# 100+ Things You Can Automate with Zapier

## Complete Automation Ideas Reference Guide

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**Purpose:** Comprehensive list of automation ideas for learning and client projects

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## Email & Communication

1. Save starred emails to Google Sheets
2. Save email attachments to Google Drive automatically

3. Create tasks from flagged emails
4. Send Slack notification when you get email from specific person
5. Auto-forward emails with specific keywords to team members
6. Save all receipts from email to expense tracking app
7. Create calendar events from emails
8. Auto-reply to emails based on keywords
9. Archive old emails automatically
10. Send digest of daily emails as one summary

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## Calendar & Scheduling

11. Create tasks when calendar event is added
12. Send Slack reminder 15 min before meeting
13. Log all meetings to spreadsheet for time tracking
14. Auto-decline meetings outside work hours
15. Send thank you email after meeting ends
16. Create follow-up task when meeting completes
17. Sync multiple calendars automatically
18. Block focus time when task is marked high priority
19. Send meeting prep email to attendees 1 day before
20. Log billable meeting hours to invoicing app

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## CRM & Sales

21. New form submission → Create contact in CRM
22. New lead → Notify sales team in Slack
23. New deal won → Send to accounting for invoicing
24. Contact changes stage → Send automated email sequence
25. New customer → Add to email newsletter
26. Lost deal → Add to re-engagement campaign in 6 months
27. Lead score changes → Assign to different salesperson
28. Meeting booked → Send confirmation email + add to CRM
29. New proposal sent → Create task to follow up in 3 days
30. Customer anniversary → Send celebration email

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## Social Media & Content

31. New blog post → Share on Twitter, LinkedIn, Facebook
32. New YouTube video → Post to all social channels
33. Instagram post → Save image to Google Drive
34. Save all tweets with specific hashtag to spreadsheet
35. RSS feed update → Auto-post to social media
36. New podcast episode → Email your subscriber list
37. Schedule social posts from Google Sheets
38. Someone mentions you on Twitter → Slack notification
39. New testimonial → Post to social media automatically
40. Blog comment → Notify you via email/Slack

# Finance & Expenses

41. New Stripe payment → Add row to revenue spreadsheet
42. New PayPal transaction → Create expense in QuickBooks
43. Invoice paid → Send thank you email + update CRM
44. Expense over $X → Notify manager for approval
45. Monthly revenue → Auto-create financial report
46. New subscription → Add to recurring revenue tracker
47. Refund issued → Create support ticket for follow-up
48. Bank transaction → Categorize and log to spreadsheet
49. Upcoming invoice due → Send reminder email
50. End of month → Send revenue summary to team

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# E-commerce

51. New order → Send to fulfillment sheet
52. Order shipped → Email customer with tracking
53. New customer → Add to CRM + email welcome sequence
54. Product review received → Notify team + thank customer
55. Inventory low → Email supplier to reorder
56. Abandoned cart → Send reminder email in 2 hours
57. High-value order → Personal thank you from founder
58. Customer support ticket → Create in helpdesk system
59. Refund requested → Notify CS team immediately
60. Product back in stock → Email waitlist customers

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# Project Management

61. New Trello card → Create task in other project tool
62. Task completed → Notify team in Slack
63. Project milestone reached → Send celebration email
64. High priority task → Send SMS to team lead
65. Task overdue → Escalate to manager
66. New project → Create folder structure in Google Drive
67. Time entry logged → Update project budget tracker
68. Bug reported → Create ticket in GitHub/Jira
69. Project status changed → Update client via email
70. Sprint completed → Generate report automatically

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# HR & Team Management

71. New employee → Create accounts in all tools (Slack, email, etc.)
72. Employee birthday → Send team notification
73. Time-off request → Add to calendar + notify manager

74. New applicant → Add to hiring pipeline
75. Interview scheduled → Send prep materials to candidate
76. Offer accepted → Trigger onboarding workflow
77. Performance review due → Remind manager
78. Employee anniversary → Send celebration message
79. New starter survey → Analyze and report results
80. Team member leaves → Disable all accounts automatically

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## Data & Analytics

81. Daily website analytics → Email summary report
82. New form response → Update dashboard in real-time
83. Database updated → Sync to spreadsheet for analysis
84. Survey completed → Add to analysis spreadsheet
85. API data → Log to Google Sheets hourly
86. Metrics hit threshold → Alert team via Slack
87. Competitor mentions → Track in monitoring sheet
88. App error logged → Create bug ticket + notify devs
89. User signup → Add to growth analytics tracker
90. A/B test results → Compile and email weekly

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## Education & Courses

91. Student enrolls → Add to email course sequence
92. Course completed → Send certificate + request testimonial
93. Assignment submitted → Notify instructor
94. New course question → Create support ticket
95. Webinar registration → Add to calendar + send reminder
96. Student inactive 7 days → Send re-engagement email
97. Quiz completed → Update grade in spreadsheet
98. New module released → Email all students
99. Student completes milestone → Award badge/certificate
100. Cohort starts → Create private community channel

