

zapier*

Automate your entire business with Zapier



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Why automate your entire company with Zapier

Automation is a great way to save time. By automating tedious tasks, you can have more time to spend on work that truly needs a human touch.

But automation can do so much more than simplify isolated tasks. When you use automation across your entire company, you can give every team more time to focus on what matters most. Automation can also make collaboration easier by streamlining processes or projects that span multiple teams, like when

- your marketing team has to manually hand off leads to your sales reps so they can reach out.
- cross-functional stakeholders need to collaborate on recruiting and hiring a new employee.
- your accounting team needs to reconcile invoices at the end of the month but needs to wait for up-to-date sales data from your CRM.

What is Zapier? How does it work?

Zapier is an automation platform that connects with thousands of the most popular apps, like Slack, Mailchimp, and Google Sheets. The workflows you create in Zapier are called Zaps, and they can automate many common tasks. Some simpler tasks you can automate with Zaps include adding items to your to-do list when you star a message in Slack or creating leads in your CRM when a row is added to a spreadsheet.

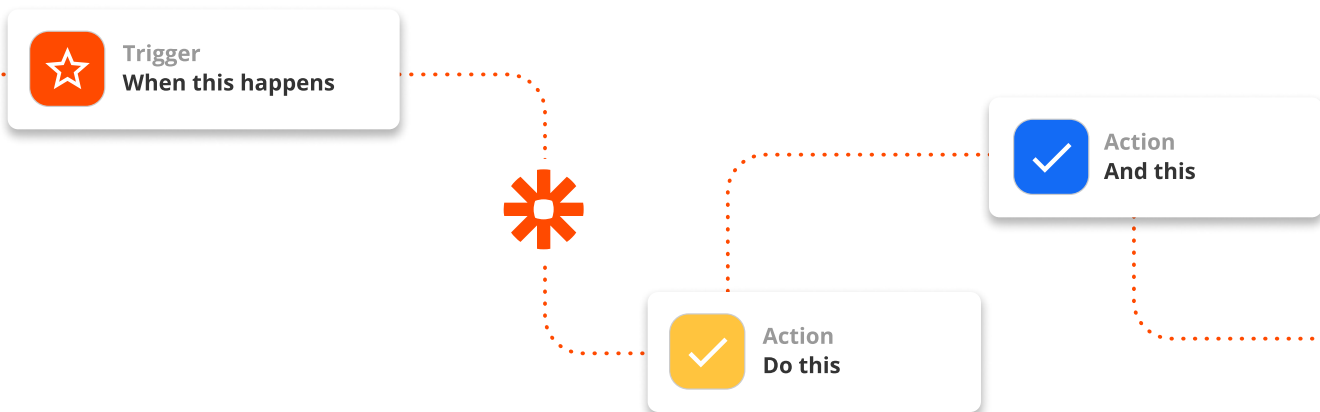
A Zap is always made up of these parts:

Trigger

An event that starts a Zap, like when you receive a new email. Every Zap has one trigger.

Action

An event a Zap performs after it's triggered, like adding that email to your to-do list as a new item. A Zap can have more than one action.



Why choose Zapier?



Easy setup and sharing

With Zapier, you can connect your apps into automated workflows without any code or relying on developers to build an integration. It's easy enough that anyone can build their own Zaps with just a few clicks.

Zapier is also shareable. You can share a copy of your favorite Zap, minus any sensitive information or app authorizations, with your colleagues, clients, or followers. And shared Zaps are easy to set up, so the person you share with can start automating away busywork in just a few minutes!



Powerful automation

You can create Zaps that simplify common tasks, like adding important emails to your to-do list. But you can also create Zaps that automatically perform more complicated processes from end-to-end—such as adding leads to your CRM from your digital advertising platform, sending them a personal follow-up email, and letting you know about the most high-value leads with a chat app notification. No matter what your job is or which apps you use, you can create Zaps that do work for you.



