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**GET LAZY! WORKFLOW AUTOMATION
AND SCHEDULED TASKS**

Get Lazy! Workflow Automation and Scheduled Tasks

Written by Wes Trochlil

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One of the reasons I've always been attracted to technology is because I'm inherently lazy. I really get my kicks when the computer can do all the work for me. I can recall way back when, making the move from DOS to Windows programs, and how excited I was that we could now CUT and PASTE data from one program to another, instead of having to re-key everything. Heaven!

Of course, database programs have come a long way since then, and now feature all kinds of automation tools that help eliminate mundane tasks. Two of the more important functions in most modern association management software (AMS) packages are workflow automation and scheduled tasks.

Workflow Automation

In a nutshell, workflow automation is programming that has the database execute one or more additional steps automatically, based on what just happened in the database. For example, a common workflow that most of us now take for granted is automated emails when a customer (or staff member) processes an order in the AMS. A customer goes online, registers herself for a meeting, and as soon as that order is saved, the system sends an email (or two) confirming the order and providing additional details about the event. Customer automatically receives the email and no staff intervention is required.

But these days, workflow automation can do so much more. Beyond kicking off immediate email confirmations, workflow automation can also set up reminders for staff, create new records within the database, and even set reminder emails to be sent days, weeks, or months later. For example, suppose you track incoming inquiries about your upcoming annual conference. A workflow could be set up within your database such that when the inquiry is captured in your database, the system automatically creates a tickler task assigned to key staff within your association, and schedules an email to the person inquiring, to be sent automatically one week before the event takes place.

Most off-the-shelf AMS packages provide some type of workflow automation, and some even provide tools for staff to create workflow automations in-house (i.e., without the time and expense required of vendor intervention).

Scheduled Tasks

Another automation tool that most AMS packages have built-in are scheduled tasks. Scheduled tasks are generally some type of query that is designed to run automatically in order to check and/or correct data within the databases. Automated tasks could be as simple as automatically running a nightly query of all new members who have joined in the previous day, and delivering that report to your email box. A more advanced query might check for obviously erroneous data and correct that data automatically, and deliver a report to your email box outlining what was updated.

At the National Rural Electric Cooperative Association, John Conner, Applications and Data Advisor, uses a wide variety of scheduled tasks. One task simply runs through the database every night and checks to make sure there is a period after the middle initial in every name in the database. If a period is missing, the task automatically updates that piece of data.

Another much more advanced task, run on a daily basis, reviews all certification information and updates certification points based on participation data that has been entered in the past day. In both cases, the scheduled task takes care of very mundane tasks that used to require human intervention but no longer do.

Ask Your Vendor

If you have an off-the-shelf AMS (or even custom tool supported by programming experts), ask your vendor about automated workflow and scheduled tasks. You may be able to identify and automate processes that staff is currently handling manually, thus freeing them up for higher value activities.

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About the Author

For more than 20 years, Wes Trochlil has worked in and with dozens of associations and membership organizations providing a range of consulting services, from general consulting on data management issues to full-scale, association-wide selection and implementation of association management systems. Follow Wes on Twitter @westrochlil. His website is www.effectivedatabase.com

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