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## Personal Productivity

101. Save liked tweets to reading list
102. Bookmark article → Send to read-it-later app
103. Todo completed → Log to productivity tracker
104. Voice note recorded → Transcribe and save to Notion
105. Photo taken → Auto-backup to cloud storage
106. Track habits → Log to spreadsheet daily
107. Weather forecast → Morning notification
108. Package delivered → Archive tracking emails
109. Bill due → Reminder 3 days before
110. Workout logged → Update fitness spreadsheet

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# Marketing & Leads

111. Webinar registration → Add to email nurture sequence
112. Lead magnet downloaded → Send thank you + follow-up series
113. Form filled → Score lead + assign to sales rep
114. Email clicked → Update lead score in CRM
115. Hot lead identified → SMS to sales team immediately
116. Demo requested → Auto-schedule meeting
117. Trial started → Begin onboarding email sequence
118. Free user hits usage limit → Offer upgrade
119. Contact downloads multiple resources → Flag as hot lead
120. Event attendee → Add to post-event follow-up campaign

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# Customer Success

121. Support ticket created → Notify CS team + create task
122. Customer at-risk → Alert account manager
123. Product usage drops → Trigger check-in email
124. Feature request → Add to product roadmap tracker
125. Positive review → Share with team + thank customer
126. Negative review → Immediate escalation to manager
127. Renewal coming up → Notify CS team 30 days before
128. Customer achieves goal → Send celebration email
129. Bug affecting customer → Proactive notification
130. Customer refers someone → Send thank you gift

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# Operations & Admin

131. New vendor → Create in accounting system
132. Contract expiring → Remind 30 days before
133. Document uploaded → Convert and save to archive
134. Backup completed → Verify and log to tracker
135. Server error → Create incident ticket + alert devs
136. API limit reached → Notify tech team
137. Password reset requested → Log for security audit
138. New software request → Create approval workflow
139. Equipment order → Track in inventory system
140. License renewal due → Purchase reminder

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# Notifications & Alerts

141. Specific keyword mentioned online → Email alert
142. Competitor launches feature → Team notification
143. Domain expiring soon → Renewal reminder
144. SSL certificate expiring → Alert dev team
145. Large file uploaded → Admin notification

146. User hits milestone → Celebrate via email
147. System downtime → SMS to on-call engineer
148. Unusual activity detected → Security alert
149. Budget threshold reached → Finance team notification
150. Deadline approaching → Escalating reminders

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# Most Common Client Use Cases

## Top 10 Client Requests

These are the automation types clients request most frequently:

1. **Lead capture automation** - Form → CRM → Notification → Email sequence
2. **Data sync** - Keep two databases in sync automatically
3. **Notification systems** - Alert team when important things happen
4. **Reporting automation** - Compile data and email reports
5. **Onboarding workflows** - Customer/employee onboarding sequences
6. **Task creation** - Auto-create tasks from various triggers
7. **Calendar management** - Sync, schedule, remind
8. **Invoice/payment tracking** - Financial automation
9. **Social media posting** - Content distribution
10. **Support ticket routing** - Customer service automation

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# Understanding the Pattern

## The Core Automation Formula

**Notice the pattern in ALL of these:**

**When [TRIGGER] happens → Do [ACTION]**

## Common Examples

- When email arrives → Save to sheet
- When form submitted → Create CRM contact
- When payment received → Send thank you
- When task completed → Notify team
- When deadline approaching → Send reminder

**This is literally the entire automation game.**

Once you understand this trigger-action pattern, you can create infinite variations to solve any business problem.

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# How This Helps Your Learning Journey

## Week-by-Week Application

**Week 1-2: Personal Practice** - Pick 10 automations from this list - Build them for yourself - Document the process - Learn the patterns

**Week 3-4: Complexity Building** - Combine 2-3 triggers/actions into workflows - Add conditional logic - Implement error handling - Create more sophisticated automations

**Week 5-6: Business Thinking** - Look at a business and ask “Which of these 150 could help them?” - Identify their pain points - Match automations to problems - Calculate potential ROI

**Month 3+: Client Recognition** - Client says “I need help with X” - You recognize it as variation of automation #47 - You can scope and quote immediately - Deliver confidently because you’ve practiced

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# Your Learning Assignment

## Pick 5 Automations That Actually Help YOUR Life Right Now

Build them this week. Real problems = real motivation = better learning.

## Recommended for Your Current Situation

**For Job Search & Career Transition:**

1. **#1: Star job-related emails → Track in sheet**
    - Keep all job opportunities organized
    - Never lose track of applications
    - Easy follow-up management
2. **#21: Form submissions → CRM**
    - If you set up consulting inquiry form
    - Automatically capture potential clients
    - Track all leads in one place
3. **#61: Tasks across different tools**
    - Sync your todo lists
    - Keep everything organized
    - Reduce manual copying
4. **#101: Save interesting articles/resources**
    - Build your learning library
    - Organize research automatically
    - Create knowledge base
5. **#106: Track your learning hours**
    - Log time spent on Systems Optimizer training
    - See progress visually
    - Stay accountable to goals

### Why This Matters

When you build automations that solve YOUR real problems: - You're more motivated to finish them - You understand the value immediately - You can show them to potential clients - You learn faster because it matters - You build your portfolio organically

