Assignment No 2
Dated: 11^{th} Dec 2025
Course: “LOW CODE,NO-CODE B-1 Wed Thurs 7pm to 9pm”

Kindly note - Agenda:

- ✓ If don’t have account, create account for ALL NEW APPS, Identified below: "AirTable", "HubSpot", "Google Forms", "Google Sheets" , "Google Mail, or Gmail", "Outlook Mail, or Microsoft Outlook Mail".
- ✓ Create zap for each of the following cases. Separate zap for each of the following 15 cases.
- ✓ Debug/Trace – Analyze.
- ✓ Refine and refine. Improve and improve. Keep me posted. Thanks.

Marketing & Social (3)

1) Lead- Magnet Nurture & UTM Attribution

Problem: Marketing collects leads from multiple forms, but UTM parameters and source attribution are inconsistent; nurturing isn’t launched on time and data is scattered.
Trigger: New form submission (Typeform/HubSpot/Gravity Forms).

Steps:

1. **Formatter** – Parse and normalize UTM fields (source/medium/campaign/content/term).
2. **Filter** – Continue only if email is present and not disposable.
3. **CRM** – Create/update contact (HubSpot/Salesforce) with UTM properties and lifecycle stage.
4. **Email Platform** – Add to Mailchimp/Klaviyo audience + apply tags from UTM.
5. **Drip Sequence** – Enroll contact in welcome/nurture journey (Mailchimp/Klaviyo).
6. **Spreadsheet** – Append lead + UTM + timestamp into Google Sheets/Airtable for audit.
7. **Chat** – Notify #marketing channel (Slack/Teams) with lead + source + campaign.
8. **Calendar** – Schedule follow- up task/event for SDR if MQL score ≥ threshold.

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2) Blog- to- Social Content Pipeline

Problem: New blog posts go live without timely social amplification or consistent brand captions and assets.
Trigger: New published post (WordPress/Webflow/Contentful).

Steps:

1. **Formatter/AI** – Generate post summary + 3 social captions (short/X, medium/LinkedIn, long/Facebook).
2. **Design** – Create/attach social image (Canva integration or asset lookup in Drive/OneDrive).
3. **Buffer/Hootsuite** – Queue posts across X, LinkedIn, Facebook (add UTM campaign).
4. **Link Shortener** – Create trackable short link (Bitly/Rebrandly).
5. **DAM** – Save post assets + captions in Google Drive/SharePoint structured folders.
6. **Spreadsheet** – Log publish URL + scheduled social timestamps for reporting.
7. **Chat** – Send a summary to #social with links, captions, and visuals.
8. **Task** – Create QA task in Asana/Trello for a quick post check 24h after publish.

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3) **Webinar Registration to Attendee Follow- Up**

Problem: Registrants aren't consistently added to CRM or nurtured differently based on attendance.
Trigger: New webinar registration (Zoom/GoToWebinar/Teams Webinar).

Steps:

1. **CRM** – Upsert contact + create 'Webinar' campaign association (HubSpot/Salesforce).
2. **Calendar** – Add registrant event to calendar with join link.
3. **Email** – Send confirmation + ICS attachment (Gmail/Outlook).
4. **Paths** – Post- event: Path A (Attended) vs Path B (No- show) using attendance trigger.
5. **Email Journeys** – Attended: send recording/resources; No- show: send recording + CTA to future sessions.
6. **Scoring** – Update lead score + lifecycle stage based on attendance and Q&A interactions.
7. **Spreadsheet** – Log attendance outcome and CTA clicks in Google Sheets.
8. **Chat** – Post a roll- up summary to #events with attendance and top questions.

Sales & CRM (3)

4) **Lead Enrichment & Territory Routing**

Problem: Raw leads from ad platforms lack firmographic data; SDR assignment is slow and error- prone.
Trigger: New lead (Facebook Lead Ads/LinkedIn Lead Gen/Typeform).

Steps:

1. **Enrichment** – Clearbit/ZoomInfo to fetch company size, industry, domain, location.
2. **Filter** – Continue only if email verified and company size matches ICP.
3. **CRM** – Create lead/contact and attach enrichment fields (Salesforce/HubSpot).
4. **Router** – Assign owner by territory (Zapier Paths/Lookup table in Airtable/Sheets).
5. **Deal/Opportunity** – Auto- create opportunity with stage = 'Qualification.'
6. **Task** – Create SDR call task + due date based on SLA.
7. **Chat** – Notify the assigned SDR with contact card and talking points.
8. **Sheet** – Archive lead + routing outcome in Google Sheets for weekly QA.

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5) Quote- to- Invoice & Handoff to Onboarding

Problem: After a quote is accepted, invoicing and onboarding setup is inconsistent across teams.
Trigger: Document status = Completed (PandaDoc/DocuSign).

