



---

# **PERSONAL AUTOMATION: THE BIG TREND YOU CANNOT MISS OUT ON**

**(PLUS 17 EXAMPLES OF TASKS THAT YOU CAN  
AUTOMATE TODAY AND FREE UP 5-8 HOURS/WEEK)**

Date: August 1, 2019

Dear Asian Efficiency reader,

One big trend in the world right now is automation. Amazon and other big companies are automating everything that they can. Very soon we will have cashier-less grocery stores, drones delivering our packages, and AI predicting what we would like to buy next. It's all being automated now.

Automation is not just for big companies. We're at a time right now where people like you and me can get access to this and use it in our personal lives. Back in 2014, if you wanted to automate anything you had to have coding skills, technical knowledge and be willing to read a 500-page manual. Nowadays, that's not the case anymore. With simple point-and-click interfaces, anyone can start and benefit from automation. You don't need to have coding or technical skills - you just have to be able to use a mouse and pin-point what you would like to have done.

Imagine being able to automate any repetitive task you have. It can be simple things like:

- Preparing a contract and changing the names, addresses and misc details every day
- Creating an invoice from scratch and sending the same email to a customer
- Downloading documents onto your computer, renaming them and moving them to the right folder for future reference
- Paying bills, updating your bookkeeping and double-checking it all got done properly
- Sorting, renaming and organizing your photos
- Moving information from one application to another with manual copy & paste efforts

These are all things you might do on a daily basis and that takes up time, energy and focus away from the bigger, important things. It's these kinds of repetitive tasks that can be automated and easily free up 5-8 hours a week.

Imagine what you can do with that extra time. You could go home earlier, spend more time with your family, further your education, and start a new project. Automating your repetitive tasks is the biggest opportunity right now to free up lots of time.

Unfortunately, this topic is not being covered in the personal productivity industry. Most people don't know where to start and what to automate first. They also think it's only reserved for coders and people with technical skills. That's why it hasn't reached the masses yet but that's about to change. We're seeing internally at AE more and more clients use automation in their personal lives to free up time and have the freedom to choose what they want to do.

At AE we want to help you get started with automation because it's the best way to save a lot of time and free up 5-8 hours a week. We recommend you go through this booklet to get an idea of what automation can do for you and where you can get started.

[Below is a short summary of a video that we recorded a while back for our Dojo members](#) - the on-line community that comes with accountability, coaching, and ongoing training.



Thanh Pham  
Founder of Asian Efficiency  
Austin, TX  
USA



# How to Get Started With Automation With This **3-Step** Process

One of the most common obstacles to getting started with personal automation has nothing to do with your technical or coding skills. Most people think that you need coding skills or be a techie to automate something.

That might have been true in 2012 but nowadays that's not the case anymore. With MacOS and MS Windows you have point-and-click interfaces that make it easy to automate repetitive tasks.

What's holding most people back is not knowing where to start and what to automate first. If that is you, here's a simple 3-step process to find out what you should automate first.

## 1. What are your most common activities and repetitive tasks?

Think about the repetitive tasks and things that you do on a daily basis. For example, typing your email address, managing files, and searching for stuff online. When we asked people what they do repetitively, they said things like:

- Preparing a contract and changing the names, addresses and misc details every day
- Creating an invoice from scratch and sending the same email to a customer
- Downloading documents onto your computer, renaming them and moving them to the right folder for future reference
- Paying bills, updating your bookkeeping and double-checking it all got done properly
- Sorting, renaming and organizing your photos
- Moving information from one application to another with manual copy&paste efforts

Anything you do more than once is an opportunity for you to automate it and save lots of time.

**Action item:** create a list of tasks and things you do repetitively.

## 2. What benefit would you like to get when you automate your most common activities?

Once you know what you like to automate, then you want to think about the benefits of automating your tasks.

Ask yourself: “what can this automation do for me?”

For example, if your task is “changing names and addresses in contracts”, you would ask yourself: “what can automating this task do for me?”

It could benefit you by:

- Making fewer mistakes (and prevent yourself from looking like an amateur)
- Get the task done faster and save time

Once you have clarity about how this automation can benefit you, then it’s easy to find the solution.

