



Happily ever after automation

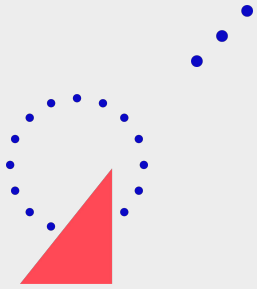
Automate yourself to work on what you love

LISA KLEINMAN [Make]
PETER LEVIN [HubSpot]
ANNA SANCHEZ [Esri]

September 21, 2023

INTRO

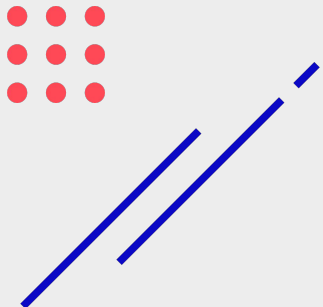
Today's session



01

Intro

Brief overview of how we're defining automation, and what you'll get out of this session



02

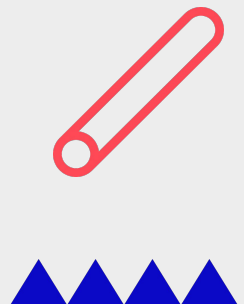
Show & tell

Sharing examples of how we use automations in our research process

03

Demo

Let's look at an automation together and see how it works



Who we are



Lisa Kleinman

Head of Product Design
Make.com



Peter Levin

Principal Researcher
HubSpot



Anna Sanchez

Research Operations Manager
Esri



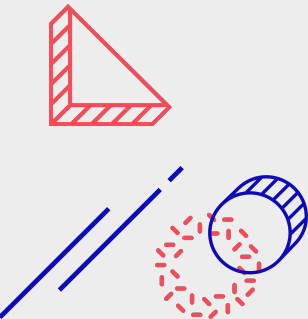
Automations shift activity

Automation is an effort-shifting endeavor, moving activity from humans to mechanical / physical or software systems. Tasks, pattern finding, and decisions are amongst the many things that have and are being automated.

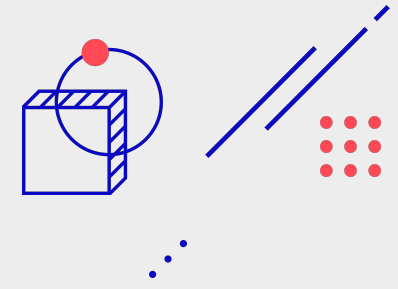
Automation has garnered repeated attention both in terms of what it takes to create it (how it is produced), and perhaps more critically, of the impact it has, both in local settings and more broadly. Do automated systems and work flows create efficiencies? Do they save labor, or just shift it elsewhere? Are the labor-saving ramifications good for business? What about for society? What's left out when things are automated, and what new possibilities does it give rise to?

Cefkin, 2023

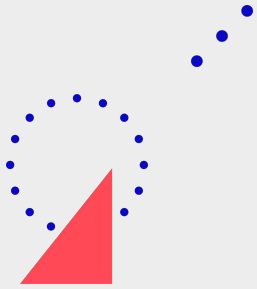
<https://www.epicpeople.org/collections/automation/>



Today we're talking about shifting the tedious tasks in research, so you can focus on what you love about the work



Does this sound familiar?



You've got a system, but no one else does

It's the start of a new research project, but you work slightly differently than your colleagues.

Stakeholders never know where to find what they need.

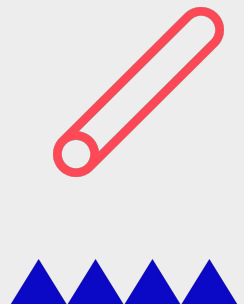
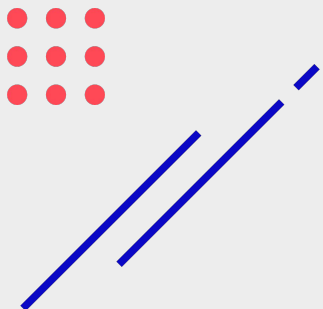
The data is there, but not in a way you can use it

You've collected a lot of data, but it's in a bunch of different tools, and none of these tools have exactly the right feature you need.

It takes forever to recruit & schedule users

If you're lucky, you have a Research Ops or Recruiting Specialist(s)... and if you're like the rest of us, this is also your job.

What if you could automate it?





Automations are a set of rules that you create to accomplish a goal

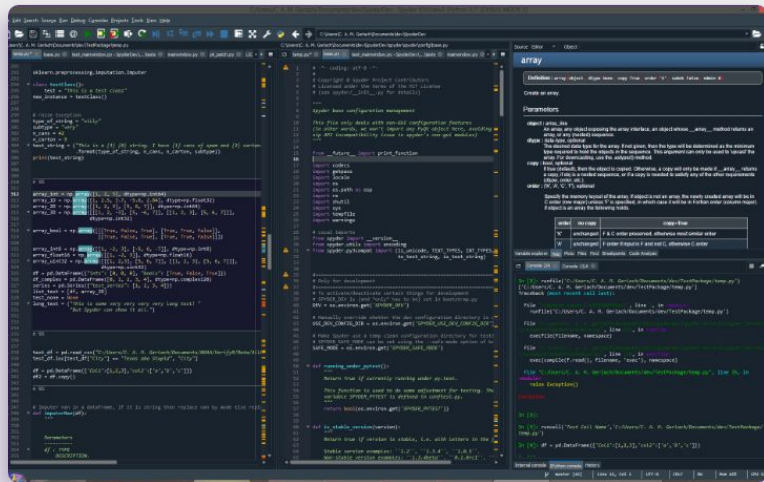
Simply put:

Rules for systems like **if this happens, then that happens...**

By using tools:

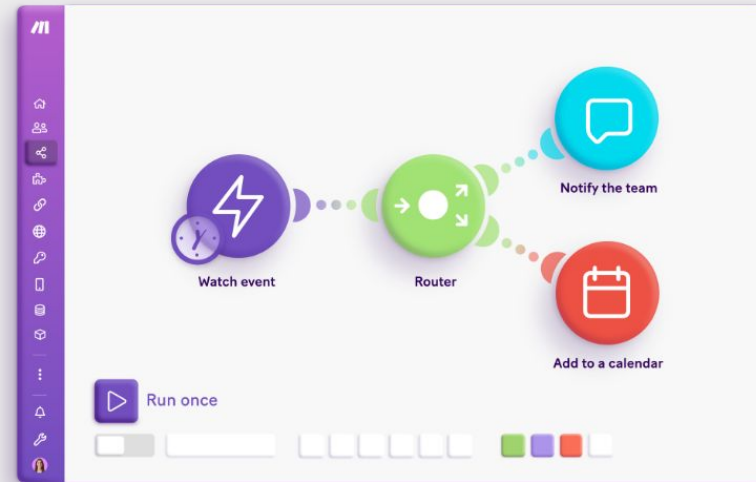
Platforms like **Make, Zapier, Airtable automations**, and more allow you to connect and transform the data you use across any cloud-based apps.

