



## Ask An Expert - Automation





# Ask An Expert Content



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TEAM

# Natasha Dubauskas-Reed

## Customer Success Specialist

Natasha is part of the Customer Success team at Actionstep. Having come from the legal industry Natasha has a wealth of experience in how to use Actionstep to obtain the maximum benefit for your law firm. She is more than willing to offer expert advice, hints, and tricks – feel free to reach out to her at [natasha.dubauskas-reed@actionstep.com](mailto:natasha.dubauskas-reed@actionstep.com).





## TEAM

# Christie Dillon

## Customer Success Manager

Christie is part of the Customer Success team at Actionstep. She works with clients to help them optimize usage of Actionstep's software solutions so that they improve productivity and achieve their business goals. Prior to joining Actionstep Christie was a strategic partnerships manager for a video assessment software company – feel free to reach out to her at [christie.dillon@actionstep.com](mailto:christie.dillon@actionstep.com).





## AUTOMATION

# Automation

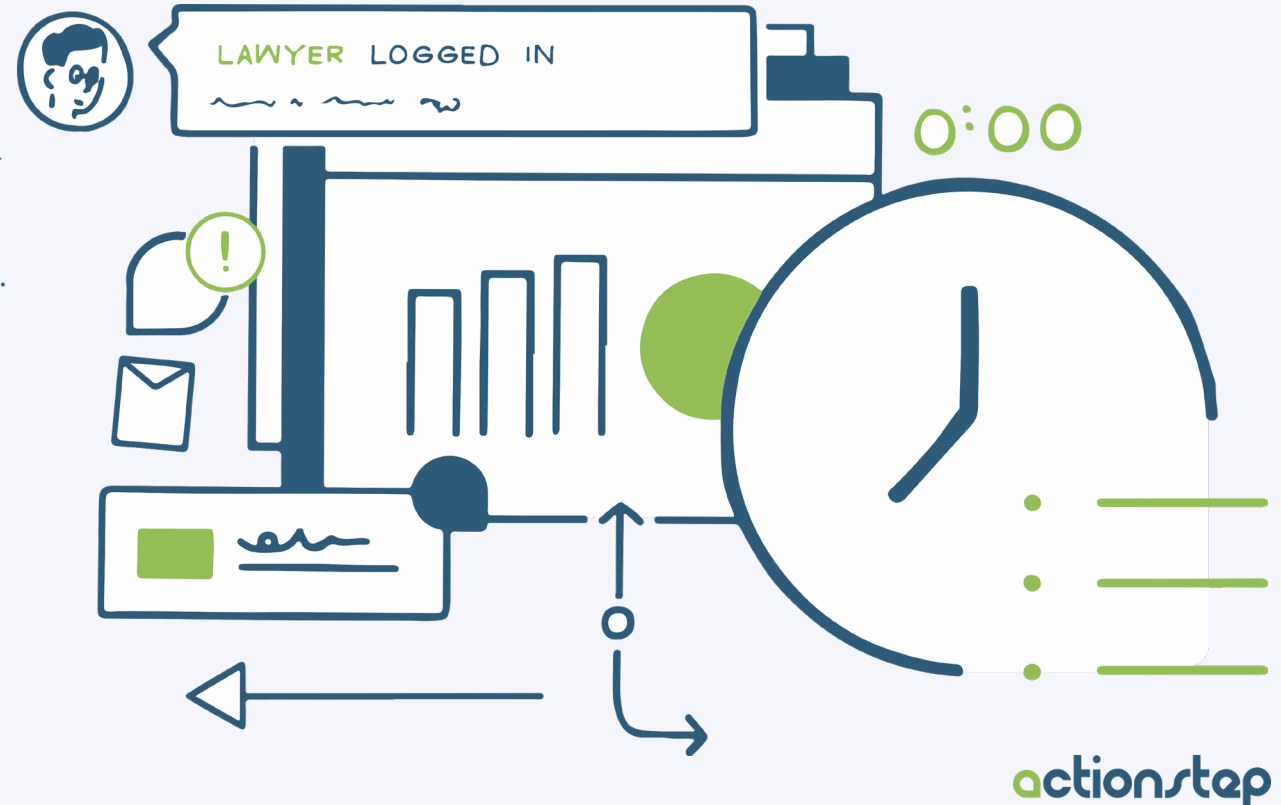
Our ultimate goal at Actionstep is to provide our customers with a fully automated practice management system. By utilising Actionstep's workflows, tasks, reminders etc we want to take the administration out of your work so you can have the time to focus on your actual client work.

**Automation puts you in control of how things are done, without having to control every little thing.**



# Tasks & Workflows

- By automating tasks, you allow your business to free up team members from repetitive actions and concentrate on more important duties and tasks.
- Workflow is the key to transforming your law practice into an efficient business. You can create a unique set of steps and tasks for each matter type, automate each step to collect information, assign tasks, and make sure everything is checked off before moving to the next step. Delegate work to your staff with the assurance that everything will be done according to plan.



# Zapier

- Zapier provides a go-between for web-based applications that enables you not to just automate Actionstep but also automate other web-based applications like Outlook, Mailchimp, Teams, and even other Actionstep systems
- Applications communicate with each other using “Zaps”. You can create your own Zap, or choose from a list of existing Zaps.
- You create Zaps by connecting “Triggers” in one application to “Actions” in the other application. When something changes in one application (Example - If a new appointment is created in Google Calendar) a “Trigger” is activated. The “Zap” connects the Trigger to an available “Action” in the other system (Example - creating a File Note). The Zap passes the related information from the trigger to the Action ( The new appointment In the Google Calendar).





# Questions?

**Now is your chance to 'Ask an Expert' –  
comment questions in the chat section**