Most people skip this step and then will try to automate a task with a high degree of failure. They might hear about some great tool or maybe somebody mentions the tool to them and they think that it’s the answer. However, you may not be in a situation where that tool is going to help you as much as it might help your friend and it might not actually save you a lot of time or give you a lot of benefits.

That’s why it’s important to first get clear on what you want to automate and how it is going to benefit you. Only then can you match the right tool to solve your problem. Which brings us to the next step...

### 3. Find the right tools and techniques to help you.

Now that you have a task to automate and you understand how it’s going to benefit you, finding the right tool is, surprisingly, the easy part.

If you want to be efficient in typing and would like to benefit from automating it, then look for a tool that will address this. One tool for this is TextExpander (MacOS and Windows) that we love.

If you want to organize your files and desktop in an efficient manner, Droplr (Windows) and Hazel (MacOS) would be the right tool for the job (and the ones we recommend).

You need to match tools with specific problems or specific goals that you have versus just going out and finding miscellaneous tools.

Most people probably don't use the tool right. They installed it and have no idea how to use it. They go to YouTube and find some tutorials and they might just give up because they find it challenging. This is why this 3-step process is important because if you find a tool and you don't know what problem you're trying to solve for or you don't know what the benefit is that you're looking for, then

the tool becomes worthless. Any tool that you hear about is just not going to stick with you.

Don't get a tool first and then try to figure out what you're trying to optimize because that usually does not work for most people. Follow the above 3-step and you'll be well on your way to automating your first task and freeing up 5-8 hours a week.



## 17 Examples of Tasks That You Can Automate

[In the video recording that this booklet is based on](#), we demo several tasks that you can automate. If you would like to see it in action, please [visit this blog post](#).

Most people don't start with personal automation because they don't know where to get started or what to automate first. If you followed the 3-step process of above, you should have a list of things you can automate. Let's say you still don't have a list. When we polled Asian Efficiency readers, they mentioned the following things they do repetitively and something they would like to automate:

1. Automatically download email attachments and based on the type of file, take different actions, i.e. a PDF file gets moved to a certain folder
2. Color-code files in red that are older than 30 days in my Downloads folder
3. Move iPhone/iPad photos sent via Airdrop to my Desktop folder so it's in one place
4. Download bank statements, rename them and then move them to my finance folder in the appropriate month and year
5. Having a system to control and track several versions of the same files
6. Rename invoices of customers and move them to an invoices folder
7. Share screenshots and videos with people without uploading anything manually
8. Keeping my desktop organized and clear without me manually moving files and photos around
9. Prompts for my journaling app whenever I'm journaling
10. Scanning papers and have it automatically filed into folders and appropriately renamed
11. File and archive emails automatically based on who sent it and what the email contains
12. Bookkeeping tasks and reconciling transactions
13. Sorting, filing, renaming scanned papers like hand-written notes
14. Paying bills and making sure it got done
15. Simplify and speed up record-keeping of car mileage and expenses
16. Doing a weekly review
17. Automated email deletion for emails with a specified sender after a certain number of days (Outlook and Gmail)

Do you see some tasks in there that you would like to automate? Did it give you some ideas?

Well, guess what?

Every single item on that list can be automated...and has been automated by us. In fact, we have workflows created for them (personally and for clients). In our upcoming automation course, we will be including them so you can use them.

In the meantime, we would like to demo a few examples so you can see the potential time savings you might gain. This is best demonstrated in a video and [we highly recommend you watch our demo in this blog post](#) at the 25:10 mark (within the video).

Here are a few examples for you to consider to automate.

## 1) Typing Faster with Fewer Mistakes with a Text Expansion Tool

What's the number one activity you do on a computer?

It's typing.

And chances are you type a lot of the same words, phrases, and messages. This is a great opportunity to save a lot of time. Some of you might already do this by using templates that you copy & paste, e.g. for emails and documents you prepare.

