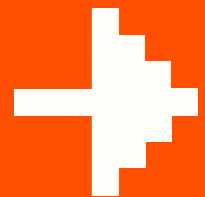


Top 24 automation hacks for enterprise success



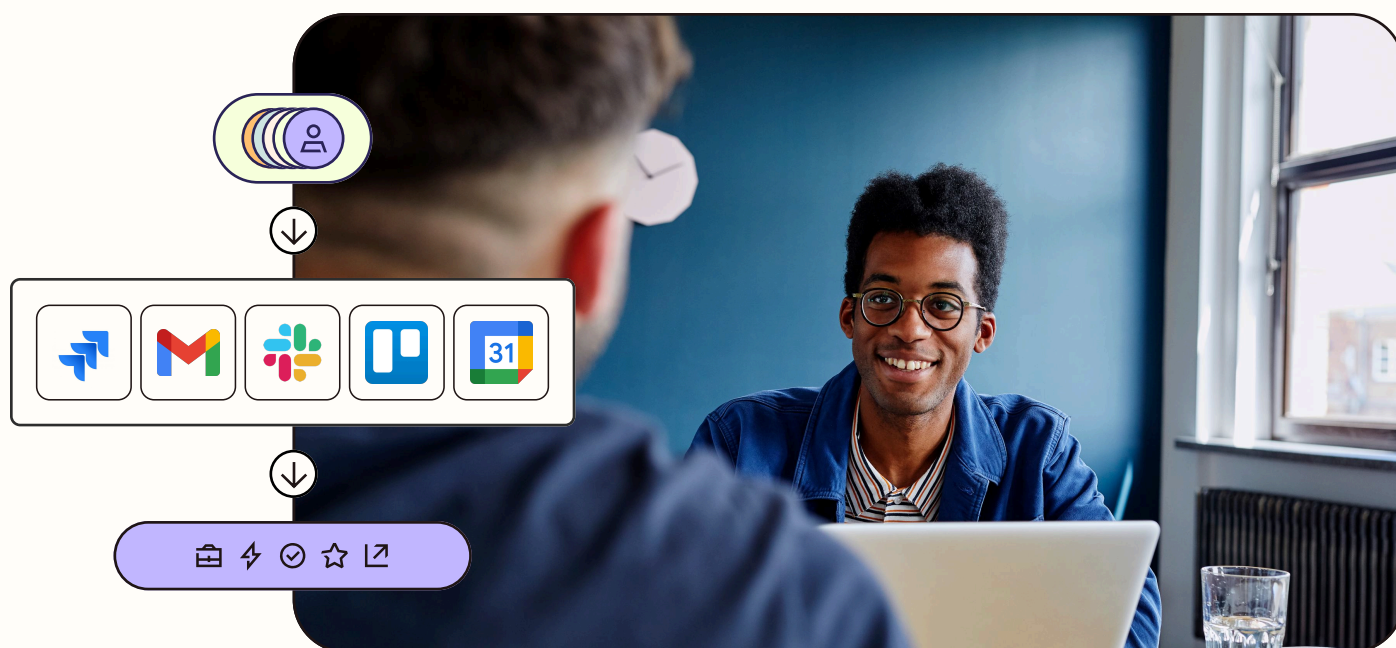


Setting up your first Zap can feel like magic.

We agree; letting your computer take over monotonous, time-consuming tasks is pretty magical.

But what if you leveraged the power of automation beyond personal productivity and across all your teams? When teams start automating together, work becomes less siloed, more departments are aligned, and every department's impact exponentially increases.

Zapier is here to help teams do exactly that. Our platform is intuitive to use—no coding skills required—and IT-approved for safe automation that scales with your organization. It's the simplest, most secure way to put the power of automation in the hands of everyone on your team.



Curious about all the benefits of automation for your teams?

Check out these real-world use cases and workflow templates to help your teams get started with automation ASAP.



Top automation hacks for RevOps teams

What is RevOps, exactly? **Revenue Operations (RevOps)** is a unified operations team that supports an entire go-to-market (GTM) team, usually including Sales, Customer Success, and Marketing.

