

Voiceover Artist 0:00

Are you ready to manage your work and personal world better to live a fulfilling productive life, then you've come to the right place productivity cast, the weekly show about all things productivity. Here, your host Ray Sidney-Smith and Augusto Pinaud with Francis Wade and Art Gelwicks.

Raymond Sidney-Smith 0:17

And Welcome back, everybody to productivity cast, the weekly show about all things personal productivity, I'm Ray Sidney Smith.

Augusto Pinaud 0:24

I am Augusto Pinaud.

Francis Wade 0:26

I'm Francis Wade.

Art Gelwicks 0:27

And I'm Art Gelwicks.

Raymond Sidney-Smith 0:28

Welcome, gentlemen. And welcome to our listeners to another episode of this productivity cast, where we will be discussing office automation. And what I thought we would do today is we would discuss the contrast between what is office automation and what is home automation and explaining that for everybody, and then getting into the context of what automation we use in our own office environments or the environments that we work in because that could be home as well. People have home offices, and people work from home. And those offices also can take advantage of automation. And then talking about what technology we would use if all technology was available to us and cost and other barriers to entry were reduced. What would we use in our office to help us be more productive in our workplaces? And and then we'll, we'll close out the episode with what are the first steps we would consider offering to our listeners to you listeners to start in the office automation space? So let's get started first with what is office automation and how does it contrast in your minds with home automation?

Augusto Pinaud 1:42

From my perspective, home automation, it's a lot more about comfort, okay, it's about security and comfort you go you know, get the lights Get, get automated, something's when you now come to the office. It's more related about efficiency on productivity. One of the First examples we can talk about, about automation in the office was the death of the paper fax, okay, and I need even that most people will not consider that automation. That's the first step. So the earliest steps of the office automation, the moment we stop having to worry about replacing, you know, getting a fax in the middle of the thing, and now discovered, oh, we run out of paper, it's called a birth a human being who send us that, to get that when now you can get the numbers digital and get that fax in the same way via email or directly in the email. You know, that's the difference between, in my opinion between home automation and office automation, it's office automation is more about how can we make the work more efficient, more productive, and even in some cases, how can we stop depending on humans for a certain task, you know, as much as You know, when you look on a small business offices, okay, how much can we use technology to not hire that person that we may or may not need or the fluctuation of their business at that particular point? can or cannot afford? And how can we use technology and automation to help that?

Raymond Sidney-Smith 3:20

I think that office automation is about helping make the business more profitable. And increasing productivity is, you know, one of those mean a big ticket big majority reasons and, and vehicles to that end. And the way in which I see office automation, really mostly different from home automation, is that there is so much more software involved in office automation than there than there probably isn't home automation, just because we spend most of our days working in an office environment or just working generally in our lives. And that information needs to be moved around. And now today since most people work on a computer, whether that be at a desk or on their phone, we are, are constantly being bombarded with new types of productivity software. And those software can be connected together. And we've talked a little bit about this before, with, you know, Zapier and other other integration tools. But I'd like to get a little bit more into that today, as well. And I'm sure we'll talk about it exclusively as you know, kind of workflow integration and workflow automation on the software side, in a later episode, but the real piece here is is how do you connect the physical electronics together for day to day productivity, along with the software that's available to us today? And I'm, I'm uniquely interested in seeing taking a step back. You know, my my audience is small business owners and I spend a lot of time in small businesses, helping them and so I see how many times a small business owner is using a lot of home automation, or least consumer based electronics and consumer based software in their businesses, because it's less expensive. There aren't enterprise licenses. And so I'm seeing a lot of that being used in the automation space. And we'll talk a little bit about that later today. But the that's really the part that I see is office automation is how we connect all of these various parts, these disparate parts to be able to help us get gains where we otherwise wouldn't think about getting gains. But we're doing these things routinely.

Francis Wade 5:43

I think the rationale is completely different than home automation. In other words, the Why is different. I think as automation needs to produce some, some results that accrues to the bottom line and there are well established Process Improvement reengineering, process management techniques that I've been around since the 90s. that tell you how to do that. And office automation for me is, comes from that, that kind of line of thinking, where there's an investment and then there's a payoff. And if there's no payoff, then it's not worth making the investment. And also, if something can't scale, then if your business is going to scale, then you need to look very carefully at whether or not that nice Gizmo is is actually adding value or not. So I think in home of home automation, that the need for comfort and to be the first on the block and to have something that diversionary or entertaining, entertaining, is more possible. But in business, I think that the more black and white in terms of will I will I make an investment that produces Have a bang for the buck.

