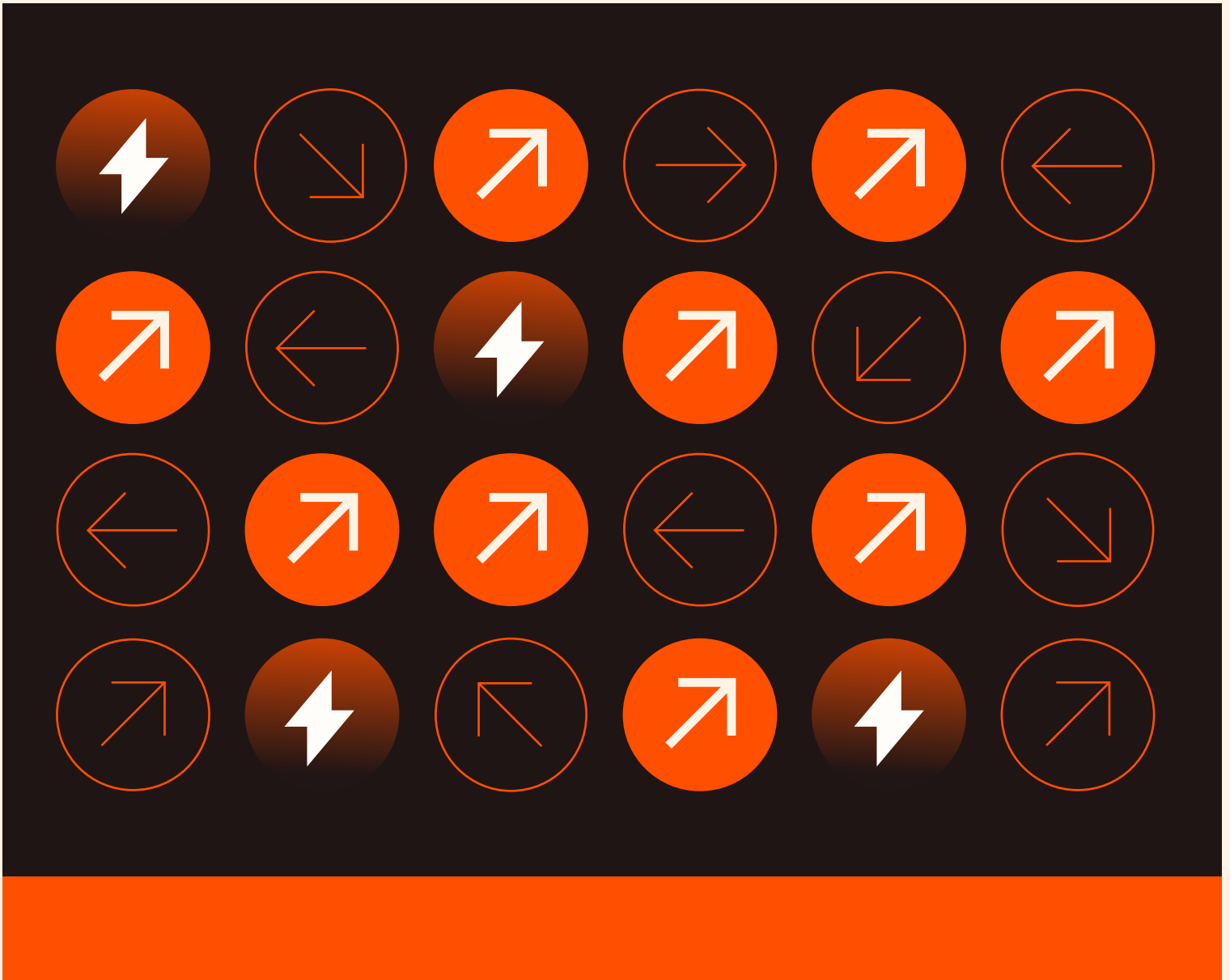_zapier

How to talk about Zapier: A guide for Partners

1. This guide's purpose

This guide will help your teams—from Support Specialists to Sales teams—clearly and confidently talk about your integration with Zapier.