RevOps pros might work in the background a lot of the time, but these folks heavily influence the outcome of Sales and Marketing team initiatives. To make those teams even more effective, here are some of the ways Zapier can help.



1. Act on customer activity across any app

Collect and centralize all your customer info seamlessly. With Zapier, your RevOps team can pull context from every sales call, email, and support ticket and send it to your team's favorite tool. That way, teams get full context for every customer—not just bits and pieces—so they can convert more leads and close more deals.

→ **Try these templates:** [Active Campaign + Intercom](#) | [CallRail + Salesforce](#) | [HubSpot + Zendesk](#)



2. Boost alignment across GTM teams

RevOps plays a crucial role in breaking down silos between teams. And when you align Sales, Marketing, and Customer Success teams, it's easier to turn curious leads into paying customers. One way to ensure everyone is on the same page is to automate cross-functional processes like lead routing, attribution, and project management. Leaving these tasks to automation means leads will have a consistent and impactful experience throughout their customer journey.

→ **Try these templates:** [Route leads](#) | [Lead scoring](#)

\$ 3. Increase sales productivity

One of RevOps' focuses is helping Sales teams spend less time on admin tasks and more time engaging with leads. So, help your Sales team ditch the manual work by automatically notifying reps about new leads, drafting quotes for customers, qualifying leads, and personalizing email campaigns.

→ **Try these templates:** [Paycove + Webhooks by Zapier](#) | [Clay + Google Sheets](#) | [Gmail + Google Forms](#)



4. Create seamless data and system management

If your data is outdated or full of gaps, you can't accurately track the success of your GTM initiatives. When you have messy data, you can't act on it—which means you could be wasting time, money, and effort on campaigns that aren't working.

Automation can ensure data across your organization remains clean and usable so teams can confidently rely on this crucial info for strategic decision-making.

With automation, you can sync contact info across apps, update inventory levels to avoid sellouts, and feed your ad tools new customer data for more targeted campaigns.

→ **Try these templates:** [HubSpot + Salesforce](#) | [GoogleAds + Magento 2.X](#) | [Shopify + Square](#)





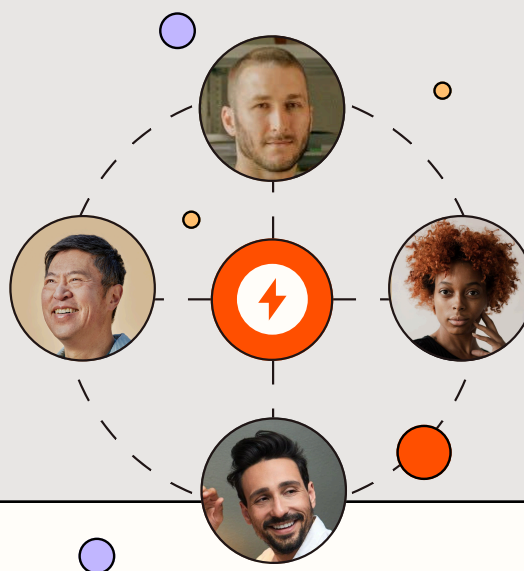
Top automation hacks for Marketing teams

Marketing is an important part of growing your organization, but this team also has a lot of moving parts.

Even the most sophisticated digital marketing tools often don't play well together. If you can't connect your marketing tech stack, your data could be siloed across multiple apps.

Zapier can help your Marketing team integrate all your favorite tools, including CRM, advertising apps, email marketing, social media management, and event management tools.

To help you integrate your tools and automate your marketing processes, browse through these workflow templates and customize them for your unique needs.



1. Nurture your new leads

Not every lead is ready to talk to your Sales team right away. Maybe they need to learn a little more about your product or service first. In this scenario, a little automation can go a long way to deliver the right message at the right time to keep your prospects engaged.

For example, Zapier can automatically add new leads to your email marketing list for a tailored campaign.