Art Gelwicks 7:01

Yeah, I think within the space of business automation, you have to remember two key areas. One, there is a big difference between physical automation and information automation, especially in the business space, that line seems to be a little bit more clearly defined. But secondarily, the influence you have over office automation is often just limited and defined by the role that you have. In many cases, things like facilities are responsible for printers, they're responsible for other controls. They're responsible for conference room setups and cameras. You don't have either control or influence over that. So you're really kind of limited in my automation is the things that I cannot influence and the things that influence me.

Raymond Sidney-Smith 7:50

I came across a really interesting paradigm mine McKinsey, the big global Consulting Group, and they talk about kind of the four four fundamentals of workplace automation, you know, office automation. And they they talk about it from the perspective that there is automation of activities, and then read of it redefinition of jobs and processes, right? The idea of business processes being redefined based on that automation, the impact on occupation in general. So,

like, if you have high wage occupations, those are obviously going to be, you know, changed by, you know, impacted by the by automation. And then finally, how that impacts creativity and meaning both for the workplace but also for the industry, the economy at large as well. And so, that's like, on the very, I think, kind of like you know, from the ground level up to the macro level in terms of how we consider automation and for like for you art where You are in an environment where you're not controlling the space. And I am in an environment where I do get to control most of my space. And then going into environments where, you know, I'm working with business owners trying to automate and become more efficient, it becomes an issue of the I'm not controlling the space, I'm but I'm trying to make recommendations to help them, you know, gain practical benefits in their spaces. And that's a that's usually a, you know, a challenge that is unique and interesting in my world. But for you, you're dealing with a set of requirements, a set of principles that don't, you don't get to overcome those principles right there. They're become enduring in the storage space that you're working from. And so you know, if it won't allow you to do something, it you know, gets the final say and in essence and I'm sure knowing you, you have workarounds. But, but most people are not going to be able to do those things. You know, I've gone into a lot of government environments, and those folks, you know, they have cat cards and nothing can change on their on their systems. You know, they're, they're in a lockdown environment. So it's just a matter of understanding all of these and I'll put this link to the McKinsey, you know, future of work kind of four fundamentals of workplace automation. It's an interesting view of where the, where workplace automation is really going and how we need to consider it in the paradigm of just work generally for all of us. So let's move along in the conversation with the thoughts on what office automation do you currently have, and or use, and then we can talk about our wish list how we would automate our offices, if we could completely you know, snap a finger with the Genie, and make that happen. So who wants to start with what type of office automation you currently have? And we'll go from there.

Francis Wade 11:07

Sure. So I use an auto scheduler, you guys know, but as I mentioned in prior episodes, but it replaces the job of an admin who is in charge of your calendar. So you've probably heard stories that the president united states has a team of about six people who manage his calendar, his or her calendar, at some point, we have a her and what they do is they they basically, take all the appointments, take all the desk, work he needs to do. All of the alone time he says he wants to have another family time. travel time, they take all of those and and constantly reachable and reject his schedule, depending on what's happening in the day and always have an answer to the question What's next? So that you can just focus on basically just one thing at a time, and then not have to worry about should I do this that later on or that later on it's a lot of it is already handled because he has a staff group that does this because it's so complex, and CEOs have the same benefit. And there's a, there's a McKinsey article, speaking of McKinsey, that speaks to the benefit of having an admin assistant. And it is a correlation between having an admin assistant and executive productivity that most companies don't pay much attention to. They just randomly give you someone off to the pool. They want to get promoted to the right level. But they're, they don't consciously develop admin scheduling skills, and they don't consciously deploy them to individuals. But anyway, that the automation I use is awkward. ematic scheduling of my tasks and actually just by tasks. And that takes care of you guys probably also use something like calendly, which not quite automatic, but at least searches and give somebody who wants to have an appointment with you an idea when you can meet with them. So between the auto scheduler and calendar setter, those are replacing the functions of an admin to a large degree with respect to your schedule. That's that's what I use.