Just need a specific link to share with your users? Go here for our curated list of helpful resources.

How you can use this guide

To address user inquiries: Help your team explain Zapier to new and existing users and how it works with your product.

To secure your competitive edge: Learn how to confidently leverage your partnership with Zapier as a key selling point for prospects and upsell conversations.

To align on messaging: Provide consistent talking points for your teams to ensure everyone is on the same page when discussing your Zapier integration.

2. Customization instructions

To make the most out of this guide, follow these customization instructions before sharing with your team:

1. **Identify Customization Areas:** Look for areas [highlighted like this].
2. **Suggested Customization:** Use the suggested ways to fill in the highlighted fields with examples specific to your users. Fill in the highlighted areas with your company name.

Why Customize?

Customizing this guide ensures that the examples and language are as impactful and relevant as possible for your team. Tailoring the content to your specific users will make the information more relatable and actionable.

3. Why talking clearly about your integration matters

Talking clearly about how Zapier works with your product is critical for a few reasons:

- **It encourages upgrades and loyalty.** When users realize they can do more with your product by leveraging your integration, your app becomes a reliable pillar in their daily workflows.

- **It simplifies your team's work.** Ready-to-go answers and talking points help your users get up and running quickly, reduce support inquiries, and drive overall user satisfaction right from the start—a mutual win-win.

- **It shows your product's full potential.** Your product is great by itself, but it becomes even better when users connect it with other tools to fill any gaps.

Plus, by effectively communicating the value of your integration to users, you can achieve success like the industry leaders mentioned below.

From Airtable:

"Users who connect Airtable with Zapier are our **most valuable users**—they're more likely to upgrade to a paid plan."

From Jotform:

"Connected Jotform customers have a **50%** higher retention rate than non-Zapier users. Customers who use Zapier within the form builder are **25 times** more likely to upgrade to paid plans."

From Paperform:

"There is no way we can make a direct integration for every new or existing service that our users might want to use. Zapier makes it effortless for us to provide that value to our users."

From WebMerge

"Around **40%** of our customers use Zapier in some way or another. So, Zapier is an integral part of our business and integration strategy."

4. What is Zapier?

Just like you adapt how you talk about your product based on who you're speaking to, it's essential to tailor how you talk about your Zapier integration with different types of users, too.

Each scenario below requires a slightly different pitch, but the core message is the same: **Zapier makes work easier by automating tasks across thousands of apps—no matter your level of technical expertise.**

For existing users who are familiar with automation:

Zapier is a powerful automation tool that _____ trusts to connect your favorite apps and automate tasks between them. That way, your teams can focus on what matters most: growing your business.

For your enterprise users already familiar with automation:

Zapier is a powerful tool that helps your company automate repetitive tasks and processes. The platform seamlessly connects over **7,000** different apps to streamline operations. Zapier is incredibly user-friendly, allowing anyone on your team—regardless of their technical skills—to create custom automated workflows that save time and reduce errors.

For brand new users who aren't familiar with automation:

Zapier is a user-friendly tool that automates tasks between your apps with no coding required. Simply put, when something happens in one app, Zapier can automatically trigger a corresponding action in another app to take repetitive tasks off your to-do list.

Key Resources:
- The Zapier quick-start guide
- Meet Zapier Enterprise

5. Why automate tasks?

Before diving into what Zapier can do when talking with your users, start with the problem your integration (and automation in general) solves.

Below is a great section to customize to speak directly to the people you want to use (or who could benefit from) your integration.

In short, automating tasks helps you focus on what matters.

1. **Boost efficiency:** Automation reduces the amount of time your team spends on repetitive tasks like

   and   .
   That means fewer tedious tasks and less room for human error.