→ **Try these templates:** [Mailchimp + Typeform](#) | [Google Sheets + Mailchimp](#) | [Calendly + ConvertKit](#)



2. Keep your CRM up to date

CRMs are only as useful as the data they store. As prospects interact with your business across multiple channels, valuable data piles up quickly and sometimes doesn't make it into your CRM right away.

If your lead and contact data isn't up to date, contacts might be added to the wrong audiences, Sales reps could reach out with obsolete info, and all of your communications can get messy quickly.

Fortunately, Zapier can automatically keep all your data updated across your CRM and GTM tech stack with a couple of handy templates.

→ **Try these templates:** [HubSpot + Mailchimp](#) | [Mailchimp + Zoho CRM](#) | [Google Business Profile + Salesforce](#)



3. Boost your ROI on ad spend

Everyone wants to appear in a Google search—and Google Ads can go a long way to help you achieve that goal. Facebook and LinkedIn are also powerful tools for paid media.

Even with a strong pay-per-click (PPC) marketing strategy, staying on top of all the moving pieces to manage ad data is time-consuming and cumbersome. Plus, you won't be able to optimize your campaigns if the info is stale or riddled with errors.

Let Zapier handle everything from tracking offline conversions to alerting your team about new leads so new leads aren't wasted.

→ **Try these templates:** [LinkedIn Conversions](#) | [Facebook Lead Ads](#) | [Google Ads + Salesforce](#)



4. Pull data for your dashboards automatically

Dashboards are handy for centralizing data to create charts, graphs, or summaries on campaign performance—either individually or companywide. Although they're incredibly useful for tracking multiple data sources, keeping all that data up-to-date can be a challenge. Instead, use automation to gather that info quickly so you can focus on making data-driven decisions from automated campaign reports.

→ **Try these templates:** [Databox + Google Sheets](#) | [Salesforce + Webflow](#)



Top automation hacks for Sales teams

The more you chat with clients, the more deals you'll close. So, every minute spent manually entering or transferring data is time you could spend on more important things—like strategic sales prep.

Here are the top ways **Sales teams** use automation to stay organized, keep data up to date, and spend more time doing what they do best—selling.



1. Notify your team about new leads

When it comes to making a sale, speed is of the essence. Reps have to quickly reach out to new leads so they can capitalize on the moment they show interest and intent.

With Zapier, you can immediately notify your team when you receive a new lead—regardless of where they came from. You can even use [Zapier Paths](#) to route the lead to the right rep based on different criteria. That way, you don't risk warm leads going cold before reps can reach out.

→ **Try these templates:** [Slack + Webflow](#) | [Gmail + Typeform](#) | [Email by Zapier + Facebook Lead Ads](#)