Steps:

1. **CRM** – Update opportunity stage to 'Closed Won' and attach signed doc URL.
2. **Accounting** – Create invoice (QuickBooks/Xero) and line items from the quote.
3. **Payments** – Generate payment link (Stripe/PayPal) + send payment email (Outlook/Gmail).
4. **Project Tool** – Create onboarding project with template tasks (Asana/Trello/ClickUp).
5. **Files** – Create client folder + move signed docs (SharePoint/Google Drive/OneDrive).
6. **Chat** – Notify #onboarding with invoice status and kickoff date.
7. **Sheet** – Log deal value, invoice number, and expected onboarding milestones.

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6) Renewal & Expansion Playbook

Problem: Renewals slip through the cracks; expansion signals aren't tied to proactive outreach.
Trigger: Deal won with subscription term (HubSpot/Salesforce) or 'Subscription created' (Stripe).

Steps:

1. **Formatter** – Calculate renewal date + 90/30/7 day reminders.
2. **Tasks** – Create renewal tasks for CSM/AE at each interval.
3. **Email Sequences** – Launch 3- touch renewal journey with value proof + FAQ.
4. **Chat** – Post upcoming renewals weekly to #cs- renewals.
5. **CRM** – Update health score based on product usage (from Segment/Airtable lookup).
6. **Quote Tool** – Auto- generate renewal quote (PandaDoc) when user count > threshold.

7. **Sheet** – Log renewal signals and deal outcomes for cohort analysis.

Support & Success (2)

7) Priority Escalation & Post- Resolution CSAT

Problem: Critical tickets aren't escalated fast enough; CSAT collection is inconsistent post- resolution.
Trigger: Zendesk/Freshdesk ticket tagged priority.

Steps:

1. **Issue Tracker** – Create incident (Jira/ServiceNow) with customer context.
2. **Chat** – Alert #support- warroom with SLA timer and assignee.
3. **Knowledge Base** – Attach similar articles (Confluence/Notion lookup via search step).
4. **CRM** – Flag account health risk and add 'Escalated' note.
5. **Task** – Create CSM follow- up task 24h post- resolution.
6. **Survey** – Send CSAT/NPS (Typeform/Delighted) on ticket solved.
7. **Sheet** – Log CSAT score and resolution time for weekly QA.
8. **Paths** – If CSAT ≤ 3, open CSM recovery play (task + manager alert).

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8) New Customer Onboarding Tracker

Problem: Post- purchase onboarding steps are manual; statuses are scattered across teams.
Trigger: New paid customer (Stripe/Shopify/WooCommerce).

Steps:

1. **Project Tool** – Create onboarding board with templated checklist (Asana/Trello/ClickUp).
2. **Access** – Create IT helpdesk ticket to provision accounts (Jira/ServiceNow).
3. **Email** – Send welcome email + getting started guide (Outlook/Gmail).
4. **Calendar** – Auto- book kickoff via Calendly link (invite sent).
5. **CRM** – Update onboarding stage + owner (HubSpot/Salesforce).
6. **Files** – Create customer folder + store welcome pack (SharePoint/Drive).
7. **Chat** – Notify #customer- launch with timeline and assigned CSM.
8. **Sheet** – Track onboarding milestones and time- to- value.

Project & Tasks (2)

9) **Cross- Functional Launch Plan Orchestration**

Problem: Product launches require coordination across marketing, sales, support, and ops; tasks live in silos.
Trigger: New launch entry added in Airtable/Google Sheets 'Roadmap.'

Steps:

1. **Project Tool** – Create project from template (ClickUp/Asana).
2. **Tasks** – Bulk create tasks (PRD review, QA, GA date, enablement, collateral).
3. **Router** – Assign tasks to owners based on department lookup table.
4. **Calendar** – Add GA date + internal milestones to team calendars.
5. **Chat** – Create Teams/Slack channel and post kickoff summary.
6. **Files** – Create SharePoint/Drive folder structure; link to project.
7. **Sheet** – Update status roll- up for exec dashboard.
8. **Paths** – If GA date slips, auto- notify stakeholders + rebaseline tasks.

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10) **Bug Triage from GitHub to Jira/Notion**

Problem: Engineering issues need structured triage and visibility for PMs and support.
Trigger: New GitHub issue labeled bug.

Steps:

1. **Formatter** – Parse title/body; extract environment/version via regex.
2. **Issue Tracker** – Create Jira ticket with priority and component.
3. **PM DB** – Insert into Notion product backlog with tags/owner.
4. **Chat** – Notify #bug- triage with links and severity.
5. **Tasks** – Create QA verification task for pre- release checks.
6. **Sheet** – Append to bug log for weekly trend analysis.

Docs & Files (1)

11) **Contract Intake, Filing, and Renewal Reminder**

Problem: Signed contracts are misfiled; renewal dates aren't tracked; legal lacks visibility.
Trigger: DocuSign/PandaDoc document completed.