In the past, only developers had the know-how



Classic dev

What it looks like when you need developers or coding skills to build automated workflows.



Automation platforms (no coding needed)

Platforms like Make let you visualize everything. Visually build and watch your workflow run in real-time in front of your eyes, without the need for coding skills.



No-code platforms & built-in automations lower the barrier for being your own creator



Unicorn finder

Please complete this questionnaire to find out if you qualify for our research study.

lisa.kleinman@gmail.com [Switch account](#)



* Indicates required question

Email *

Your email

What is the first thing you brush in the morning? *

- ☐ Hair
- ☐ Teeth
- ☐ Magical mane
- ☐ The cat, whether they like it or not

What's your favorite breakfast? *

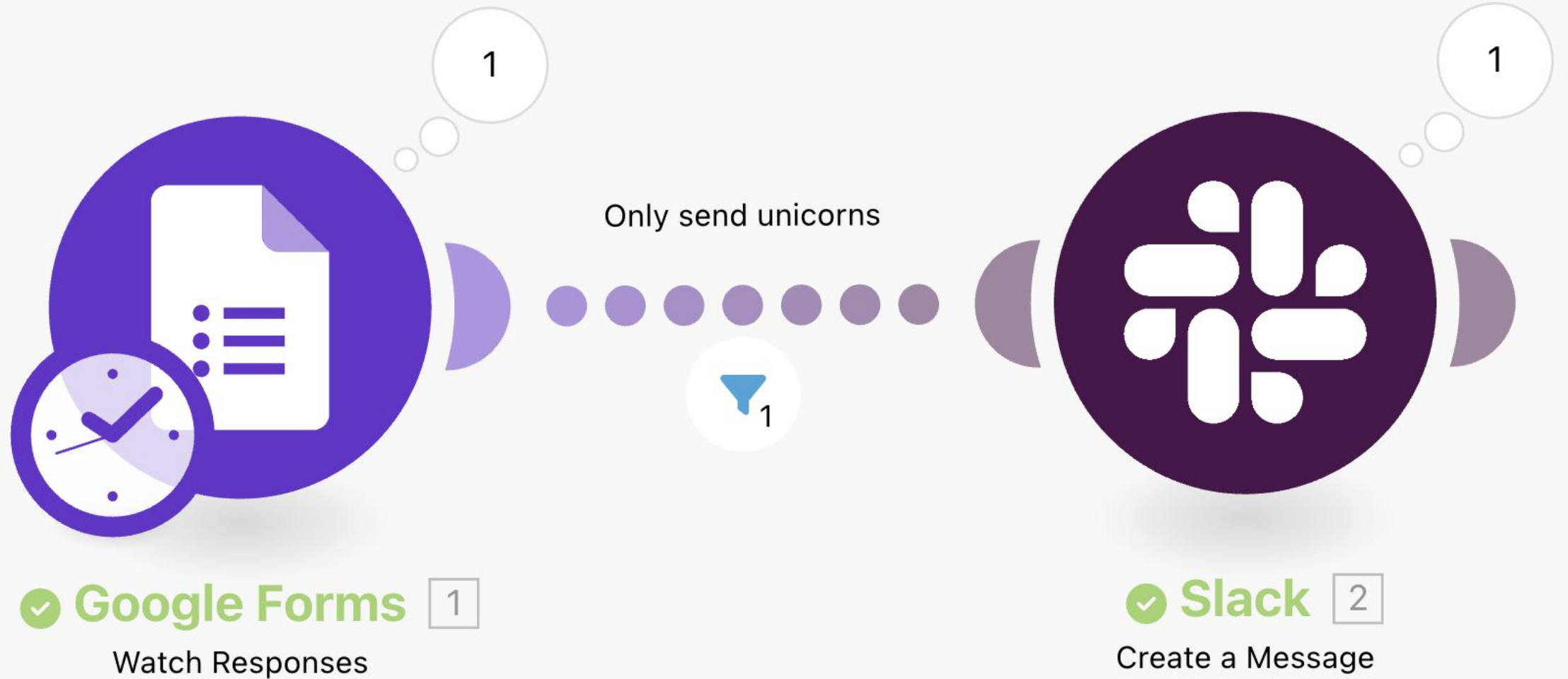
- ☐ Breakfast burritos
- ☐ Cereal
- ☐ Rainbow dust
- ☐ Smoothie
- ☐ None

Submit

Clear form

***Let's say you've got a
screener questionnaire in
Google Forms***

***And you want to be
notified when you've
found a Unicorn***

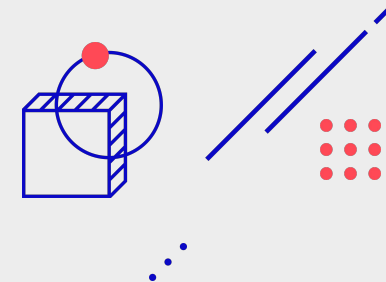
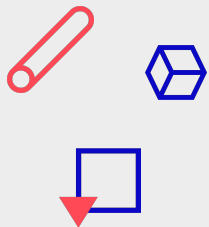


Let's find out who is a Unicorn 🦄

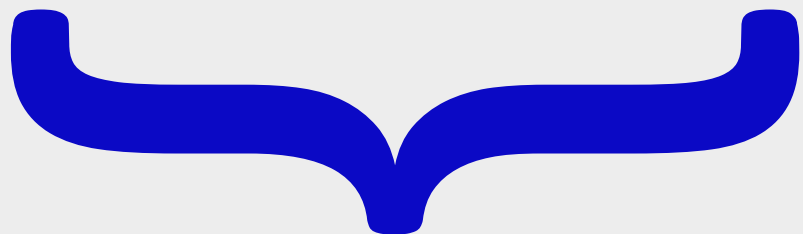
<https://forms.gle/2UorydQQSQicXdzQ9>

SHOW & TELL

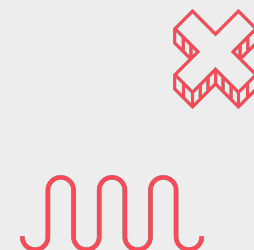
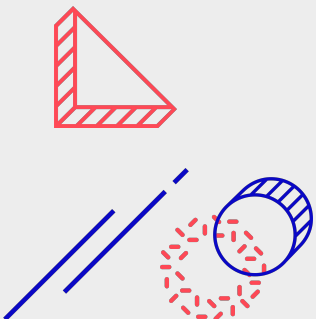