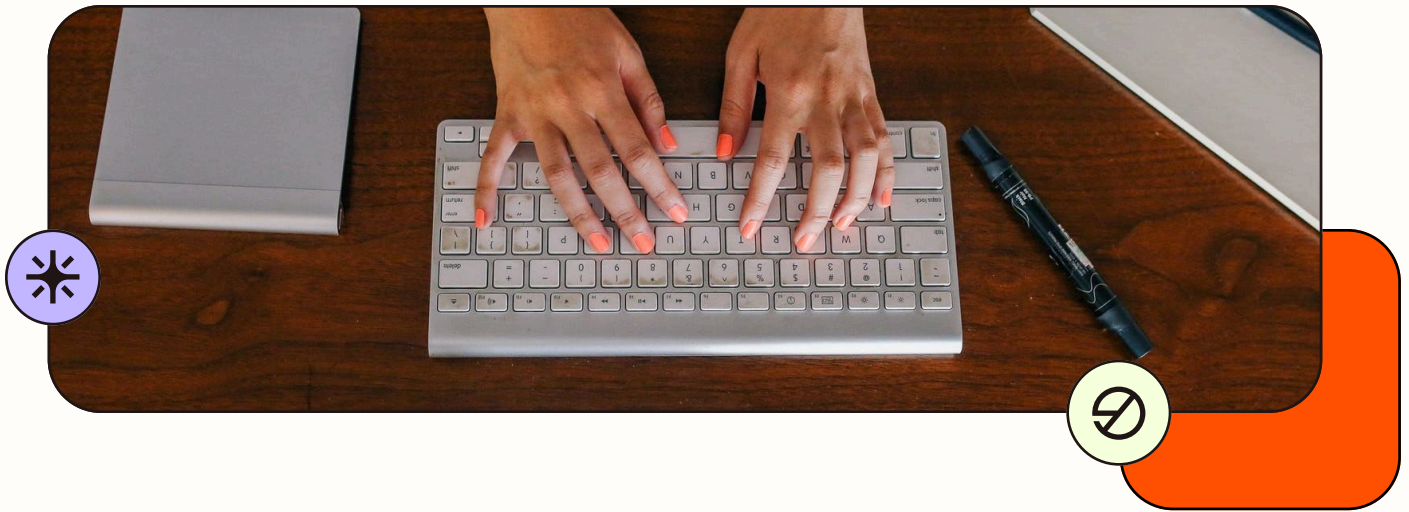


2. Put customer retention on autopilot

An important aspect of keeping customers happy and turning them into repeat customers is ensuring they have positive interactions with your company. Fortunately, automation makes maintaining (and scaling) client relationships easy.

Use automation to respond to clients, streamline your customer review process, and more. For example, you can automatically send personalized follow-up emails and trigger review requests after customers make a purchase, ensuring timely responses without manual effort.

→ **Try these templates:** [Gmail + Pipedrive](#) | [Gmail + Google Forms](#) | [Google Business Profile + Microsoft Teams](#)



3. Keep your lead data up to date

No one likes that awkward moment when you reach out to a lead only to discover they've already become a customer. The same applies to contacting a lead already talking to another Sales rep. Not only is it embarrassing, but it also sends a bad message to your customer and wastes time you could spend on other customer calls.

With Zapier, you can automatically update your lead data so you always have an accurate, up-to-date picture before reaching out to prospects. You get seamless handoffs, and nothing falls through the cracks!

→ **Try these templates:** [Mailchimp + Salesforce](#) | [Salesforce + Zapier Tables](#) | [Calendly + HubSpot](#)



4. Give your team personalized feedback on their customer calls

Coaching is an essential part of any Sales or Success leader's job, but sometimes, there's not enough time to give your reps the one-to-one feedback they need. Not without AI and automation, that is.

With Zapier, you can have AI analyze your team's customer calls in Gong and then offer personalized feedback on what's working and what's not.

→ **Try these templates:** [Gong + Slack + Formatter by Zapier + OpenAI](#)



Top automation hacks for business leaders

Business leaders have to wear many different hats. From developing your organization's overarching strategy and goals to overseeing what's going on in each department, they answer for it all. With so much under their purview, they could use some help getting it all done.

With AI and automation, leaders can set up workflows that save them time, consolidate data from across their company, and let them focus on bigger-picture trends and strategies.



1. Organize your daily schedule

Whether you need an extra hour to meet a deadline or completely re-shuffle your day based on your to-do list, AI can help you decide what to prioritize without wasting precious time figuring it out yourself.

→ **Try these templates:** [Evernote + Slack + OpenAI](#) | [Google Calendar + Slack + OpenAI](#)



2. Generate meeting transcripts and summaries

If you need to refer back to an action item from a meeting, don't waste time going through the call recording. Zapier can connect the apps that create transcripts from an audio file, draft a summary, and create a personalized to-do list based on your meeting. That saves the whole team from manually taking notes and assembling them later.

So, whether you need to gather product feedback from user interviews or catch up on a project sync you missed, AI can do the heavy lifting for you.

→ **Try these templates:** [Read AI + Slack](#) | [Descript + Google Drive](#) | [Dropbox + OpenAI](#)

3. Organize, tame, and write your emails

We've all spent too much time organizing email inboxes and separating the stuff that matters from spam.

