



THE COMPLETE GUIDE TO  
**ZAPIER MCP**

AI-Powered Automation Across 8,000+ Apps

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30,000+ Actions | 15 Categories | 80+ Companies

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SECTION

# Executive Summary

## What is Zapier MCP?

The Model Context Protocol (MCP) is an open standard by Anthropic that creates a universal bridge between AI models and external software. Zapier's MCP implementation gives AI assistants like Claude and ChatGPT real-time access to 8,000+ apps and 30,000+ actions — no custom API work required.



**8,500+**

Connected Apps



**30,000+**

Available Actions



**~40%**

Data Entry Reduction



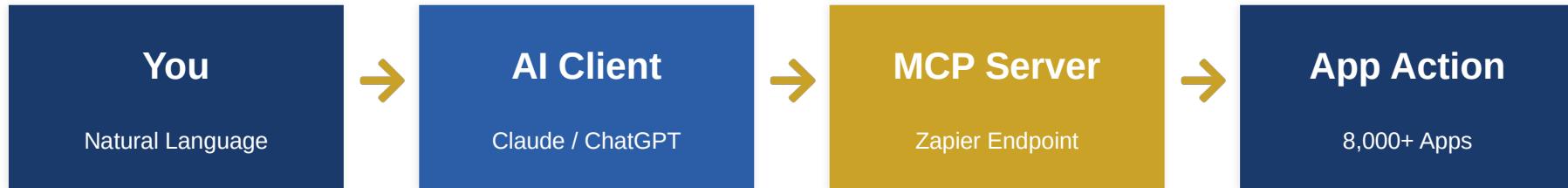
**~30%**

Faster Processing

*One connection replaces months of custom integration work. Your AI can now send emails, update CRMs, manage projects, and process payments — all from a conversation.*

## SECTION

# How Zapier MCP Works



## Supported AI Clients

AI Client	Setup	Best For
Claude (claude.ai)	Easy (built-in)	Business users, analysts
ChatGPT	Moderate	General productivity
Cursor IDE	Easy	Developers, coding
Claude Desktop	Moderate	Power users, local
Windsurf / VS Code	Easy-Moderate	Dev workflows
Custom (API)	Advanced	Enterprise apps



## Enterprise Security

- OAuth 2.0 Auth
- TLS 1.3 + AES-256
- SOC 2 & SOC 3
- Full Audit Logging
- Granular Permissions

SECTION

# Pricing & Task Economics

Each MCP tool call = 2 Zapier tasks. As of Sept 2025, hard monthly limits removed for more flexibility.

Free	Professional	Team	Enterprise
<b>\$0/mo</b>	<b>\$29.99/mo</b>	<b>\$103.50/mo</b>	<b>Custom</b>
100 tasks <b>~50 MCP calls</b>	750 tasks <b>~375 MCP calls</b>	2,000 tasks <b>~1,000 MCP calls</b>	Unlimited <b>Unlimited</b>
<i>Best for: Testing</i>	<i>Best for: Solopreneurs</i>	<i>Best for: Growing Teams</i>	<i>Best for: Organizations</i>

# 15 CATEGORIES OF AI-POWERED AUTOMATION



Communication &  
Messaging

6 apps



CRM & Sales

5 apps



Project Management

6 apps



E-Commerce &  
Payments

6 apps



Marketing & Email

5 apps



Productivity &  
Workspace

6 apps



Social Media

5 apps



Finance & Accounting

4 apps



Customer Support

4 apps



Databases

5 apps



AI & Machine Learning

4 apps



Developer & DevOps

4 apps



Documents & Content

4 apps



HR & Recruiting

4 apps



Forms & Surveys

4 apps



## SECTION 1

# Communication & Messaging

Company	Key Triggers	Key Actions
Slack	New Message, Mention, Reaction	Send Message, DM, Set Topic, Create Channel
Gmail	New Email, Labeled Email, Attachment	Send Email, Create Draft, Reply, Add Label, Find
Microsoft Teams	New Message, Channel Message	Send Message, Create Channel, Chat
Twilio	New SMS, Call, Recording	Send SMS, Make Call, Send MMS
Discord	New Message, New Member	Send Message, Create Channel, Add Role
Microsoft Outlook	New Email, Calendar Event	Send Email, Create Event, Draft

