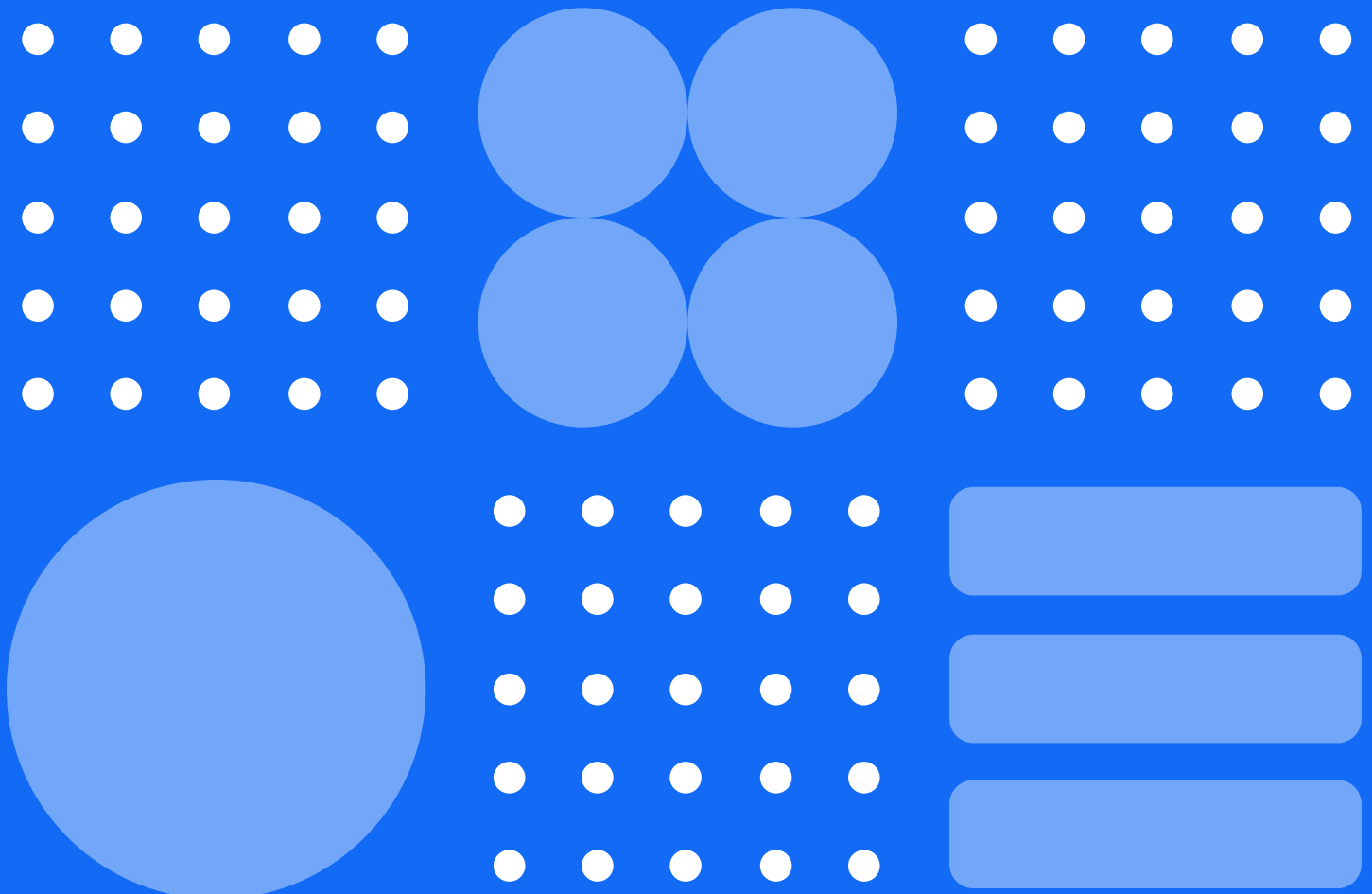




# 5 ways to automate your marketing

**Learn how automation can boost ROI—while saving you time, too**



# Contents

<b>Introduction</b>	3
Use automation to do more, faster	
<b>Chapter 1</b>	6
Easy automation for marketers	
<b>Chapter 2</b>	14
The ROI of automation	
<b>Chapter 3</b>	16
How Zapier helped Solidstudio save thousands of dollars	
<b>Chapter 4</b>	18
Zapier for your business	

# Use automation to do more, faster

Automation is a great way for marketers to save time. By automating tedious tasks, you can cut out the manual work that doesn't need a human touch.