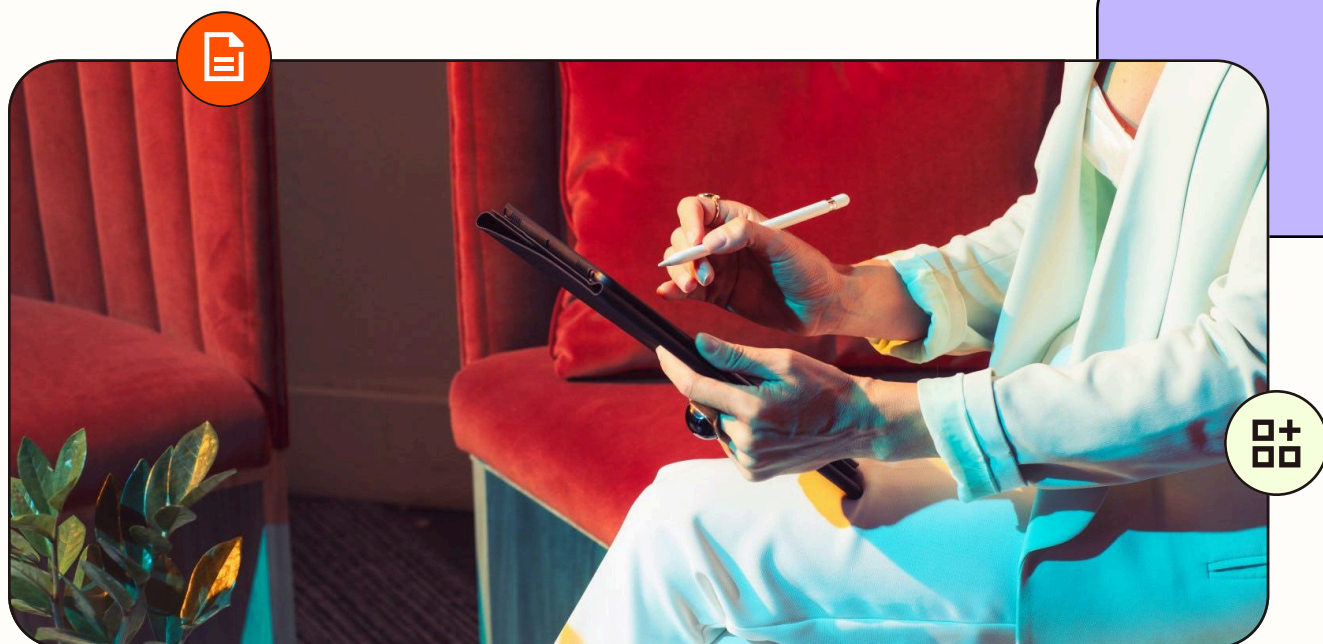
Whether you get too many emails to count, regularly miss important info that gets buried, or struggle to write emails at scale, AI can help you tame your inbox—and streamline your output.

→ **Try these templates:** [Gmail + Slack + Formatter by Zapier + OpenAI + Digest by Zapier](#) | [Slack + My AskAI](#)

4. Automate reporting

Whether you want to create weekly team reports, gather important financial data all in one place, or create charts to present to your team, Zapier makes it easy to automatically compile the key performance indicators (KPIs) you need.

→ **Try these templates:** [Airtable + Lucidchart](#) | [Expensify + Google Sheets](#) | [Google Calendar + Weekdone](#)





Top automation hacks for IT

With Zapier, teams can automate at scale safely—meaning, **IT** can empower everyone in your organization with access to automation. And with advanced roles and permissions, IT can still maintain oversight and keep all your company data safe.

Zapier's intuitive interface helps anyone with any level of technical skill automate routine tasks. Empowering employees across your organization ultimately frees up IT resources and moves your company forward faster. Plus, you can automate some of your IT team workflows, too.



1. Build an internal alert system

When something technical goes wrong, you're the go-to team. So, you want to know as soon as issues arise. By automating alerts, you can ensure your team catches new tickets and outages and even manage your on-call schedule.

