significant learning curve. Expect more time to get started implementing and setting up the tool.
- This learning curve can cause frustration and reluctance from staff to utilize the tool.
- PA isn't free, and there will be licensing costs.
- As with all iPaaS tools, your underlying data and workflow changes can cause your flows to stop working.
- PA isn't an excellent option for ad-hoc or one-off projects. It's best for repetitive tasks.

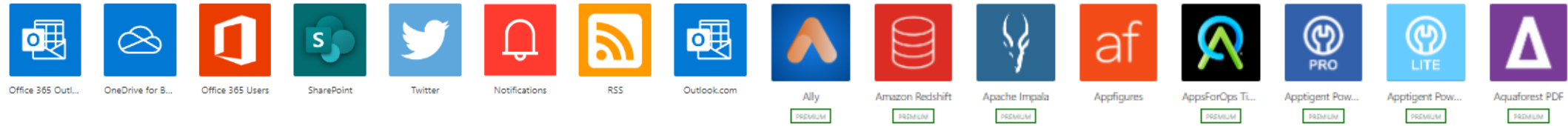


# Power Automate Connectors

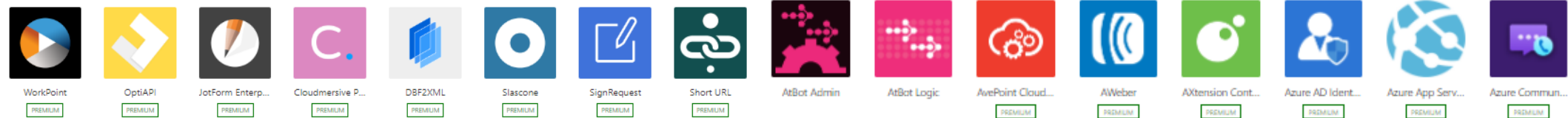


## Connect Power Automate with everything!

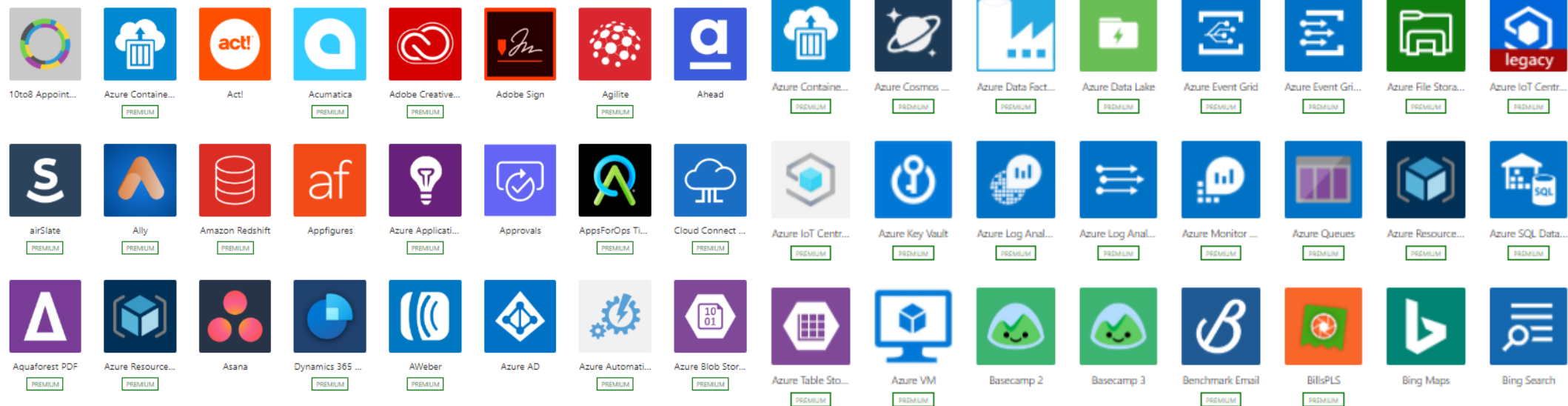
Popular connectors



Recently added connectors



All connectors



# Examples Of PA Templates



Start an approval when a file is added to Sharepoint

By Microsoft



Auto Approve Time Off Requests

By Microsoft



Send a customized email when a new file is added

By Microsoft



Notify a team when Planner tasks change status

By Microsoft



Get today's weather forecast for my current location

By Microsoft



Click a button to track work hours and work location in Google Sheets

By Microsoft



Send an email when an event is added, updated or deleted in Outlook

By Microsoft Power Automate Community



Save comments on Instagram posts to Google Sheets after one day

By Microsoft



Welcome new teams members and share their bio

By Microsoft



Email me with a list of upcoming Calendar events

By Microsoft



Protect a PDF document with a password and send via email

By PDF Blocks

# Typical Cloud Flows In PA

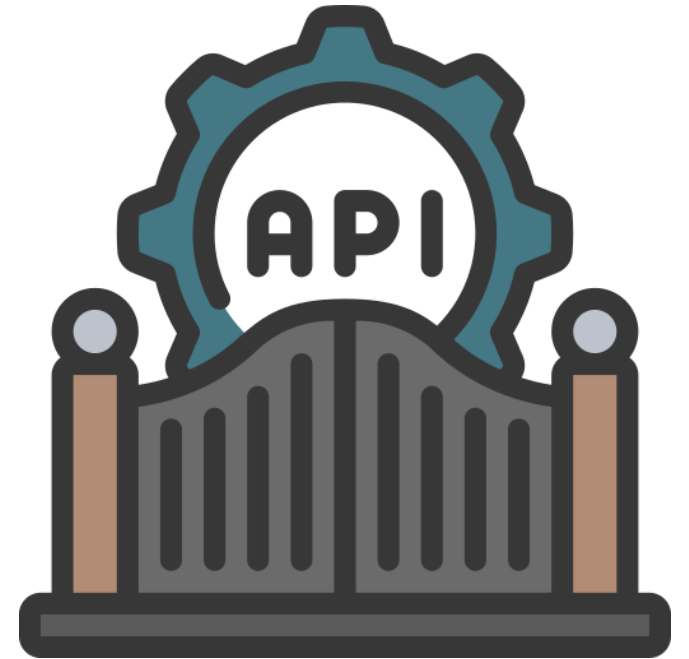


Flow type	Use case	Automation target
<b>Automated flows</b>	Create an automation that is triggered by an event, such as the arrival of an email from a specific person or a mention of your company on social media.	<a href="#">Connectors</a> for cloud or on-premises services connect your accounts and enable them to talk to each other.
<b>Instant flows</b>	Start an automation with a click of a button. You can automate for repetitive tasks from your Desktop or Mobile devices. For example, instantly send a reminder to the team with a push of a button from your mobile device.	Wide range of tasks such as requesting an approval, an action in Teams or SharePoint.
<b>Scheduled flows</b>	Schedule an automation such as daily data upload to SharePoint or a database.	Tasks that need to be automated on a schedule.

# Data Gateways



- Data gateways help connect your on-premises data to the Microsoft Cloud.
- Data Gateways can be used to connect everything from your traditional spreadsheets to your databases.
- You do not need a data gateway to connect data already in the cloud.
- Helpful for organizations with traditional applications hosted in their offices and not in the Cloud.
- Data → ODBC (typically) → Data Gateway
- Learn more at <https://bit.ly/3meMqcX>

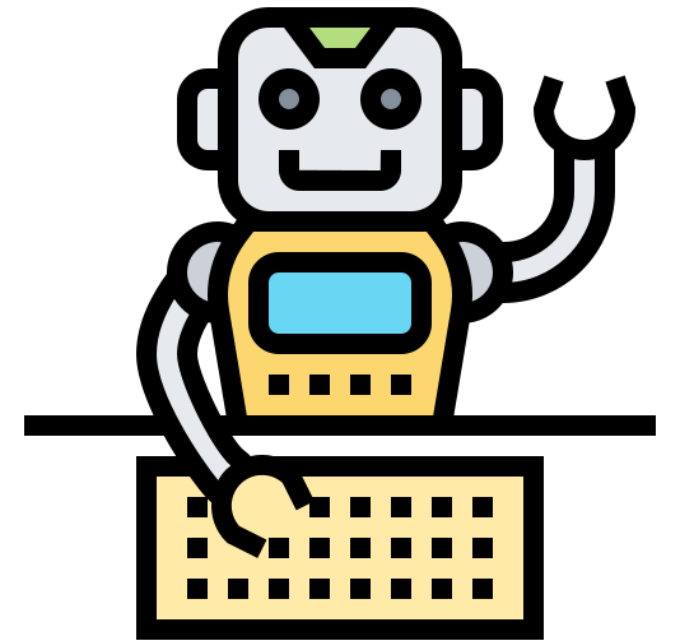




# Additional Power Automate Capabilities And Features



- **Robotic process automation.** Connect old and new systems and reduce repetitive tasks using UI-based automation with desktop flows—the Power Automate's robotic process automation (RPA) capability.
- **AI-Builder.** Create intelligent automation and find insights by building tailored AI models within Power Automate.
- **Process Advisor.** Simplify how you work by discovering workflow bottlenecks and automation opportunities through process advisor, Power Automate's process, and task mining capability.