Secure, reliable workflows

Zapier is committed to maintaining the highest security and privacy standards. Some steps we take to protect your privacy and security include encryption, access management, and keeping globally-distributed SRE and security teams on call 24/7. Our Zapier for Companies plan also offers advanced administrative controls like SAML single sign-on, user provisioning, account consolidation, and custom data retention.

Automate your marketing

Your marketing team's success is key to the success of your business. But they need accurate, actionable information to make data-driven decisions that increase your marketing ROI.

Automation can help reduce this information gap and streamline common marketing processes, so your team can work like a well-oiled marketing machine. Here are some of the most popular ways that marketers use Zapier to automate their work.

The screenshot displays a Zapier automation workflow with two steps:

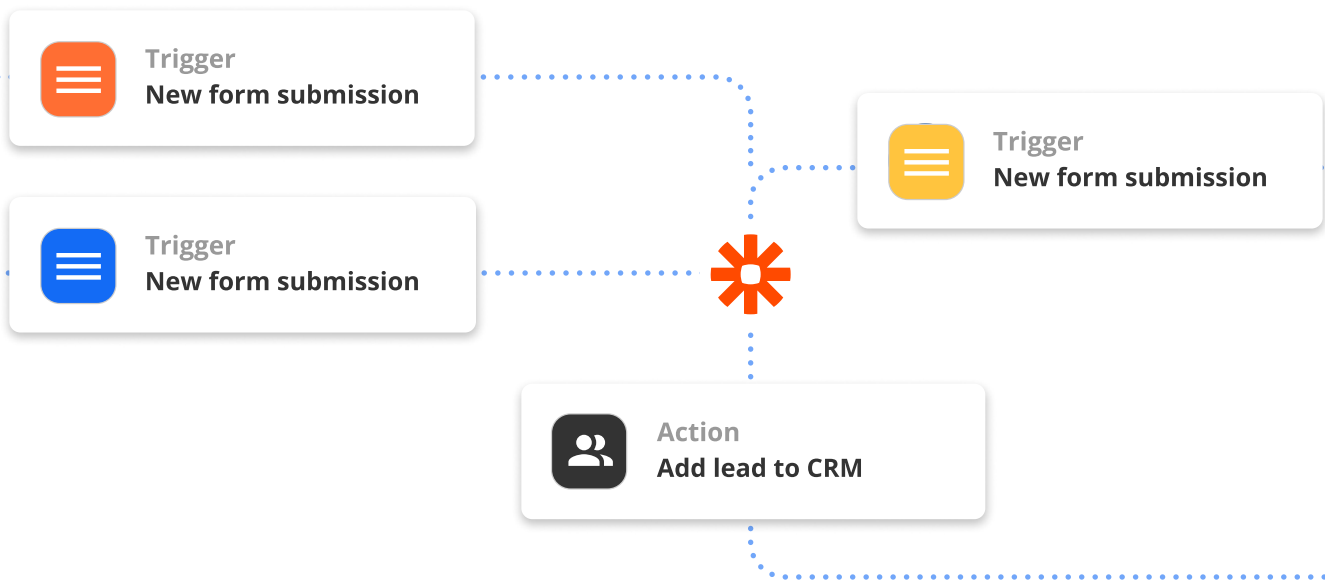
- Step 1: Active leads** (Trigger)
- Step 2: Add lead to CRM** (Action)

The 'Active leads' step shows a list of leads with the following data:

Name	Title
Wade Foster	Founder
Michelle Knoop	Sales
Bryan Helmig	CTO
Suzy Johnson	Managing Editor
John Smith	CPO

The 'Add lead to CRM' step shows a preview of the lead being added:

Name	Title	Status
Wade Foster	Founder	✓



Seamlessly collect leads from many sources

Most companies collect leads from a variety of sources, including digital advertising, web forms, and social media. To properly nurture and qualify these leads, your marketing team needs to move them into other apps.

This app might be a single source of truth—such as a marketing automation platform like HubSpot or Marketo—but sometimes it's a more specialized app, such as an email marketing tool like Mailchimp. You can create a Zap that adds new leads from a particular source to another app, so your marketing team can instantly access the most up-to-date lead information.