Art Gelwicks 13:31

What I usually do is I run based in the regular office suite of tools, the automation capabilities that are built in for most of my functions, meeting schedulers, room availability, that sort. The

other primary area I will use though, is I use tools like IFTTT and Zapier and now more than before power automate Microsoft to move the information around wherever needs to be rather than having to spend time accruing and dropping it into the right spot. So little example, I use an app called Feedly to handle incoming RSS news feeds and all I have to do is bookmark it for read later. What happens is IFTTT goes and grabs it says, Oh, you've marked it for read later. And it creates an entry in my OneNote notebook. Excuse me in a section for things that I need to read later, it takes the content of the article drops it into place, and then I can catch up with it later. It's not a big thing. But honestly, if you compare it to like home automation, it's really no more complex than asking your favorite voice assistant to turn on the couch light. It's a convenience. And it means that I know this stuff will be done consistently rather than me having to go back and do it.

Augusto Pinaud 14:49

There's a couple of things that I've been seeing, you know that the small business I where I tend to move more, we are fine or they have been relying a lot more on the cloud. Sometimes even enterprise cloud as you were discussing early, but these two things important to mention one is how much on the big enterprise we are moving, you know, to the cloud and on the first episode of anything but idle, the new podcast Ray and I are doing as we discuss about how, in 2019 Finally, we have seen the enterprise embracing the cloud, at least for certain things. So, we are going to start looking more and more of that, whether it's also going in time to allow more automation inside of the office for some of these corporations that today doesn't happen because their systems are 10 years behind. The second thing is I want to do on my own my own business. I have I use a schedule that is has the ability to look and act as my personal assistant looking into the different calendars not only work but my personal calendar and the family calendar so that way it can decide if you want to make an appointment with me when that appointment should or should not happen it also have our automated or semi automated billing. So that way I don't need to follow on hunting, you know, people I have a computer who kindly you know, we'll send you a reminder, if you have paid we'll send you a reminder if you have not paid and after a certain amount of time will send me a reminder. So I decide what to do about it. So those little things on out on super basic automation allows me to not need to count into having a person doing that job or even having me doing that consistent job. Now understand From that basic perspective, one of the big things in the last 10 years with the use of the iPhones and then on the Android and people getting in their day to day on their personal side, access to technology that they, many people haven't dreamed before, has allowed also to make a little revolution in this automation because people now wonder if they can get some of the things they get for free from their iPhone from their Android and get them implemented

Raymond Sidney-Smith 17:37

into their business so they can get better things so they can get more things. I'll quickly run through some of the automation that I have that I think may be practical to listeners, one of the things that I do is I have voicemail coming into my office line and I do not like voicemails so Have it actually transmit. This is done by the service, though it's automatically transcribed, and then I have it captured into my email, my email then is able to identify that email and do stuff with it. So it can actually look at the text of the email and identify, oh, this is from this person, or this is about that topic. And four very important ones, those can then trigger a notification to other folks that that email came in, or I can forward that email to them. Those kinds of things can happen through this concept of office automation. So instead of me having to cater to every email that shows up, that's a voicemail message from someone who, who contacts. They're contacting me, but it's not really me who needs to talk to them. I'm able to deal with that completely outside of me having to deal with that. So it automatically sends it to the right person and it tag me for a follow up in, in my task management system, which is remember the milk. And all of that is done in the background without me having to touch either the voicemail or the email associated with communicating that data to other folks. And that's just a huge