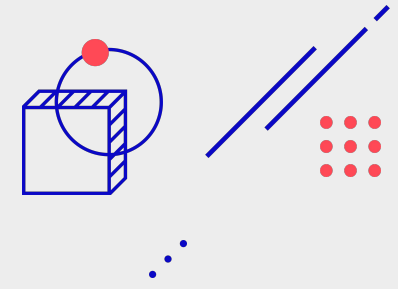
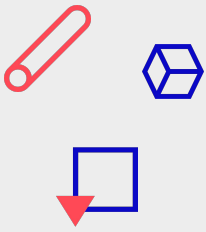


A simplified qualitative research workflow



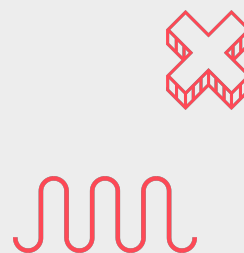
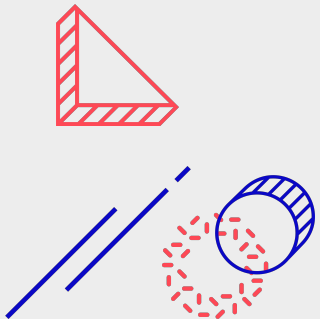
We'll focus mostly here



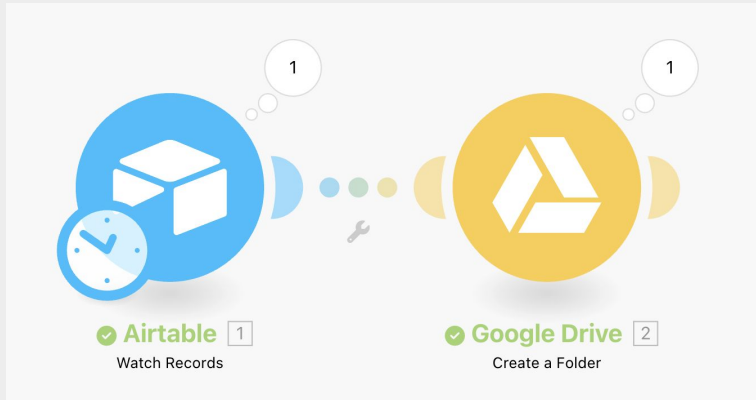
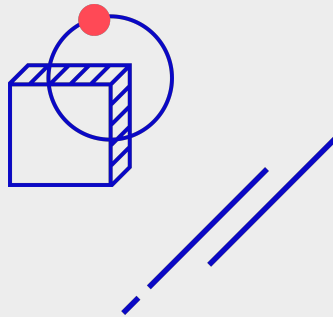


Example one

Streamline project initiation, improve accountability, and actually manage some visibility across your research team

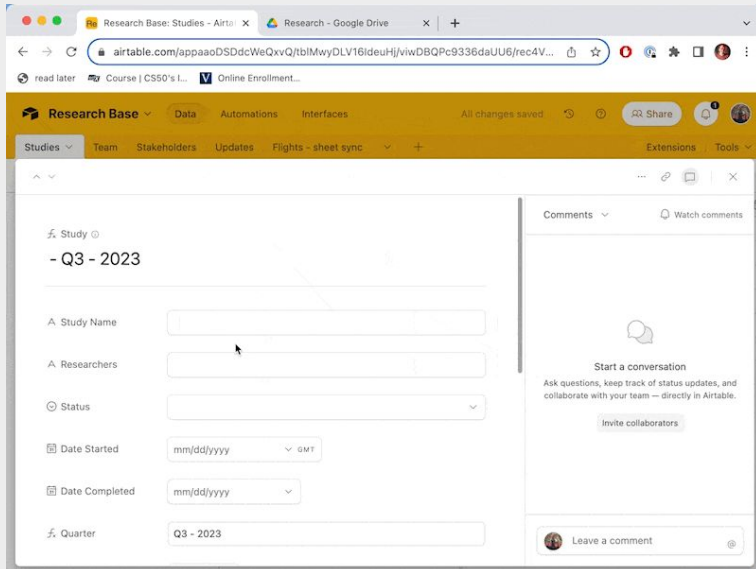


Keep folders in one place

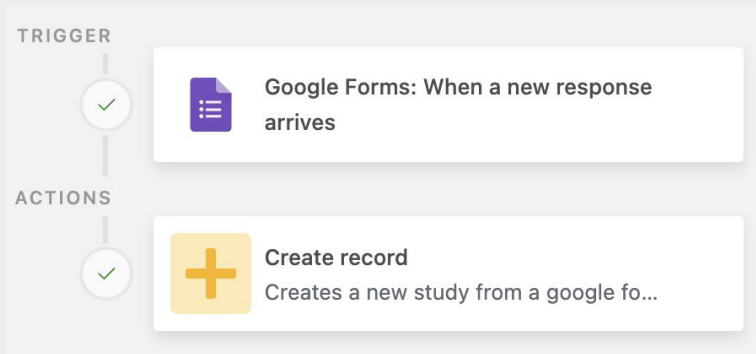
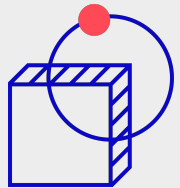


A little bit of automation keeps everyone on the same page!

- When you start a new project, automate the creation of a Google folder with your study title and current quarter, in a common Google drive.
- I used a “Make” integration, that watches an Airtable table and then creates a new folder in Research, with the name of the project.

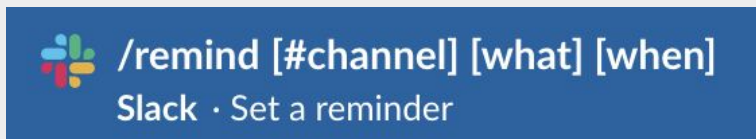
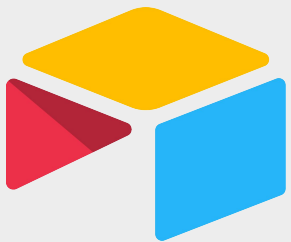


Create a weekly update

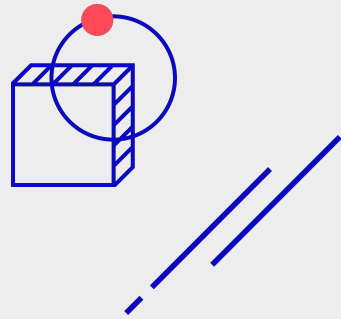


A little bit of automation keeps everyone on the same page!