Customization prompt:
Consider the specific repetitive tasks your product automates. Ask yourself, "What routine tasks do our customers perform that they can simplify with our integration?"

2. **Enhance collaboration:** When tools don't work well together, it can slow everyone down and make work more difficult.   users, for example, often want to connect
   and
   so that they can   .
   Our integration with Zapier helps all your different tools talk to each other, so everything runs smoothly and everyone stays up to date.
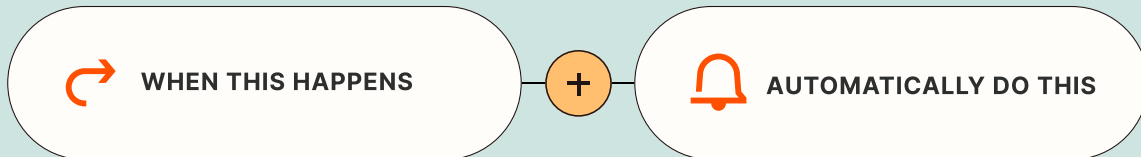
Customization prompt:
What are some of the most common kinds of tools your users want to connect to? What are some of the challenges they want to overcome by connecting these tools?

Key Resources:

- When should you automate a task?
- Automation at scale: What it looks like and how to do it

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3. Scalability: As businesses grow, managing _____ and _____ can become overwhelming. The _____ integration with Zapier automates these tasks, such as _____ and _____, which helps businesses scale operations without increasing complexity or needing additional resources.

Customization prompt: Consider how your tool helps businesses handle growth. What tasks or processes can your integration automate that helps businesses scale efficiently?

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4. Reliability: With _____ and Zapier, you can trust that important tasks like _____ and _____ will get done every single time. That way, your work continues to be accurate and meets strict rules and standards.

Customization prompt: Think about the tasks that must be perfect for your users. What might happen if these critical tasks are done wrong?

6. When should you automate a task?

You may hear your users who are new to both Zapier and automation ask your team, **"Okay, automating tasks sounds cool, but how do I know when to automate a task?"**

To help you answer this quickly and clearly, we've provided a template table with examples showing automation's benefits.

Tip from other Zapier Partners: Highlight specific examples that address feature gaps that aren't currently (or ever going to be) on your roadmap. Consider providing examples that include product features you want your users to take advantage of (like certain features only available on paid plans).

For example, the team behind TikTok For Business knows customer relationship management (CRM) software is an essential part of their business users' workflows. While a CRM is not a feature TikTok Business offers, their Zapier integration makes it easy for users to plug their data into the CRM of their choice. That's why TikTok sends their users lifecycle marketing emails encouraging them to integrate their CRM via Zapier early on.

When to automate	Reason to automate	General example	Your turn
Tasks you do frequently or on a schedule	Automating these tasks saves time and ensures consistency without daily manual effort.	Automatically send a reminder email to clients a day before their appointments.	
Tasks that move data between apps	Moving data manually is inefficient and can lead to errors.	Automatically transfer sales data from your eCommerce platform to your accounting software.	
Repetitive and simple tasks	These tasks don't require critical thinking and can be tedious.	Automatically compile daily sales reports from transaction data.	
Tasks that are time-consuming	Automating heavy-lift tasks means you can redirect focus to high-value activities.	Automatically track project time across different tools and compile it into a single report.	

7. Why use Zapier to automate your tasks?

Users who are familiar with automation may have heard of a few different automation tools. Your team can demonstrate why your integration with Zapier is the right solution for them (while offering resources and transparency to make the final decision themselves).

Here's what to say:

In a nutshell, Zapier is the most popular automation platform for a reason.

They introduced no-code automation to the world with their easy-to-use, point-and-click interface. With 6,000+ integrations with other apps, anyone on your team can start confidently connecting the tools you need and automate business-critical tasks.

