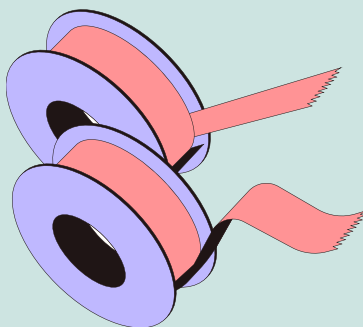
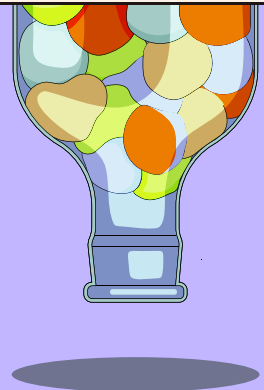
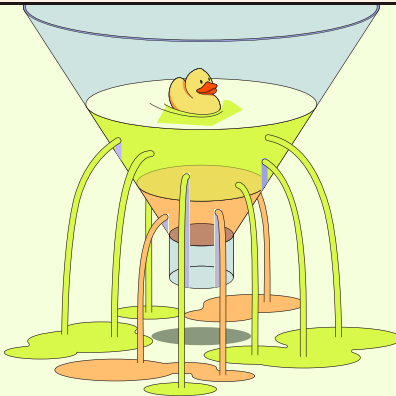
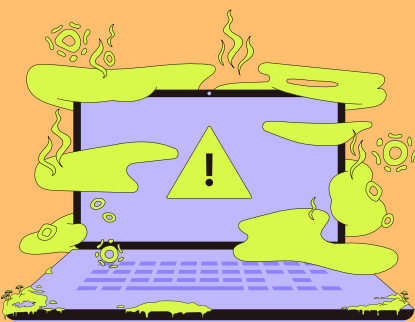


The RevOps leader's guide to transforming your go-to-market machine

Automation strategies to solve revenue challenges and chart a new future



Introduction

RevOps professionals are the architects *and* alchemists behind the customer journey: expert process builders, efficiency finders, and revenue maximizers.

But after you've done your detective work, secured that stakeholder alignment, and started digging into the systems, it's often the same culprit clogging up your workflows:

Too many tools dictate how your processes work, instead of working *with* you to solve the problem.

And it gets worse. Inevitably, your company will purchase a new tool that doesn't integrate with your existing systems, and it'll spawn the same issues:



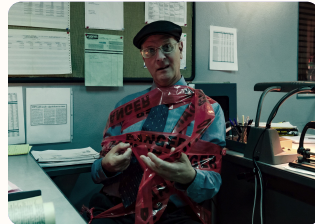
Manual processes eroding your sales and marketing efficiency.



Bad data hygiene throwing off your forecasts, decisions, and outreach.



Leaky sales funnels slowing deal velocity to a trickle.



Disorganized handoffs that risk deals, reputations, and revenue.

Don't bother with more tools that overpromise and under-deliver. You don't need that kind of crystal ball giving you fuzzy promises. Instead, you can chart a different future.

"Zapier contributes to an overhead savings of around \$500,000 on an annual basis, and it's growing every day!"

Tyler Diogo, Operations Manager at Arden Insurance

Zapier is here to give you the building blocks to solve those revenue-draining challenges, uncover new opportunities, and become **uninhibited architects** of the customer journey.

In this guide, you'll get:



Insights from RevOps leaders who've solved these problems—and how you can do it, too.



Tried-and-tested strategies for connecting your tech stack and scaling automation across your teams.



Workflows to steal and adapt across your customer journey.



Connect the systems that fall short

SOLVES:

Tool bloat

Bad data hygiene

Engineer and IT bottlenecks

Manual processes

Leaky sales funnel

Disorganized handoffs

"The Director of Marketing [at a previous company] asked me if we needed something like Zapier and my immediate response was 'no.' I didn't want to manage yet another tool. But when I used Zapier at my next job, I [realized] it made everything much easier."

Lena Yue, Marketing Operations Manager, Zapier

At the time, Lena's team had just migrated to a new marketing automation platform (MAP), so adding *another* tool to her previous company's tech stack was the last thing she wanted. Settling for middling tools felt safer at the time, even though her team needed more complex workflows.

Have you had the same thought? We don't blame you. You already use built-in workflows in your CRM and MAPs. They might work well or get you halfway there. Don't get stuck juggling another disparate tool that fails to scale with your needs. That shouldn't be your destiny.

"I might've been able to keep a system I loved and generally worked well for our go-to-market (GTM) team, while using Zapier for...other use cases [beyond] marketing emails," Lena admits. "It also would've been more cost-effective. I think we spent an additional \$100,000 per year on other tools."

How to get your tools to talk

Just like your customer journey, your tech stack (and all its warts) is unique to your business. You can use Zaps to bridge the gaps, keep the tools and processes that already work well, and trim the excess—all without needing a developer.

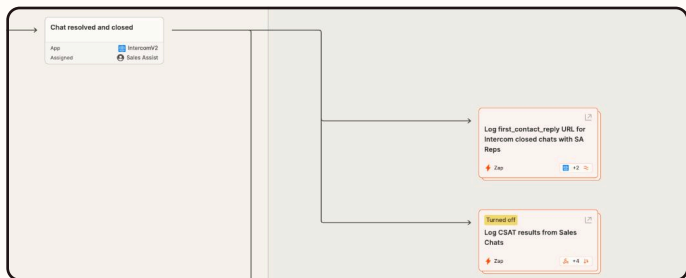
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Automate manual steps between processes

Ideal for: Repetitive, manual tasks between existing workflows that don't need a human touch.

You can likely think of plenty of manual steps in a process you'd love to offload to automation, but you couldn't make it work. Built-in integrations are too basic, or third-party tools couldn't support complex workflows.

Instead, lean on a dedicated automation platform. To get started, identify the breakpoints in a process where automation ends and onerous copy-pasting begins.



The fastest way to do this is with [Zapier Canvas](#), our free AI-powered diagramming tool. Visualize every step, app, and person involved in a workflow—and even transform your plan into a draft Zap all in one spot.