→ **Try these templates:** [Slack + Zendesk](#) | [PagerDuty + Slack](#) | [Google Calendar + Slack](#)



2. Onboard and offboard employees

Onboarding and offboarding employees often require repetitive tasks. After all, you're giving new colleagues access to the same apps and hardware and disabling access when they leave.

Instead, put your employee onboarding and offboarding on autopilot with Zapier. Automatically add new hires to your formal identity system, give them access to the apps they'll need, and manage projects instantly.

→ **Try these templates:** [Okta + Typeform](#) | [BambooHR + LastPass](#) | [Trello + Typeform](#)



3. Reduce data entry

Manual data entry is a time-consuming, monotonous task. Often, it requires a lot of copying and pasting, and it's easy to make mistakes.

Zapier can automate data and analytics collection from any app in your tech stack—that way, you can avoid pesky human errors.

→ **Try these templates:** [Airtable + Google Sheets](#) | [Microsoft Excel](#)

4. Streamline customer communication

Create automated workflows so you can focus on generating leads and sales. Zapier's intuitive platform makes it simple to build workflows for any team with its drag-and-drop editor. To get your Sales and Marketing teams started, create automated communication channels, so it's easier for them to engage with prospects and customers.

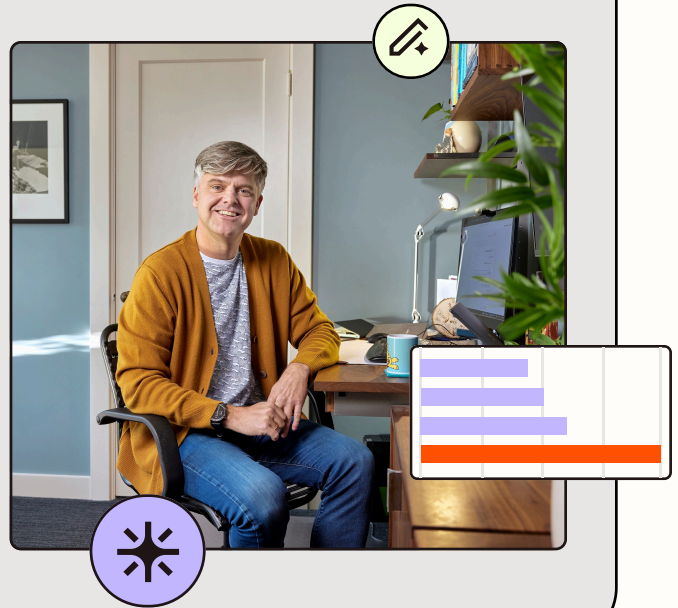
→ **Try these templates:** [HubSpot + Mailchimp](#) | [ActiveCampaign + PayPal](#) | [Mailchimp + Stripe](#)



Top automation hacks for HR teams

HR has more than it's fair share of admin work, but no one got into this profession because they loved piles of paperwork.

Automation can help remove the burdensome admin work, and get your team back to doing what they do best: making your company a great place to work.



1. Share job openings across platforms

If you're a growing company, posting open roles across various platforms can consume a lot of your day. Instead, set up a Zap that shares job postings on LinkedIn, Facebook Pages, and any other networks to spread the word.

→ **Try these templates:** [BrightMove + LinkedIn](#) | [Jobtoolz + LinkedIn](#)



2. Onboard new employees

With automation, you can make sure new employees receive the right training materials at the right time throughout their onboarding so nothing falls through the cracks. You can even set up Zaps that automatically invite them to a new Slack channel once they've completed certain onboarding steps.

→ **Try these templates:** [BambooHR + Seismic Learning](#) | [BambooHR + GoTo Training](#) | [Seismic Learning + Slack](#)



3. Manage time off and birthdays

It can be difficult to keep track of everyone's out-of-office time, especially if you're part of a big team.

While managers typically stay on top of their employees' time off, you can automatically post summaries of those absent that day in your team chat app. And make all your colleagues feel special with an automated workflow that sends them well wishes on their birthday.

