Pipedrive Automation Library

30 ready-to-use automations for your Pipedrive CRM

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Introduction

This document contains 30 automation examples available as part of the Rocksoft Pipedrive CRM Setup service. Each automation is designed to eliminate manual work, enforce process consistency, and give your team better visibility into the pipeline.

The automations are grouped into six categories:

- **Deal Management**: automations that keep opportunities moving and properly assigned
- **Contact & Lead Management**: automations that handle inbound leads and keep contact records current
- **Activity & Task Automation**: automations that ensure every conversation has a follow-up
- **Email & Communication**: automations that send the right message at the right stage
- **Reporting & Notifications**: automations that keep managers informed without manual reporting
- **Integration & Data Sync**: automations that connect Pipedrive to your other tools
- **Pipeline Hygiene**: automations that maintain data quality and flag issues early

Not every automation will be relevant to your team. During the Pipedrive CRM Setup engagement, we review your sales process and configure the automations that make sense for how you actually work.

Additional automations can be built on request.

Deal Management

1. New deal — assign owner by source	
Trigger	Deal is created
Action	Assign deal owner based on lead source field
Why it matters	Ensures every inbound lead is immediately routed to the right rep without manual triage.

2. Deal stuck in stage — notify owner	
Trigger	Deal has not moved stage in X days
Action	Send Slack or email notification to deal owner
Why it matters	Prevents deals from going cold by alerting reps to re-engage at the right moment.

3. Deal won — create onboarding task	
Trigger	Deal is moved to Won
Action	Create a follow-up task or project in connected tool (e.g. ClickUp)
Why it matters	Eliminates the gap between closing and onboarding. The handoff happens automatically.

4. Deal lost — log reason and notify manager	
Trigger	Deal is moved to Lost
Action	Require lost reason field, then notify sales manager via email
Why it matters	Captures competitive intelligence and gives management visibility without extra meetings.

5. High-value deal — escalate to manager	
Trigger	Deal value exceeds defined threshold (e.g. €10,000)
Action	Notify sales manager and add them as a follower on the deal
Why it matters	High-value opportunities get appropriate attention without relying on reps to flag them.

6. Proposal sent — schedule follow-up	
Trigger	Deal stage changes to 'Proposal Sent'
Action	Create a follow-up activity due in 3 business days
Why it matters	Proposals without follow-up lose momentum. This automation prevents silence after the pitch.

Contact & Lead Management

7. New contact — send welcome email	
Trigger	Contact is created
Action	Send automated welcome email introducing the team and next steps
Why it matters	First impressions matter. An immediate, personal-feeling message sets the right tone.

8. Contact goes cold — re-engagement nudge	
Trigger	No activity on contact in 30 days
Action	Create a task for the owner: re-engage or archive
Why it matters	Prevents CRM clutter. Forces a deliberate decision on every contact instead of passive neglect.

9. Web form submission — create contact and deal	
Trigger	Form submitted via website (Webflow, Typeform, etc.)
Action	Create contact, create deal in first pipeline stage, assign to owner
Why it matters	Eliminates manual entry for every inbound inquiry. Leads enter the pipeline within seconds.

10. Contact field updated — sync to email tool	
Trigger	Key contact field changes (e.g. company, title)
Action	Update record in connected email marketing platform
Why it matters	Keeps segmentation accurate across tools without anyone remembering to update two systems.

Activity & Task Automation

11. Meeting completed — create next step	
Trigger	Activity of type 'Meeting' is marked done
Action	Create a follow-up task due in 24 hours
Why it matters	Every conversation should have a next action. This automation makes it non-negotiable.

12. Overdue task — escalate to manager	
Trigger	Task is overdue by more than 2 days
Action	Notify manager and re-assign or duplicate the task
Why it matters	Overdue tasks are a leading indicator of pipeline risk. Managers get visibility before deals slip.

13. Call logged — update deal stage	
Trigger	Activity of type 'Call' is created on deal
Action	Move deal from 'Lead In' to 'Contacted' stage
Why it matters	Keeps the pipeline up to date automatically after each call, without reps updating stages manually.