Did you know?

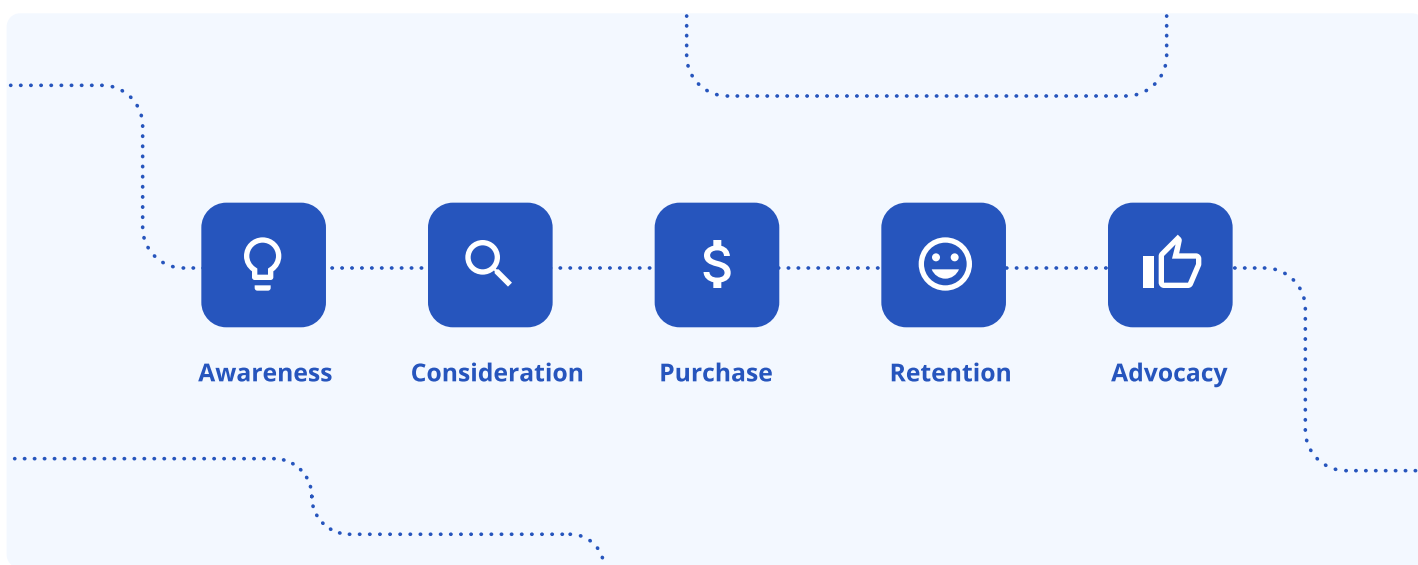
To prevent duplicate leads, a Zap can check first to see if a lead with the same information (such as phone number or email address) already exists. If there is an existing lead, the Zap can update it instead of creating a brand-new duplicate lead.

Create a cohesive customer journey

Whether you need to win a new client or upsell an existing customer, it's crucial for marketers to reach out to leads at just the right time. But knowing when the right moment arrives can be tricky, especially if important lead or customer data—such as purchase information—lives in another app.

With Zapier, you can connect your marketing apps into a cohesive app ecosystem that helps you turn first-time customers into repeat buyers and brand advocates.

You can use a Zap to enrich leads with information from other apps, like your eCommerce platform or support ticketing app. Or you can create a Zap that encourages upsells with personalized email outreach whenever a customer makes a new purchase—and gathers customer feedback through your survey app, too.



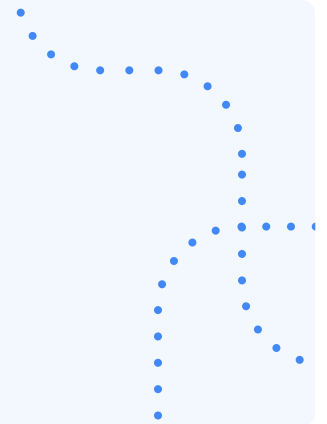
Maximize your digital advertising ROI

Digital advertising is one of the most powerful ways to find new customers, but it can also be daunting—especially for a smaller marketing team. How do you know whether your ads are truly performing?