Not sure what automation looks like? Chances are you're already using automation without even realizing it. Do you get an automatic email before calendar events start? That's automation. Do you get a text alert when it's almost time to renew a prescription or remind you about an upcoming appointment? Automation again!

But automation can do so much more than simplify isolated tasks. When you use automation across your entire marketing team, you can give everyone more time to focus on what matters most.



### Did you know?

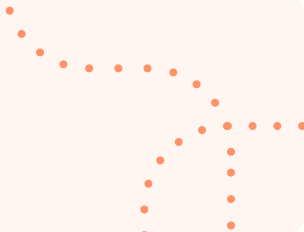
88% of small and medium businesses say that automation allows them to compete with larger companies.<sup>1</sup>

## Save 25 hours every week

Good marketing works. But the best marketing works in the background because it frees you up to do more in less time.

Marketing automation allows you to be more efficient, increase ROI, and overcome challenges. With automation, you can streamline your marketing process without breaking the bank.

Zapier helps marketing teams save 25 hours a week on average.<sup>2</sup>



## What challenges could you solve through automation?

### The challenge:

- Not enough time to get everything done
- Keeping your team informed on new projects and campaigns
- Scaling your customer outreach
- Keeping your data error-free when manually copying and pasting from one tool to another

### How automation can help:

- Automate repetitive tasks so you can focus on the more important things
- Send automated updates to your team to keep everyone in the loop
- Automate personalized email campaigns across your customer base
- Cut down on mistakes by moving information automatically between your apps



## 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 save a message in Slack or creating leads in your CRM when a row is added to a spreadsheet.

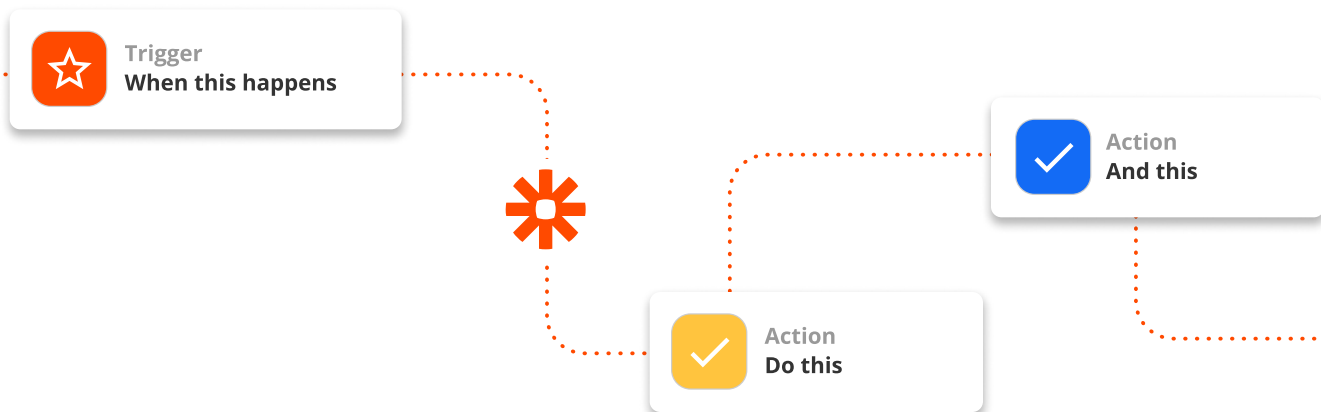
### A Zap is always made up of these parts:

#### 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.



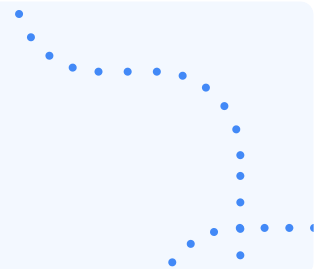
# Easy automation for marketers

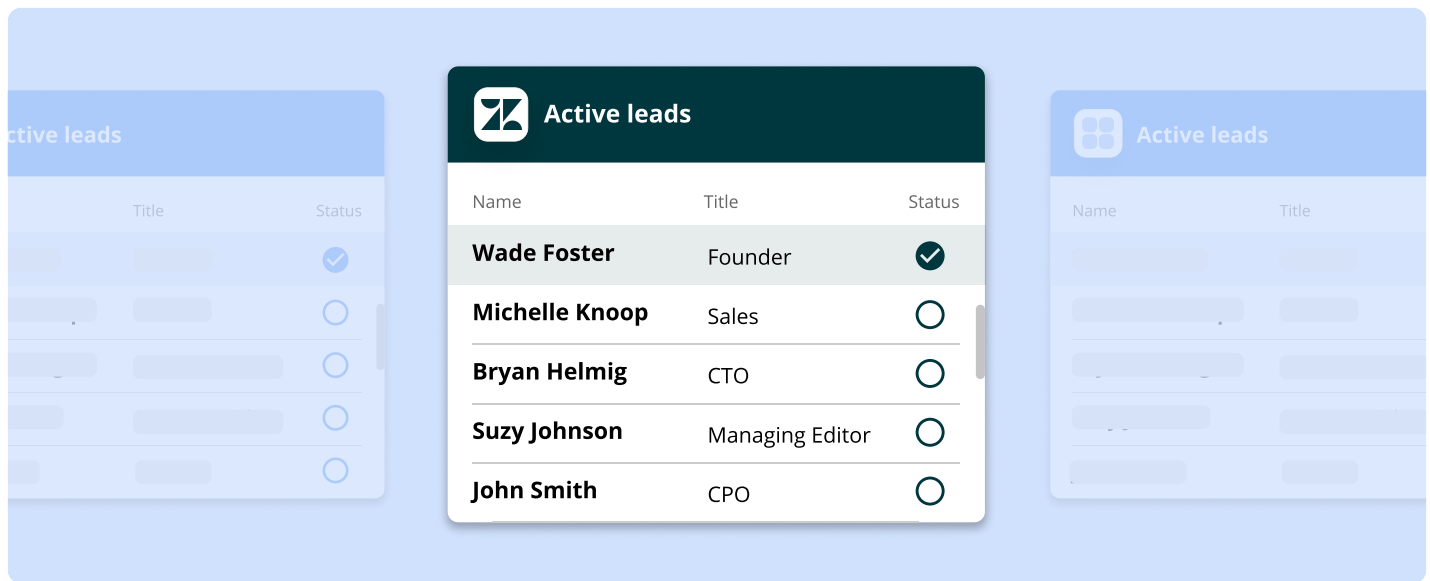
Automation will look different for every marketing team, depending on its size and goals. But one of the most powerful parts of automation is that every workflow is customizable to you and your business.

Your marketing processes should grow with your business. With Zapier, you can collect leads, nurture them with the marketing apps you use most, optimize your spending, and turn new customers into repeat buyers—all with no extra manual work.

Keep reading to learn how automation can level up your marketing, saving you time and money.

Nearly 70% of employees at small and medium-sized businesses say using automation software has helped them be more productive at work.<sup>3</sup>