→ If your users want more specific comparisons or have questions:

Encourage them to reach out to our support team! They're always on standby to offer detailed insights and help everyone make well-informed choices.

→ If you want your users to trust your Zapier integration even more, share how you leverage Zapier yourself:

It may also help them feel more confident and start automating tasks with your integration.

Key Resources:

- Make vs. Zapier
- Workato vs. Zapier
- Tray.io vs. Zapier

Dive deeper into Zapier's benefits below (and customize for your users):

Benefit	Details
Connects with everything	Zapier connects **over 6,000 apps**, far more than most competitors, ensuring you can connect nearly any tool your business uses.
Constantly innovating	Zapier is always adding new features, such as AI tools, custom databases, and no-code web interfaces —so your automated workflows stay cutting-edge.
Exceedingly easy-to-use	The platform is user-friendly, allowing anyone in your organization to set up and manage automated tasks with and others—all without any tech skills.
Saves you money	Zapier charges only for the actions you perform, not for checking data. This translates to significant cost savings as your needs grow. For example, if you have a workflow through our integration that checks but only when specific criteria are met, you're only billed for the , not the checks. This makes scaling cost-effective. ⭐ **Customization prompt:** Include an example of a workflow they can set up with your integration that checks for data regularly, but will only perform one action.
Great support	If we ever encounter a need we can't solve for you, Zapier provides incredible support—a key reason we chose to integrate with them. With a large user community, access to experts, and dedicated support, Zapier ensures you have all the help you need for setting up and running your automated workflows.
Zapier Experts	Need to build complex workflows? You can build it yourself—or save time and hire a Zapier-certified expert. These Experts are certified consultants who specialize in workflow automation.
Proven and trusted	Over 2.2 million businesses across the globe use Zapier for automation —and they've built 25,000,000+ Zaps.

8. How does Zapier work

Here's a step-by-step guide to help your team explain how Zapier works. Tailor the conversation to what your users want to achieve, using the provided examples. If you need assistance filling it out, <u>contact us</u>!
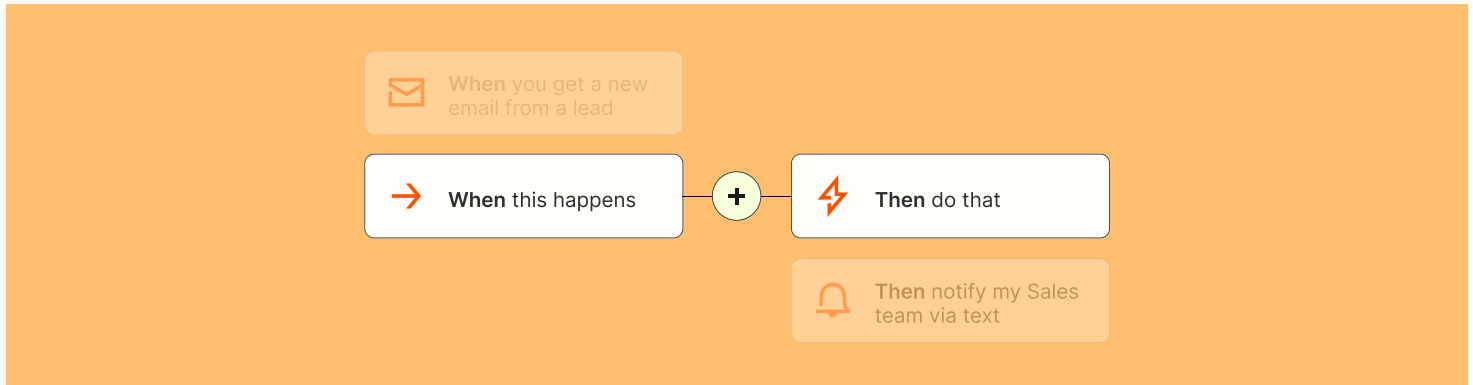
The basics: A "Zap" is the term for automated workflows you set up between
and any other tool you use. Some of the most popular tasks that users start putting on autopilot with our Zapier integration include:
- Example 1.
- Example 2.
- Example 3.

