IT automation
checklist

Streamline workflows and increase impact for you and your company
Automate your IT workflows

As an IT professional, it's your job to make everyone more effective and secure. You provide and maintain the hardware and software needed to get work done and ensure everything is being used correctly. From planned projects to emergency tickets, there's a lot to manage.

You already know automation makes it easier to get things done. **Use this checklist to evaluate your automation efforts and find more ways to leverage automation** for yourself, your coworkers, and your company to increase your impact.

**What makes a task good for automation?**

1. **It happens on a schedule**
2. **It involves moving information between apps**
3. **It's repetitive** and done the same way each time

*Learn more: Identify automation-ready tasks and build powerful automated systems.*
Automation for yourself

⚠️ Alerts and notifications

- Send customized alerts for new tickets to team chat, email, or by SMS
- Get chat or SMS alerts for important emails (use a parser for fine-tuning)
- Set up SMS alerts for approaching events

Overwhelmed with alerts? Check out our tips to streamline notifications.

✉️ Email

- Turn email messages into tasks
- Automatically save attachments to the cloud
- Log emails in a searchable archive or database

Keep your inbox in line with our tips for automating your email.

📊 Data management

- Send new ticket info to spreadsheets or reporting platforms
- Add form responses to spreadsheets and databases
- Get custom notifications when a spreadsheet is changed

Learn more: Automate spreadsheets for better analysis.
Automation for your team

⚠ On-call schedules

- Alert on-call employees about new requests by text, team chat, or email
- Remind employees when they're on call with customized alerts

Learn more: Create an on-call notification bot.

🗂 Meetings

- Create new meetings on a schedule
- Automatically create agendas from templates
- Remind team members to fill out meeting agendas in advance

Learn more: Add automation for better meetings.

โน Reporti ng

- Add tasks, tickets, or events to a reporting platform
- Summarize completed tasks on a schedule
- Push important data to daily dashboards

Learn more: Automatically update or create reports, charts, and dashboards.
Automation for your company

Human resources & recruiting

- Automatically share job openings
- Add new employees to HR platforms
- Assign training courses to new hires
- Grant software access to new hires
- Send contracts to approved hires
- Get notified of onboarding needs
- Schedule exit interviews and surveys

Learn more: Automation for recruiting, human resources, and employee onboarding and offboarding.

Marketing

- Track leads in a spreadsheet or database
- Create retargeting lists for advertising
- Automatically email prospects and clients
- Crosspost social posts to different platforms

Learn more: Ways to automate marketing.

Accounting

- Track invoices and payments
- Automate payment reminders
- Track deals through the sales cycle

Learn more: Automation for invoices and payment processing.
Automation inspiration

Visit the Zapier blog to learn about how people automate their work with Zapier. Take a look at the examples below, and then explore on your own!

- 4 ways to automate IT management workflows
- How to spread automation at work
- How to troubleshoot your Zaps
- Create powerful Zaps with webhooks, filters, formatter, code, and more