Connor Sheffield, Head of Business Automation at Zonos, regularly uses Canvas to document automated workflows and demonstrate their impact to his executive team. That helped him find ways to cut their software spending.



Zonos needed more flexibility and visibility, so Connor built a marketing automation solution entirely on Zapier, which saves the company \$12,000-\$13,000 annually.

"With Zapier, we replaced Pardot completely as a marketing automation platform for Zonos," he says.

You don't have to ditch Pardot if it works for you. (We love our [Pardot integration](#).) But by visualizing (and automating) processes within your existing tech stack, you'll identify what you truly need for your GTM strategy.

You can also automate using your existing tools without spending more on software licenses. Hudl saves \$15,000 per year in software licenses alone, thanks to automation powered by Zapier. And that's just the beginning of the potential cost savings.

"I was able to leverage Slack and our [automated workflows] to avoid the need to add dozens of Salesforce licenses for our specialized teams," says Tori Phillips, Hudl's Revenue Operations System Administrator. "Our users get answers and fixes to their issues much faster now."



Expand your CRM and MAP workflows with webhooks

Ideal for: Sending data from other tools directly to built-in workflows, as well as catching leaks in your sales and marketing pipelines

At Zapier, we use the best tools for the job and connect them using automation. This approach is preferable to forcing monolithic solutions to work for us.

Instead, our RevOps team uses a combination of built-in CRM workflows *and* Zaps throughout the customer journey. This allows for greater flexibility and customization when business needs shift.

If your marketing platform or CRM's workflow tool supports it, use our [built-in webhooks tool](#)—available on [paid plans](#)—to trigger a Zap from an existing workflow.

For example, [we have an internal HubSpot workflow that qualifies leads](#). If a customer who needs product support accidentally ends up in our qualified lead queue, the workflow sends a request to the Zapier-generated webhook URL. That webhook triggers a Zap that creates a Zendesk ticket and redirects the customer to our Support team.

You also don't need to wait for an engineer to use webhooks. At Lena's former company, she felt guilty whenever she asked an engineer to make minor edits to existing workflows.

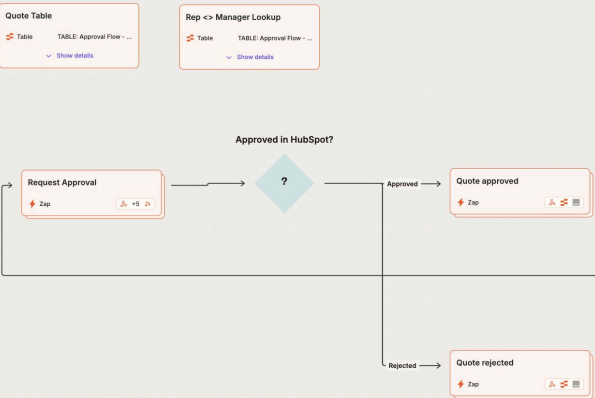
"I didn't know that I could use webhook steps... [with Zapier]," she says. "Even if I need someone else to help with more technically complex steps, I can still own the Zap and adjust other steps without waiting for help."

Steal this workflow

→ Deal desk

We see more closed-won deals in your future. With an automated deal desk, coordinate approvals between different tools to remove the red tape and get to the finish line faster.

This workflow triggers a few different actions from your team chat app for cross-team communication and collaboration. Then, it routes through the necessary approval steps in your CRM using your existing built-in workflows.



IMPROVE YOUR:

Deal velocity

Sales efficiency

Pipeline reporting

When should I choose built-in integrations vs. Zapier?

Here are some things to keep in mind when deciding where to build your workflows:

- **How much granular control do I need?**
Lena says her choice comes down to which platform has what she needs. "Sometimes, the functionality of Zapier gives us greater granular control—and vice versa [with built-in capabilities]," Lena says. Let the features you need for a process guide you.
- **Am I combining data in multiple ways?**
"When [our RevOps team] prefers to do things using Zapier, a lot of times it's for combining data across multiple sources in multiple ways, or [our CRM] doesn't have the functionality." Zapier can pick up where your existing tools fall short.
- **Where can I debug issues faster?**
Plan for the worst-case scenario, so if something breaks, you can get things back online quickly without interrupting operations.

3

Bridge bottlenecks with backdoor integrations

Ideal for: Proprietary software, tools without webhook features, and freeing up engineering and IT resources

Zapier has more than 7,000 integrations, along with additional solutions to address internal bottlenecks like:



Your tool doesn't have a direct Zapier integration



You use complex, hard-to-integrate, custom software



You still have to go through IT or engineering for minor changes for security purposes

You can unclog the first two types of bottlenecks by using a backdoor integration—an alternative app integration that acts as a bridge so you can automate with your chosen tool.

For example, instead of constantly checking an app's status page, use our built-in [RSS by Zapier tool](#) in a Zap to automate alerts for system outages in your tech stack. That way, your whole team will know right away when something is down.

But what about more complex needs, like working with custom software without an API? [Jet Agency](#) used an [SQL integration](#) as a bridge to unlock automation when using its proprietary CRM.

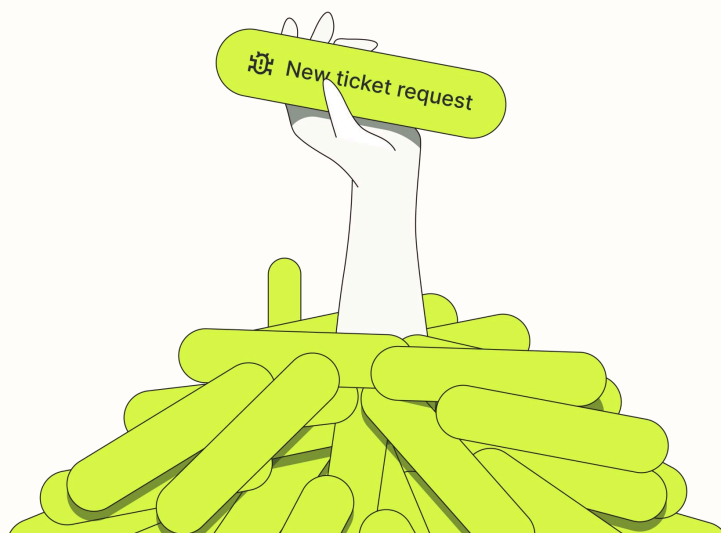
For something more robust, you can even build a private Zapier integration, with or without coding, through the [Zapier Platform](#).