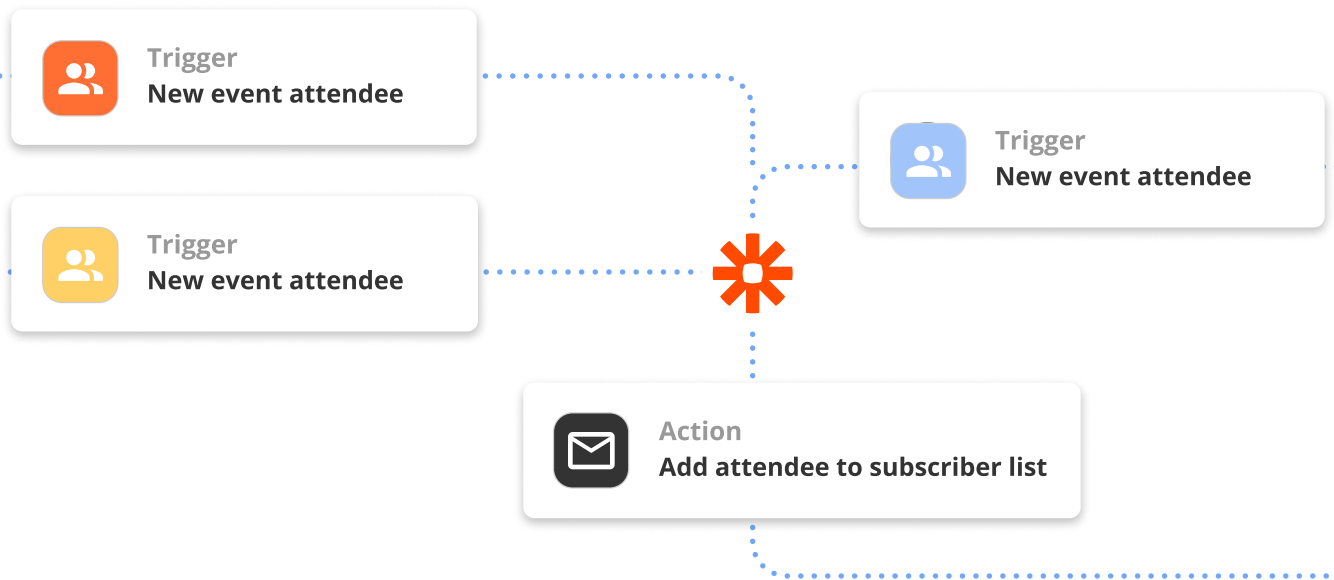
### 1. Automate your lead managment

For most businesses, leads are the lifeblood. The more leads you have, the more potential for new sales and customer retention. But there are a lot of touchpoints across your lead lifecycle—and a lot of different apps and software to juggle to keep track of them all..

Automation can help your team get the right information to the right place and the right people at the right time.

#### Use automation to:

- Seamlessly collect leads from many sources—like your ads, forms, and social accounts—and add them to your CRM
- Enrich leads with information from other apps, like your eCommerce platform or support ticketing app
- Follow up with potential leads faster by automatically sending an email or SMS as soon as they're added to your CRM
- and more!



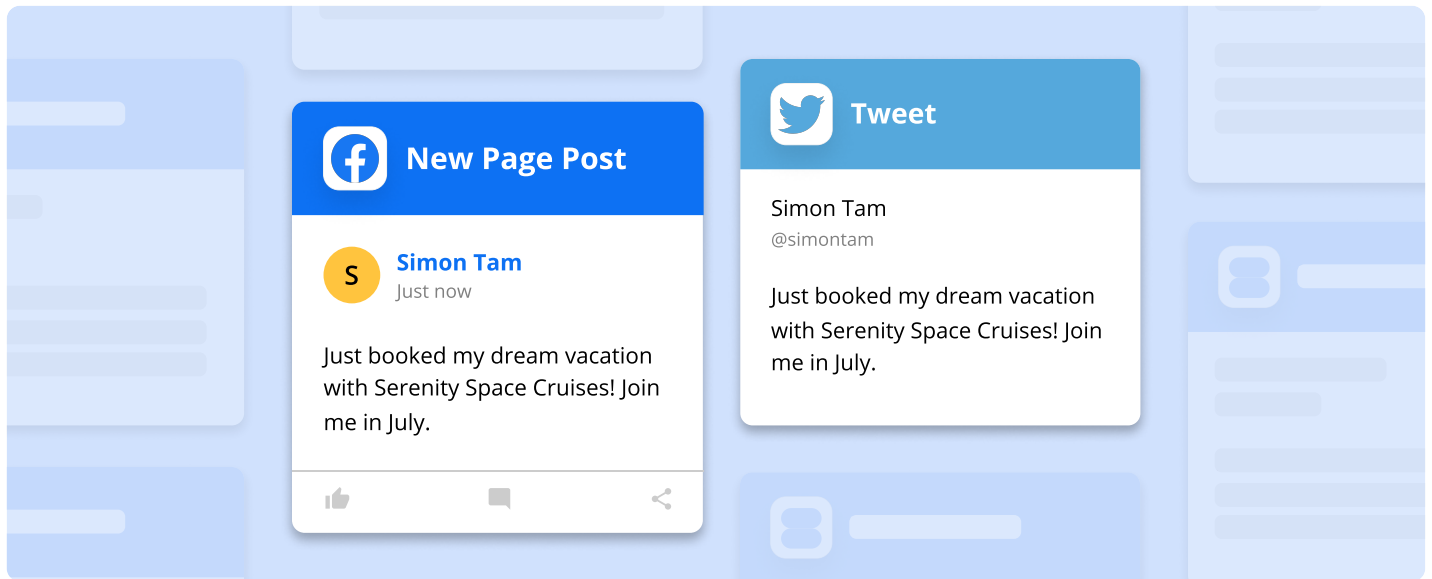
## 2. Automate your email marketing

Email marketing is one of the most valuable platforms in a digital marketer's toolkit. It's an effective way to deliver your message to a wide audience while also encouraging engagement. But if you're working with limited time, budget, or resources, it can be hard to make sure you're covering all of your email marketing bases.