# Power Automate Pricing Options



## License by user

### Per user plan

**\$15**

per user/month

Allow individual users to analyze their processes and create unlimited cloud flows based on their unique needs.

- Available to buy now with a credit card.

## License by user

### Per user plan with attended RPA

**\$40**

per user/month

Allow individual users to analyze their processes and create unlimited cloud flows, plus automate legacy applications through [robotic process automation \(RPA\)](#) and AI.

- Includes 5,000 [AI Builder](#) service credits per month.
- Available to buy now with a credit card.

## License by flow

### Per flow plan

Starting at

**\$100**

for five flows/month<sup>2</sup>

Implement cloud flows with reserved capacity for unlimited users across your organization.

- Requires access to the Microsoft 365 admin center with [global administrator or billing administrator roles](#).



Other iPaaS tools you should consider checking out

**ZAPIER, IFTTT, N8N, ZOHIO FLOW AND  
OTHERS**

# Zapier



## *Connect your apps and automate workflows*

- Zapier allows you to integrate various applications to share data.
- Zapier works off the principle of triggers and actions.
- Triggers initiate a workflow. For example, receiving an email or creating an invoice.
- Actions are operations that occur in other systems. For example, updating a customer record in your CRM or sending a channel message in Slack.
- Workflows are designed visually, and the only application needed is a web browser.
- Try it out today. Check out at <https://zapier.com>

# Zapier

## *Features and highlights of the solution*



- **Start Workflows from Any App.** Pick a Trigger that sets your Zap into motion.
- **Finish Routine Tasks Automatically.** Zaps complete Actions while you solve more important problems.
- **Simple, Fill-In-The-Blank Setup.** Point, click, automate. Go from idea to workflow in minutes.
- Works with over 3000 web services.

Zaps connect the apps you use every day



**TRIGGER**  
When I get a new email in **Gmail**



**ACTION**  
Copy the attachment from **Gmail** to **Dropbox**



**ACTION**  
Alert me in **Slack** about the new **Dropbox** file



# Understanding Zapier's Pricing

There are three main drivers for determining the monthly pricing for Zapier.

- **Zaps.** These are separate workflows. A zap can be a single integration between two services, or it can be between many services.
- **Tasks Per Month.** How many times your workflows can run in each month.
- **Update Interval.** How often a specific Zap will run an associated workflow.

Read more at <https://zapier.com/pricing>.



# Zapier Pricing Model



Price	Plan Name	Tasks / mo	Button
\$0	Free	100	TRY FREE
\$19.99	Starter	750	TRY FREE
\$49	Professional	2,000	TRY FREE
\$299	Team	50,000	TRY FREE
\$599	Company	100,000	TRY FREE

#### FREE PLAN FEATURES

- 5 Zaps
- 15min Update Time
- Single-step Zaps

#### STARTER PLAN FEATURES

- 20 Zaps
- 15min Update Time
- Multi-step Zaps
- 3 Premium Apps
- Filters
- Formatters
- Custom Integrations

#### PROFESSIONAL PLAN FEATURES

- Unlimited Zaps
- 2min Update Time
- Multi-step Zaps
- Unlimited Premium Apps
- Filters
- Formatters
- Custom Integrations

#### TEAM PLAN FEATURES

- Unlimited Zaps
- 1min Update Time
- Multi-step Zaps
- Unlimited Premium Apps
- Filters
- Formatters
- Custom Integrations

#### COMPANY PLAN FEATURES

- Unlimited Zaps
- 1min Update Time
- Multi-step Zaps
- Unlimited Premium Apps
- Filters
- Formatters
- Custom Integrations

- **Free.** 5 Zaps/Workflows run up to 100 tasks per month at 15-minute intervals.
- **Professional Plan.** \$50 per month for unlimited Zaps/Workflows, which run up to 2000 tasks per month at 2-minute intervals.

# Zoho Flow



- Point and click integration within the incredible ecosystem of Zoho products.
- Supports a wide range of connections, especially within Zoho. Outside services include Citrix ShareFile, QuickBooks, Stripe, Calendly, Google calendar, etc. 650+ services are supported.
- Automation designer is simple and effective. Easy to learn and quick to get started.
- The solution is more affordable compared to competitors, either \$10 or \$24 per month for the entire organization.
- Learn more at <https://www.zoho.com/flow/>

STANDARD

**\$10**

/org/month billed annually

TRY NOW

PROFESSIONAL

**\$24**

/org/month billed annually

TRY NOW

✓ 20 flows per org

✓ 1000 tasks per org per month

✓ 60 day flow history

✓ Base apps

✓ Logic and utilities

✓ Custom functions

✓ Test and debug

✓ Manual rerun

✓ 50 flows per org

✓ 3000 tasks per org per month

✓ 90 day flow history

✓ Base apps

✓ Premium apps

✓ Logic and utilities

✓ Custom functions

✓ Test and debug

✓ Versions

✓ Manual rerun

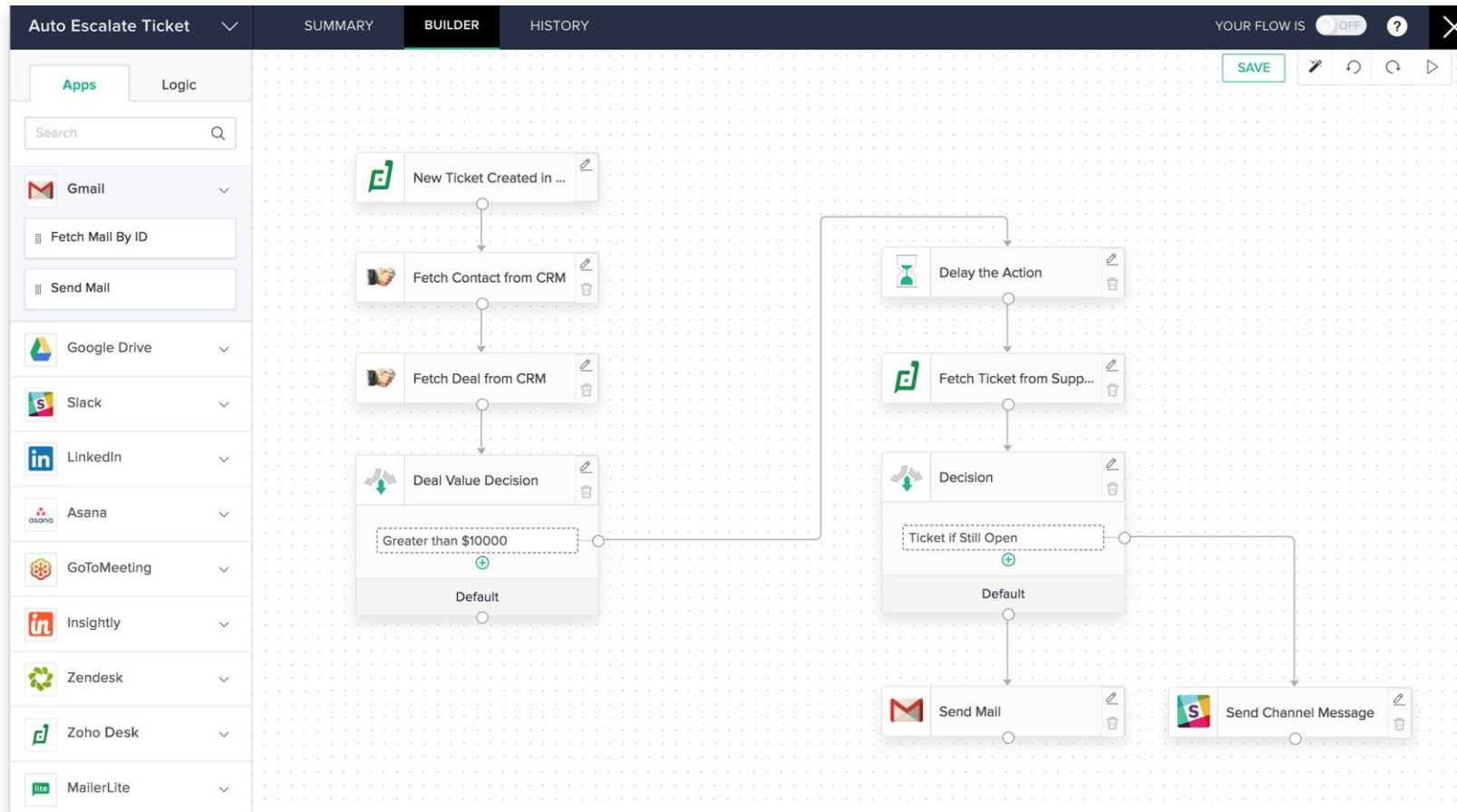
✓ Auto rerun



# Zoho Flow



*Tie your apps together, set yourself free.*



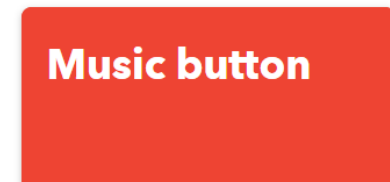
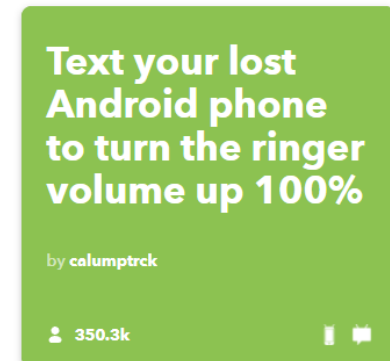
- Connect your critical applications
- Automate extensively with multi-step flows
- Make it all happen on a dynamic builder
- Off-the-shelf solutions