- For active projects, automate a weekly update: what progress you've made, what's on tap, and an insight to share.
- I used an Google form to capture a weekly update, and then I used a simple Slack automation to remind people to fill out the form.

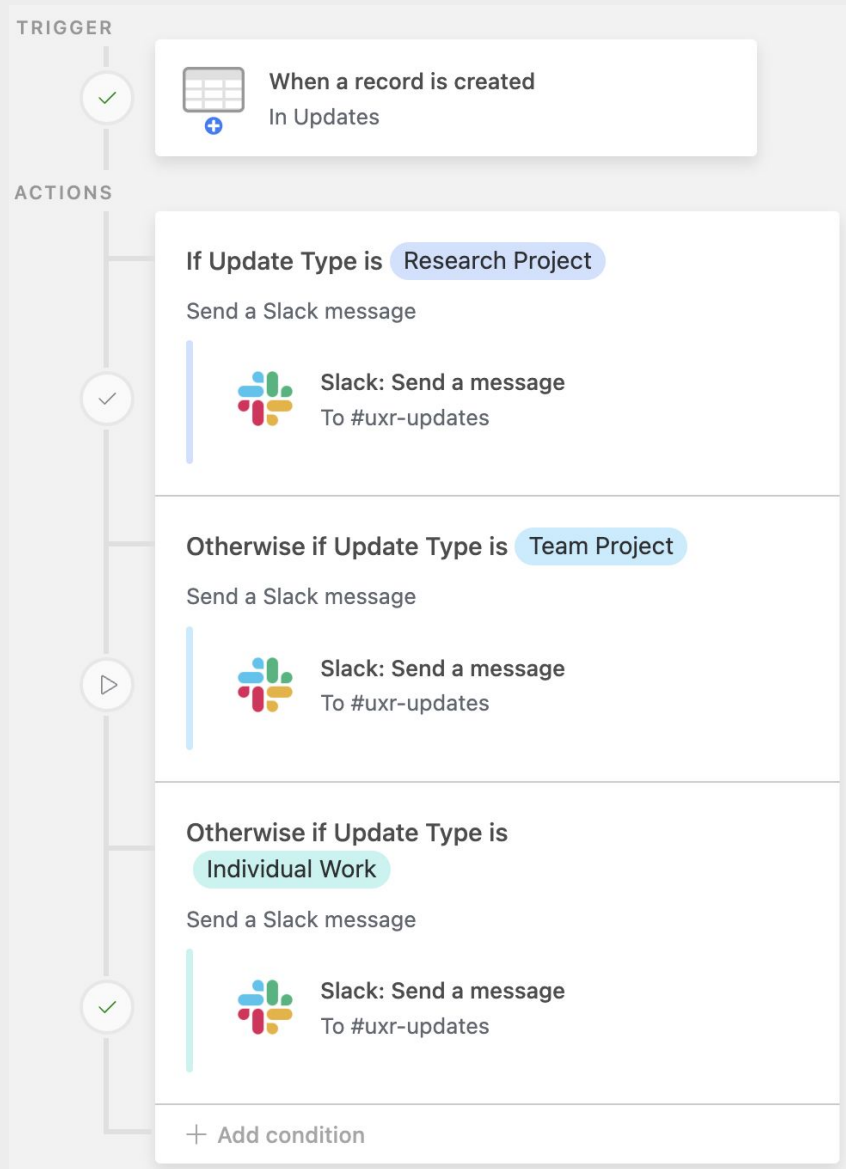


Let everyone know what's happening

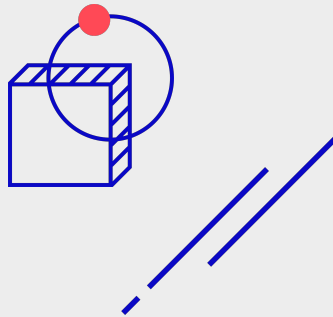


A little bit of automation keeps everyone on the same page!

- For updates, automate communication to a common Slack channel. Everyone keeps up on everyone else's work.
- I used a native Airtable integration to post everyone's updates to a dedicated Slack channel, and to attach the update to the overall project.

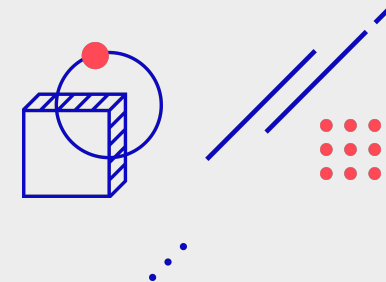
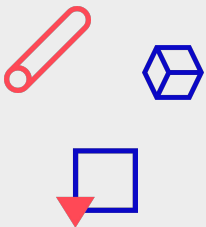


This is just the beginning



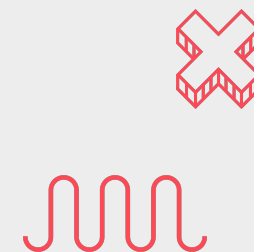
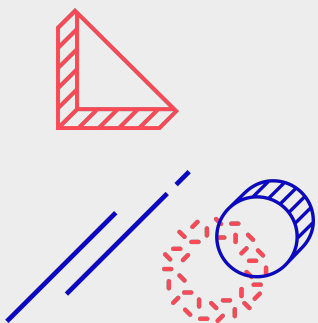
We often do too many manual tasks:

- Pre-populate a research brief! Maybe you can automate creating a project brief document?
- Automate a To-Do List! Maybe you can turn a 'what's next' update into a to-do list, and Slack it to the team?
- Automate a Completion check-list! When a project is done, automate closing-out tasks.