Automation can help you get the most of your email marketing so you don't miss out on any growth opportunities for your business.

### Use automation to:

- Add attendees to your newsletter subscriber list as soon as they register for an event
- Automatically segment your leads into the right email list by connecting your CRM with your email marketing tool
- Set up drip campaigns to automatically send emails on a schedule or based on specific customer actions
- and more!



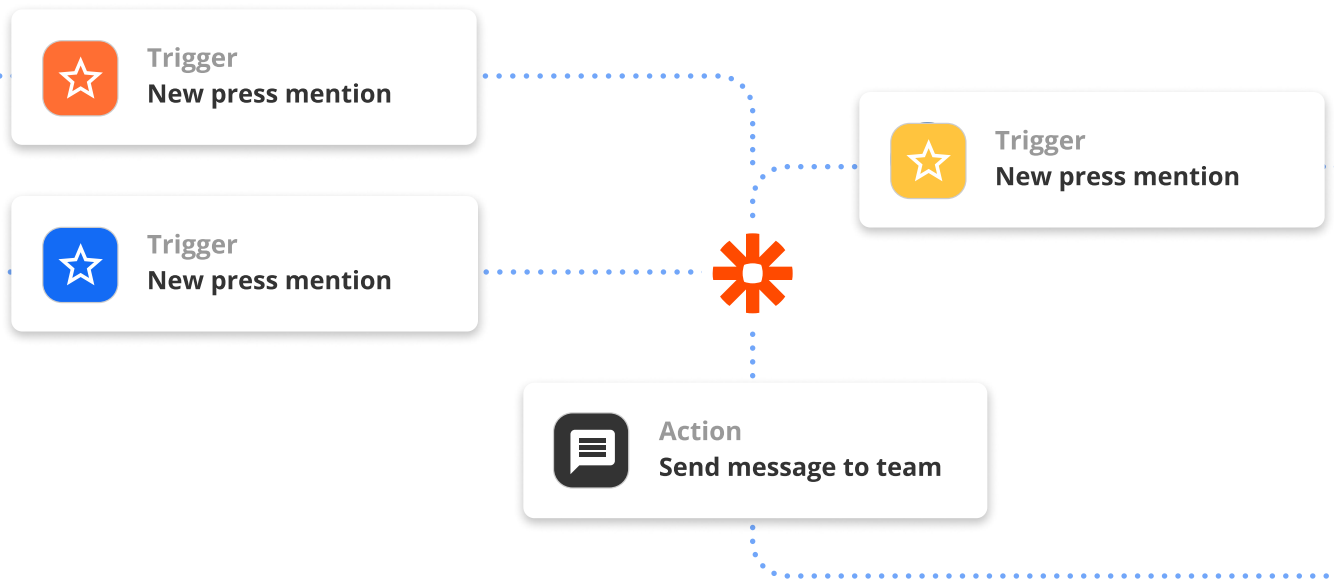
### 3. Automate your social media

Your audience is probably strewn across a bunch of different social media networks. While it's important to meet your customers where they are, just managing these different streams can quickly consume your entire day, taking you away from more strategic tasks.

With automation, you can make your social media management easier and more productive by ditching the busywork.

#### Use automation to:

- Instantly cross-post across all your social media platforms
- Automatically track mentions of your business or other key topics and save them all in a spreadsheet for easy analysis
- Get your content in front of your audience by sharing new blog posts on your social channels
- and more!