Explore our favorite solutions, from least to most technical, for getting any app to work with Zapier.

Let's be clear: We **do not** recommend going behind your technical teams' backs. (Zapier rhymes with "happier," not "torch your cross-team relationships.")

If your IT or Engineering teams are concerned about security, software licensing, and risk mitigation, address those to get their buy-in. That's how Jet Agency's Executive Vice President of Biz Ops James Sperry secured developer approval and converted the entire team into power Zapier users.



Jet Agency

The challenge: A proprietary CRM

Finding a CRM for a private aviation charter broker is like finding a mythical unicorn. That's why Jet Agency uses its proprietary software—known as the "Grid"—to source flights, manage leads, and handle other business operations.

Anytime James Sperry, Executive Vice President of Biz Ops, wanted to test something out, he faced slowdowns and roadblocks when going through their previous development team.

The solution:

Jet Agency uses Zapier's MySQL and PostgreSQL integrations to get their proprietary software to talk to other apps. Now, they can integrate their systems with their team chat and even AI.

Metrics:



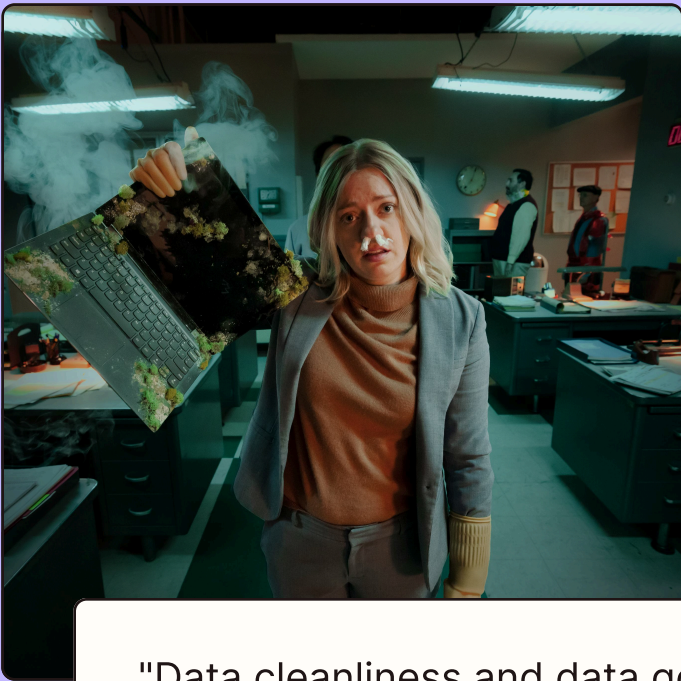
Hundreds of hours saved on finalizing quotes.



Jet Agency **no longer needs an entire department** to source quotes.

"The speed is just unmatched [with Zapier]. We'll go from a meeting with salespeople, someone will suggest an idea, and by the end of the day, we can implement it."

James Sperry, Executive Vice President of Biz Ops, Jet Agency



Data hygiene starts at the source (of truth)

SOLVES:

Tool bloat

Bad data hygiene

Engineer and IT bottlenecks

Manual processes

Leaky sales funnel

Disorganized handoffs

"Data cleanliness and data governance is eternally [a problem]. You have manual data, sync data, enriched data, and once it hits your system, [it's] stale."

Jeff Ignacio, Head of GTM Ops, Keystone AI

When data across your systems is missing, doesn't match, or is inaccurate, you might as well be making decisions blindfolded.

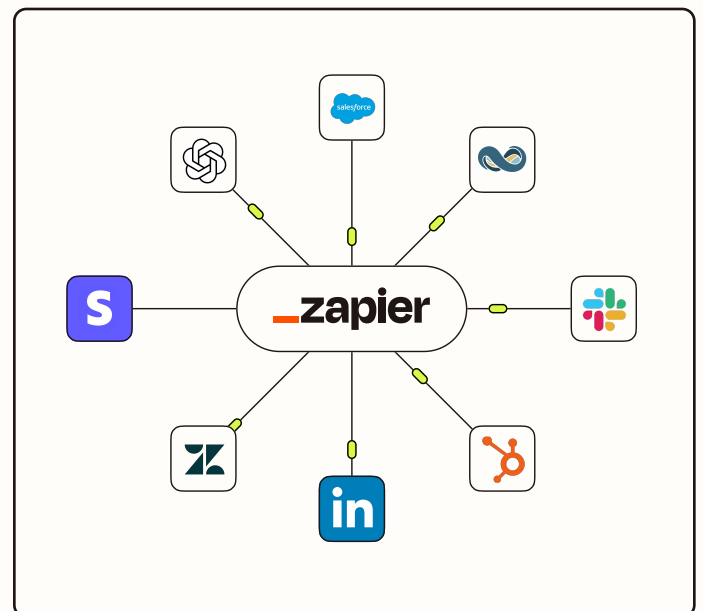
All your forecasts are off. No one trusts the data available. Context gets lost in handoffs, risking deals, reputations, and, ultimately, revenue.

That's why a source of truth is a critical pillar for speedy, strategic decision-making.

Anchor automation around your source of truth

Your source of truth is a central system where your Zaps will send and retrieve data. Think of it as the anchor for your automated processes.

When you use Zaps intentionally to reinforce your source of truth, you'll have a more holistic view of your data in one place, reduce context-switching, and keep your data squeaky clean.



Here's how:

1

Don't get buried in mountains of irrelevant data

Your CRM will most likely be your source of truth, but that doesn't mean you'll be info-dumping *everything* there. Think through which data sources will be useful fuel for your revenue engine.