# If This Then That (IFTTT)



*Quickly and easily automate your favorite apps and devices.*

- IFTTT probably created the iPaaS category of tools. Their tool has been around since 2011.
- IFTTT is a service that enables users to connect different web applications (e.g. Facebook, Dropbox, etc.) together through simple conditional statements known as applets.
- You can connect just about any Internet service to any other service to share data or notifications.
- Primarily aimed for person use and home automation. Good for your personal stuff.
- The individual workflows are called applets.
- Learn more at <https://www.ifttt.com>



# IFTTT – What Can You Do With It?



IFTTT can be used to accomplish various tasks to automate and simplify your personal life. For example:

- Every day at 07:00 AM, get an iOS notification with weather conditions and forecast for today.
- If the Apple stock price dips below \$350, send me an email.
- Automatically download tagged photos of yourself from social media to your personal Dropbox account.
- Backup your phone's contact records to Google Sheets.
- Track your work hours to a Google calendar.



# IFTTT Pricing Options



## IFTTT **Free**

**\$0** / forever

Get started with automation. Fast, easy, and free.

- ✓ 5 Applets
- ✓ Standard Applet speeds
- ✓ DIY or use published Applets
- ✓ Unlimited Applet runs
- ✓ Free mobile app access
- ✓ Simple no-code integrations

## IFTTT **Pro**

**\$5** / month

More, better, faster Applets.

- ✓ 20 Applets
- ✓ Fastest Applet speeds
- ✓ Multi-action Applets
- ✓ Customer support

[Start 7-day free trial](#)

## IFTTT **Pro+**

**\$10** / month

Unlimited Applets and possibilities.

- ✓ Unlimited Applets
- ✓ Everything in Pro
- ✓ Connect multiple accounts
- ✓ Use queries and filter code
- ✓ Developer tools
- ✓ Prioritized customer support

[Start 7-day free trial](#)

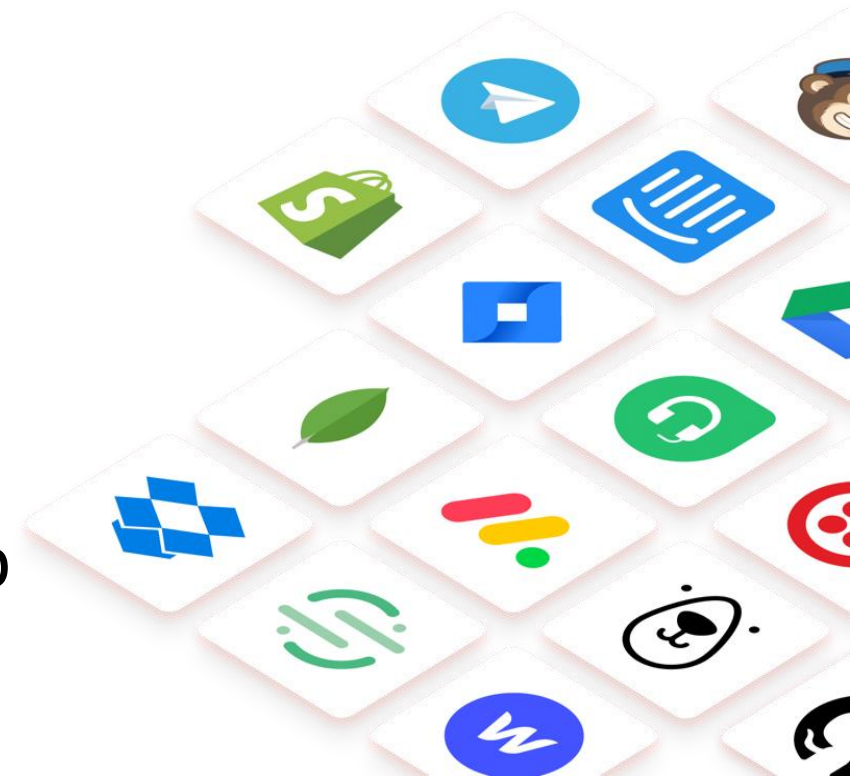
- Check out their free plan if you're just getting started.
- The Pro plan is probably good enough for most folks' personal use. You can have 20 integration workflows (applets).

# n8n Community Edition



## *Free iPaaS automation for your projects*

- **Free and open.** You can run n8n free with their fair-code license, whether in the bedroom or boardroom.
- **Easily extendable.** Create your nodes to integrate third-party services or in-house tools. Learn how from our community, docs and tutorials.
- **Your data stays with you.** Run n8n locally or in the cloud. You decide who gets access and keep complete control of your data.
- Learn more at <https://n8n.io/>



# n8n Community Edition



## *Free iPaaS automation for your projects*

- While free, it might not be as easy to use as other iPaaS tools, especially if you're using the tool locally.
- It doesn't have as many connectors as other tools, but it gives you much more freedom in using the tool and more advanced capabilities.
- They offer hundreds of pre-built workflows to help you learn how to use the tool.
- As the tool can be self-hosted, you get 100% control over the security and data.
- If you're going to use this tool for your business, you should consider their hosted business edition, <https://n8n.cloud>. It's virtually the same as the community edition, but it is delivered as a managed service.

Notify on New Emails with Invoices

by jon-n8n about 1 month ago



Validate Website of New Companies  
in CRM (Hubspot)

by jon-n8n about 1 month ago



Notify on Social Media when New  
Order is Added (WooCommerce)

by jon-n8n about 1 month ago

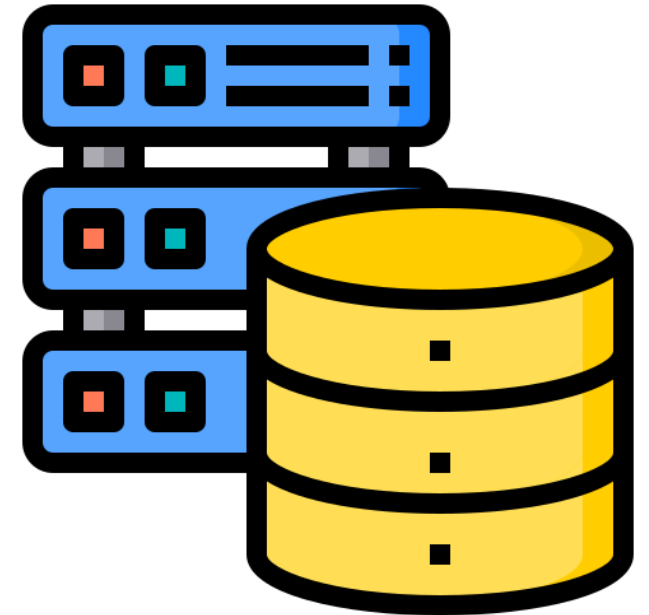


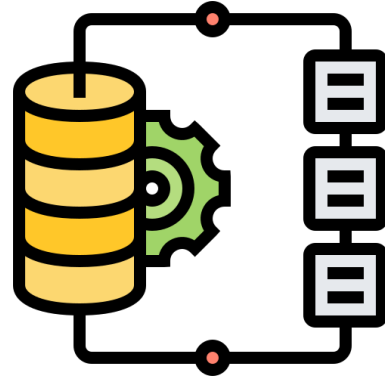
# CData



## *The universal data connectivity platform*

- If your iPaaS tool doesn't provide native access to your data you might need a “helper tool” to allow you to get access.
- CData makes connectors to all the most used business and accounting applications. Their connectors give you access to your data that would otherwise be unreachable.
- Their drivers can be used for everything from automation to reporting in Power BI.
- Learn more at <https://www.cdata.com/>





Microsoft, Apple, and Google already have automation built into their tools

# **USEFUL AUTOMATION & INTEGRATION TOOLS FOR BUSINESS**

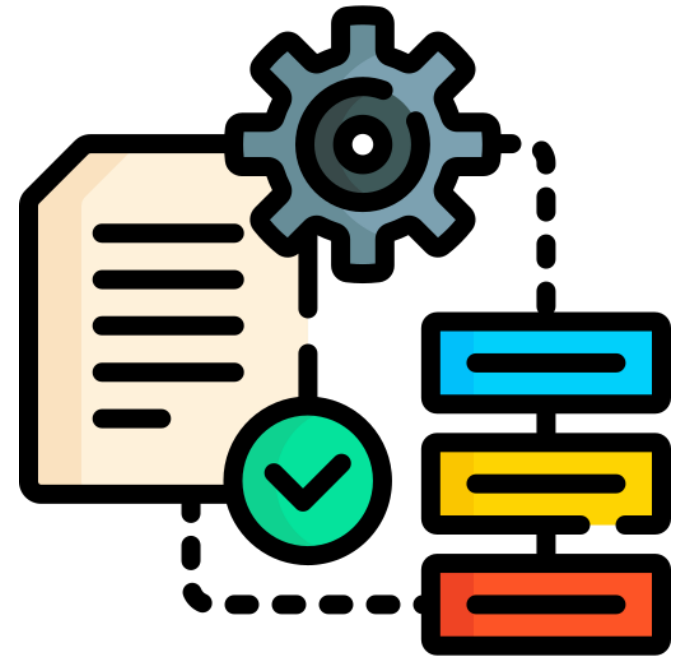


# Often There Is Automation Inside Applications You're Already Using



Most applications have various methods to automate routine tasks or make complicated actions easier.