Example two

Relieve some of the tedium of creating a panel



Example *two*

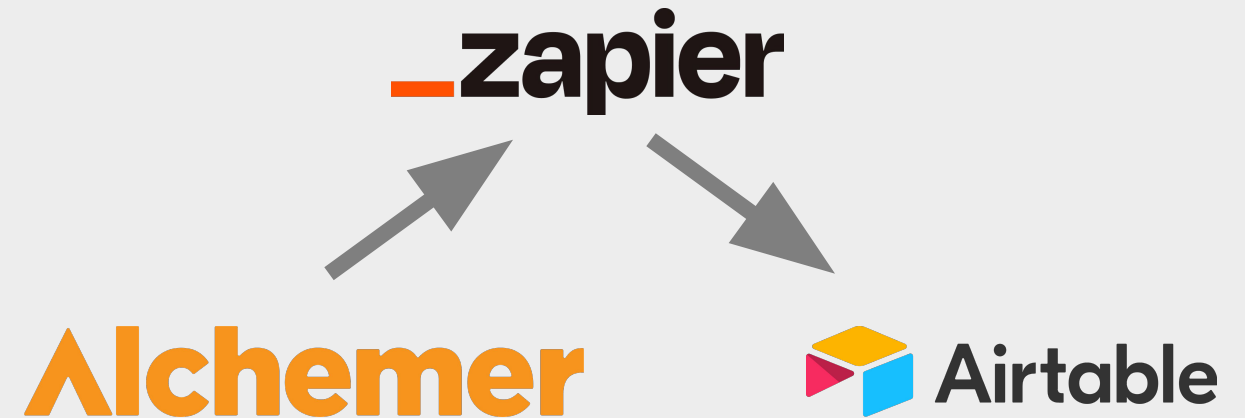
Automate to build a participant panel

Automate moving data from your
SURVEY to your DATABASE

Build your database as your single
source of truth

Things to think about

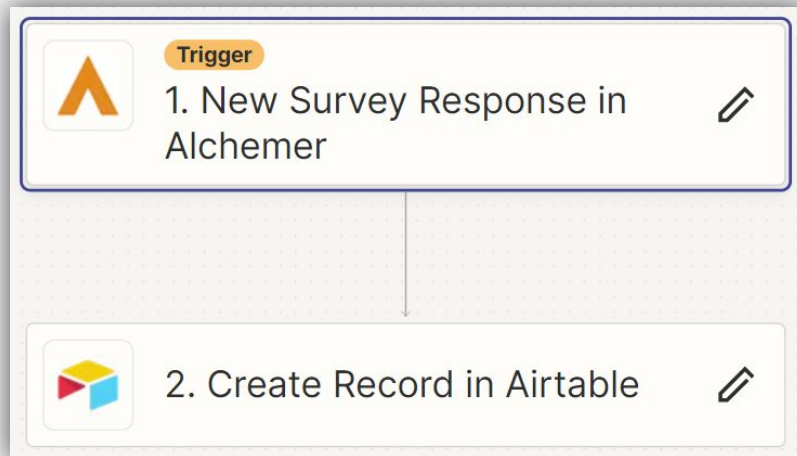
Choose the automation tool first?
Or the survey/database tools?
You have options!



Preparing for your Automation

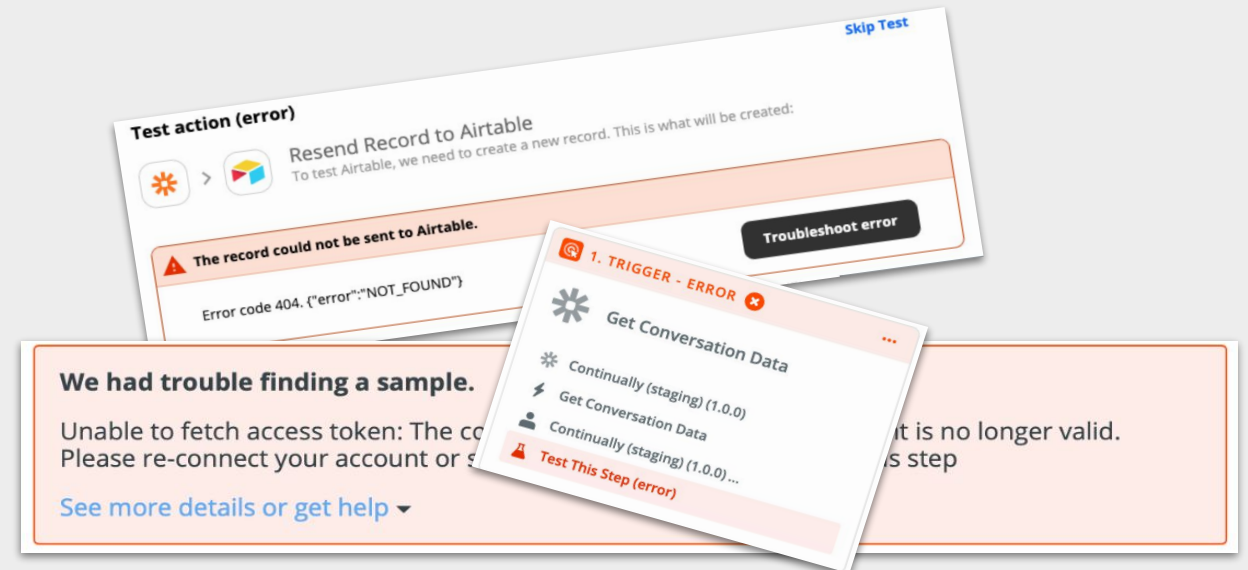
Checklist

- ✓ Survey is ready
- ✓ Database columns are ready
- ✓ Optional: Planning spreadsheet is ready



Basic Steps

- Match up survey questions to database columns in your automation tool
- Test test test! Don't be discouraged by errors; every mistake builds your skill and knowledge
- Format answers that might have troublesome delimiters/characters



Creating a Planning Spreadsheet

Alchemer

Make a spreadsheet to help organize your automation

- Survey questions
- Database columns
- Automation tool status

Reduce time switching between tools

Copy/paste from a single spreadsheet

Find mismatches between tools quickly

Know exactly which tool is missing information and what that info is

	A	B	C	D	E	F	G
1	Alchemer Questions						
2	Order	Status	Page#	Page Name	Prompt	Type	ID
3	0	txt	1	Welcome!	Welcome! Become a collaborator...	Text / Instructions	107
4	1	req	2	Research Participation	First, please review the following..	Checkboxes	378
5	2	req	3	Basic Info	What is your full name ?	Textbox	13
6	3	req	3	Basic Info	What email address should we use	Email	14
7	4	req	3	Basic Info	What is your relationship to Esri?	Radio Buttons	58
8	5	req	4	Work Background	What organization type do you cur	Dropdown Menu	799
9	6	req	4	Work Background	How would you describe the organ	Textbox	800
10	7	req	4	Work Background	What industry do you currently wo	Dropdown Menu	798
11	8	req	4	Work Background	How would you describe the indus	Textbox	631

Airtable

H	I	J
AirTable Fields - Evergreen Survey Responses		
Order	Name	Type
1	Sign-up consent	Single select
2	Name	Single line text
3	Email	Single line text
4	Relationship to Esri	Single select
5	Organization type	Single select
6	Organization type (Other write-in)	Single line text
7	Industry	Single select
8	Industry (Other write-in)	Single line text

zapier

K	L	M
Zapier		
Order	Linked	Formatte
40	x	
1	x	
2	x	
3	x	
41	x	
55	x	x
42	x	
7	x	x
6	x	