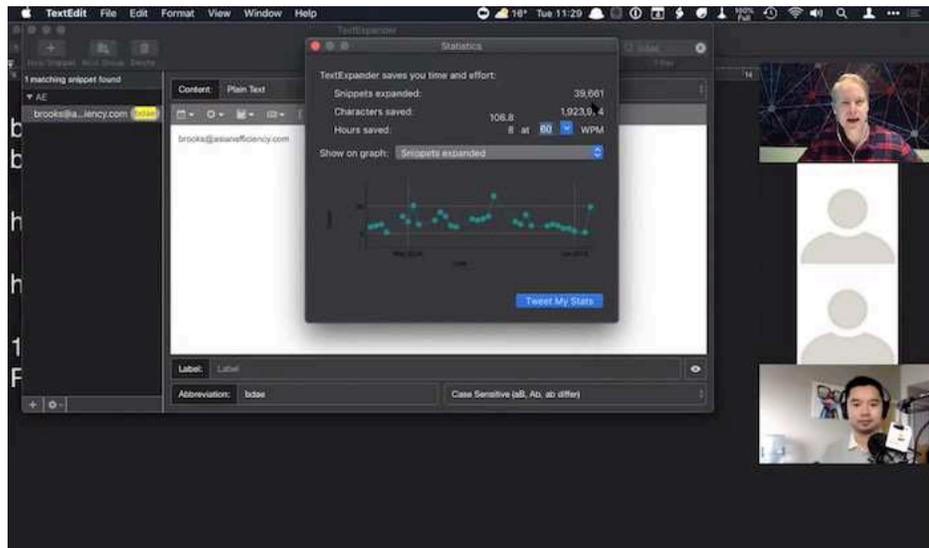
While that is a great step forward, there's an even faster and more efficient way and that's by using a text expansion tool such as TextExpander (that we are a fan of and available on MacOS/Windows). If you don't want to use an app, there are built-in options that you can use for Text Expansion for both operating systems and that we will demo soon on our blog.

Let's show you an example. If you type your email address several times a day, you can create a "snippet" in TextExpander for it to save time. For example, instead of writing jane.smith@abcindustries.com, you just need to type "jswork" (without the apostrophes) it will automatically type the entire email address.

(This sounds great in theory but it's [best shown in video as mentioned earlier.](#))

You can also use this for websites, addresses, phone numbers, names, file names, and so much more. Anything that you type repetitively, you can create a TextExpander snippet for. For example, I have multiple phone numbers (cell phone and business landline). I can never remember both of them but I know that if I type "#mob" (without the apostrophes) it will change into 555-555-5555 (which is my fake cell phone number) because I created a snippet for it. The same is true when I type "#biz" (without the apostrophes) and it will replace it with 555-555-1234 (which is fake business landline number). You get the idea.

Now this might sound really simple, but this is a great opportunity to save a lot of time typing over time. It's like compound interest - the earlier and smaller you start, the more compounding benefit you will get. As an example, Brooks has saved 106.88 hours in total by using TextExpander and has saved nearly two million characters.



Two million characters and 106 hours. That's a lot!

Imagine if you have an extra 106 hours. What could you do with that?

Don't let the simplicity of text expansion fool you. It's extremely powerful and the range of possibilities are endless. You can also use TextExpander for email templates. Yes, you can save a template somewhere on your computer but it will take you a couple of clicks before you can finally copy and paste it. With TextExpander, you only need to type in your snippet and you're done. No digging through documents.

Again, the power of text expansion is best demonstrated in a video. [Click here to watch an example of this](#) at the 25:10 mark.

## 2) Automate the Way You Deal with Lots of Emails with Email Rules

Another common activity is dealing with email. Wouldn't it be nice if you could save yourself a few hours a week dealing with email? We teach an efficient email system inside our Escape Your Email course that has saved clients 30 hours a week on email. One of the components that we teach is using Email Rules.

If you're not familiar with this technique, think of it as an automated email scanner that can take various actions. Every time you get an incoming email, your email client will scan it and then based

on what you instructed it, it will take appropriate actions.