- **Templates.** You memorize commonly used or customized formats and reports.
- **Macros.** You can record your actions and keystrokes and play them back.
- **Rules & Filters.** You can set up procedures to categorize and organize your work.
- **Communication.** You can set up actions to communicate about your work through email or chat.
- **Integration with third-party tools.** It's common to integrate external tools to provide additional functionality or data.

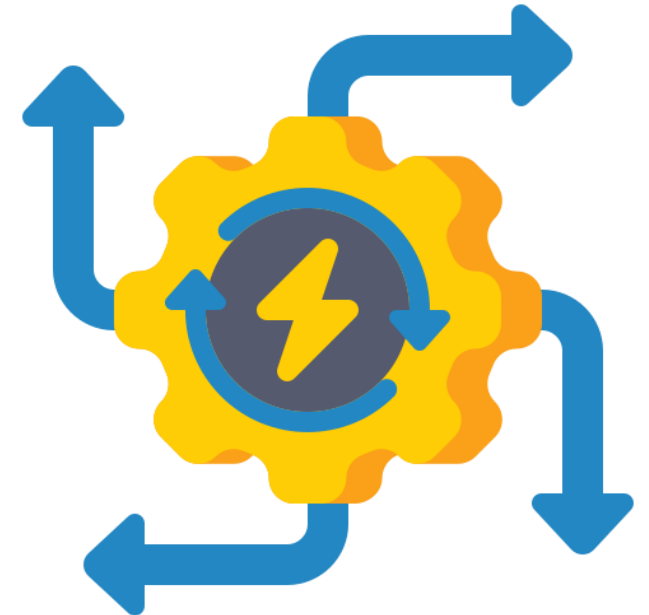


# Examples Of Built-In Automation



*You can find automation everywhere!*

- Categorizing email through rules or filters in your preferred Email Client
- Saving your common searches or views in Explorer, Outlook, etc.
- Recording actions with a macro in documents and spreadsheets.
- Creating templates of your commonly used documents in Microsoft Office, Google Workspace, etc.
- Using simple batch, Bash, or PowerShell Scripts in your operating system.
- Use Windows Task Scheduler or iOS Background Task to launch tasks automatically
- Adding your commonly used functions to the quick access toolbar in Office.
- Using the sharing functionality of any application.



# Microsoft Excel



## *Examples of integration and automation features*

- Macros and user-defined functions can automate the tasks you repeatedly do.
- Power Automate can significantly improve your process of extracting, transforming, and loading data inside of Excel.
- There are countless third-party add-ins to assist with reporting and processing inside the application.
- You can use the quick action toolbar to pin your most-used shortcuts.
- Flash Fill can automatically fill your data when it recognizes a pattern.
- Analyze Data and Recommended Pivot Tables can help you better understand your data.



# Microsoft Word



## *Examples of integration and automation features*

- You can use Styles to easily, quickly, and consistently apply visual appearance to your documents and presentations.
- You can use the quick action toolbar to pin your most-used shortcuts.
- The “reuse content” and template function allows you to leverage and repurpose previously written content/documents.
- Mail merge, table of content, etc., functionality automatically performs complicated actions that take forever to accomplish manually.
- There are countless third-party tools available in the Microsoft Store to extend Word’s capabilities.
- You can request signatures on documents with the Adobe Acrobat DC plugin.

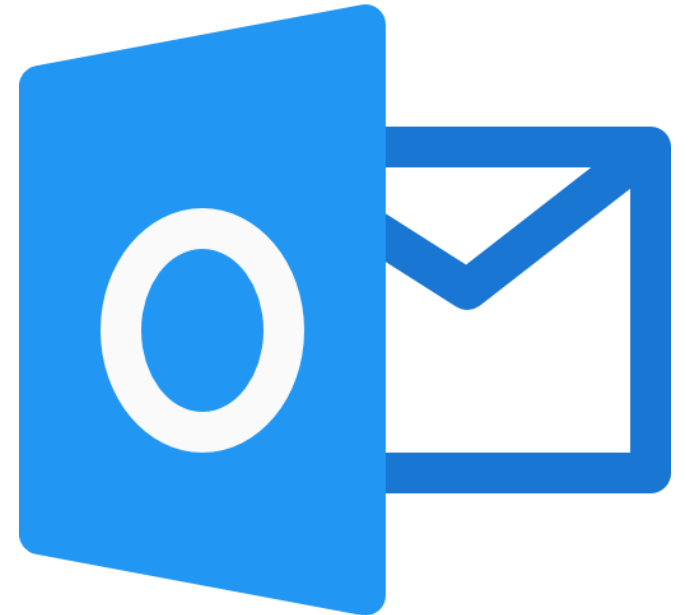


# Microsoft Outlook



## *Quick steps and rules for automation*

- Quick Steps apply multiple actions at the same time to email messages. This helps you quickly manage your mailbox.
- For example, if you frequently move messages to a specific folder, you can use a Quick Step to move the message in one click. Or, if you forward messages to your manager or peers, a one-click Quick Step can simplify the task.
- You can also use rules to apply actions automatically to future incoming messages.
- You can use the quick action toolbar to pin your most-used shortcuts.
- There are countless third-party tools available in the Microsoft Store to extend Outlook's capabilities.



# Automation And Integration Option Inside Microsoft Teams



- Microsoft Teams is the “grand central station” of communication. It brings together chat, voice, video, and file collaboration for an organization.
- It has a ton of automation and integration functionality throughout the application. It offers excellent connectivity to other applications both in and outside the 365 ecosystems.
- Just using Teams, you can have access to communicate with your whole organization, collaborate on documents in real-time, access data in third-party systems, approve documents, and more.

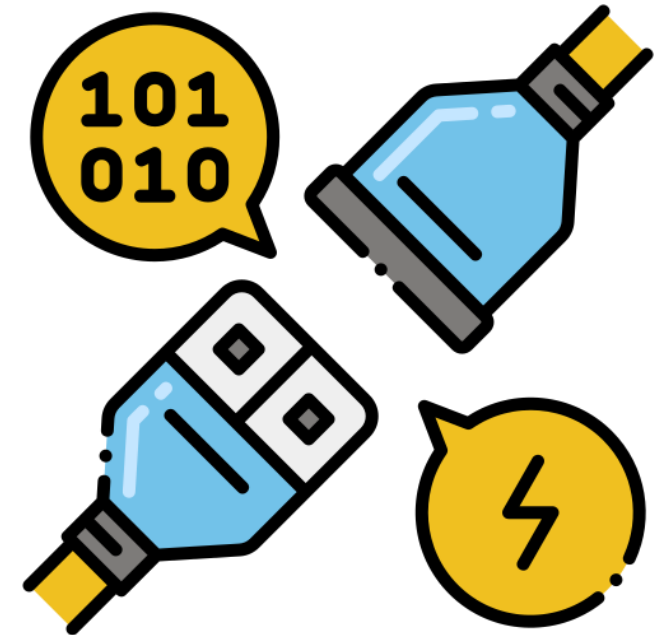


# Connectors Inside Teams



## *Connect Teams to Anything!*

- In a nutshell, connectors allow you to connect with Teams to external applications
- Connectors keep your team current by delivering content and updates from services you frequently use directly into a channel. With connectors, your Teams users can receive updates from popular services such as Trello, Wunderlist, GitHub, and Azure DevOps Services in their Teams chats.
- Use Third-party apps to create automation: Flow bot, Zapier, Slack
- Use Connectors to pull status updates into Teams from non-Microsoft products



# Approvals Inside Teams



## *Review and document your staff's work*

- The Approvals app provides a simple way to bring auditing, compliance, accountability, and workflows structured and unstructured Approvals in Teams
- Approvals hub manages all approvals, including those in Power Automate, SharePoint, and Microsoft Dynamics 365
- Create approvals templates for yourself or your entire organization
- Approval requests are directly inside Teams
- Can trigger approvals from 350+ connectors or your LOB connector
- Learn more at <https://bit.ly/3De6x2i>





