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EXPLORATION

Automating Your RTO
With Zapier and
Other Tools

Paul Pellier



NATIONAL VET CONFERENCE
GOLD COAST 2021
#2021NVC



ABOUT: PAUL PELLIER FROM ACCELLIER

Paul runs an RTO called Accellier.
He's obsessed with automating away all the mundane
repetitive RTO tasks, so his team can focus on
creating amazing learner experiences.

Accellier

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WHAT DO WE MEAN BY AUTOMATION?



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WHAT DO WE MEAN BY AUTOMATION?



WHEN ENROLMENT
FORM IS RECEIVED
THROUGH WEBSITE



TAKE THEM OFF OUR
MARKETING EMAIL
LIST

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WHAT DO WE MEAN BY AUTOMATION?



WHEN A STUDENT
JOINS OUR ZOOM
MEETING



LOG THEIR
ATTENDANCE IN A
SPREADSHEET

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WHAT DO WE MEAN BY AUTOMATION?



NEW EMAIL TAGGED
'CONTINUOUS
IMPROVEMENT'



MAKE A NEW CARD
IN TRELLO TO
COMMENCE
CONTINUOUS
IMPROVEMENT
TASKS KANBAN

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WHAT DO WE MEAN BY AUTOMATION?

WHEN SOMETHING
HAPPENS



AUTOMATICALLY DO
SOMETHING ELSE
WITH THAT INFO

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WHAT DO WE MEAN BY AUTOMATION?

TRIGGER  ACTION

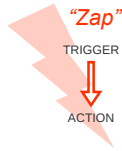
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zapier* (RHYMES WITH HAPPIER)

A platform that connects apps and automates workflows
3000+ apps

"Easy automation for busy people. Zapier moves info between your web apps automatically, so you can focus on your most important work"



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QUICK EXAMPLE: TRIGGER AND ACTIONS

When a student books an appointment in Calendly, add a note into Hubspot (CRM)

Benefits:

- Eliminates data entry
- Improves compliance (record of student engagements)
- Improves team communication and awareness



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WORKED EXAMPLE: TRIGGER AND ACTIONS

When a student is deemed competent in the SMS, issue them a digital badge, and make a note in the CRM

Benefits:

- Improves student motivation, engagement and recognition
- Improves team communication and awareness



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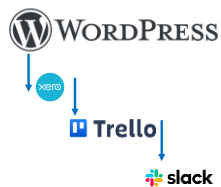
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WORKED EXAMPLE: TRIGGER AND ACTIONS

When a student enrolls via our website, raise an invoice in Xero, add a card in Trello, and send a message in Slack

Benefits:

- Reduces data entry
- Improves team communication and awareness
- Allows quicker action to be taken



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AUTOMATION AND CONNECTION STRATEGIES



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BENEFITS OF AUTOMATION: EFFICIENCY

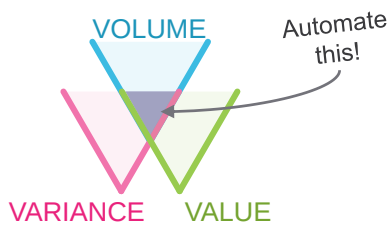
How much time would we save each year if we **halved** a repetitive 3-minute record-keeping task, performed around 10 times a day each by a team of 5 trainers?



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THE THREE VEES



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WHAT'S ONE THING YOU COULD AUTOMATE?

- Nothing too complex – it could be a simple sub-task
- Consider the three Vs:
 - Volume – does it happen often? Daily?
 - Little variance – no if/thens, creativity or decision making
 - Value – automating it will be valuable to your RTO



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AUTOMATION STRATEGIES: COMMON HOTSPOTS

- Marketing, sales, social media
- Enrolment
- Payments
- Assessments: evidence and records
- Learner support and engagement
- Completion and certification
- Compliance house-keeping



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AUTOMATION STRATEGIES

Observe your team using your software

Watch for friction points:

- Switching apps
- Copy/paste between apps
- Dependencies and delays

Review policies and procedures



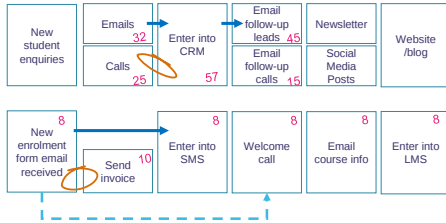
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AUTOMATION STRATEGIES: PROCESS MAPPING

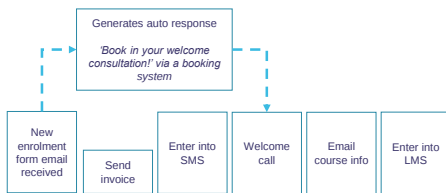
Look for:

- Flow
- Volume



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AUTOMATION STRATEGIES: PROCESS MAPPING

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WHAT NOT TO AUTOMATE

- Genuine human interaction
- Creative or complex tasks
- Tasks with many IF → THENs

CoBots?



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OTHER AUTOMATION TOOLS

- integromat.com
- Automate.io
- www.n8n.cloud
- flow.microsoft.com
- IFTTT ifttt.com (If This Then That)
- Pipedream.com (advanced – uses Node.js)



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FREE RESOURCES

accellier.edu.au/resources/automation

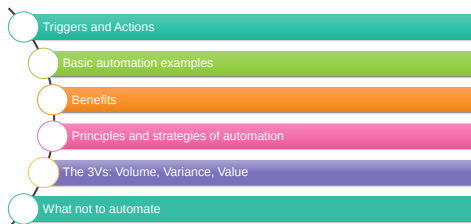
Full examples from today
Plus more tutorials and examples
Canvas LMS, Zoom, Webhooks



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WHAT WE HAVE COVERED...



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THANK YOU FOR YOUR COMPANY

We really hope you enjoyed engaging with Paul for your session today.

If you have any queries or feedback relating to today's topic, or any general questions regarding your role within the VET sector, do not hesitate to contact the team at Velg Training.

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COMING UP NEXT:
12.10 - 1.00PM



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COMPLIANCE	TRAINING & STUDENT ENGAGEMENT	ASSESSMENT	RTO ADMINISTRATION	EXPLORATION
Welcome to VET: Intro to the Standards Part 2 of 2 Michelle Charlton	Learning Differently - Addressing the challenges faced by students with Dyslexia and other learning differences Karen Dymke	Influences of AQF on Assessment Questions Anni Yaringa	What Auditors are Looking for in Completed Student Files Kevin Ekendal	Re-Defining Competency: Time for a new approach Michael Hartman