→ **Try these templates:** [Schedule by Zapier + Slack + BambooHR](#) | [Slack + Zoho People](#)

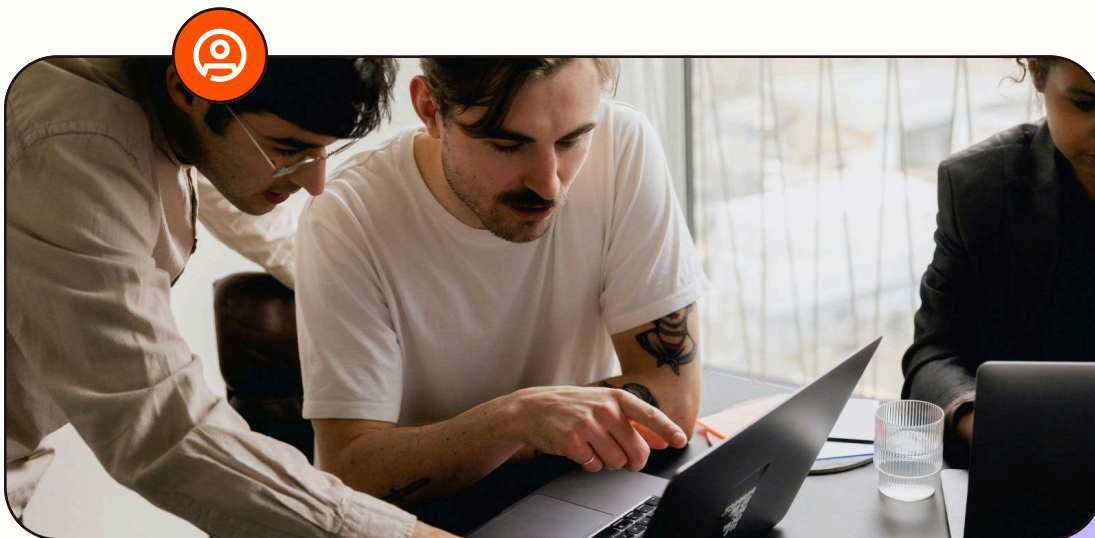


4. Get notified about new applications

Once you post a job, you start seeing those applications roll in. But don't waste time and resources double-checking those sites every five minutes. Instead, these Zaps will notify your team in your preferred chat app whenever a new candidate submits an application.

That way, you and your employees can tag team the review process and leave no stone unturned in your search for the right person.

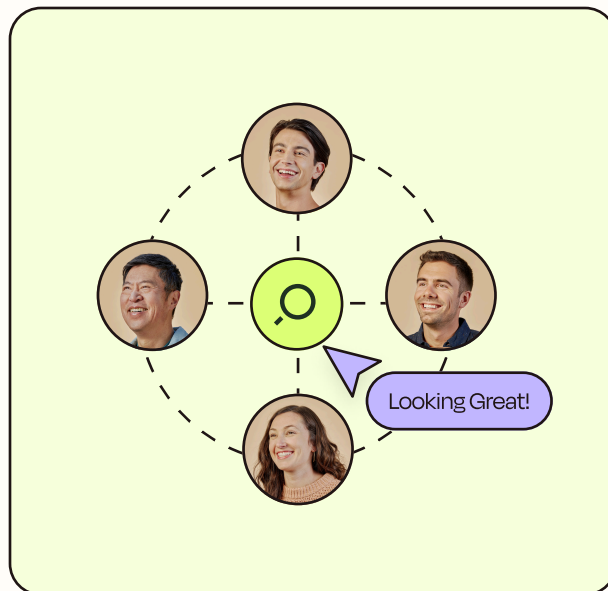
→ **Try these templates:** [Slack + Workable](#) | [Recruitee + Slack](#)





Open up automation to your entire workforce

If your organization isn't streamlining processes with automation, it'll fall behind those that do. When you give the power of automation to everyone—within the necessary guardrails set up by IT—you'll be amazed at the creativity, efficiency, and results you see from every level of your organization.



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Zapier Enterprise**

[Visit Zapier Enterprise page](#)

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Enterprise can help
growing teams.**

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