> **Customization prompt:** If you need inspiration, check out <u>our breakdown</u> of the most common workflows people use at work and <u>how others are integrating the power of AI</u> into their workflows.

Start with a trigger: A trigger starts your automation. It's whatever event you want that will kick off a series of other actions. For   , common triggers include:
- Trigger 1.
- Trigger 2.
- Trigger 3.

Now, it's time for action: Actions are what your automation does when it's triggered. If your trigger is a lead filling out a form, the action would be sending a message to your Sales team. Add as many actions as you want. Common actions users set up include:
- Action 1.
- Action 2.
- Action 3.

Watch the work happen—automatically: That's it! Once you've completed the steps above, you've created a Zap. Now, you can sit back and let Zapier and   do the heavy lifting.

Key Resources:
- <u>Zapier Learn</u>
- <u>Zapier webinars</u>
- <u>Zapier feature guides</u>

What else can I do with Zapier?

Category	Tool/ Feature	Description	Sample use case	More Info
Zapier Tools	Formatter by Zapier	Sometimes, getting the data in the right format is a pain—and that's where Formatter comes in. Formatter is a built-in Zapier tool that automatically reformats your data to get it working the way you need.	If you need to simplify customer data from Shopify before adding it to a Mailchimp mailing list—like extracting first names and the day of the week from the full customer details—simply use a Formatter step in your Zap.	Formatter guide
	Filter by Zapier	Filter by Zapier allows you to set up rules for your Zaps so they only continue if they absolutely have to. When the filter's conditions don't match, the Zap won't proceed.	With a filter, you only allow your Zap to run if an invoice is for a charge greater than a certain amount.	Paths guide
	Paths by Zapier	Paths lets you split your Zap into the different outcomes your data needs.	A single Zap using Paths can automatically handle emails by replying to routine messages, directing complex inquiries to specific team members, or prioritizing urgent ones based on the details of each message.	Filter guide
	Other solutions	Include webhooks for unsupported apps and Code by Zapier, which helps you create snippets of code.	If the tool you want to use with doesn't have a Zapier integration, webhooks can fill the gap by accepting data from almost any app. Store the data in Google Sheets or your spreadsheet app to easily share or keep as an archive.	Other solutions
Zapier Features	Interfaces	A visual drag-and-drop builder that seamlessly creates forms, webpages, apps, and AI chatbots that are integrated with Zapier's extensive app ecosystem.	Create professional customer portals to centralize all the resources your customers need into one branded hub. Then, automate follow-up tasks to make their onboarding a breeze.	Interfaces guide
	Tables	A no-code, all-in-one database tool for storing, editing, and automating data that powers Zaps.	Use Tables to create dynamic lookups for the latest tasks, clients, and other information you need to reference in business-critical Zaps.	Tables guide
	Canvas	A planning and diagramming tool that allows users to visualize and optimize automated workflows with AI.	Share a canvas with your team to build processes together, or let colleagues leave comments. Once you've agreed on the plan, it's a snap to turn that diagram into an automated workflow.	Canvas guide
	Chatbots	Allows users to create custom, AI-powered chatbots that answer questions and perform tasks based on predefined knowledge sources.	Automate customer interaction and support tasks, and scale service capacity without additional human resources.	Chatbot guide
	AI features	Includes the AI Zap builder to automate Zap creation through plain English descriptions, turn sentences into code, and quickly resolve issues with AI-powered troubleshooting.	Create email copy with ChatGPT from new Gmail emails and save them as drafts in Gmail.	AI features

9. Best practices for gathering testimonials

Testimonials from those who use your integration can increase your integration's credibility. This section helps you effectively collect and use testimonials. If you have an awesome testimonial to share, get in touch with us. We may be able to help you amplify it.