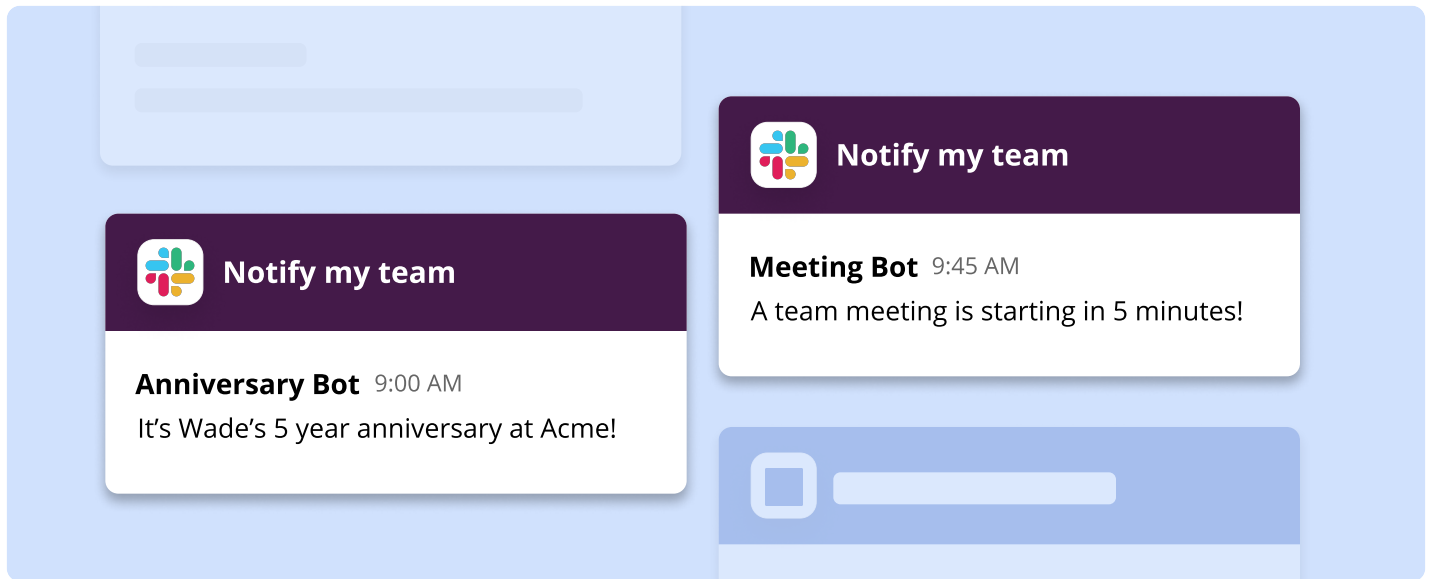
### 4. Automate your PR and comms

Good public relations is essential to put the spotlight on your brand and build awareness in the spaces where your people hang out. But there's a lot to manage. From booking guest spots to writing press releases to tracking press mentions—it can be hard to find time to do it all.

By automating some of your manual work, you can get your brand name out there with less tedious tasks.

#### Use automation to:

- Get a notification in your team chat app when you get press outreach so you can respond immediately
- Keep your team in the know on new press mentions by tracking new hits in a spreadsheet app and posting them in your team chat tool
- Track award cycles in your calendar app and get automatic reminders when applications are due
- and more!



## 5. Automate your team management

When your team is informed and on the same page, everyone can do their work better and faster. This adds up to big savings over time and a healthier work environment, too, but successful team management is easier said than done.

Automation can help keep everyone in the loop and streamline everyday processes. That way, your team can work like the well-oiled marketing machine it's meant to be.

### Use automation to:

- Send automatic meeting reminders to where your team spends the most time, like in their inbox or chat app
- Automatically create agendas every time you schedule a meeting
- Help your managers stay on top of everything by sending automatic reminders for anniversaries and annual raises
- and more!

### Automation is most powerful when everyone uses it

When you use automation across your entire business, you can give every person more time to focus on what matters most. Automation makes collaboration easier by streamlining processes or projects that span multiple departments.





"The problem we were struggling with was feeding our ad platforms with real-time data of where our prospects were in their lifecycle stage from our CRM. [Zapier] completely automates the sales to operations handoff and saves us nearly an hour every time someone buys something from us."

Taylor Payne, CEO, SpeakerFlow

## Work smarter with automation

Get more done, in less time.

[Try it free](#)

# The ROI of automation

"Just in the past month, this process (automating workflows with Zapier) has probably saved us \$50,000. When you start adding up what inefficiency costs your business, it only makes sense to do something like this.

Understanding our processes better by using automation helps us get stuff done. Getting stuff done is the most effective thing you can do for your business. It's the thing that makes you the most money. It's also what makes your clients the most money."