14. Discovery call scheduled — send prep email	
Trigger	Activity 'Discovery Call' is created
Action	Send contact a preparation email with agenda and what to expect
Why it matters	Prepared prospects show up better. This automation reduces no-shows and improves call quality.

Email & Communication

15. Deal stage change — send stage-specific email	
Trigger	Deal moves to a specific stage
Action	Send pre-written email template to associated contact
Why it matters	The right message at the right stage. Reps stay consistent without writing from scratch every time.

16. Proposal opened — notify rep immediately	
Trigger	Email with proposal is opened (via tracking)
Action	Push notification to rep via Slack or mobile
Why it matters	When a prospect opens a proposal, they're engaged. Reps can follow up while attention is high.

17. No reply in 5 days — send automated follow-up	
Trigger	Sent email has no reply within 5 days
Action	Send a short follow-up email from the rep's address
Why it matters	Persistent follow-up increases reply rates significantly. Automation removes the friction of doing it manually.

18. Contract signed — send onboarding sequence	
Trigger	Deal moved to Won / contract field updated
Action	Trigger multi-step onboarding email sequence
Why it matters	New clients need structured communication. This automation starts the relationship right.

Reporting & Notifications

19. Weekly pipeline summary — send to manager	
Trigger	Every Monday at 8:00 AM
Action	Send pipeline summary report via email to sales manager
Why it matters	Managers start every week with a clear view of pipeline health without pulling reports manually.

20. Monthly revenue report — send to leadership	
Trigger	First business day of each month
Action	Send monthly revenue and deal velocity summary
Why it matters	Leadership stays informed on key revenue metrics without scheduling a meeting.

21. Deal closes this week — alert the team	
Trigger	Deal expected close date is within 7 days
Action	Notify team channel with deal name, value, and owner
Why it matters	Keeps the team aligned on what is closing soon, enabling timely support and coordination.

22. Pipeline below target — alert management	
Trigger	Total open deal value drops below a defined threshold
Action	Send alert to sales manager
Why it matters	Early warning signals allow management to take corrective action before end-of-quarter pressure.

Integration & Data Sync

23. New deal — create project in ClickUp	
Trigger	Deal moves to 'Proposal' stage
Action	Create a linked project or task list in ClickUp
Why it matters	Sales and delivery stay in sync from the moment a deal gets serious.

24. Deal won — create invoice in accounting tool	
Trigger	Deal is marked Won
Action	Create draft invoice in Xero, QuickBooks, or equivalent
Why it matters	Closes the gap between sales and finance. No manual invoice creation or data re-entry.

25. Contact created — enrich from LinkedIn/Clearbit	
Trigger	New contact is created
Action	Trigger enrichment via Zapier/Make to pull company size, industry, title
Why it matters	Reps get better context automatically. No manual research before the first call.

26. Deal value updated — sync to Google Sheets forecast	
Trigger	Deal value or close date is updated
Action	Update connected Google Sheets revenue forecast
Why it matters	Finance teams that run forecasts in spreadsheets stay current without manual exports.

Pipeline Hygiene

27. Duplicate contact detected — flag for review	
Trigger	Contact created with matching email or phone
Action	Create a task for the owner: review and merge duplicates
Why it matters	Duplicate contacts cause confusion and skewed reporting. This automation surfaces them immediately.

28. Deal missing required fields — remind owner	
Trigger	Deal is in a certain stage but key fields are empty (e.g. company size, budget)
Action	Send reminder to deal owner with list of missing fields
Why it matters	Data quality degrades quietly. This automation enforces data standards without manual audits.

29. **Inactive deal — archive or mark stale**	
Trigger	No activity on deal in 60 days
Action	Change deal label to 'Stale' and notify owner
Why it matters	Stale deals inflate pipeline and distort forecasts. Regular cleanup keeps the numbers honest.

30. **Contact email bounced — update status**	
Trigger	Email bounce event received (via connected email tool)
Action	Update contact status to 'Invalid email', create task to find correct address
Why it matters	Bad email data silently kills outreach. Flagging bounced addresses keeps the contact base clean.