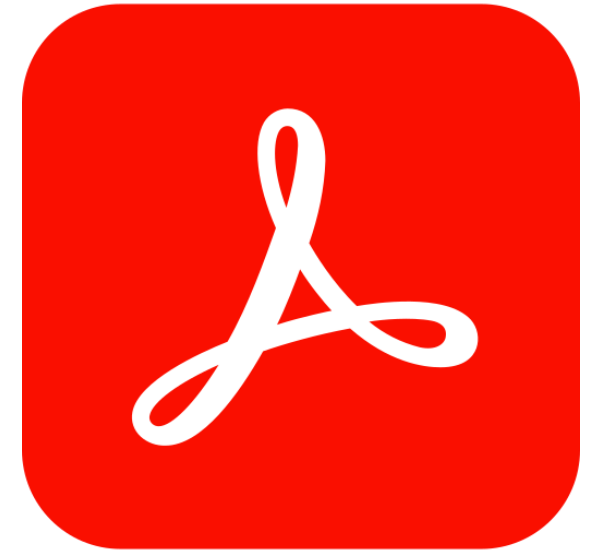
# Adobe Acrobat DC



*Tons of automation inside your favorite PDF tool*

Adobe Acrobat DC is hands down the best tool to create, edit, and organize PDF documents. There are also some fantastic automation tools inside the application which you should know about:

- Integration with Microsoft Office
- E-Signature with Adobe Sign
- Sharing and send for comments
- Custom multi-actions



# Integration With Microsoft Office

## *Adobe Acrobat DC*

Easily create and share PDFs right inside Microsoft Office applications. Functionality between applications differs, but generally, you can:

- One click create a PDF. You can create a password-protected PDF as well as choose the quality.
- Create and share a PDF
- Mail merge a PDF
- Create and send for review
- Create PDF and run custom action



# eSignature & Adobe Acrobat Pro DC



*Easily Send your documents to be reviewed and signed*

- eSignature is now provided within Adobe Sign inside Adobe Acrobat Pro DC
- Easily convert any document into a signature document, right inside the application.
- According to a 3-year [Forrester TEI Total Economy Impact Study](#) in 2019, E-signatures speed up cycle times by 28x
- Companies saved \$6/document processed
- Companies saved 125 hours/employee across 3 years



# Adobe Sign Features



- Adobe Sign integrates with the Microsoft Suite, Salesforce, Workday, Zoho CRM, and more
- Adobe Sign can be integrated with industry-specific security standards
- Adobe Sign provides real-time visibility on documents out for signature
- It will alert you when documents have been signed
- Allows you to create and manage templates for frequently used forms
- Can send a document to multiple recipients, and Adobe will customize it for each person
- Allows for custom branding in documents



# Calendly



*Schedule meetings without the back-and-forth emails*

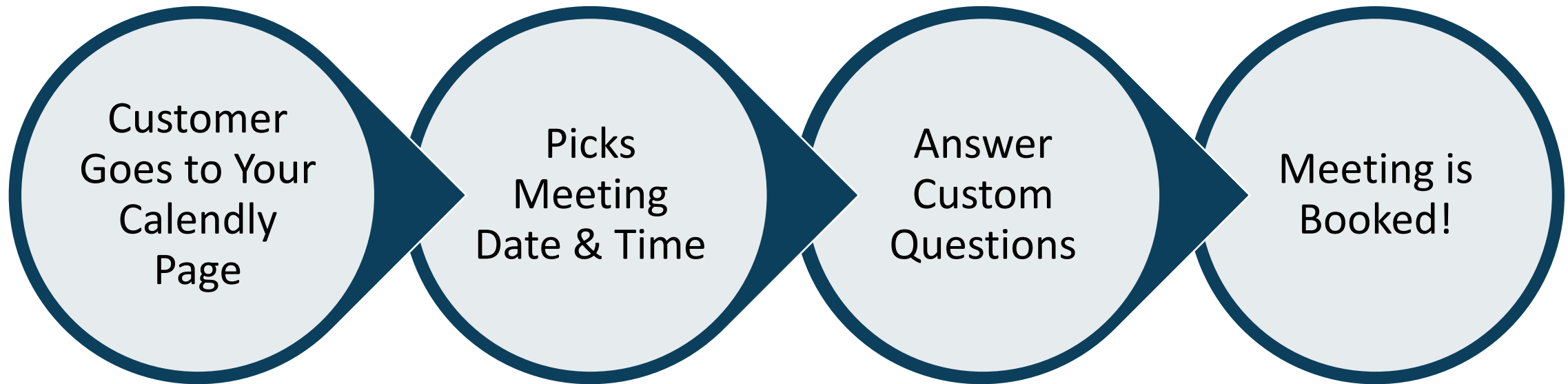
- Calendly takes the headache out of scheduling meetings and events. Your team or clients schedule appointments with you based on your real-time availability.
- **Create simple rules.** Let Calendly know your availability preferences, and it'll do the work for you.
- **Share your link.** Send guests your Calendly link or embed it on your website.
- **Get booked.** They pick a time, and the event is added to your calendar.



# Booking Meetings With Calendly



*A client or staff booking a meeting with you*



- The client sees a listing of your different meeting types.
- They choose a meeting type (e.g. tax, audit, etc.)
- Each meeting type can have unique characteristics.

- The client sees your up-to-the-minute availability coming from 365, Google or both.
- They pick a date and time that works for them, but they only can choose the times your available.

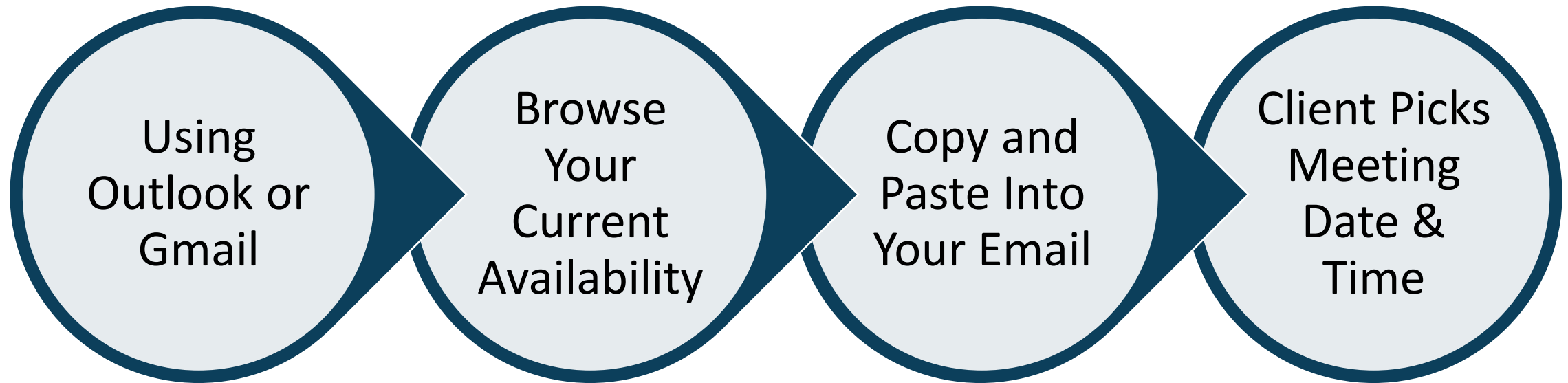
- You can ask questions such as the intention of the meeting, collect payment, or anything else.
- Can choose the location of the meeting, virtual or a physical location.

- When the user schedules the meeting, an email is sent to you and them.
- A calendar invitation with all event details is sent to everybody.

# Booking Meetings With Calendly



*Sending a meeting request to someone*



- Compose an email to a client
- Insert a meeting request from Calendly

- Calendly will show you your current availability
- You can pick specific dates and times that that you would like to meet. Giving the client some options.

- Calendly will prepare a meeting request which you can easily include with your email message

- The client receives your email and picks a date and time from your proposed selected.

# Calendly Meeting Workflow



*Making everybody's life simpler and easier.*

- **Automate reminders and follow-ups.** Calendly puts your entire meeting workflow on autopilot, sending everything from reminder emails to thank you notes, so you can focus on the work only you can do. It's like getting an assistant, even if you're a business of one.
- **On-demand scheduling.** Anybody can schedule meetings in just a few clicks – whenever the moment is right. And cancellations go down because rescheduling is easy, fast, and on their terms.
- **Integration with Gmail and Outlook.** They have deep integration with 365 and Gmail for both calendar and email.
- Learn more at <https://calendly.com/>





# Calendly Advanced Features



*Calendly is loaded with incredible functionality!*

Calendly has several advanced workflow tools to help people manage their meetings more effectively, including:

- Custom availability schedules to match your work hours.
- Automated event notifications (SMS and email) before and after the event.
- Multi-step and multi-action workflow for calendar bookings.
- Fantastic customization of your Calendly page and emails.
- Group meetings with multiple people on your team.
- Collect credit card payments before meetings.
- Integrations with common sales and marketing tools such as HubSpot, Mailchimp, Slack, Salesforce, etc.