"The main goal is to show how each GTM team's data can be meaningful to each other," explains Justin Nakano, our RevOps Strategy and Analytics Manager at Zapier.

Pinpoint those intersections with [Zapier Canvas](#), our AI-powered diagramming tool. For example, your Sales team relies on high-quality leads from Marketing to meet their goals. So, you can map out how you'll feed those leads from your ad platforms, email marketing, and other sources to your CRM for lead scoring.

"Marketing's impact is reflected in sales performance, with lead volume and quality playing a critical role in driving conversions," says Justin. "A tailored sales strategy by customer segment ensures further success."

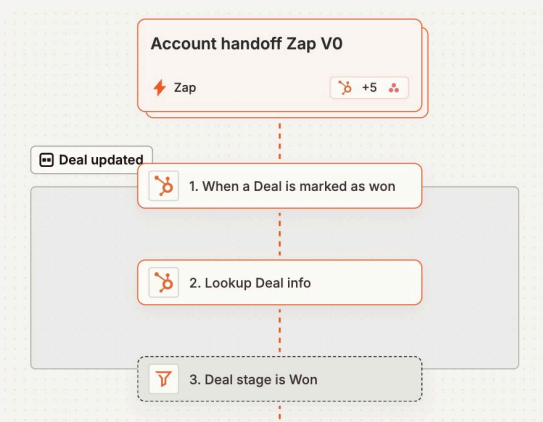
Customer Success takes over in the post-sale journey. When Customer Success Managers (CSMs) learn how customers actually use your product versus how it's marketed, they can automatically share those insights with the Sales and Marketing teams.

Steal this workflow

→ [Internal handoffs](#)

Automate your account handoffs for qualified buyers and preserve context at critical transition points in the customer journey.

Whenever deals reach the qualified-to-buy stage in your CRM, this Zap notifies your team of the deal amount. Then, it creates a customized slide deck and assigns a task in your project management tool with the deck attached.



IMPROVE YOUR:

Time in pipeline

Time to value

Marketing and sales efficiency

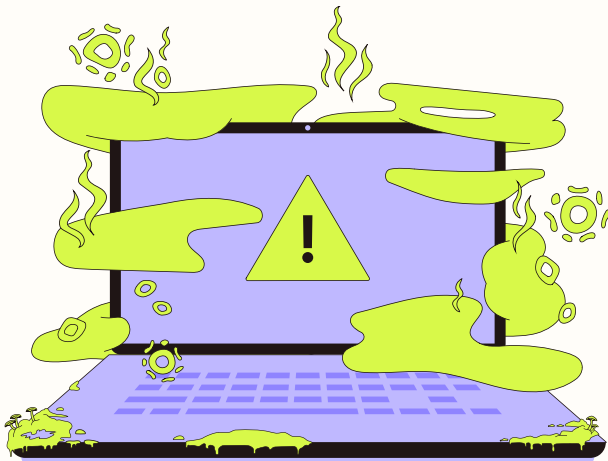
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Transform data while protecting your source of truth

Data integrity is critical for reliable reports and insights. That's why you don't want to make too many updates in your CRM—it'll throw off your reporting.

Instead, use a spreadsheet or database as a temporary intermediary storage spot to automate data transformation before sending the clean version to your CRM source of truth.

"There's a lot of these temporary [Google Sheets] that we'll build to store all this data until we know that the concept is going to work," says James Sperry of Jet Agency. "Once we know it'll work, then we'll build it into a real [SQL] table so we don't bog down our production databases."



Dynamic lookup tables are one of the tried-and-true tricks when matching multiple pieces of related data across apps. However, automation can be tricky with traditional spreadsheets and databases. Moving columns around can break workflows, and tracking change history requires hacky workarounds.

Enter Zapier Tables, which works hand-in-hand with Zaps, so you can automate your data (including approval workflows), keep track of changes, and edit data without accidentally triggering an automated workflow.

Automating with spreadsheets and databases



Use a spreadsheet if...

...multiple teams need to collaborate on draft versions for planning or forecasts.

"It's particularly useful if you're still refining formulas or awaiting approval for key performance indicators (KPIs)," says Justin.

Watch for: Moving columns, sorting, and row edits can accidentally trigger a Zap.



Use a database if...

...you have fully transformed datasets that need minimal updates.

Justin says dynamic lookup tables, trend analysis, and large volumes of cleaned data are good candidates to automate through a database.

Watch for: Editing filter conditions in database views may introduce new records, which can accidentally trigger a Zap.

Zonos

The challenge:

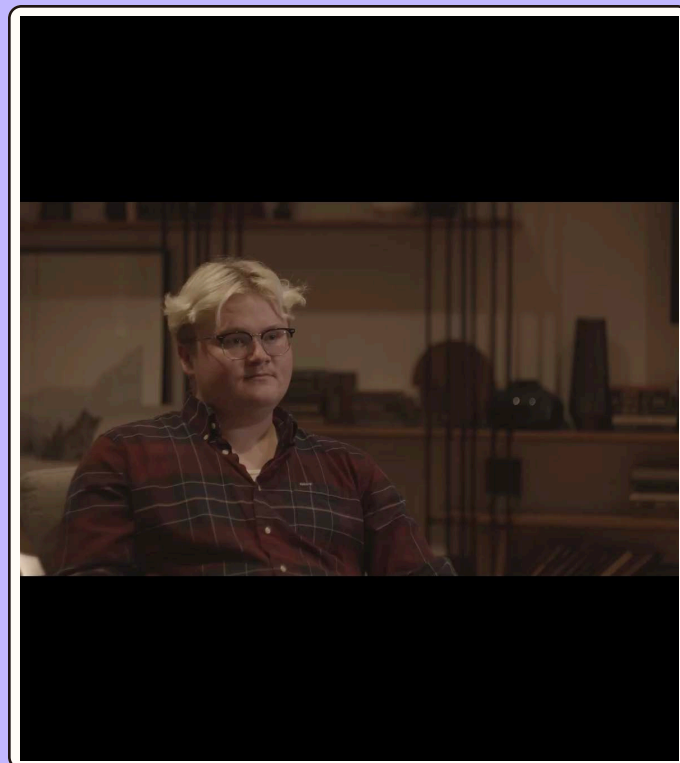
Brittle systems affecting data reliability

Zonos helps online shops simplify international shipping, duties, and taxes at checkout.