time saver for me because I actually do get quite a number of phone calls that would come to voicemail that I would probably not deal with, if it was sitting in my voicemail inbox. And so it just helps to streamline for me capture being in a centralized space. You know, most people talk about Inbox Zero. I talk about it, you know, inbox one, which is your you should have one inbox one place where you're funneling everything as limited as you can, I mean, you know, within reason, you want to have as few places where you are funneling into in and so I like having in my world And inbox one where the where everything is flowing into one space. And so for me right now, and because of the way the technology works, email is that place that includes SMS and email and voicemail and bits of paper that I might capture. You know, like, I want all of those things, communicating into in as few places as possible. And so just like reality factor, you know, I typically capture things that are a piece of paper that I need to deal with, say, a wedding invitation, or if I received a new report in paper or something like that, that's going to be scanned, and that's probably going to end up not in my email inbox. But I am going to either email it into Evernote or capture it directly into Evernote. So email is this place where it's the, it's the, the junction for all of that data to someplace else and that gives me a lot of control in the automations Because your email integrates with almost every one of the automation software that are out there and available. So, alright, so if all things were available to you, if you could snap your fingers, let's talk a little bit about what office automation you would implement, I'll just get started with in, in my world, what I would really love to have is the ability for there to be a digital assistant that was able to really truly understand my outcomes, what my goals are for any particular task, and then be able to delegate those tasks to other folks. And that's a that's a real challenge for me, I'm a bit of a control freak. And so I tend to hold everything close to the chest, I want to control and do and execute everything myself. And that's just not a good skill for you know, someone and so I'm I'm consistently Having to work very hard at delegating, you know, tasks outward. And so that would be my, it would be mostly, you know, it would be some kind of artificial intelligence slash machine learning natural language processing type assistant that was able to really do that function well, which is to be able to take what I've captured, you know, if I've have a salient thought that I capture into remember the milk and it says, you know, oh, this is something that Ray does not need to do and should delegate to someone else. How do I get that to that someone else to get done? And that could include asking me questions, engaging with me, but that doesn't exist right now. Most of the the AI based assistance are rudimentary, to say the least even the most intelligent ones that are available on the market. I have not seen that. And, and again, as a as a knowledge worker, someone who is really focused on helping other people business owners and other businesses, you know, develop in that sense, I'm I'm constantly feeling the pressure to delegate to others. Because, you know, as a business grows, as you get more things going on, you just don't have as many hands. And it would be really, really nice. And I want my staff to do more, I want the people around me to do more, I just can't seem to get enough off my own plate, because there is usually a high barrier to entry for any particular skill or skill set that I'm trying to, you know, hand off, I write

Francis Wade 23:36

an article for the local newspaper every two weeks. And I go through the same, pretty much the exact same process throughout the in the life cycle of an article. I won't go through the steps because the point isn't quite the steps. Neither. Neither is it, automation, per se, but I wish there were a With a prompt, or a way in which my something on my laptop, something in my world of my connected world would realize that I do this on a regular basis, and then made suggestions as to how to automate parts of it with a view to automating most of it. I mean, I need to do the creative part myself. But there are certain parts that are not creative, that are just automatically happen every time. I wish there were a app that could sense that I have this cycle. So it would see what I'm doing, or would read a report and it could read I track my time. So it could just read my report. And then it could sort of parse or understand that I'm doing this article every two weeks, and then go looking for suggestions as to how to automate parts of it, but not just the technologies because it would have to look at the overall flow of the

activity. Maybe if it asked me, would you like me to look for ways to automate this activity? And I say yes. Well give me some more information. What are the steps that you follow? I noticed that you use this software that software. So if it could interrogate me and interview me, and I could tell it, what, what the overall detailed processes, and then it could go away, and then come back with intelligent, intelligent recommendations. So there's a detection part of it. And then there's the recommendation part of it. Because I believe that there could be technologies out there that could help but there is no, there's no stitching them together into one process that could replace or supplement what I do, I would have to do all that work. And that's a lot of work for me to do to go search out apps that only I'm not even sure if they even exist, but a robot could do that and, and come back with intelligent suggestions.

Raymond Sidney-Smith 25:53

Yeah, that's an interesting use case. I think that there are a couple of technologies that do exist out there. One is called the Monkey learn. And I'm going to confess I have not been able to pierce the the use of Monkey learn, but monkey learn is is a machine learning technology. And it's it's not maybe maybe it's akin to TensorFlow and I just don't understand the technology is well enough. But the idea here is that you can have it, analyzing text, analyzing data, generally that you're feeding into it, but in this case, I believe it's text, and then it can learn from that text. And the curious part for me is that I tried to use this with a client several years ago, using Zapier and the idea was that it would attempt to try and learn the, the tags in this particular client's Evernote account. And as it learned, which and where the client was placing notes in notebooks and tags, override the current automatic filing functions within Evernote itself, which are not perfect. It does a pretty good job, but it's not perfect. And we were trying to get it to be more accurate through something like this tool monkey learn and what you are talking about Francis, it sounds to me like that's someplace where you could potentially use that type of tool to get to that place. But you know, that's that's a that's an interesting use case for for something where it can identify your activity by looking at your schedule, because it could just look at your schedule, and then based on the schedule, make sense of it and say, Okay, well, most Tuesday mornings, Francis is doing x, what do I do with that data? And then you can tell it when you see these patterns do x when you see these patterns to why and so on so forth, but I don't think the technology is quite there yet. But it's it's getting there. That's that's the that's the good part. That's the that's the hopeful side of this.