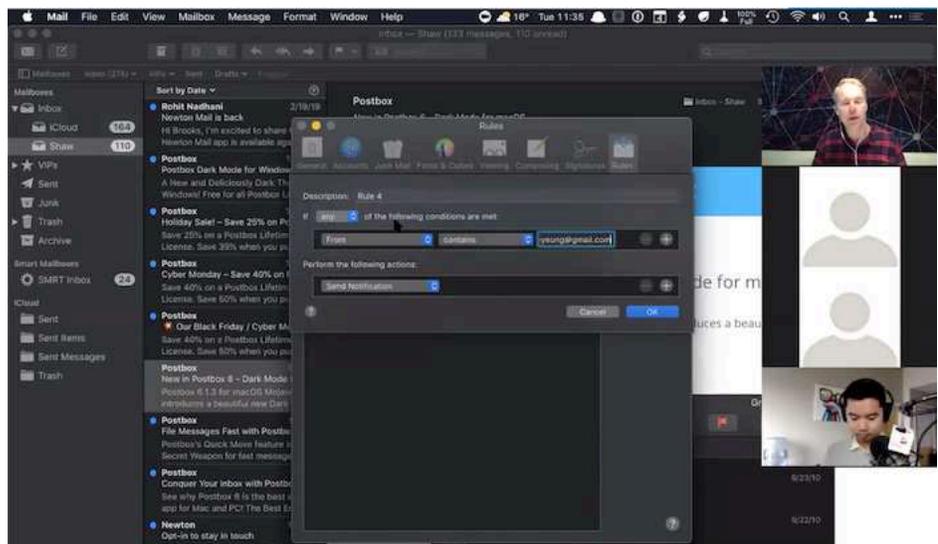
For example, you can tell it to automatically delete emails from your ex-girlfriend or ex-boyfriend so it never hits your inbox. You can also have it notify you on your phone if your boss emails you.

The possibilities are endless and Email Rules are a great way to automate some of the things you do when you deal with (lots) of emails.

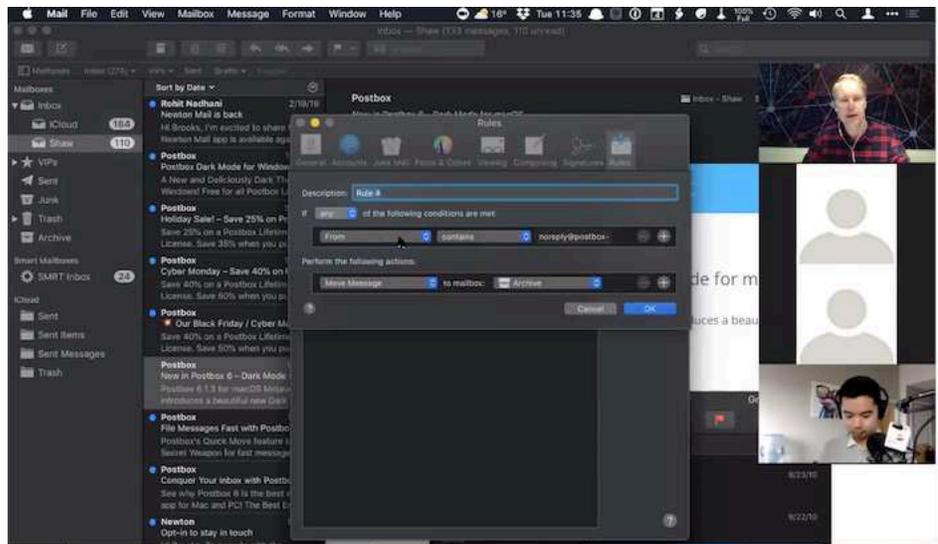
Most email clients have this feature. Gmail has this and Outlook has this as well. Here are a few more examples of what it can do.

[This is best demonstrated in a video](#) and it starts at the 33:35 mark.

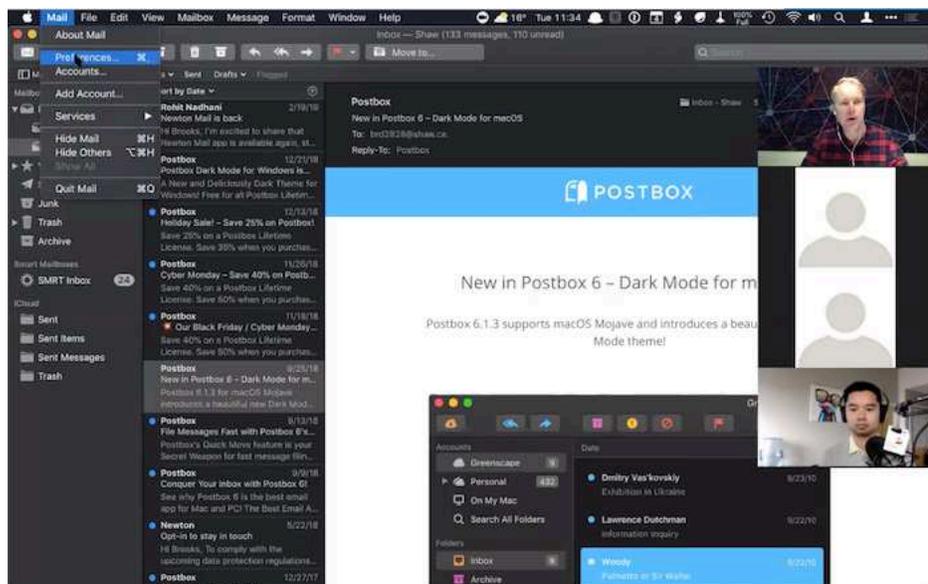
1. Automatically process emails coming from a particular email address (move to a folder, delete, etc).