Dennis Yu, Founder, BlitzMetrics

## The ROI of automation



### 10,000+ hours

The average amount Zapier customers save in time per year.<sup>4</sup>

**92% of marketing agencies** are investing more time, resources, and budget into marketing automation.<sup>5</sup>

**88% of SMBs** say automation lets them compete with larger companies by allowing them to move faster, close leads quickly, spend less time on busywork, reduce errors, and offer better customer service.<sup>6</sup>



### 25 hours

The amount of time marketing teams save each week on average using Zapier.<sup>7</sup>



### 4 hours

The number of hours people who set up a Zap save on average in their first week.<sup>8</sup>

**98% of knowledge workers** who use automation at work say it benefits them.<sup>9</sup>



### 40 hours per week saved

By automatically compiling SeatGeek's financial data in one place, Zapier does the work of one full-time employee.<sup>10</sup>

# How Zapier helped Solidstudio save thousands of dollars

Solidstudio is a small software development agency that helps business owners turn their software development ideas into reality.

## Challenge

[Solidstudio](#) was looking for ways to optimize their lead funnel, but because they're a small company they had small marketing budget—especially compared to the other big software development companies in their market.

In a competitive market where one booked client can be a game-changer, the agency needed to find ways to do more marketing with the resources they already had. With Zapier, Solidstudio can streamline the way they reach out, follow up, and keep track of potential customers, saving both time and money.

### Solution

To optimize their lead generation, Solidstudio needed to follow up with leads in a timely manner while keep their marketing platforms up-to-date with the latest lead data—all without breaking the bank.

To do this, they created a few critical Zaps that automatically sent emails to engaged leads *and* sent that lead info to their customer relationship management (CRM) app or email marketing tool.

For example, Solidstudio created a Zap that immediately sends a thank you email to new leads when they download a lead magnet PDF on the Solidstudio website. Another Zap updates their CRM (HubSpot) with the new lead's info, so they can nurture that lead into a customer.

### A few of the apps they automate



HubSpot



Gmail



Mailchimp

**“I used automation with Zapier to save us thousands of dollars on our CRM (customer relationship management) system, email marketing, and more.”**

Pawel Scheffler, Inbound Marketing Manager, Solidstudio

### Results

- Automated repetitive tasks and gained back valuable work time
- Created an efficient lead lifecycle with cleaner data input
- Saved money by using Zapier to automate across multiple tools

# Zapier for your business

If you aren't used to building automated workflows on your own, it can be daunting to think about how you might use automation to save time for yourself or your team.

How do you decide what to automate? What can you do better by not doing it manually? Where do you even start?

Whether your automation needs are large or small, we have a plan to help you scale. And with over 3,000 integrations, Zapier connects the apps your business relies on so you can make your systems more efficient.

Zapier saves users an average of 10 hours a week. <sup>11</sup>



## Checklist: Should you start automating?

If any of these apply to you or your team, it's time to start automating:

- ☐ You have tasks that you perform frequently or on a set schedule
- ☐ You regularly copy/paste or manually move information between apps
- ☐ You do tasks that are boring and don't need higher-order thinking
- ☐ You do tasks that take you away from what you really want to be doing
- ☐ You're manually collecting leads from a bunch of different sources
- ☐ Your leads aren't going to the right team or in the right app because you have too many systems and collaborators to juggle
- ☐ You can't follow up with your leads quickly because you have too many leads or not enough resources (or both!)
- ☐ Your team is growing, but you're struggling to keep everyone in the loop

 What will you start automating?



## Ready to experience the power of Zapier?

Work more efficiently than ever.

[Try it free](#)



## Endnotes:

1. Zapier Editorial Team, Zapier, Zapier report: The 2021 state of business automation, (<https://zapier.com/blog/state-of-business-automation-2021>), April 20, 2021.
2. Based on proprietary Zapier data.
3. Zapier Editorial Team, Zapier, Zapier report: The 2021 state of business automation, (<https://zapier.com/blog/state-of-business-automation-2021>), April 20, 2021.
4. Based on proprietary Zapier data.
5. HubSpot, The Ultimate List of Marketing Statistics for 2021, (<https://www.hubspot.com/marketing-statistics>), June 25, 2021.
6. Zapier Editorial Team, Zapier, Zapier report: The 2021 state of business automation, (<https://zapier.com/blog/state-of-business-automation-2021>), April 20, 2021.
7. Based on proprietary Zapier data.
8. Based on proprietary Zapier data.
9. Zapier Editorial Team, Zapier, Zapier's automation confidence index: Wave 3, (<https://zapier.com/blog/automation-index-q1-2021>), March 1, 2021.
10. Zapier, How SeatGeek saves 40 hours per week with Zapier, (<https://go.zapier.com/zapier-for-companies-seatgeek-may-15>), June 25, 2021
11. Based on proprietary Zapier data.