Pro tips



Special sign-up events

Create new, small automations

- Lean on your main, master automation to help these become quicker tasks

Database labelling

- Keep your data organized, fresh, and manageable for longevity

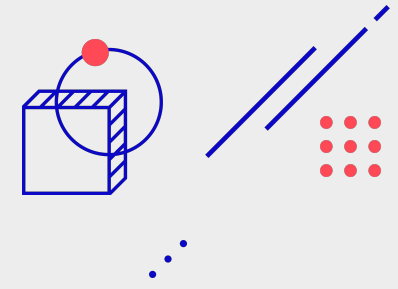
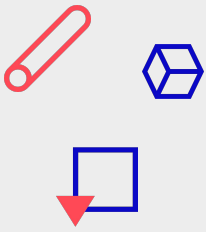
Repeat sign-ups

Look up existing entries

- Use “look-up” or “find” step in your automation to match up emails

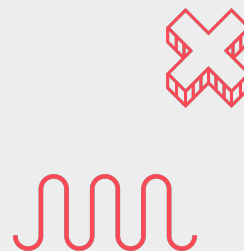
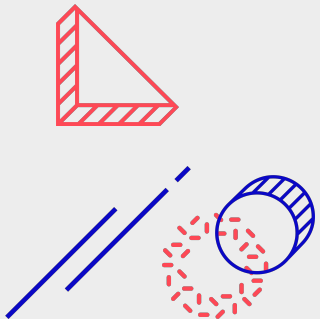
Update survey answers, leave other data alone

- Keep your tracking data intact while updating your sign-ups’ latest product usage and preferences



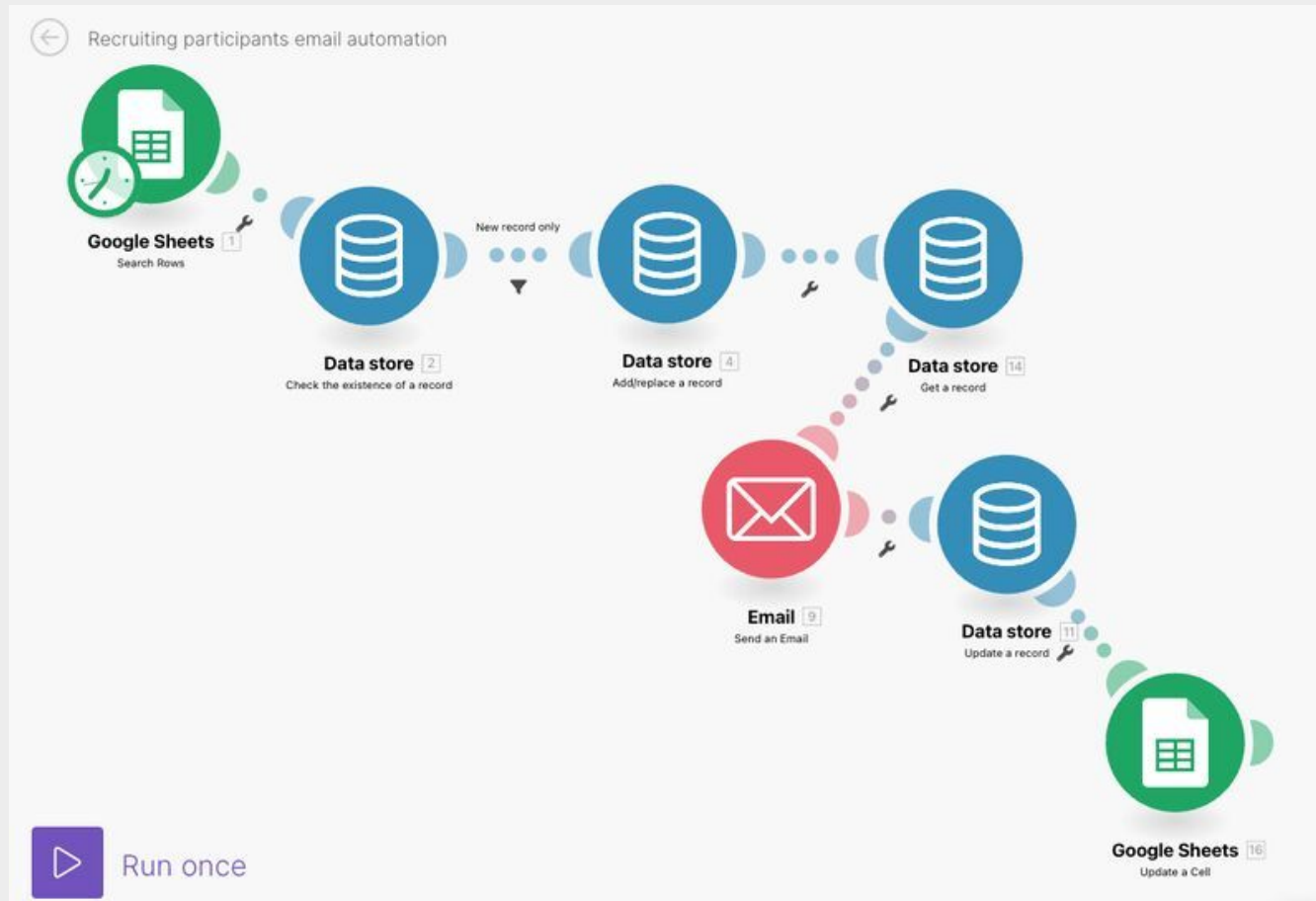
Example three

Stop emailing back & forth, and start scheduling without having to talk to your humans (yet!)