2. Only get notifications when it's from a particular person (for example, your boss or your spouse).



To create a Rule, go to *Mail > System Preferences* and then choose the *Rules* tab.



Again, this is all best demonstrated in a video. [Click here to watch an example of this](#) at the 33:35 mark.

### 3) Using a Command Launcher

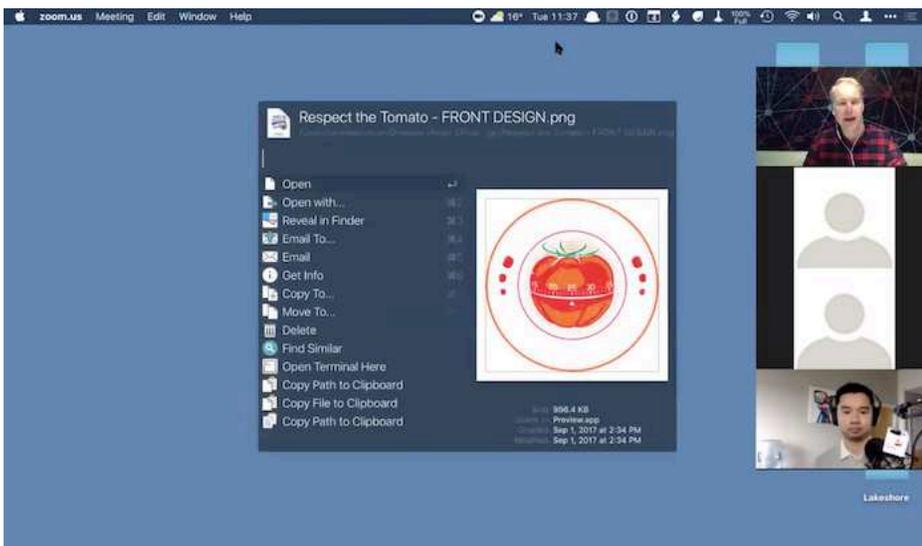
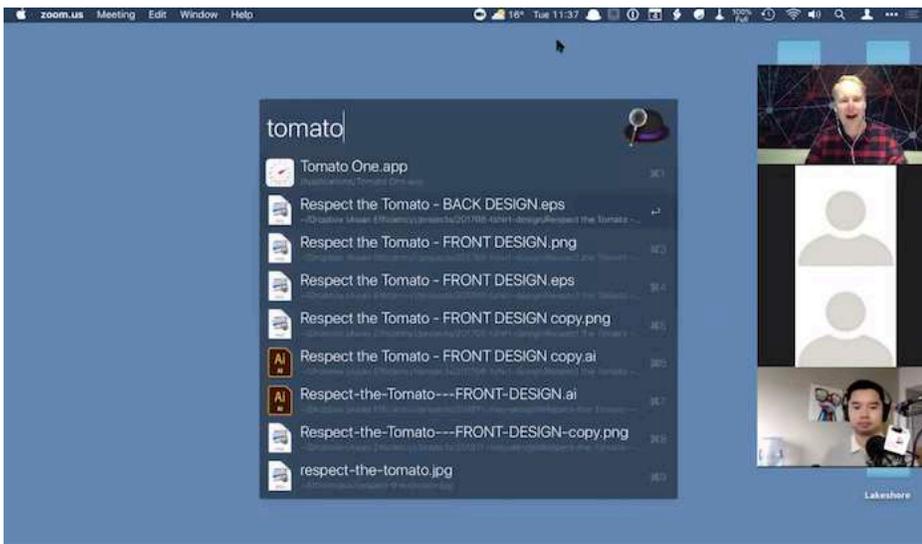
Searching for files and information on the Internet and in your browser tab is a very common task. It can be tedious to try to find an invoice, an email attachment you downloaded months ago, and locating a photo you moved somewhere. We see people waste precious time trying to find the right file.