You can use Zapier to get better, faster insights into which marketing activities perform best. For example, you can create a Zap that shares offline conversion events from your CRM with your advertising tool (such as Google Ads). Or you can use a Zap to add leads to a specific nurture campaign based on the ad they interacted with. This way, you can stay on top of ad performance and make the most of your budget.

Keep your marketing team connected

Zapier can help connect your marketing team with the other teams they work closely with—like sales. Whether you use a Zap to notify your sales reps of new marketing qualified leads in a chat app like Slack or to send sales conversion back to your marketing team for analysis, Zapier can keep your marketing team in the loop.



Automate your sales

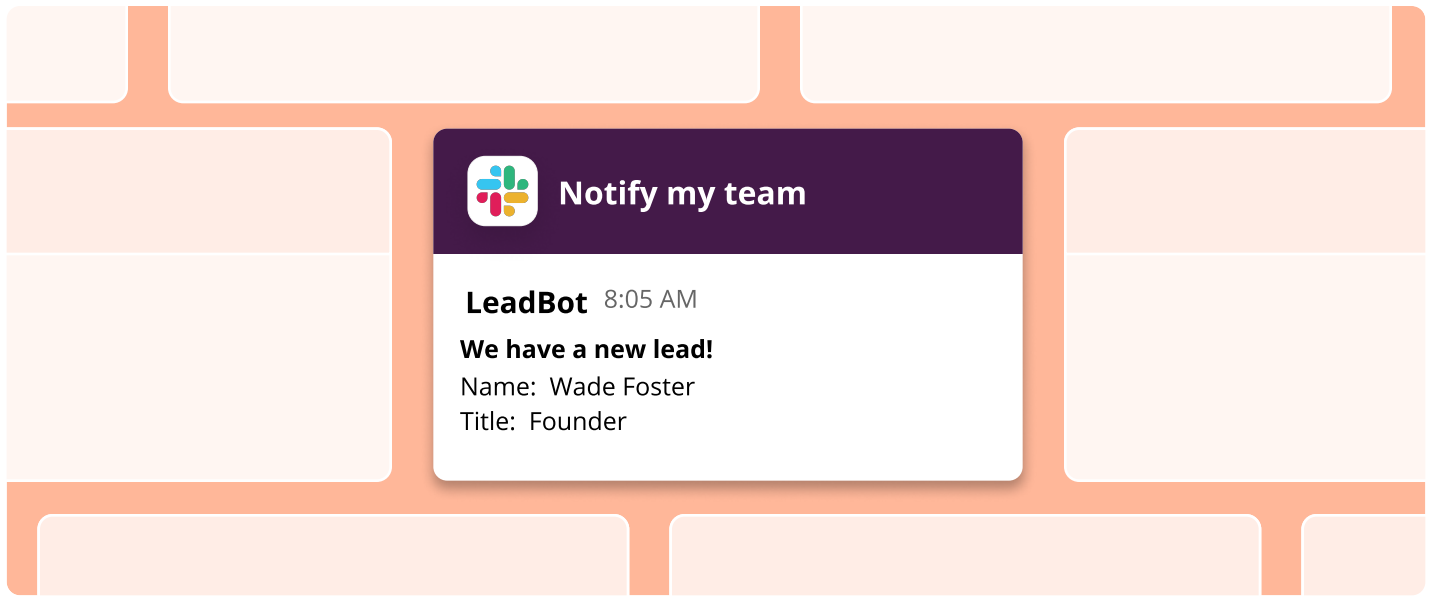
Sales is a fast-paced and collaborative job. Reps should spend time on what they do best: Closing deals, not tracking down customer details or following up on a deal's status.