Internal operations weren't as simple. Zonos was fighting friction everywhere—their marketing automation platform (MAP) was inflexible for their data needs, handoffs were high-tension, and customer onboarding was slow.

The solution:

Zonos automated its customer acquisition and lifecycle processes using Zapier Interfaces, Tables, and Salesforce. Teams no longer need to manage leads manually, create new customer accounts, or communicate basic info for onboarding. They even replaced their MAP with Tables and Interfaces!



Metrics:



Time to value shrunk by **40%**



Cut onboarding time **in half**



2x faster response times for inbound leads

"Zapier really enables us to build end-to-end solutions for our teams internally and integrations externally. It doesn't just offer data thinking and mapping data. [Zapier is] manipulating, enriching, growing, formatting and transferring that data and making it viewable.."

Connor Sheffield, Head of Business Automation, Zonos



Refine the data flow to your source of truth

There's a reason "firehose data enrichment" isn't a term—inundating yourself with data doesn't necessarily give you usable insights. You need the *right* data.

Fortunately, Zapier has plenty of tools you can use to maintain data quality and hygiene:



Narrow down datasets and exclude incomplete or irrelevant data with a filter step. With Paths, you can also add branching logic to automate more complex processes that trigger based on specific rules.



Use Code by Zapier to run Python or JavaScript for advanced data cleaning or validation. Haven't written code since Myspace was a thing? Describe what you want to achieve with the built-in AI assistant to generate code.

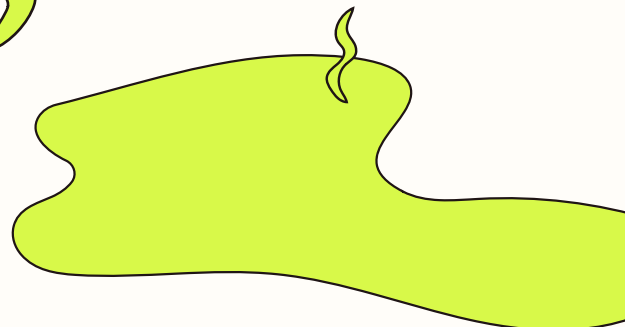


Standardize data formats with Formatter by Zapier. Automatically remove spaces, format dates, run simple calculations, split text, and even set default values.



Automate actions through large datasets with Looping by Zapier, which can run through arrays of line items, text, and numbers.

RevOps pros like you already turn to these tools every day to get cleaner data and clearer insights.



Fix funnel leaks and scale with Zap systems

SOLVES:

Tool bloat

Bad data hygiene

Engineer and IT bottlenecks

Manual processes

Leaky sales funnel

Disorganized handoffs

“When a vendor says, ‘Oh, it takes you five minutes to set up in Salesforce,’ those are fighting words to me. I don't care how easy you think an integration is. It can cause a lot of chaos unintentionally. Integrations need to be flexible and customizable.”

JP Zangre, Director of Marketing, Bazaarvoice

As a customer journey architect, you clear the path so your GTM teams, tools, and processes flow smoothly—all while these elements constantly change.

But staying ahead of shapeshifting strategies isn't just about speed, accuracy, and agility. You have to think through scale *and* execution.

How to move fast (without breaking everything)

The secret to scaling automation with your GTM strategy: Zap systems. This modular automation is a series of Zaps that each automate a specific function, but, as a whole, automate an *entire* process.

When used strategically, multiple smaller Zaps give you more flexibility and help you scale far better than one 50-step workflow.



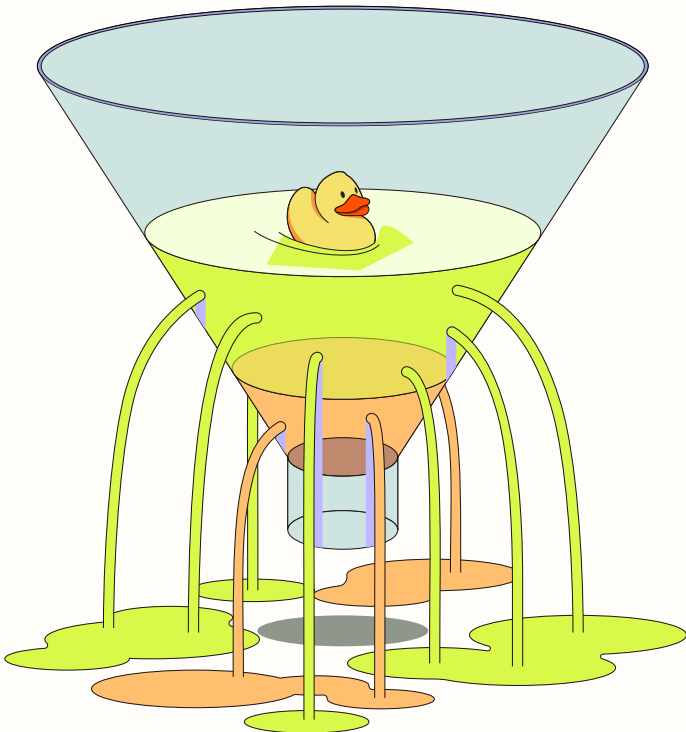
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Why Zap systems scale

Multiple Zaps simplify editing and collaboration. Sometimes, you need to make changes to accommodate strategy shifts or team needs. With Zap systems, it's easier to gain context and edit the Zap that's most affected by the shift—without compromising the entire process.

It's also easier to build on an existing Zap system. For example, if you're testing TikTok ads to generate new leads, it's easy to tack on a new Zap to your existing lead capture process. And if the experiment doesn't work out, you can turn it off without affecting other lead sources.