Francis Wade 28:09

I'm on the monkey learner website, it looks like it's, it's trying to connect data more about data than actions, it seems

Raymond Sidney-Smith 28:17

right? That's where you would connect it to Zapier or or Integra mat or some other tool that integrates with monkey learn. But that would be action would have to be taken by another, another tool, monkey learn about it, learning the technology, it learn it understanding the data, it's information processing, not action. Right.

Francis Wade 28:37

It's not doesn't look like time data, it looks more like static data like you would find in Evernote. Like you were talking about time data,

Raymond Sidney-Smith 28:44

right. But presumably it should be able to understand any type of data, it's machine learning. So you put in, you put in the data and you give it the outputs, and then it figures out the algorithm. So you know, it should be able to identify what you're what you're looking for. By what you give it in terms of the output, you know, which is which is the unique part.

Art Gelwicks 29:05

I would like for more developers, when they put together applications to open up the API's to those applications, so that they can be interfaced with outside tools there, we have far too much information in silos that makes the process of automation too difficult. You wind up having to build workarounds and screen scraping and that sort of thing to try and get tools to do things that, for all intents and purposes, should be pretty straightforward. The other part of it goes along the line of integrating more into our automation tools, the ability to understand what we're trying to automate. The tools themselves are sometimes a little esoteric, and when we try to translate our business processes into these kinds of tools, One of the things that I see most commonly is that we don't understand our business processes. Group after group after group after team after individual doesn't really matter. They're doing jobs on a daily basis on a repeating basis, but they really can't nail down exactly what they're doing. There's this case, and there's this exception, and this person sometimes says that but other times does this. And none of that gets captured anywhere. And if you can't elucidate what you're doing, how do you expect to be able to automate it? So integrating tools that help people understand what they're doing, and then opening up the systems so that they can be integrated? That would be my two big wishlist items.

Raymond Sidney-Smith 30:43

No one could see this but i was i was like jumping up and down in my chair. When art was talking, because I I fully fully agree with this. I think that it's imperative upon all developers who are who are building any software that it's connected to, to the internet. That'd be the World Wide Web, email or otherwise, is to make it interoperable with the rest of the world. I just I don't understand this notion that you're going to create a technology and then you're going to create this silo of capability. And, you know, there there are obviously, security and data privacy issues associated with all of this. And this takes us to the kind of macro level, which is that the global software community, which is stewarding a dramatic change in how, you know, basically, human civilization will will either prosper or fail. I mean, it's we're talking at that level right now in terms of society, being able to really, you know, be impacted by how software runs, you know, software doesn't run just like our day to day apps. We're talking about how it does waste management and water purification and, and smart electricity. These are all things that can bring the tech nology to third world countries and and elevate them to, to living in a modern era, reducing disease and decreasing mortality rate. And all of these positive benefits, you know, out there in the world are all being shepherded by software. And that means developers are at the core of that, and they need to kind of mature or they need to mature so that we are able to as an industry, they need to mature so that we're able to really develop tools that are one interoperable to fully, you know, compliant with some global standard regarding security and privacy. And, and, and being able to do remediation when there is some kind of cyber attack. We need to be resilient in that way. And, and so that's like that's a bigger level issue. I'm interested in what is kind of the first or the next step. Someone listening should Do in furtherance of automating in their own office environment and their own workplace environment. What would you suggest to a listener right now and say, this is where your next first best step is? Okay?

Art Gelwicks 33:17

first understand what tools you have. If it's a small business, if it's a sole proprietorship, if it's a corporation, you have certain tools available to you learn those tools, figure out what their capabilities are and how they can integrate. You look at things like Excel, Excel is almost a staple. It's a standard. It's more as common as your word processing. And yet it has incredibly powerful automation capabilities within it through macro structures. Just taking the time to learn that can simplify a lot of your operations without having to go looking for yet another solution. Once you get comfortable with what tools you already have available, then you can start looking at what can you Get that will work with the tools that you have. Don't make the mistake of running down a path and getting sold a bill of goods of this particular tool can do all

these wonderful things. But it won't do it with the tools that you already have. You've got to make sure those integration points come into play. And then third, I'm going to go back to my previous statement, understand your steps. Understand your business process, developers will develop what you ask them to, to build. If you go through and you say I need this, and they're gonna say, Okay, I'm going to assume that that's what you need. So that's what I'm going to build. But if you can't quantify or prove that that's what you need, and there's value from it, the developers are not going to be able to interrupt that they're going to be they're going to say, look, either I can't or I can't build it. If you don't have a good grasp as to the best ways to improve the efficiency of your operations through automation, than going through the steps of actually procuring the automation itself, is really a wasted effort.