Steps:

1. **Formatter** – Extract client name, effective date, renewal term from fields.
2. **Files** – Rename and move PDF to client folder (OneDrive/SharePoint/Drive).

3. **CRM** – Attach contract URL to account/opportunity and set contract status.
4. **Sheet** – Log contract metadata (value, term, renewal date).
5. **Calendar** – Create renewal reminder events (90/30/7 days).
6. **Chat** – Notify #legal with link and renewal date.
7. **Tasks** – Create account manager task for EBR scheduling 60 days prior.

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eCommerce (2)

12) **Abandoned Cart Recovery + Couponing**

Problem: Abandoned carts aren't consistently retargeted; high- value carts need special handling.
Trigger: New abandoned checkout (Shopify/WooCommerce).

Steps:

1. **Filter** – Continue only if cart value ≥ threshold.
2. **Email Platform** – Add/update contact in Klaviyo with cart items and value.
3. **Coupon** – Generate single- use discount code (Shopify/WooCommerce) and store on contact.
4. **Email Journey** – Launch 3- step recovery sequence with coupon + urgency.
5. **Ads** – Add contact/email to Facebook/Google Ads custom audience for retargeting.
6. **CRM** – Create lead/opportunity with source = 'Abandoned Cart.'
7. **Chat** – Notify #ecom of high- value carts and recovery status.
8. **Sheet** – Record recoveries and average discount cost for ROI.

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13) **Order Fulfillment, Tracking & Review Collection**

Problem: Orders require manual label creation, tracking updates, and post- delivery review requests.
Trigger: New paid order (Shopify/WooCommerce).

Steps:

1. **Tasks** – Create fulfillment task (Trello/Asana) with items/quantities.
2. **Shipping** – Create shipping label and tracking (Shippo/Easyship).
3. **Store Update** – Add tracking to the order and mark as fulfilled.
4. **SMS/Email** – Send tracking info to customer (Twilio/Klaviyo/Outlook).
5. **Survey** – After delivery (delay), send review/NPS (Typeform/Delighted).
6. **Inventory** – Update stock levels in Airtable/Sheets.
7. **Sheet** – Append order revenue and delivery time for logistics KPI.
8. **Chat** – Notify #ops with exceptions (late, damaged, RTO).

Analytics & Reporting (1)

14) **Daily Executive KPI Snapshot**

Problem: KPIs live across ads, CRM, commerce, and support; leaders need a daily consolidated snapshot.
Trigger: Scheduled daily at 8:00 AM.

Steps:

1. **Data Pulls** – Fetch metrics (Google Ads, Meta Ads, HubSpot/Salesforce, Shopify/WooCommerce, Zendesk).
2. **Formatter** – Calculate derived KPIs (CAC, ROAS, MQL→SQL rate, AOV, CSAT).
3. **Sheet/DB** – Write to Google Sheets/Airtable for historical trend.
4. **Charts** – Auto- update charts or generate dashboard image (Sheets/Looker Studio export).
5. **Docs/PDF** – Create a one- page PDF summary (Google Docs → PDF or ReportLab via webhook).
6. **Email** – Send PDF to exec mailing list (Gmail/Outlook).
7. **Chat** – Post highlights in Teams/Slack with top changes vs yesterday.
8. **Archive** – Store raw pulls in Drive/SharePoint.

Operations & Admin (1)

15) **New Hire Onboarding Orchestration**

Problem: HR, IT, and Facilities perform onboarding steps manually; accounts and equipment requests get missed.
Trigger: New employee record (BambooHR/Workday/Personio).

Steps:

1. **Project Tool** – Create onboarding board with role- specific checklist (ClickUp/Asana/Trello).
2. **IT Ticket** – Open Jira/ServiceNow ticket for account provisioning + hardware.
3. **Docs** – Send DocuSign policy pack + handbook for e- signature.
4. **Calendar** – Schedule orientation and manager 1:1 via Calendly/Outlook.
5. **Files** – Create OneDrive/SharePoint folder and pre- load starter docs.
6. **Chat** – Announce new hire in Teams/Slack with start date and role.
7. **Payroll** – Add employee to payroll system (QuickBooks/Xero) and benefits checklist.
8. **Sheet** – Log completion of onboarding tasks and probation review date.

Notes on Implementation

- **Common Zapier building blocks**:
  - **Filters** for quality gates (e.g., email present, cart value ≥ X).
  - **Formatter** for field normalization, date math, and regex extractions.
  - **Paths** to branch logic (e.g., attended vs no- show, CSAT high vs low).
  - **Lookup tables** in Google Sheets/Airtable for routing (territory/owner).
  - **Delays** (e.g., post- delivery reviews).
  - **Error handling**: send alerts on step failures to a dedicated ops channel.
- **Security & compliance**: Store PII in approved systems (CRM/HRIS); limit email content; use least- privilege API keys; version your Zaps and test in staging.