In fact, many of the workflows we've featured here are Zap systems!



Steal this workflow

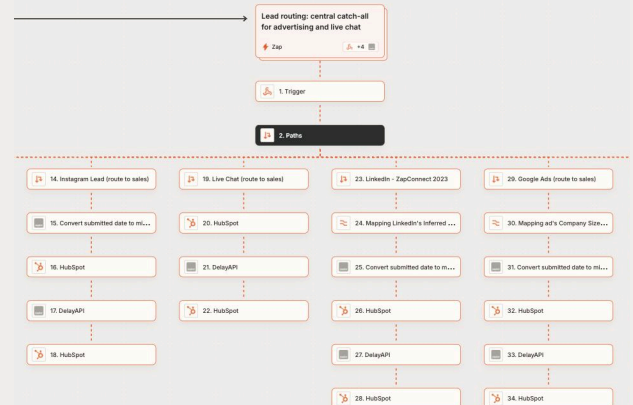
→ Advertising lead capture

Don't leave any of your leads to chance. With this workflow, you'll spend less time managing systems for every CRM change, new campaign, or evolving UTM parameters.

This Zap system breaks down lead capture into individual Zaps for each campaign or channel, making it easier to account for data quirks by platform.

After the data is standardized in a consistent format, it's funneled into a single catchall Zap that routes leads to a CRM.

This makes it easier to maintain and scale this system with new campaigns or channels.



IMPROVE YOUR:

Speed-to-lead

Return on ad spend (ROAS)

Time saved

Lead volume

2

When to fix the flow with Zap systems

Here are some signs a process needs to be a Zap system:

- **There are clear, organic breaks in a process.** For example, this can be handoff points where team ownership changes. You may want to give the respective teams the flexibility to modify Zaps to make the process work for them. Or, there are distinct functions you can manage separately, such as capturing form submissions, reformatting data, and transferring data to the final destination.
- **You need to lock down permissions at a specific point.** You may have a Zap handling sensitive data submissions in your CRM, so you want to restrict editing access to certain teammates to ensure data integrity. You can share and limit access to Zaps on Team and Enterprise plans.
- **You're duplicating the same data formatting steps across multiple Zaps.** Let's say you're routing leads to your CRM. You may need to standardize data from various sources, such as leads from different social channels, and each one has different formatting quirks. You could use separate Zaps to route those different lead sources to a "catchall" Zap that fixes the formatting and then creates a new lead in your CRM.

3

How to fight funnel leaks with Zap systems

Even if you have a process that meets all the criteria, your team needs to determine whether a Zap system is the right approach based on your tools.

For example, can you troubleshoot your lead outreach Zap faster if it's one big workflow, or broken up into smaller Zaps? If Zap systems make more sense, ensure you understand the purpose of each puzzle piece to avoid scaling disasters.

"You really have to understand how the pieces fit together," advises Lena Yue, our Marketing Operations Manager. "If you understand the process really well, it's a lot easier to troubleshoot."

Risk reduction tips for Zap systems:

- **Understand and document the process.** Our RevOps team uses Canvas to document processes and leave additional notes in our CRM. You can also add notes within Zaps, and try these tips for keeping your Zaps systems organized.
- **Watch out for Zap loops.** If you don't understand how the process works, you may inadvertently get your Zaps stuck in a neverending loop on the same data. You can prevent loops by using filters and unique values. And don't forget to document everything!
- **Avoid rate limits.** It's like a RevOps law for rate limits to occur at the worst times. If you're using Zap systems with large datasets, you can customize the polling interval in your Zaps. This feature is available on paid plans and allows you to control how often Zaps check for new information.



Posh

The challenge: Scaling with a small team

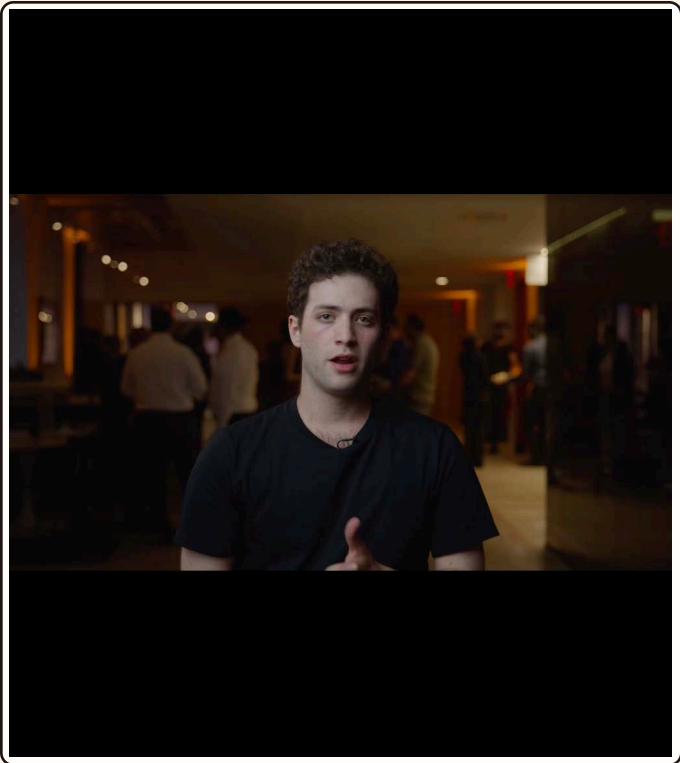
Posh was founded in 2020 as a more flexible alternative to traditional event management platforms.

Customer retention and expansion were a challenge for the small team of just four full-time members.

The solution:

Posh created an outbound engagement system that keeps current customers engaged while also sending outreach communications and faster follow-ups to nurture new leads.

Instead of sending 100 emails after every hosted event on their platform, Posh's growth team can focus on higher-value tasks—all while the bot generates new revenue.



Metrics:



Scale to **\$30 million** in gross merchandise value (GMV) while maintaining profitability



Cut human **touchpoints** by about **80%**

"Once we started using Zapier, it really overhauled the way we thought about scaling...We've been able to keep a team of four full-time growth members and scale to over 7,000 organizers, 700,000 end users, and \$30 million in GMV while maintaining profitability."