Luckily for you, there's an Asian Efficient way to go about this and that's by using a command launcher tool. We use Alfred for the Mac and for Windows, there's Launchy. By using such tools, you can quickly find files by typing a few keywords. But these tools can do a lot more too.

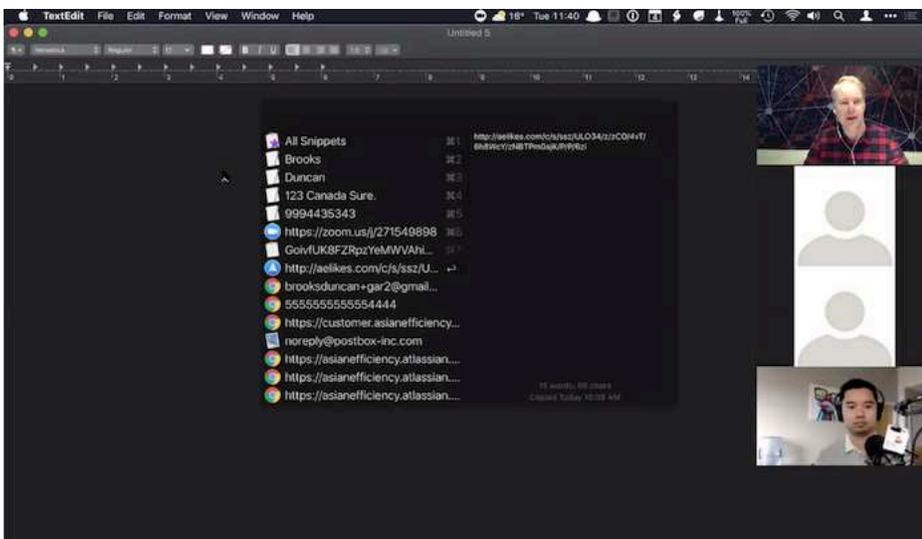
[This is best demonstrated in a video which you can find in this blog post.](#)

Here are some of the things a command launcher can do (using Alfred as an example):

1. Find files and folder to open or manipulating them without your fingers ever leaving your keyboard. [Watch it in this video](#) at the 35:50 mark.