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## The Business Opportunity

### Revenue Potential

**The beautiful thing:** By Month 6, you'll be able to build ANY of these 150 automations in under 30 minutes.

**And businesses will pay you $500-2,000 to build just 3-5 of them.**

### Simple Math

- **Your time:** 30 minutes per automation × 5 automations = 2.5 hours
- **Your rate:** $2,500 ÷ 2.5 hours = $1,000/hour effective rate
- **Client value:** 10 hours/week saved × $50/hour × 52 weeks = $26,000/year
- **Client ROI:** $26,000 value ÷ $2,500 cost = 10x return

**That's why automation consulting is so profitable.**

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## How to Use This Reference

### For Learning (Phases 1-2)

- Use as practice project inspiration
- Build 3-5 automations per week
- Document each one for portfolio
- Master the common patterns

### For Client Discovery (Phase 3+)

- Review list before client calls
- Ask which categories apply to their business
- Identify 5-10 relevant automations
- Calculate time/cost savings
- Create compelling proposal

### For Project Scoping (Phase 4+)

- Client describes problem
- Match to automation type from list
- Estimate complexity and timeline

- Quote based on value delivered
- Deliver with confidence

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# Categories by Business Type

## For Marketing Agencies

Focus on: - Social Media & Content (#31-40) - CRM & Sales (#21-30) - Project Management (#61-70) - Marketing & Leads (#111-120)

## For E-commerce Businesses

Focus on: - E-commerce (#51-60) - Customer Success (#121-130) - Notifications & Alerts (#141-150) - Finance & Expenses (#41-50)

## For SaaS Companies

Focus on: - Customer Success (#121-130) - Data & Analytics (#81-90) - Notifications & Alerts (#141-150) - Marketing & Leads (#111-120)

## For Service Businesses

Focus on: - CRM & Sales (#21-30) - Calendar & Scheduling (#11-20) - Email & Communication (#1-10) - Finance & Expenses (#41-50)

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# Advanced Combinations

## Multi-Step Workflows

Once you master individual automations, combine them:

**Lead Generation Workflow:** 1. Form submission → Create CRM contact (#21) 2. → Send Slack notification (#22) 3. → Add to email sequence (#111) 4. → Create follow-up task (#29) 5. → Log to analytics (#89)

**Customer Onboarding Workflow:** 1. Payment received → Update CRM (#43) 2. → Send welcome email (#53) 3. → Create onboarding tasks (internal) 4. → Schedule check-in (#127) 5. → Add to success tracking (#89)

**Project Completion Workflow:** 1. Task completed → Notify team (#62) 2. → Update client (#69) 3. → Generate invoice (#43) 4. → Create case study task (internal) 5. → Request testimonial (#125)

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# Building Your Expertise

### Progression Path

**Beginner (Months 1-2):** - Build single-step automations - Master 1-2 platforms - Focus on reliability

**Intermediate (Months 3-6):** - Combine multiple steps - Add conditional logic - Handle errors gracefully

**Advanced (Months 7-12):** - Design complex workflows - Integrate multiple platforms - Optimize for performance

**Expert (Year 2+):** - Build custom solutions - Teach others your methods - Create reusable templates

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# Resources for Each Category

### Email & Communication

- **Tools:** Gmail, Outlook, Slack, Email by Zapier
- **Docs:** Gmail API, Slack API
- **Difficulty:** Beginner

### Calendar & Scheduling

- **Tools:** Google Calendar, Outlook Calendar, Calendly
- **Docs:** Calendar APIs
- **Difficulty:** Beginner

### CRM & Sales

- **Tools:** HubSpot, Pipedrive, Salesforce, Airtable
- **Docs:** CRM API documentation
- **Difficulty:** Intermediate

### Data & Analytics

- **Tools:** Google Sheets, Airtable, Looker Studio
- **Docs:** Sheets API, data visualization
- **Difficulty:** Intermediate

### Advanced Integrations

- **Tools:** Webhooks, HTTP requests, custom APIs
- **Docs:** RESTful API principles
- **Difficulty:** Advanced

# Next Steps

## Immediate Actions

1. **Bookmark this document** - Reference it often
2. **Pick 5 automations** - Choose ones that help you now
3. **Start building** - Begin with #1 (Gmail → Sheets)
4. **Document progress** - Track in your Notion workspace
5. **Celebrate wins** - Log each completed automation

## This Week

- Build 3 automations from the list
- Test them thoroughly
- Document with screenshots
- Add to your portfolio

## This Month

- Build 10-15 total automations
- Master the trigger-action pattern
- Share wins in communities
- Start thinking about client applications

## This Quarter

- Build 30+ automations
- Develop expertise in 2-3 categories
- Create case studies
- Ready to pitch first clients

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# Conclusion

This list isn't just ideas—it's your **revenue roadmap**.

Every automation you learn = a problem you can solve for clients. Every problem you solve = $500-2,000 in your pocket.

**150 automation types × $1,000 average = $150,000 potential revenue pipeline**

Start with one. Master it. Move to the next. By Month 6, you'll be unstoppable.

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