# Document Management & Client Portal



*All your client's documents in one central place*

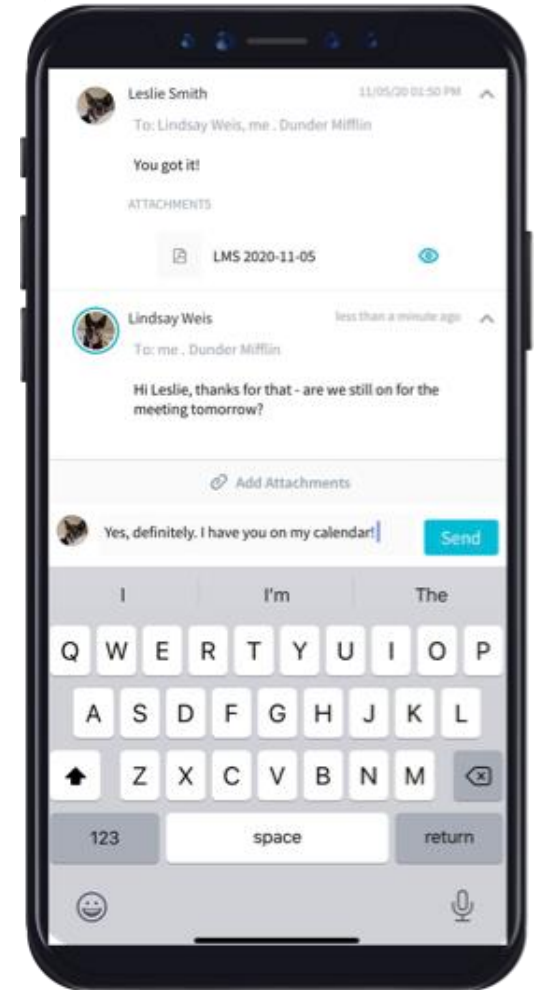
- A client portal can simplify your life by simplifying and streamlining how you distribute documents to clients into a single point of contact.
- **Improved productivity.** Often client portals allow you to send documents to clients in just a few clicks. Much faster than printing and mailing or email.
- **Improved security.** Email is not the most secure method of sending and receiving documents. A portal is preferred as you 100% know the document is in a secured place and to the correct person. The client will also access the portal with a strong password and multi-factor authentication.



# Liscio For Easy And Fast CPA Firm Document Management



- **Need a document?** No problem. Liscio enables clients to respond quickly right from their smartphones. They can scan and send documents on the go – you get them as a high-quality PDF.
- **Email is the new snail mail.** Clients want to text. And it's too easy for urgent business to get buried in email. Liscio's Real-Time Messaging is a secure hotline between you and your clients.
- **Task tracking.** Always know the who, what, and when with easy-to-track progress and ownership. Client-facing tasks with text alerts and automated mobile reminders for overdue items keep clients on schedule.
- **Integrated signature.** eSign on-screen or print, sign, and snap a pic. Compliant eSignature, communication, task tracking, and files mean no more hopping between apps.
- Integrations with many standard business tools, including QuickBooks Online, One Drive, Google Drive, Outlook, Adobe Sign, Zoom, Calendly, and more!



# Liscio Pricing And Features



Tons of features at a fantastic price!

- Unlimited Clients
- Unlimited File Storage
- Mobile Apps (Firm and Client)
- In-App Scanning
- Zoom Integration
- Engagement Letters
- Client-Facing Tasks
- In-Network Messaging
- Text Message Alerts

Learn more at <https://liscio.me/>

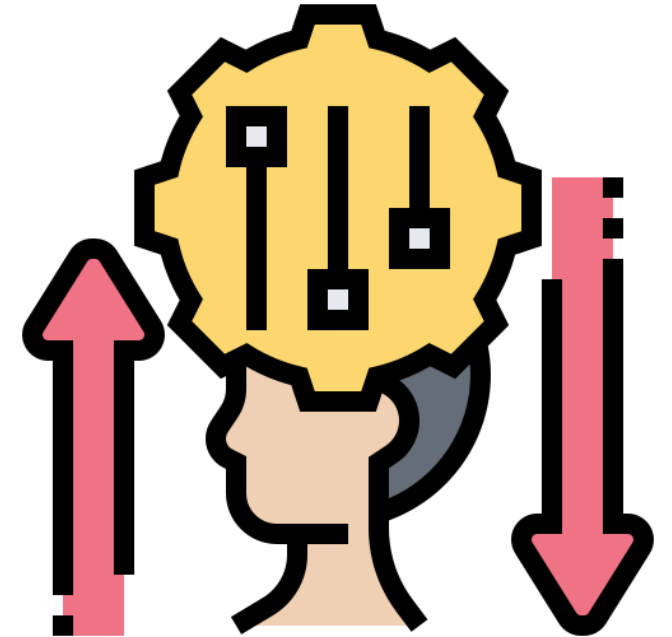
Small Firm \$50+/month
Mid-Size Firm \$199+/month
Large Firm \$399+/month

# Change Detection



*Get automatically notified when a website changes*

- Ever need to keep a website? Maybe you want to know when your favorite band announces new tour dates? Perhaps you want to know when a law or regulation changes?
- Change Detection will regularly and automatically check websites for additions, changes, and deletions of content.
- When it detects something has changed, it will notify you through email, Teams, or other methods.
- It's a free and open-source tool, but you would need to host and install it yourself. Alternatively, there are paid plans which include installation and hosting.
- Learn more at <https://changedetection.io>



# Change Detection



*Examples of how you can use this awesome service*

- Products and services have a change in pricing
- Governmental department updates (changes are often only on their websites)
- New software releases, security advisories when you're not on their mailing list
- Festivals with changes
- Real-estate listing changes
- COVID related news from government websites
- University/organization news from their website





Push a button and do things!

# **ELGATO'S STREAM DECK**

# Elgato Stream Deck



- A Stream Deck is an external programmable “hotkey” USB keyboard. Each button does something different and has a tiny customizable screen.
- The Stream Deck allows you to easily program your most frequently used shortcuts to keys on the device. The screen and keys can be completely customized to any user, use case, and application.
- For example, you could use keys to trigger actions in Excel or to launch commonly used files. You can even program more complicated actions that could automate time entries. The possibilities are endless!
- It’s the last mile of personal automation and truly transformative when you embrace it fully.
- It can be used on both Mac and PC.
- Learn more at <https://bit.ly/36zUCjx>





# What Can You Do With A Stream Deck?



*You can use it for virtually anything!*

- Automation of time and billing. Press a button to start a timer and accurately track clients on client projects.
- Perform complicated actions in Excel, Word, and other Office applications. One button press can initiate complex workflow in any application.
- Launch your commonly used applications and files.
- Open standard websites and folders on your computer.
- Easily respond to emails with pre-built text snippets
- Schedule appointments in Outlook and Google Calendar.
- Test your Internet connection with a speed test.
- Move applications between multiple monitors with a press of a button.

# How The Stream Deck Works



## *Some tips to help you get started*

- **First, objectively think about your workflow.** What applications are you using? What are you doing within those applications?
- **Break down tasks into basic actions.** With an application, what are the most common activities you are doing? Map those actions to buttons on the Stream Deck.
- **Group everyday actions together into profiles.** Create profiles for each application or function you do. For example, a profile-specific for Excel, your favorite websites, or preparing a financial statement.
- A profile allows you to access targeted functionality easily.

# Which Stream Deck Is Right For You? What Should You Get?



- **Stream Deck Mini** - \$79 – 6 buttons. This would be useful for straightforward workflows but is probably too small for most operations.
- **Stream Deck** - \$149 – 15 buttons. This is the standard size and will be a good option for most users.
- **Stream Deck XL** - \$249 – 32 buttons. This larger size will be significantly appreciated by power users who want a higher level of configuration.
- Additional options would be the mobile app (\$24.99/year) for iOS and Android. Additionally, the Stream Deck Pedal (\$89) is for foot control of actions.