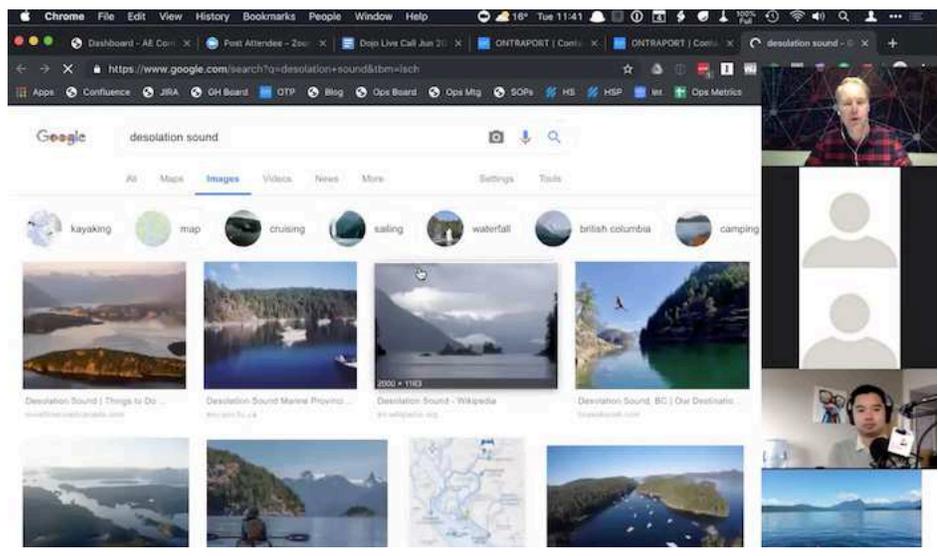
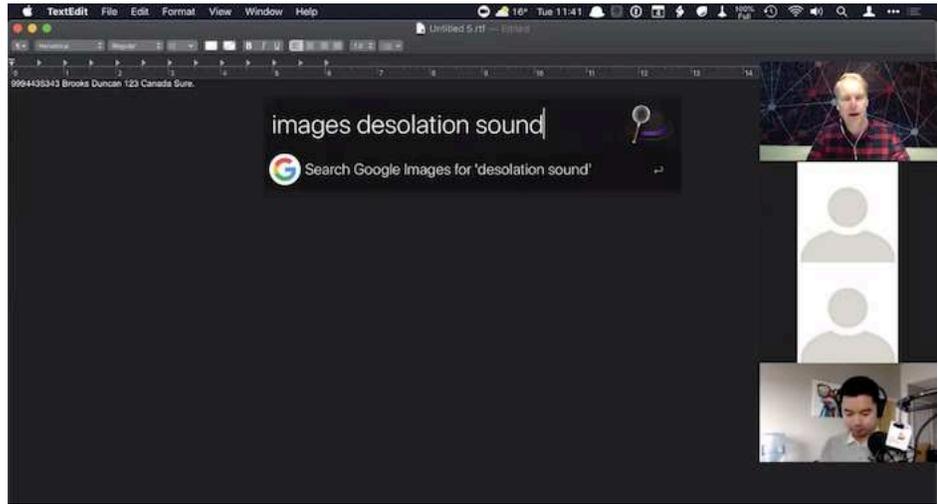


2. Launch applications with just a few keystrokes (without ever using your mouse).
3. Copy multiple items to Alfred's clipboard and paste sequentially using its clipboard history feature. This is great when you need to move information from one app to another, i.e. move data from an Excel file into an online form. [Watch it in this video](#) at the 37:40 mark.