Augusto Pinaud 34:59

Oh, I know I completely agree with that. I think if I believe 10 years ago that learned the software you use the most was important. I now believe that that's critical. Especially in the world of small businesses, where really you don't have in many cases, the, the tools or the resources to just throw people at the problem. So learn how to use those tools and, and how those tools affect the real processes. You know, I found a lot that we don't know how to use a tool and we don't understand really what the processes we do the process because we that's how we have been doing the process, but we have not stopped for a moment to really understand the process. You know, those two things are going to be the first stop Even before we even consider automation, you know, and I said productivity for productivity sake is a waste of time, automation for automation sake, it's also a waste of time. So it's only going to be useful when you understand what components of that process you are trying to improve what he's what you're trying to, to automate, it's not out to make the process is you need to understand really what and why.

Francis Wade 36:29

I think there's a an additional angle to this, which is that many manual processes so forget about the, the tool that you're using for just a moment and assume that a human a human being is going through a set of habits and practices in order to execute a particular activity or process. And I think there's a step that that needs to be done that's a little bit different than what to in addition to what tool Do you use, which is, how well are you executing In the process, so there's some research, for example that you can do to find out what work class performance in that activity looks like. Versus beginner performance, which is sort of at the very beginning. For example, I'm about to do some Facebook ads. And I'm a, I did them a few years ago, back when it was very different, and things have no changed. And I'm a beginner. And I'm trying to study the way that the experts do it, or at least what work class performance looks like, when you really know what you're doing when you're putting together Facebook ads. And I think that kind of evaluation. So if I rate myself as a complete novice, that kind of evaluation is really important because it can tell you where you can make some easy gains with the tools that you currently have without making any investments in new technology without making any purchase without purchases or without hiring. Anybody else, they tell you where you are. And I think that's self evaluation that off even on an office level at the scale of a department or a unit, that evaluation that grabbing a performance baseline is really important. It's a way to discover where you can make improvements without having to spend a lot of money.

Raymond Sidney-Smith 38:24

In my world, I think that I would take that a step further potentially and have something like a desk audit done, whether that's a formal desk audit, by a compensation analyst, or if you are if you have someone for those who don't know desk audit is a usually a compensation tool where someone in HR or a consultant to the HR department would come in and in essence, interview you and watch what you're doing throughout the course of a day or some other length of time, in order to be able to identify, you know, your compensation, how much you