# Buttons, Action, Plugins, & Profiles

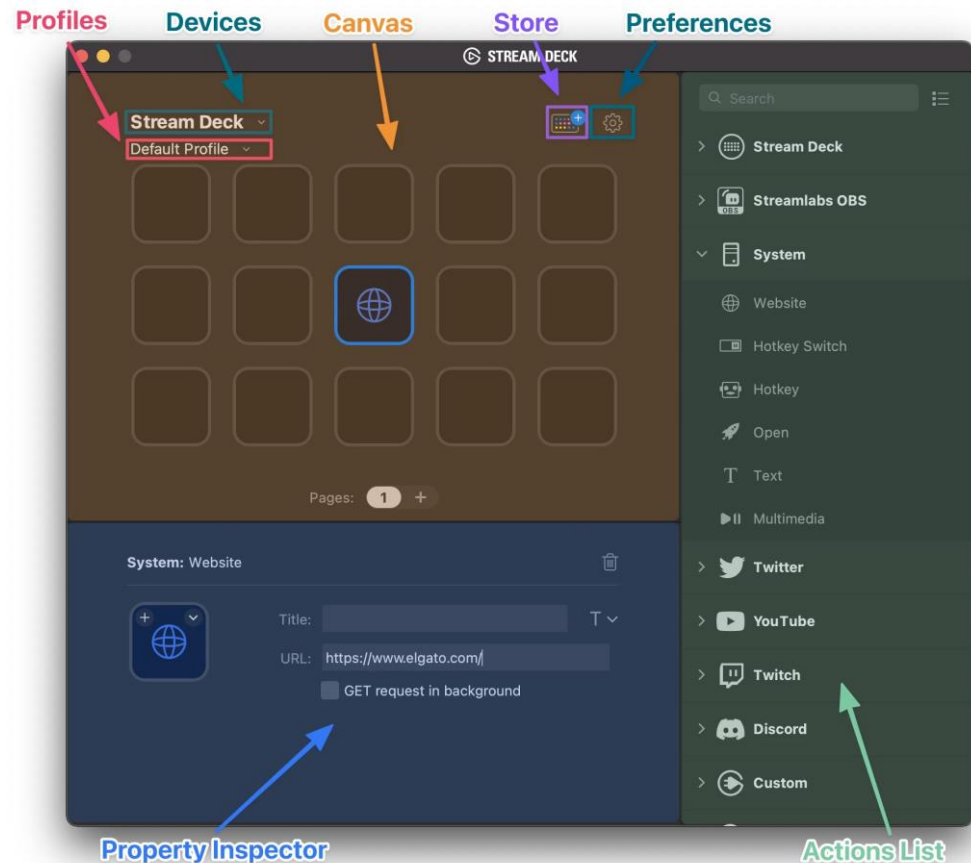


*Making your Stream Deck uniquely yours.*

- **Buttons** are the visual representation of an action. They can have a custom name, icon and locate anywhere on the Stream Deck.
- **Actions** do something for you. For example, it can be opening an application, launching a website, etc.
- **Multi-Actions** allow you to do multiple things at once. For example, you can open multiple applications with a single button push. Alternatively, you could send an email with a push-button and archive the message.
- **Folders** contain multiple buttons to make organization easy.
- **Plugins** are third-party tools that extend the Stream Deck's underlying functionality. The community submits many plugins for free.
- **Profiles** are like big folders but are more easily navigable.



# How To Use A Stream Deck



- **Actions list:** sidebar containing a list of all the actions provided by the installed plugins
- **Canvas:** grid displaying the keys containing actions (the size of the grid will change depending on the device)
- **Property Inspector:** form area, available to the currently selected key in the canvas where you can customize the icon, title, and action settings
- **Devices:** dropdown showing available devices
- **Profiles:** user stored key layouts selected from a dropdown on the canvas
- **Store:** store button that navigates to the app store where users can find plugins, assets, etc. to use with their Stream Deck
- **Preferences:** opens a menu where you can change Stream Deck settings



Some of the most useful and helpful tools for your Stream Deck

# **STREAM DECK PLUGIN RECOMMENDATIONS**

# System & User Plugins



## *Tools to help better manage your system*

- **Windows Mover & Resizer.** Allows you to control the position and size of application windows on your Windows PC. Maximize/Minimize windows or change height, width, and position. Supports moving applications across multiple screens. <https://bit.ly/353mE6i>
- **WinTools.** An advanced set of useful plugins for controlling Windows. Control the volume of your Windows apps from the Stream Deck. Use the 'Explorer Scratch Pad' to quickly cycle between common folders. <https://bit.ly/3ItQwXc>
- **SuperMacro.** Keyboard and Mouse simulator that supports creating advanced keystroke macros. <https://bit.ly/3wrtxtf>
- **Advanced Launcher.** Smart application launcher for the Stream Deck with a bunch of customizable options.
- **Speed Test.** Run a Speedtest.Net speed test directly from your Stream Deck. <https://bit.ly/36RffaC>

# Commerce & Business Plugins



## *Tools to help you in the workplace*

- **Stock Ticker.** View live quotes of your favorite stocks directly on the Stream Deck. <https://bit.ly/36wSAAF>
- **Zoom.** Control virtually every aspect of Zoom for web conferencing. <https://bit.ly/3ughGf4>
- **World Time.** Displays the local time in cities around the world
- **PowerPoint.** Control your presentations right from your Stream Deck, change slides, and more! <https://bit.ly/3wmNW2J>
- **iCal Support.** Easily see yours or anybody else's next appointment <https://bit.ly/3L15aqr>
- **Clockify for Timekeeping.** Push-button time tracking for billing and productivity management. <https://bit.ly/351mEnb>



# Personal & Home Plugins



## *Tools to help you around the house*

- **IFTTT.** Trigger events to occur in IFTTT at the push of a button <https://bit.ly/3CYVhXA>
- **Weather.** Check the weather in your community or anywhere else in the world <https://bit.ly/3it3M3M>
- **Spotify Integration.** Full integration with Spotify. Control your music directly from the Stream Deck. <https://bit.ly/3DkMEqj>
- **Countdown Timer.** Set a timer on your Stream Deck, and it will start flashing in a color of your choice when the time is up.
- **Stop Watch.** A simple Stopwatch for your Stream Deck

# Profiles For Business Applications



- Check out some fantastic pre-built Stream Deck profiles for commonly used business applications such as Excel, Word, Outlook, PowerPoint, and Zoom.
- Manage these typical applications with the push of a button.
- Layouts for both the 15 and 32 key Stream Deck.
- Check out <https://richday.uk/> to download the profiles for free.





Amazon Alexa, Google Home, Apple Siri and Microsoft Cortana

# **INTELLIGENT VIRTUAL ASSISTANT (IVA)**

# Intelligent Virtual Assistant (IVA)



*You can ask them just about anything!*

- IVAs are software agents that can perform tasks or services for an individual based on commands or questions.
- Using an IVA, you ask it questions such as the weather in Paris or the time of the sunrise in Chicago.
- IVAs can also interact with devices in your home or office. For example, turning on the lights or adjusting the thermostat.
- IVAs can be either a dedicated hardware device (e.g., Amazon Echo, Google Assistant, etc.) or a built-in feature of a device (e.g., Siri on an iPhone, Cortana on a Windows device).

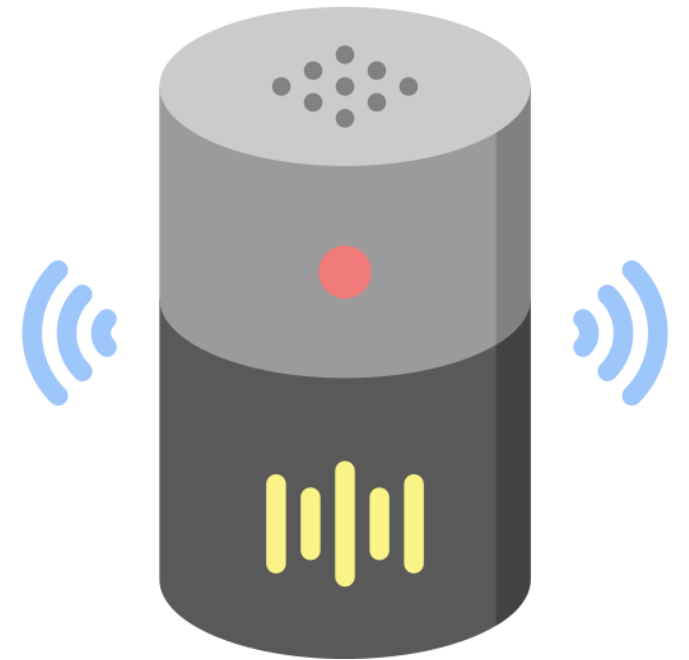
# Examples Of Things To Do With IVAs



*You can ask them just about anything!*

IVAs can be used for both personal and business tasks. It will tell you if it can't answer the question or perform the action.