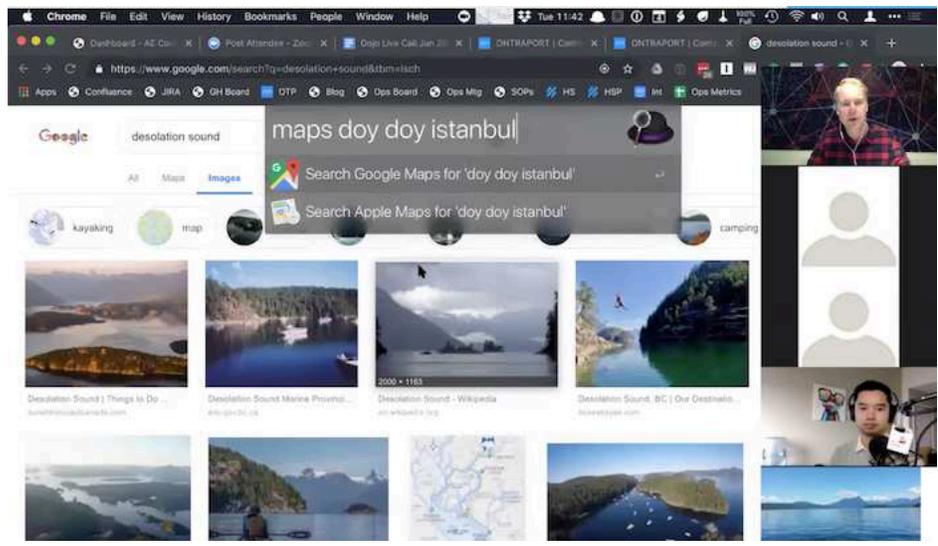


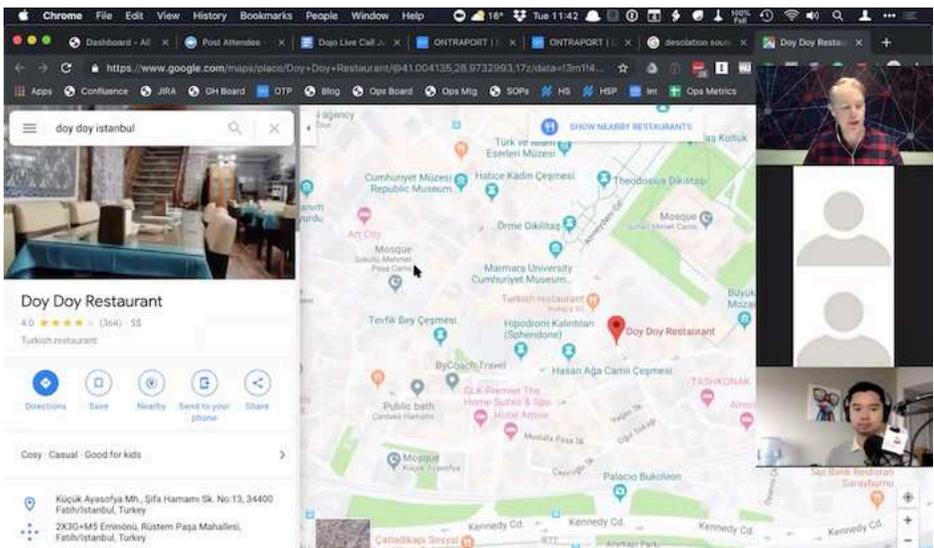
4. Web searches such as images & maps. Instead of opening a browser and going to Google Images or Google Maps, you can just launch Alfred, type in “image” and then start typing your keyword to find images. [Go to the video](#) and watch it at the 40:35 mark.

*Image search*



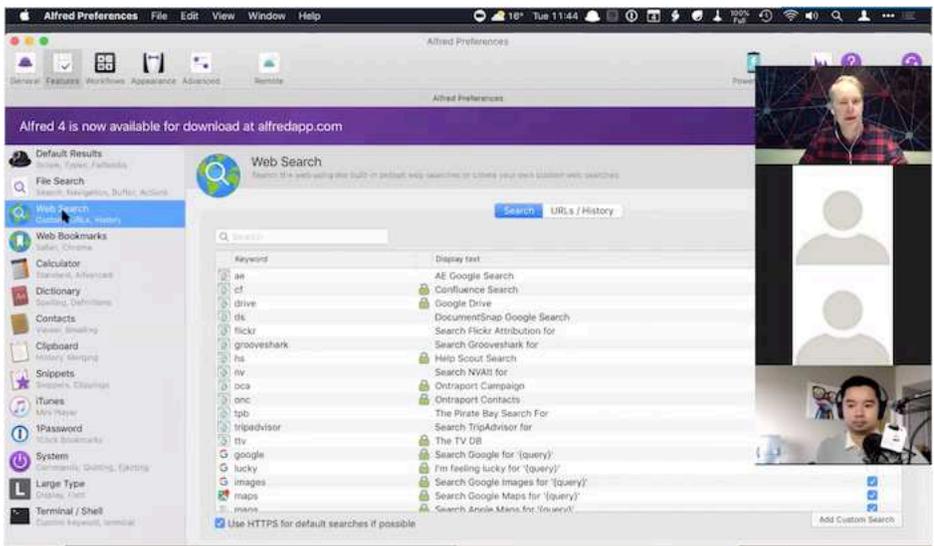
*Map Search - the same works for maps.*





5. Custom Searches - You can create your own search tool for a website or for a web-based application as long as they are using a URL similar to this: <https://app.ontraport.com/#!/contact/listAll&search=> or `q=`

We use this all the time whenever we want to find a contact record inside our CRM (Customer Relationship Manager - where we store info of clients).



Hopefully, you have some new ideas now of what you can automate.

## Conclusion

Personal automation is the next big opportunity to save lots of time and free up 5-8 hours a week. It's not reserved for technical people or coders - average folks like you and me can now automate repetitive tasks. You just have to know where to start. We hope that this booklet has given you some ideas of what you can automate and how you can get started.

In the near future, we will release Automation Academy, a course that will help you get started with automation. We will guide you through this process and get your first few tasks automated to free up at least an hour a day. The course will come with pre-made workflows so you can download them and install them with just one click, and instantly use them.

If you are interested in this course, shoot us an email at [support@asianefficiency.com](mailto:support@asianefficiency.com) and let us know that you're interested in the Personal Automation course. We're more than happy to send you some more information about it.