Collecting testimonials

1. **Choose the right users:** Identify and select those who benefit from your integration.
2. **Ask the right questions:** Focus on questions that encourage detailed and quantifiable responses. For example, choose 2-3 questions below that most closely match the type of feedback you want to share with other users.

Question	Details
What specific problem did our integration solve for you?	This question helps users articulate the direct benefits they experienced, which will resonate with potential users facing similar challenges.
What feature of our integration do you find most valuable and why?	Encouraging users to focus on particular features can highlight unique aspects of your integration that may not be apparent to new users.
How has our integration impacted your productivity or business growth?	This question seeks specific ways your integration has helped their growth. Tangible results are persuasive in demonstrating the integration's effectiveness in real-world applications.
Can you describe how our integration fits into your daily workflow?	Understanding how customers use your integration on a daily basis can help prospective users visualize how it might work for them, too.
What was your workflow like before using our integration, and how has it changed?	Comparisons between "before" and "after" can effectively showcase the transformation and benefits from using your integration.
How would you describe the learning curve for our integration?	Insights into the ease of implementation and learning can address concerns about complexity and encourage those wary of new tech solutions to adopt.
What would you say to someone considering whether to use our integration?	This open-ended question allows users to freely advocate for your integration and provide genuine endorsements that can influence potential users.
If you could suggest any improvements to our integration, what would they be?	While this may seem counterintuitive for a testimonial, it shows transparency and a commitment to continuous improvement, which is compelling to prospective users.

Guidelines for submission

1. **Collect testimonials in one place:** Use an online form or a direct email link to make submitting testimonials as straightforward as possible.

2. **Offer guidance:** Prompt your users with the questions you're most interested in.

3. **Get their permission**: Always obtain consent to use the testimonials in your marketing materials, and clearly explain how and where you'll use them.

Examples

Here are a few examples of testimonials that would help prospective integration users understand the value of your integration.

Time efficiency

"Using the integration, I've cut down my weekly reporting time over 50 percent, which allows me to focus more on strategic tasks."

—

Problem solving:

"Our team faced significant challenges with data-entry errors and workflow bottlenecks. The   integration automated these processes, reducing errors by 90 percent and improving our overall operational efficiency."

—

Ease of use:

"The integration was incredibly easy to set up and use. It seamlessly integrated into our existing systems, requiring minimal effort with maximum return."

—

10. FAQ

Here are some handy responses to the most common questions we get about Zapier.

Who uses Zapier?

You can benefit from workflow automation regardless of your industry. If you use apps or software for work, automation is for you.

Here are a few examples of how different job roles can benefit from workflow automation:

When to automate	Reason to automate
Marketing operations	Streamlining lead collection, managing paid campaigns, reporting metrics, segmenting subscribers, tracking offline conversions.
Social media manager	Tracking brand mentions, sharing content across platforms, logging posts, curating content for posts.
Sales	Following up with prospects, scheduling demos and consultations, tracking sales pipeline, updating and managing contacts.
Accounting	Invoicing, client onboarding, filing expense reports, updating CRM with payment statuses, collecting signatures.
eCommerce	Fulfilling orders, tracking sales, adding customers to a mailing list, notifications for failed charges, inviting customers to leave reviews.
Project manager	Creating reports, assigning tasks, reminders for deadlines, tracking time.

Key Resources:

- Zapier customer stories
- Zapier use cases by team member rolez

Is Zapier included with my account? What does it cost?

→ ## Template version

Zapier is a separate tool, but our integration with them means it works seamlessly with the features you already use and love in our product. We recommend starting with a free trial.

→ ## Customizable Version

For those on our _____._____ plan, you can start automating tasks with Zapier. As a heads up, while we provide the ability to connect through Zapier, you'll need to set up and manage your own Zapier account to choose your plan. Zapier offers different plans, including a free option that's great for getting started. If you need more features, they offer paid plans as well.