should be getting paid in terms of pay increase in terms of succession planning. And the goal for the compensation analyst is to be able to really understand that person's job better. So that the organization the business can understand what that person is really achieving through their day to day activities. And that usually helps to update job descriptions for, you know, for hiring, and also compensating someone for retention purposes because many times if you don't know what someone is really doing on a day to day basis, you can sometimes take advantage of that person or take them for granted, and then they will leave. And so desk audits are a way for organizations to hopefully overcome that issue. It is in at least in the small business Arena in the mid sized business arena is fairly unknown, and not done very often. And I fully support people who should Do that do more of the desk audits. And that will help with retention because you'll learn more, and may also help you, you know, fire people faster if you see that they're doing nothing. But the idea here is that in the workplace automation space, if you start to do desk audits, even a self audit, you just sit down and take track of what you're doing over the course of a week, you will a typical week, not you know, not an outlier week, you will then be able to see, oh, I'm doing this thing, this routine every week, what parts of it are useful and practical for the business? And can I automate that part? Can I automate that routine? So that in some way, shape or form, perhaps I instigated, I trigger that routine, but I'm not actually doing that part. So for example, every morning, I turn on my computer, and I want the same programs to open. I use software to do that. I mean, what, what practical sense would it be for me to open up all that software every day that I use almost every day by myself. And that includes in, in my web browser opening up the same tabs, which most for me are tools usually, but I want my calendar to open, I want my email to open, I want those things to open automatically at a particular time. And so I use workplace automation software to do that. I don't want to do that myself. One, I'd have to remember all the various tools that I use every day, and then open them in the right sequence at the right time. Well, guess what? I don't, I don't have to do that. Because it's a computer, it should, it should be able to do that. And it's not quite machine learning, as Francis was talking about earlier, of being able to anticipate my needs. We'll get there and I hope we'll get there. But right now, it's just I know myself because I track my time. I know what I do throughout any given day. And now I know based on that, on average, I open up the software at this time, open up this software that time and now the computer can do that. So if you are paying attention If you're bringing awareness to your routine, you're then able to understand it better, and then automate those things. And, and it can, it can, it just saves me oodles of time to have the machine just turn on and, and execute what I need when I need it in terms of bringing the tools up. And so, for example, I have a particular day of the week when I do my social media, you know, posting and those kinds of things scheduling for the future week for, you know, business and clients. And so, I those tools all just open at that time. And sure, I might be giving a seminar that day, and you know, out of the office, and so it opens, who cares when I get back, it'll be there waiting for me. So even though it's not smart in that sense, it's just feature rich, and that kind of automation can be very, very useful. I will also step back and say one first thing you can do as well is looking at your home automation based on last week's episode and how we talked about automating in the home environment, some of those creature comforts are really useful and helpful in an office environment as well. So just the notion of, you know, if you are worried about crime or other kinds of issues in that regard safety, you know, harkening back to Francis's thoughts about, you know, having security cameras, and so and so forth, or I think I talked about the idea of, of having lights turned on randomly. You could do that in an office environment as well, especially if you have a retail office space. You can have lights turn on at random hours, you can do different things to be able to help mitigate crime and help you feel more safe in your office space, just through some office automation. And so, you know, it's not like Alexa or Google or that is the echo devices, or Google or even Cortana on the Microsoft platform. And Apple's you know, all of those can potentially work in a small office and home office environment. Where you may be able to do that I have lots of clients who are using those devices in their retail spaces when they're small businesses because, you know, the consumer technology just works. And and so I think giving

some consideration to what you're already using at home, and potentially seeing how those may be applicable in an office environment. And I think that can be really, really useful. So any final thoughts from you gentlemen, about office automation, workplace productivity, I know that we will definitely have to do some deep dives into workflow software automation at some future time. But what do you have any Do you have any big ticket questions? controversies. thoughts, before we, before we wrap up this episode,

Francis Wade 44:47

I have one. I think it's really important before implementing automation to look at the total cost. I think I mentioned this in the last episode, but in the business, it's really important. It might be easy to Put in an automation, but internal to be wickedly difficult to maintain it and keep it going. In which case it would make it not worth it. If it's if the cost of maintenance and the time it takes to keep playing with it to make it work and to keep it relevant if the total time and the investment is too large, and it might not be worth it, and I think that for a business, you have to sort of evaluate is it worth it or not from the total cost point of view, and make a decision accordingly. And I imagine that companies that sell automation aren't really big on you doing that because they're trying to sell it to discourage you from implementing it. So as a business person, you've got to ask the question, do I have what it takes to maintain this automation then is the maintenance cost? Does the maintenance cost override the benefit? Just by itself?

Art Gelwicks 45:51

I was I was just gonna pile on that real quick. Make sure that you can quantify that stuff because often you'll get the it's going to improve efficiency or save you time I think no numbers, hard facts, then you can have the conversation if you don't have those hard facts, there's no way to say that it actually did what it was supposed to do.