Owen Colwell, VP of Growth at Posh

Beyond the buzz: AI strategies for RevOps

SOLVES:

Tool bloat

Bad data hygiene

Engineer and IT bottlenecks

Manual processes

Leaky sales funnel

Disorganized handoffs

Use your own discretion!

"I do think that some people have lost the thread and they are trying to innovate with AI in a place where your buyer doesn't want you to."

Jen Igartua, CEO, Go Nimbly

AI is poised to change how we work. But you don't chase trends—until there's strong data to back it up. It doesn't help that you hear five AI horror stories for every success.

You need dependable tools to prevent accidental leaks of sensitive data, disruptions of critical parts of the customer journey, and revenue compromises for the entire business.

That's why we recommend specific, strategic ways to use AI with a few guardrails in place. The strategies will give you the reins so you can harness the power of AI on **your terms**.



If your organization is considering or already using AI, do your research and ensure compliance with company policies. If you don't have policies in place, consult with your Legal, IT, and Security teams. [Learn how Zapier uses AI and review our security practices.](#)

AI strategies for the scared and skeptical

If you're anxious about AI, you're unsure how to use it, or haven't found a helpful use case, you're not alone. Our RevOps team at Zapier initially felt the same way.

"[At first], I was like, 'Oh, I automate a lot. Why do I need AI?'" says Lena Yue, our Marketing Operations Manager. "I just didn't understand the power it unlocked."

Instead of diving into the deep end, Lena recommends starting slowly with these principles in mind:



Add a human touch for anything customer-facing

AI is helpful, but it's not perfect. (We all know that well by this point.) Still, you may be navigating two competing viewpoints on using AI in your organization—just like clean energy brand egg.

"The non-technical population in our company is like, 'let it loose on everything,'" says Usman Mahomed, Head of Product at egg. "In the technical population of our company, we're a lot more apprehensive about letting an LLM [large language model] speak to customers."

That's why RevOps leaders add a human review step for anything AI touches that's customer-facing. Instead of trusting AI entirely to personalize lead outreach, egg minimizes risk by combining Zaps, our ChatGPT integration, and Zapier Tables.

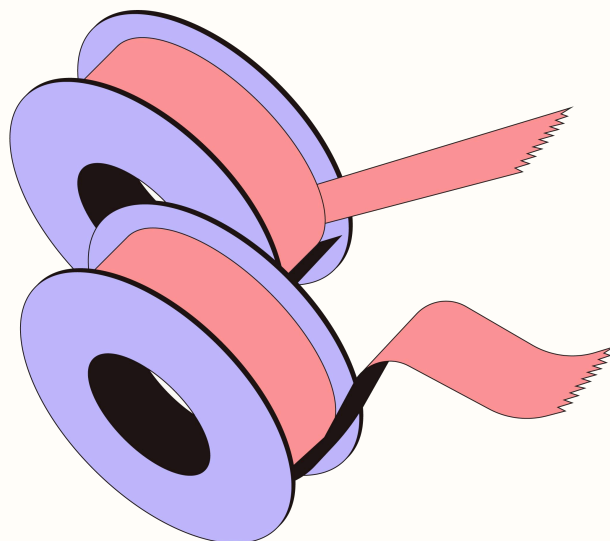
When a teammate clicks a button in Tables, it triggers a Zap that prompts ChatGPT to write and create a draft in Microsoft Outlook. The team can review the drafted email and make any changes before sending it.

If you're generating content with AI, add a human review step to curb inaccurate info.

"If AI is inferring anything from the internet about [a company], we double-check and make sure it's correct," says Lena.



With Zapier, you decide how you want AI to work for you. From AI products like Agents and Chatbots to more than 270 AI app integrations, you can easily bring your most innovative ideas to life and scale your impact. [Explore our AI guide to learn how.](#)





egg

The challenge:
Time-intensive research
tanking sales efficiency

egg's on a mission to help consumers and businesses simplify the switch to renewable energy. egg's Sales teams spent hours per prospect on research, but they couldn't close deals without it.

The solution:

egg created personalized, AI-powered sales research assistants using Zapier Agents. Instead of spending hours compiling research, their Sales teams can focus on closing more deals.

Databricks Conference
Today at 1:08pm

What can I help you with?

Andy Berman
Today at 1:18pm

Go to <https://www.databricks.com/dataaisummit> and give me a list of all the speakers. Create a google doc with all the speakers

Databricks Conference
Today at 1:18pm

Tool Complete
fetchAsBrowser

Action in progress..
 Google Docs: Create Document from Text

Metrics:

Two to three hours saved per prospect on research

Saved the cost of a full-time contractor to get higher-quality lead data

"The best thing about [Zapier Agents] is it's an [AI] agent, not a fixed LLM," Usman says. "Because [Agents] can do those Google searches, we're actually able to find live information we can rely on, which is just incredible."

Usman Mahomed, Head of Product, egg

2

AI is a helpful assistant—not an expert

There are a few areas where AI can be a helpful assistant for RevOps tasks:

- **Formatting and correcting grammar.**

For example, AI can quickly convert lists into a table, prioritize items according to specific criteria, and correct inconsistencies between British and American English.