Automation can help get your sales team the information they need, right when they need it—as well as eliminate repetitive tasks. Here are some of the most popular ways that sales teams use Zapier to automate their work.

Easily enrich leads

To convert leads into real sales, your sales team needs to go into every conversation with the most up-to-date and relevant information. With Zapier, it's easy to automate lead enrichment—so sales reps can have the best lead data and spend more time on higher-value activities.

You can create a Zap that adds lead information to your CRM from a dedicated lead enrichment tool like Clearbit or use information from a variety of sources, such as your email marketing app. This way, reps will always have the information they need to make a sale right at their fingertips.



Instantly notify reps of new leads

Sales is notoriously time-sensitive; reach out to a lead too late, and they may not make a purchase. Instead of trying to stay on top of leads manually, you can create a Zap that instantly notifies reps of new, hot, or otherwise high-value leads with notifications in a chat app like Slack, so they can reach out quickly.

Want to automatically add leads to your CRM without letting reps know about every single one—like after a trade show or other event? You can create a Zap that does that, too!

Keep your sales team connected

Zapier can keep your sales team looped in with other teams across your company. You can create Zaps that send sales conversion data back to the marketing team, for example, or that lets sales reps know about general accounting updates via chat app—and more!

How Eaton Realty nurtures 500+ new leads per month with Zapier

Eaton Realty is a Tampa-based, full-service real estate brokerage. They work with home buyers, sellers, and renters, as well as manage properties and assist with property investments.

Challenge

Many people contact Eaton Realty for information about buying, selling, and renting. The firm receives leads from more than 10 different sources, including Zillow, Hotpads, Realtor.com, their own website, and more.

Adding all those contacts into a central ecosystem manually took a lot of time, and they needed a faster way to distribute new leads to sales reps for timely follow-up.

CUSTOMER SPOTLIGHT

Solution

Eaton Realty created several Zaps that add new leads from sources like Typeform, Zillow Tech Connect, and Real Geeks to Constant Contact. These Zaps enable the firm to quickly sort those leads into email marketing campaigns that qualify, nurture, and convert them.

They also use Zaps to notify staff in Slack about rental applications, e-faxes, or emails to a specific service mailbox. These automated workflows help staff stay on top of leads throughout the entire sales cycle, from initial interest all the way to close.

Apps they use



“In just one month this year, Zapier processed over 500 leads. That would be my full-time job if not for Zapier.”

— Shawn Eaton, Director of Operations

Results

- Less manual data entry for staff
- Leads are distributed and followed up on more quickly
- A streamlined and efficient sales cycle

Automate your accounting

Your accounting and finance team plays a critical role in supporting other teams throughout your company and keeping them on track towards goals. Automation can empower them to provide this cross-functional support without adding more manual work. Here are some of the most popular ways that accountants use Zapier to automate their work.

Create invoices from sales receipts

If your business does a high volume of sales every day, that can really pile up by the end of the month. To accelerate end-of-month close, you can use a Zap to create invoices in your bookkeeping app whenever a new sale is logged in your eCommerce platform, CRM, or payment app.

You can even mark these as paid invoices if the customer has paid online through a platform like Stripe or PayPal. This way, your accounting team can easily see which invoices are still open—and how much revenue has come in.



Trigger
New sales order



Action
Create an invoice



Step 1
New approval request



Step 2
Notify a team member

Streamline purchase approvals with chatbots

Whether they're large or small expenses, approving purchases is one of the most important functions of any accounting team. But all too often, it's a hassle for everyone involved, from submitting the initial request to reviewing it to following up.

With Zapier, it's easy to automate the purchase approval process. You can create Zaps that notify the right team member in a chat app like Slack or Microsoft Teams whenever there's a new request. And these automated workflows can also be extended to let the requestor know once their request has been approved.

You can use similar Zaps to automate other processes, like customer refunds or expense reports, too.

Stay on top of revenue forecasting

When sales activity is logged in a completely separate app, like a CRM, it can be difficult for your accounting team to track predicted revenue. It's not impossible—but it likely means exporting a few reports and then manually importing them into your accounting app or ERP platform.