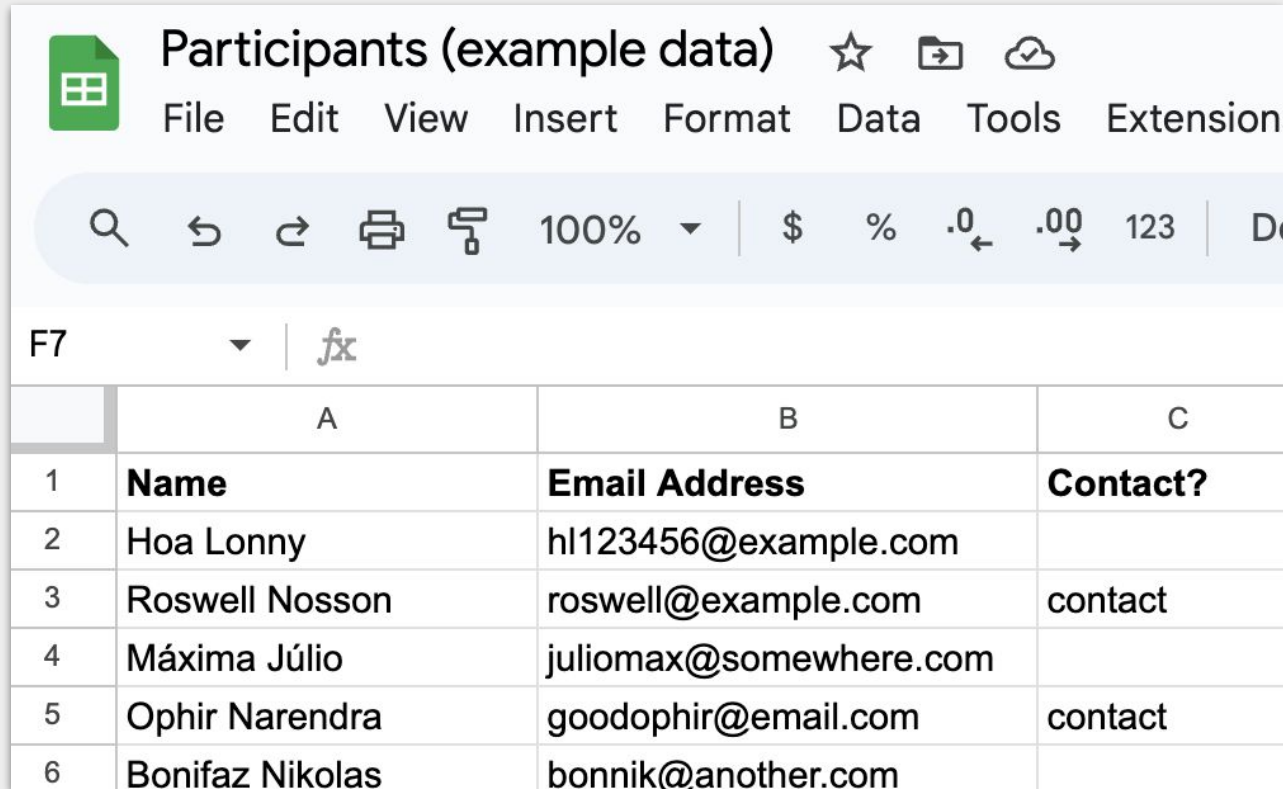
Example three

Now you've got a panel -- how do you quickly schedule them?



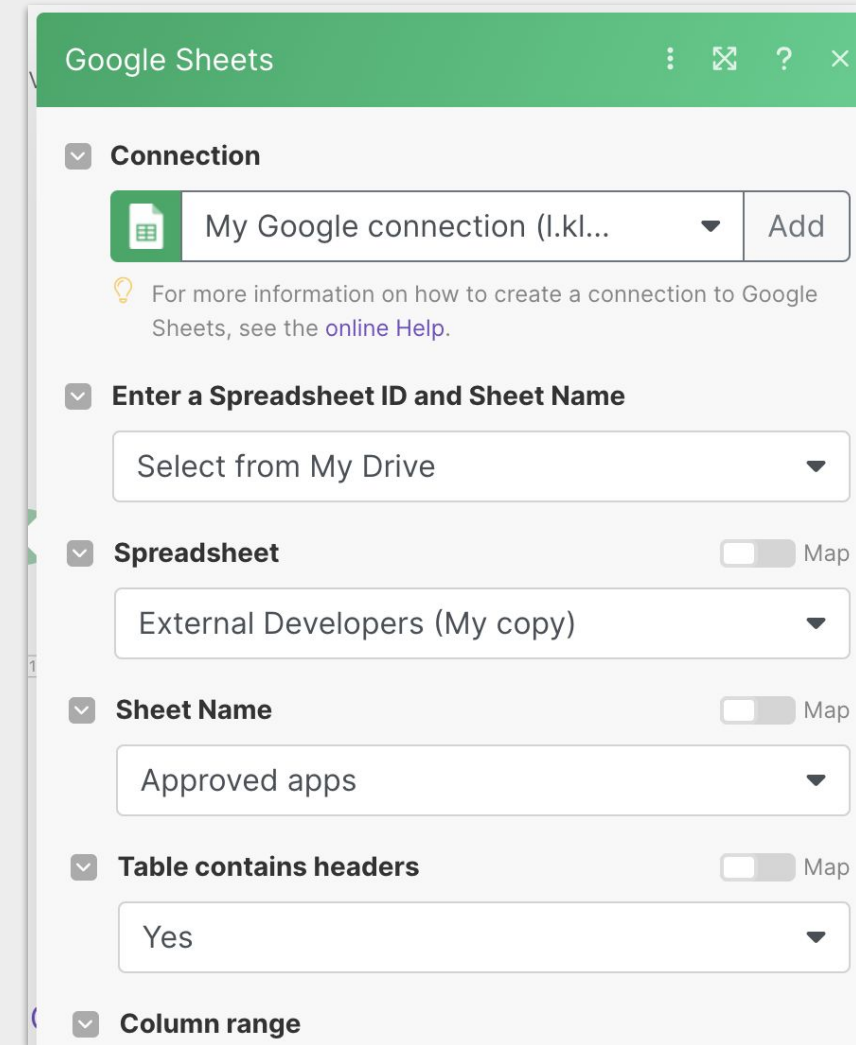
Using a spreadsheet that lists the qualified participants, this automation sends a personalized email to the participant and allows them to schedule using an online calendar service

Participants qualified for the study



The screenshot shows a Google Sheet interface with the title 'Participants (example data)'. The menu bar includes File, Edit, View, Insert, Format, Data, Tools, and Extensions. The toolbar shows search, undo, redo, print, link, zoom (100%), currency, percentage, decimal, and thousands separators. The active cell is F7. The table has four columns: Name, Email Address, and Contact? (with an empty header cell in column A). The data rows are as follows:

	A	B	C
1	Name	Email Address	Contact?
2	Hoa Lonny	hl123456@example.com	
3	Roswell Nosson	roswell@example.com	contact
4	Máxima Júlio	juliomax@somewhere.com	
5	Ophir Narendra	goodophir@email.com	contact
6	Bonifaz Nikolas	bonnik@another.com	



The screenshot shows the 'Import data' sidebar in Google Sheets. It includes the following sections:

- Connection:** A dropdown menu showing 'My Google connection (l.kl...)' with an 'Add' button. A lightbulb icon and text provide a link to online help for creating a connection.
- Enter a Spreadsheet ID and Sheet Name:** A dropdown menu showing 'Select from My Drive'.
- Spreadsheet:** A dropdown menu showing 'External Developers (My copy)' with a 'Map' toggle switch.
- Sheet Name:** A dropdown menu showing 'Approved apps' with a 'Map' toggle switch.
- Table contains headers:** A dropdown menu showing 'Yes' with a 'Map' toggle switch.
- Column range:** A dropdown menu (partially visible).