- **Summarizing and editing content.**

Chris Ondera, Sales and Success Enablement Manager at Zapier, created an AI-powered coaching bot that analyzes sales and success call transcripts. Thanks to this bot, sales reps receive an additional three to five coaching sessions per week and increased enablement-driven insights by 50%. [Steal this workflow for yourself.](#)

- **Calculations and formulas.**

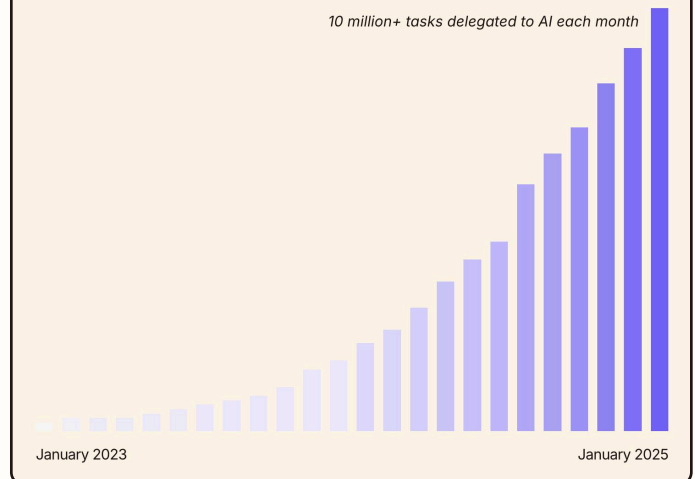
"We do a lot of analysis," says Lena. "Sometimes, I ask for help with conversion rates or calculations for forecasting spreadsheets."

- **Research that doesn't require detailed accuracy.**

"I used AI to automatically research how much funding a company has received." Jenny Hsu, Revenue Operations Technology Manager at Zapier, says. "There isn't a public database for funding, so this would've been a highly manual process otherwise."

While AI isn't a subject matter expert, with the right prompts and knowledge sources, you can customize AI to meet your business needs.

AI Growth on Zapier



That's why AI is Zapier's fastest-growing app category with more than **10 million tasks delegated to AI each month.**

Jet Agency used [OpenAI's Assistants API](#) to build Jetson Booker, an AI-powered teammate that answers questions and conducts specific searches in their internal, proprietary database. So, if a Sales rep needs to book a flight for a client, they can ask Jetson to find available "empty leg" flights to offer. With Zapier's ChatGPT integration, Jet Agency can also use Jetson in their Zaps, saving them [hundreds of hours processing emailed quotes.](#)

Steal this workflow

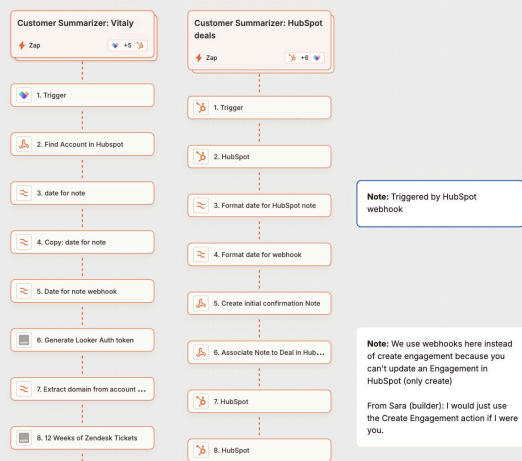
→ Account 360

Generate comprehensive account overviews with AI so your team has the latest insights to personalize every sales call.

When there's a new deal in your CRM or a customer is handed off to Customer Success, this workflow uses separate Zaps to search for relevant info across your tools—think support tickets, usage data from product tools, and more.

Then, it uses OpenAI (or your AI platform of choice) to find key company and industry info for potential customers.

Finally, everything is consolidated in a central spot, such as a note in your CRM, a team chat message, or whatever you prefer—freeing sales reps to focus on driving deals forward.



IMPROVE YOUR:

Win rate

Sales efficiency

3

A dash of personality yields better results

You won't get the results you want from AI if your prompt is confusing or vague. After all, it's not human, so it may not use the right tone or know how to process info unless you say so.

Need a quick shortcut to AI success? Give it a role to play.

"We find that our prompts work better when we clearly state their role, like 'you are a RevOps analyst,'" Lena explains.

Defining the role first frames your AI's knowledge and helps it process the rest of your instructions through a narrower lens. You can also inject a little fun with your prompts, as Jet Agency did with their bot, Jetson Booker.

"He has a whole persona of this cool airline pilot guy," James Sperry, Jet Agency's Executive Vice President of Biz Ops, says. "It's just a more fun way to interact with our data."

The bottom line: You're the boss—AI is just your helper.



We've spent countless hours tweaking AI prompts so you don't have to. Check out our top tips for writing effective prompts.

Workflows to steal throughout the GTM journey

Convert more leads

- Route leads from ad campaigns
- Improve lead volume and speed-to-lead

→ Get the workflow

Close deals faster

- Streamline contracts approvals
- Automate configure, price, quote (CPQ)
- Improve your pipeline reporting

→ Get the workflow

Centralize account insights

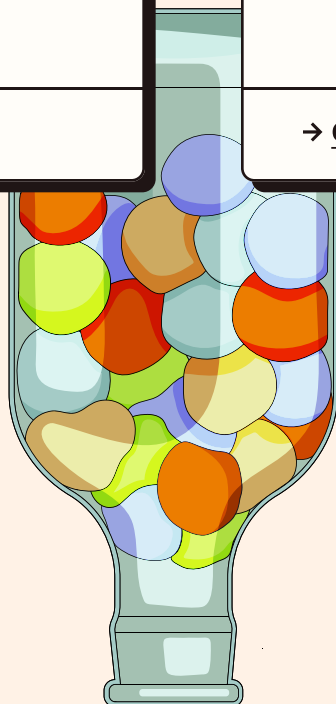
- Summarize customer insights
- Personalize sales calls
- Improve meeting conversion rates

→ Get the workflow

Hassle-free handoffs

- Transfer customer context
- Automate onboarding assets
- Smooth team transitions
- Improve time in pipeline

→ Get the workflow



Automate without limits



Chart a different future with automation that scales with your needs. We foresee seamless handoffs, airtight pipelines, and squeaky-clean data.

Zapier is the leader in workflow automation. Use interfaces, data tables, logic, and thousands of app integrations to build secure, automated systems and business-critical workflows across your organization's tech stack.



Scale automation with the tools you love

Connect more than 7,000 apps and create custom solutions that scale with your GTM strategy.



Safely automate work in minutes—not months

Automate confidently with built-in features like approvals, global access controls, and permissions for tools, teams, and actions.



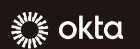
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