Instead of keeping up with sales forecasting manually, you can use a Zap to automatically generate an estimate in your accounting app when a prospective deal reaches a certain stage in your CRM. With a Zap like this, you can ensure your accounting team always has accurate estimates on hand without having to lift a finger.

Keep your accounting team connected

Though most people think of accounting as an entirely back-office function, it's crucial that your accounting team stay in close contact with the rest of the organization. Automated chat notifications and bots are a great way to communicate key accounting information to the rest of your company, whether you want to update individual employees on their purchase requests or let the leadership team know progress towards quarterly financial goals.

How Marshmallow Streaming uses Zapier to streamline sales and accounting

Marshmallow Streaming is an Illinois-based home entertainment company that helps customers set up streaming-centric home entertainment systems.

Challenge

At Marshmallow Streaming, every single customer—whether they get in touch through the company's website or via phone—goes through a rigorous sales cycle of more than 20 steps. This process includes nurturing potential customers through email marketing, closing deals, signing work orders, and billing the buyer for products and services.

"The complexity of this totally manual process really prevented us from going after more customers aggressively. It also prevented us from adding people to our company to help us grow our sales and build their own book of business," says co-founder George Kontos.

CUSTOMER SPOTLIGHT

Solution

The company created a Zap that takes new subscribers from Marshmallow Streaming's website and adds them to Mailchimp, so they can receive the company's newsletter. Another Zap creates a new customer in QuickBooks Online for every new account in Salesforce, so the company can invoice and bill customers without extra manual work.

Finally, the company uses several Zaps to create a new Google Drive folder for new Salesforce opportunities and store signed work orders in Salesforce once they've been uploaded to Drive.

Apps they use



“Zapier allows us to build integrations without having to write any code. We were able to automate what was previously a manual 20-step sales cycle. We can connect all of our enterprise business applications.”

— George Kontos, Co-founder

Results

- Less manual work and more dedicated focus time for sales staff
- A faster-growing business
- Improved onboarding for new sales employees, who can just learn how to use Salesforce rather than every single app the company uses

Automate your HR

Your HR and recruiting teams are responsible for ensuring all the other teams in your organization have everything they need to do their best work. You need to enable them to focus on people, not repetitive processes.

By automating common tasks, your HR team can have more time to do just that. Here are some of the most popular ways that people experts use Zapier to automate their work.

Collaborate with stakeholders on recruiting

One of HR's most important tasks is attracting top talent for your organization. But the recruitment process can be long and difficult to manage—especially if your HR team proactively collaborates with stakeholders across departments.

To make the process smoother, you can use a Zap that tracks a candidate's progress on a project management board like Jira, Asana, or Trello. Whenever their status changes in your recruiting app or HR hub, the Zap can automatically update the relevant card. This way, cross-functional stakeholders can stay up-to-date on the hiring process and contribute any appropriate feedback.



Did you know?

You can extend this Zap so that it also collects any feedback that interview panelists might have after meeting with a candidate. A simple chat app notification can nudge stakeholders to log their feedback on an applicant—and even provide them with instructions on how to do so.

Create a smooth onboarding experience

Another key function of HR is retaining talent, and a good employee retention rate starts with a new employee's very first day. Ensuring a smooth onboarding experience can be a challenge, however, especially if your organization is distributed or offers work-from-home flexibility.

Instead of onboarding every new worker manually, you can create a Zap that introduces a new employee to their team in a chat app like Slack on their first day. You can also use a Zap to distribute onboarding materials or remind them of any important paperwork they need to fill out.

Connect with your HR team

To do their best work, your HR team needs to keep the pulse of your entire organization. Collecting regular employee feedback is one of the best ways to gauge employee satisfaction and identify areas for improvement. You can use a Zap to send out satisfaction surveys in your company's chat app and compile the results in a spreadsheet for easy analysis.



Ready to experience the power of Zapier for Teams?

Try it free

If you're already using Zapier for Teams or Companies, [invite your colleagues](#) to try it too