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# 100+ Things You Can Automate with Zapier

## Complete Automation Ideas Reference Guide

**Version:** 1.0.0  
**Created:** October 17, 2025  
**Purpose:** Comprehensive list of automation ideas for learning and client projects

## 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

## Calendar & Scheduling

1. Create tasks when calendar event is added
2. Send Slack reminder 15 min before meeting
3. Log all meetings to spreadsheet for time tracking
4. Auto-decline meetings outside work hours
5. Send thank you email after meeting ends
6. Create follow-up task when meeting completes
7. Sync multiple calendars automatically
8. Block focus time when task is marked high priority
9. Send meeting prep email to attendees 1 day before
10. Log billable meeting hours to invoicing app

## CRM & Sales

1. New form submission → Create contact in CRM
2. New lead → Notify sales team in Slack
3. New deal won → Send to accounting for invoicing
4. Contact changes stage → Send automated email sequence
5. New customer → Add to email newsletter
6. Lost deal → Add to re-engagement campaign in 6 months
7. Lead score changes → Assign to different salesperson
8. Meeting booked → Send confirmation email + add to CRM
9. New proposal sent → Create task to follow up in 3 days
10. Customer anniversary → Send celebration email

## Social Media & Content

1. New blog post → Share on Twitter, LinkedIn, Facebook
2. New YouTube video → Post to all social channels
3. Instagram post → Save image to Google Drive
4. Save all tweets with specific hashtag to spreadsheet
5. RSS feed update → Auto-post to social media
6. New podcast episode → Email your subscriber list
7. Schedule social posts from Google Sheets
8. Someone mentions you on Twitter → Slack notification
9. New testimonial → Post to social media automatically
10. Blog comment → Notify you via email/Slack

## Finance & Expenses

1. New Stripe payment → Add row to revenue spreadsheet
2. New PayPal transaction → Create expense in QuickBooks
3. Invoice paid → Send thank you email + update CRM
4. Expense over $X → Notify manager for approval
5. Monthly revenue → Auto-create financial report
6. New subscription → Add to recurring revenue tracker
7. Refund issued → Create support ticket for follow-up
8. Bank transaction → Categorize and log to spreadsheet
9. Upcoming invoice due → Send reminder email
10. End of month → Send revenue summary to team

## E-commerce

1. New order → Send to fulfillment sheet
2. Order shipped → Email customer with tracking
3. New customer → Add to CRM + email welcome sequence
4. Product review received → Notify team + thank customer
5. Inventory low → Email supplier to reorder
6. Abandoned cart → Send reminder email in 2 hours
7. High-value order → Personal thank you from founder
8. Customer support ticket → Create in helpdesk system
9. Refund requested → Notify CS team immediately
10. Product back in stock → Email waitlist customers

## Project Management

1. New Trello card → Create task in other project tool
2. Task completed → Notify team in Slack
3. Project milestone reached → Send celebration email
4. High priority task → Send SMS to team lead
5. Task overdue → Escalate to manager
6. New project → Create folder structure in Google Drive
7. Time entry logged → Update project budget tracker
8. Bug reported → Create ticket in GitHub/Jira
9. Project status changed → Update client via email
10. Sprint completed → Generate report automatically

## HR & Team Management

1. New employee → Create accounts in all tools (Slack, email, etc.)
2. Employee birthday → Send team notification
3. Time-off request → Add to calendar + notify manager
4. New applicant → Add to hiring pipeline
5. Interview scheduled → Send prep materials to candidate
6. Offer accepted → Trigger onboarding workflow
7. Performance review due → Remind manager
8. Employee anniversary → Send celebration message
9. New starter survey → Analyze and report results
10. Team member leaves → Disable all accounts automatically

## Data & Analytics

1. Daily website analytics → Email summary report
2. New form response → Update dashboard in real-time
3. Database updated → Sync to spreadsheet for analysis
4. Survey completed → Add to analysis spreadsheet
5. API data → Log to Google Sheets hourly
6. Metrics hit threshold → Alert team via Slack
7. Competitor mentions → Track in monitoring sheet
8. App error logged → Create bug ticket + notify devs
9. User signup → Add to growth analytics tracker
10. A/B test results → Compile and email weekly

## Education & Courses

1. Student enrolls → Add to email course sequence
2. Course completed → Send certificate + request testimonial
3. Assignment submitted → Notify instructor
4. New course question → Create support ticket
5. Webinar registration → Add to calendar + send reminder
6. Student inactive 7 days → Send re-engagement email
7. Quiz completed → Update grade in spreadsheet
8. New module released → Email all students
9. Student completes milestone → Award badge/certificate
10. Cohort starts → Create private community channel

## Personal Productivity

1. Save liked tweets to reading list
2. Bookmark article → Send to read-it-later app
3. Todo completed → Log to productivity tracker
4. Voice note recorded → Transcribe and save to Notion
5. Photo taken → Auto-backup to cloud storage
6. Track habits → Log to spreadsheet daily
7. Weather forecast → Morning notification
8. Package delivered → Archive tracking emails
9. Bill due → Reminder 3 days before
10. Workout logged → Update fitness spreadsheet

## Marketing & Leads

1. Webinar registration → Add to email nurture sequence
2. Lead magnet downloaded → Send thank you + follow-up series
3. Form filled → Score lead + assign to sales rep
4. Email clicked → Update lead score in CRM
5. Hot lead identified → SMS to sales team immediately
6. Demo requested → Auto-schedule meeting
7. Trial started → Begin onboarding email sequence
8. Free user hits usage limit → Offer upgrade
9. Contact downloads multiple resources → Flag as hot lead
10. Event attendee → Add to post-event follow-up campaign

## Customer Success

1. Support ticket created → Notify CS team + create task
2. Customer at-risk → Alert account manager
3. Product usage drops → Trigger check-in email
4. Feature request → Add to product roadmap tracker
5. Positive review → Share with team + thank customer
6. Negative review → Immediate escalation to manager
7. Renewal coming up → Notify CS team 30 days before
8. Customer achieves goal → Send celebration email
9. Bug affecting customer → Proactive notification
10. Customer refers someone → Send thank you gift

## Operations & Admin

1. New vendor → Create in accounting system
2. Contract expiring → Remind 30 days before
3. Document uploaded → Convert and save to archive
4. Backup completed → Verify and log to tracker
5. Server error → Create incident ticket + alert devs
6. API limit reached → Notify tech team
7. Password reset requested → Log for security audit
8. New software request → Create approval workflow
9. Equipment order → Track in inventory system
10. License renewal due → Purchase reminder

## Notifications & Alerts

1. Specific keyword mentioned online → Email alert
2. Competitor launches feature → Team notification
3. Domain expiring soon → Renewal reminder
4. SSL certificate expiring → Alert dev team
5. Large file uploaded → Admin notification
6. User hits milestone → Celebrate via email
7. System downtime → SMS to on-call engineer
8. Unusual activity detected → Security alert
9. Budget threshold reached → Finance team notification
10. Deadline approaching → Escalating reminders

## 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

## 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.

## 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

## 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

## 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.**

## 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

## 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)

## 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)

## 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

## 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

## 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.

*Document Version: 1.0.0*  
*Created: October 17, 2025*  
*Part of: Systems Optimizer Learning Journey*