Raymond Sidney-Smith 46:10

And I would I would add to this, that which is experimentation and testing, there is some level of cost to that. So even getting to the decision point on a piece of automation, and its maintenance costs, there isn't there is a cost to entry that you need to be aware of. And I think that you should budget that in I really do I feel like you should spend some time thinking about the time investment as well as the the financial investment, which for for you might also be a financial time maybe in financial, in the sense of having staff or other team members working on these kinds of projects, depending upon the size of your organization. So, you know, really think about the costs of of working with automation. They should, at some point, have a return on investment. So the notion here is, you should understand that there's going to be an upfront cost, there is going to be an upfront cost, and then work yourself through when it will break even. And then ultimately start to provide you with compound benefits, you know, there there should be increased something, even and it could be a qualitative metric, it could be that people report, you know, to work healthier, it could be that people are, you know, higher morale, you know, greater retention, which can all be, you know, in some way shape or form quantified as well. But, you know, there can be qualitative metrics for the outcomes of these, you know, I can sit there and open up all the software I need every day. There's no question about that. Does it make my life easier and and does it actually benefit my productivity? Yes. Do I do I care so much About the time savings as it is to the what if I, you know, am I just frustrated by the fact that I have to open up those things every day, it's actually more the frustration than it is the time savings for me. And so that's a qualitative metric that was worth the time and energy. And I know that it's working. And this is one of my key kind of standards with regard to automation is that I know that it's working because it's something that I interact and engage with, regularly. I don't like automation that just runs in the background. And I don't have to, you know, on a basic level, I don't want it to be running and for me not to have to interact with it. Automation should be something that impacts what I'm what I'm doing. It should it should work into my workflows. It should not be something that just happens in the background, and I don't ever see it. So the goal for me is to be able to see those things appear

in my system and to know the automations happened. And, for example, even the example of voicemail to email to trigger other folks to deal with that voicemail, I get a task notification, in remember the milk that says follow up with such and such about that particular thing. And so I know immediately because it's, it's showing up in my system, it's not just happening in the background, and I'm not aware of it. And so I don't think you should be doing any level of automation, uh, certainly in the early stages, where it's kind of Wizard of Oz type that once you set it up, you don't quite see it. And it's opaque. I think it should be transparent to translucent in terms of what you see and how you touch automation. Automation should be facilitating things you're doing and helping you do those things faster. They shouldn't be just doing things for you. That that's that I don't think is the right approach with automation, because then when something goes wrong, you didn't know what happened. And it was on autopilot and then you start blaming that automation. Oh, you know, I had that. For example, in the work financial world. I have a lot of systems that can Automatically pay vendors and take care of bills and those kinds of things, I actually don't like them, I want to see the numbers, I want to know that the dollars in and the dollars out make sense and that they balance. And so I'm, I am against too much automation in that space because if if everything was AutoPay everything was you know, then I'm less likely to look at my profit and loss statement my income statements and and then ultimately, you know the balance sheet and that's a problem for a business owner. So you need to remember that touching it is actually as important as the automating it. So just keep that in mind as you go forward. You know, obviously, there's some things that you shouldn't have to see or touch. But those are fair, fairly few and far between, in, in my perspective. All right, thank you gentlemen, this has been a lot of fun. I've really enjoyed talking about office automation. And if you our listeners have a question or comment about office automation about workplace productivity, something we discussed on this episode and your and your, you know, just have a question about it. Let us know, if you have a comment about it. If you have further thoughts, feel free to head over to the episode page for this. It's at ProductivityCast dotnet forward slash the three digit episode number. So if you just type in the three digit episode number after productivitycast.net forward slash, you will get to the episode page there on the page, we have a comment section, you can leave your questions and comments there. And we'll be happy to respond to you from that point. If you also want to see the show notes, any of the links or resources we discussed. We'll hopefully have those linked in the show notes. And so you can click on those links and get to them from the show notes. We also have a PDF transcription of our episodes on those their machine transcribed but they're good enough for you to be able to understand and there's also a text one on the page. So you click on the read more under the transcript and it should open up and you should be able to read through the episode. Just to jump to points if you need to. If you have have any other questions related to personal productivity, you know that we would be happy, we'd be delighted to hear them. So go ahead and visit ProductivityCast dotnet forward slash contact, and there on the page, you can leave a recorded voice message, which we can, if we need to, we can play here into the episode and respond to or a written message where you can type to us and send that along to us. Again, thanks to Augusto Francis, and art for joining me here on this cast and every cast. And also, if you could leave us a rating or review in Apple podcasts or Stitcher, I think those are the two primary places where people can leave ratings right now. And I know that they help with our growth of the personal productivity podcast listening community. So feel free to do that. And thank you for those of you who have and we'll be doing that. That brings us to the close of this episode of ProductivityCast, the weekly show of all things personal productivity, take care, everybody, here's your productive life.

Voiceover Artist 52:57

And that's it for this ProductivityCast, the weekly show about all things productivity, with your hosts, Ray Sidney-Smith and Augusto Pinaud with Francis Wade and Art Gelwicks.