When it says “contact” send the recruiting message

Participants (example data) ☆ 📁 ☁

File Edit View Insert Format Data Tools Extension

🔍 ↶ ↷ 🖨 📄 100% ▾ | \$ % .0 ↵ .00 ↶ 123 | D

F7 ▾ | fx

	A	B	C
1	Name	Email Address	Contact?
2	Hoa Lonny	hl123456@example.com	
3	Roswell Nosson	roswell@example.com	contact
4	Máxima Júlio	juliomax@somewhere.com	
5	Ophir Narendra	goodophir@email.com	contact
6	Bonifaz Nikolas	bonnik@another.com	

Email ⋮ ☒ ? ✕

Content

Hello `startcase(first(split(14.`Author name` ; space)))`!

As a new Product Manager responsible for the experience of creating and managing apps on Make I would highly appreciate your inputs on this part of the Make product as I know you developed `14.`App name``, which is successful on Make.

Would you be willing to share your experience creating and managing a Make App on a short call with me and my colleagues?

It would help us design the right environment for you and other Apps developers.

<a href="https://www.getclockwise.com/c/j-k

💡 You can use HTML tags.

☒ Show advanced settings

Cancel OK

DEMO



Unicorn finder

Please complete this questionnaire to find out if you qualify for our research study.

lisa.kleinman@gmail.com [Switch account](#)



* Indicates required question

Email *

Your email

What is the first thing you brush in the morning? *

- ☐ Hair
- ☐ Teeth
- ☐ Magical mane
- ☐ The cat, whether they like it or not

What's your favorite breakfast? *

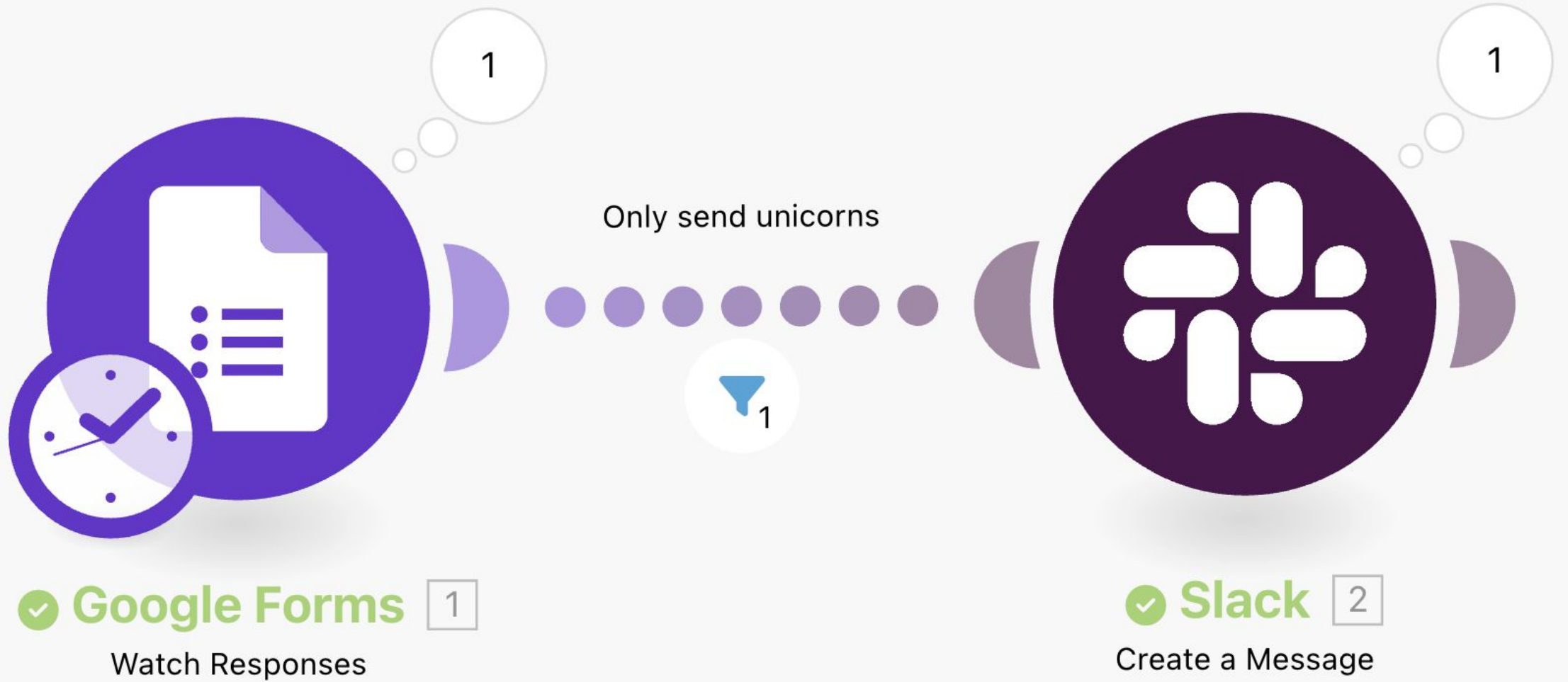
- ☐ Breakfast burritos
- ☐ Cereal
- ☐ Rainbow dust
- ☐ Smoothie
- ☐ None

Submit

Clear form

Let's say you've got a screener questionnaire in Google Forms

And you want to be notified when you've found a Unicorn



Google Forms

Connection

My Google connection (l.klei...

Add

For more information on how to create a connection to Google Forms, see the [online Help](#).

Form ID

1D6AaGWw9VBf48RdhYo4tNafBAMe6

Search

Limit

10

The maximum number of results to be worked with during one execution cycle.

Cancel

OK

Set up a filter

Label

Only send unicorns

Set the route as a fallback. A fallback route is a backup route that is used if the source data didn't go through any other route. One router can have only one fallback route.

☐ Yes

☒ No

Condition

1. Answers.What is the first thing you brush i
n the morning?.textAnswers.answers[
]: value

Text operators: Equal to

Magical mane

and

1. Answers.What's your favorite breakfast?.tex
tAnswers.answers[
]: value

Text operators: Equal to

Rainbow dust

Add AND rule

Add OR rule

Cancel

OK

Slack

Connection

My Slack (user) connection...

Add

For more information on how to create a connection to Slack, see the [online Help](#).

Enter a channel ID or name

Select from the list

Channel type

IM channel

User

I.kleinman

☐ Map

Text

Congratulations, you've found a unicorn!

Hurry and email them now at

1. Respondent Email

 before they disappear.

For detailed information about text formatting, see the Slack [documentation](#). The Text field is not enforced as required when

☐ Show advanced settings

Cancel

OK

[illegible]