$ **Customization prompt:** Is your Zapier integration available on a specific plan? If that plan offers a free trial, highlight this feature for anyone asking about your Zapier integration and let them know they can try Zapier for free, too.

Plan	Idea for	Features	Price
Free	You're just starting with automation	Connect apps and automate basic workflows with 100 tasks per month.	$0
Professional	You're an individual who wants the full power of Zapier.	Create simple and advanced workflows. Access all 6,000+ app integrations. No task charges for built-in tools.	Starting at $19.99 USD/month
Team	Your business needs multiple people managing workflows.	Build, collaborate, and manage Zaps across your team. SAML SSO is available as an add-on.	Starting at $69 USD/month
Enterprise	IT leader/large business needing high-level controls and support.	Designed for scale. Enhanced control and observability, streamlined deployment, highest support level, and flexible pricing.	Contact our team for pricing

Key Resources:

- Zapier pricing and plans

What kind of support can I get?

It can be helpful to distinguish for your users what support you provide and what we can assist them with.

→ Support from us:

If you need help understanding how our integration works with Zapier, our team is here for you. Contact us for   :
- General questions about our Zapier integration.
- Guidance on how to combine our product with Zapier effectively.

→ Support from Zapier's team:

For more detailed help, Zapier's team is ready to assist with:
- **Setting up Zaps.** Get help creating and optimizing your Zaps.
- **Troubleshooting**. Resolve any issues that come up with your Zaps.
- **Billing questions.** Have any billing questions answered.

→ Support from additional resources:

For additional support, check out Zapier's resources below:
- **Interactive courses.** Zapier offers courses to help you and your team master automation. Available to everyone.
- **Certified Zapier Experts.** Need more personalized help? Consider hiring a certified Zapier Expert who specializes in crafting complex workflows.
- **Community.** Connect with other Zapier users for tips and support.Webinars. Watch and learn on demand with Zapier's webinars. Check out topics from the basics to adding AI into your workflows.

→ **Contact Zapier's team here.**

I found something I need with the integration or a bug. Who do I go to?

The team at Zapier keeps us updated on all your feedback about our integration. We're eager to address your comments quickly, so if you spot a bug or have ideas for new features—like a new trigger or action you'd like to see—please let Zapier know. We're all ears and ready to make improvements based on your needs.

Plus, we'll update you as soon as we've addressed your feedback!

Psst—here's how to get the most from your user feedback

Stay on top of user feedback by syncing it to your issue management tracker: With the Zapier Issue Manager, you can automatically sync, track, and get notifications about the status of feedback shared by our users right inside the tool you already use to manage your product feedback

Automatically keep your most engaged users in the loop: When you resolve an issue or implement a new feature based on feedback, we'll inform the users who suggested it. As soon as you mark the feedback or bug as "Done," we'll notify them that their requested changes are live.

Where do I find the   integration?

There are a few ways your users can find and use the   integration:
Depending on whether you've added your integration inside your product with our embed tools, here's how you can talk about your integration's experience.

For non-embedded integrations

You can manage and edit your workflows with

directly on the Zapier site.

## For integrations with Partner API or Full Zapier Experience

You can discover all of our most popular workflows on the
page. From there, you can choose a popular workflow or set up your own—all without leaving our site.

For integrations with Zap Templates only

You can discover all of our most popular workflows on the
page. Once you click on the workflow you want to set up, you'll be redirected to Zapier's site to complete the process.

See how you can bring the functionality of your integration to your product: The Partner Gallery shows you how other companies are boosting product engagement by embedding their integrations into their products.
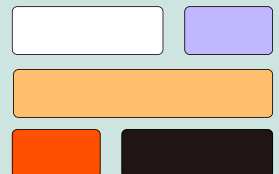
Thank you!

Together, we can help your users get the most out of Zapier. If you have any questions, don't hesitate to reach out. We're here to support you every step of the way.

→ Contact team