- Turn lights and appliances on and off
- Adjust your thermostat in your home or office
- Get sports and breaking news updates
- Control your smart TV or other appliances
- Give you the recent price of a stock or currency
- Read to you from a book or start your favorite podcast
- Schedule appointments on your calendar
- Call your friends and family



# Hardware IVAs In Today's Market



- Amazon Alexa Devices  
<https://amzn.to/3N7DGkS>
- Google Nest Devices  
<https://bit.ly/3ujEday>
- Apple HomePod Devices  
<https://apple.co/3tpjWBo>
- Sonos Speakers (Alexa or Google)  
<https://bit.ly/3Jtzdqw>
- Bose Speakers (Alex or Google)  
<https://bose.life/3N9ve4p>



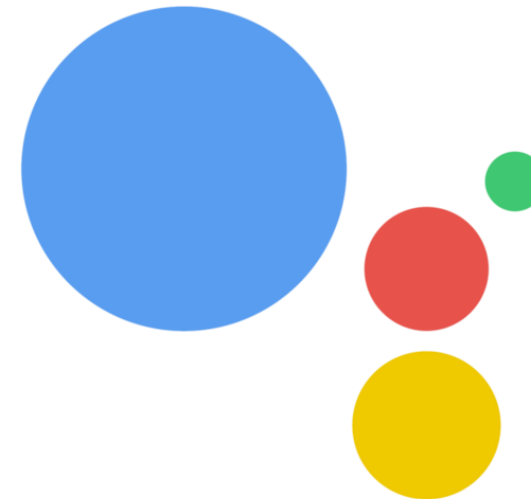
# Software IVAs In Today's Market

Often you can run an IVA on your computer as well. Typical computer IVAs include:

- Amazon Alexa (App) built into various computers and devices
- Google Assistant (App) built into various computers and devices
- Microsoft Cortana on Windows 10/11 Devices
- Apple Siri on Mac and iOS Devices



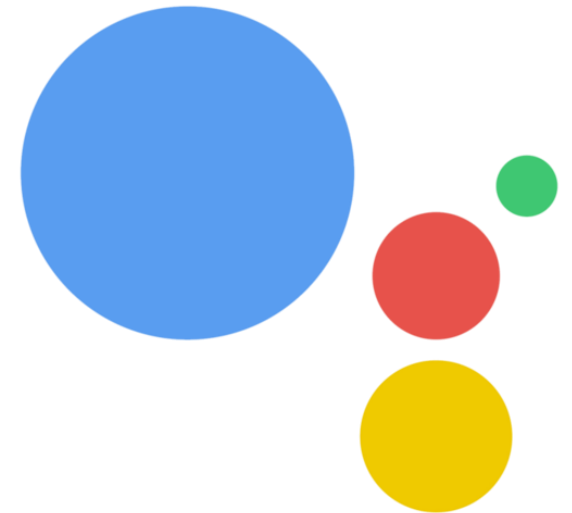
Hi, I'm Cortana.



# Google Assistant



- Google Assistant is available in more than 90 countries and over 30 languages and is used by more than 500 million users monthly
- Works on phones, smart speakers, smart displays, cars, TVs, laptops, watches, and more
- Find my phone function
- Open apps with your voice
- Have web pages read allowed
- Pull information from other Google apps and services: Keep, Calendar, and Gmail
- Set or Assign Reminders
- Ask it virtually any question under the sun!

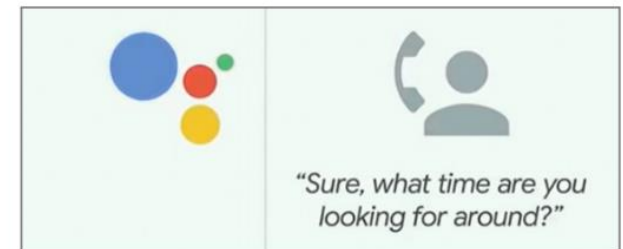
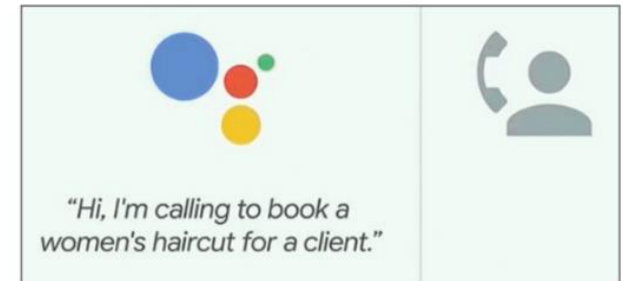




# Google Duplex



- Powers a new Google Assistant feature
- Allows a computer to call and make appointments, reservations
- Sounds more like a human than a robot
- Duplex can call any US business with info listed on Google
- Businesses can opt-out of receiving Duplex calls in their Google My Business account
- Works in 49 of the 50 states (Louisiana is not allowing it), Argentina, Australia, Brazil, Canada, Chile, Colombia, France, India, Japan, Mexico, New Zealand, Peru, Spain, UK, and Venezuela



# Amazon Alexa



- Similar features to Google Assistant Routines
- Manage home devices
- Create Smart Home groups to control devices easier
- Using Home groups gives on/off capabilities only
- Have Alexa tell you about upcoming appointments
- Manage announcements
- Automatically play music, give traffic or weather updates
- Use the Wait command to pause in between actions
- Select which device you want to perform any given action



# Magic Mirror

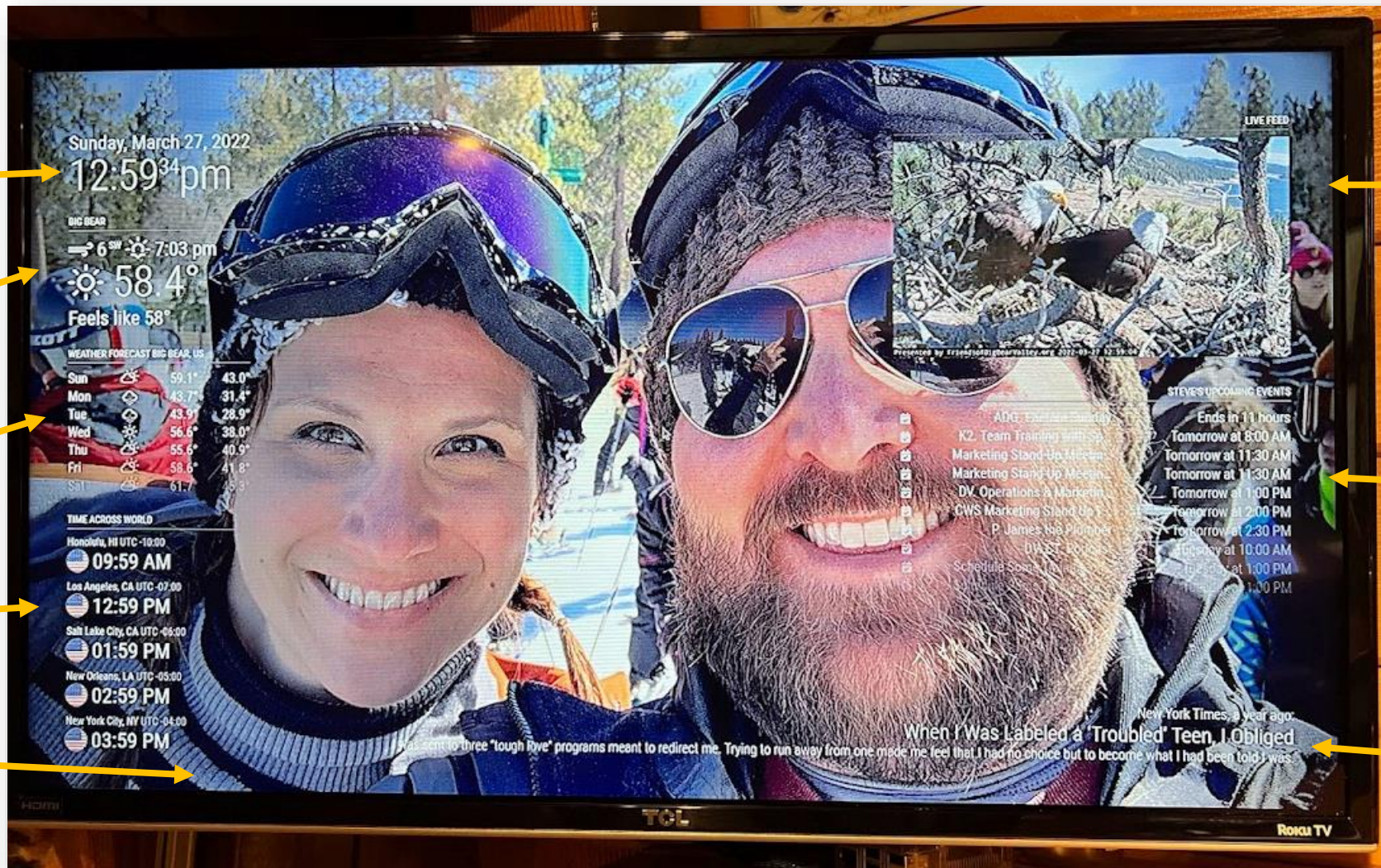


## *The open-source modular mirror system*

- A magic mirror is a FREE, open-source intelligent display system that can display information about your life, work, and family. While not technically an IVA, it's super helpful and insightful.
- It can display your upcoming calendar appointments, emails in your Inbox, billable time, favorite photos, and more!
- It is endlessly configurable and can be completely customized to meet the user's exact needs.
- All you need is a spare display and a Raspberry Pi. The software is free.
- Check out <https://magicmirror.builders/> for more information.



# Steve's Magic Mirror In Action



Current Time



Current Weather



Weather Forecast



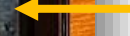
Time Across the World



Favorite Photos



Live Webcam Feed of Bald Eagles in Big Bear



Upcoming Schedule



News Headlines



# Conclusion & Summary



## *Improving personal effectiveness and efficiency*

- You have many options to implement automation and integration in your personal and work life.
- You can use iPaaS tools to easily share data between your most used applications and cloud platforms.
- There are tons of automation and integration options in your existing tools such as Excel, Acrobat, etc.
- The Elgato Stream Deck can provide push-button automation to virtually any application and significantly speed up your workflow.
- You can talk to IVAs and have them answer questions or perform tasks on your behalf.