# Communication & Messaging — Real-World Use Cases

## Slack

AI summarizes #sales channel every morning, DMs you a prioritized digest before your first meeting

## Gmail

AI drafts personalized follow-ups to everyone who emailed about Q4 proposal, saves as drafts for review

## Microsoft Teams

AI posts weekly project status updates to #engineering with latest sprint metrics

## Twilio

Customer texts order question → AI looks up order in CRM → sends personalized SMS response in seconds

## Discord

AI monitors server for new members, sends personalized welcome with channel recommendations

## Microsoft Outlook

AI cross-references calendar invites against existing schedule, flags overlapping meetings



## SECTION 2

# CRM & Sales

Company	Key Triggers	Key Actions
Salesforce	New Lead, Opportunity, Contact	Create Lead/Contact, Update Record, Find, Add Note
HubSpot	New Contact, Deal, Form Submission	Create Contact/Deal, Update, Find, Create Task
Pipedrive	New Deal, Person, Activity	Create Deal/Person, Update, Create Activity
Zoho CRM	New Lead, Contact, Deal	Create Lead/Contact/Deal, Update, Find
Close CRM	New Lead, Opportunity	Create Lead/Contact, Send Email, Create Task



## AI Prompt Example

"AI creates leads for webinar attendees not yet in CRM with proper attribution"

# CRM & Sales — Real-World Use Cases

## Salesforce

AI creates leads for webinar attendees not yet in CRM with proper attribution

## HubSpot

AI moves deals not updated in 30+ days to 'At Risk' stage, notifies deal owners

## Pipedrive

AI adds follow-up activities for 'Proposal Sent' deals older than 7 days

## Zoho CRM

AI pulls all deals expected to close this quarter, calculates weighted pipeline

## Close CRM

AI automates lead scoring and flags high-potential leads for immediate outreach



## SECTION 3

# Project Management

Company	Key Triggers	Key Actions
Asana	New/Updated/Completed Task	Create Task/Project, Update, Find, Comment
Trello	New Card, Card Moved, Checklist	Create/Move Card, Comment, Add Label
Jira Software	New/Updated Issue, Transition	Create/Update Issue, Comment, Transition
Notion	New/Updated Database Item	Create/Update DB Item, Create Page
Monday.com	New Item, Column Changed	Create Item, Update Column
ClickUp	New/Updated Task	Create Task/List/Folder, Comment

# Project Management — Real-World Use Cases

## **Asana**

AI creates complete Q1 launch project:  
15 tasks, assigned owners, 6-week  
timeline

## **Trello**

AI moves 'Blocked' cards older than 5  
days to 'Escalated' list with status  
request

## **Jira Software**

AI creates Jira tickets from QA reports,  
assigns by component ownership

## **Notion**

AI transforms customer call notes into  
structured roadmap database entries

## **Monday.com**

AI consolidates all 'High' priority items  
across boards into executive summary

## **ClickUp**

AI reviews backlog, estimates points,  
creates next sprint task list



## SECTION 4

# E-Commerce & Payments

Company	Key Triggers	Key Actions
Shopify	New Order, Customer, Abandoned Cart	Create/Update Product, Update Inventory, Find Customer
WooCommerce	New Order, Customer, Status Change	Create/Update Product/Order, Find Customer
Stripe	New Charge, Customer, Failed Payment	Create Customer/Charge/Invoice/Subscription, Refund
Square	New Payment, Customer, Order	Create Invoice/Customer, Send Invoice
eBay	New Order, New Item	Create/Revise Item
PayPal	New Sale, Dispute	Create/Send Invoice

# E-Commerce & Payments — Real-World Use Cases

## Shopify

AI triages orders: identifies VIP customers, flags for priority fulfillment

## WooCommerce

AI generates SEO-friendly product listings at scale from spreadsheet data

## Stripe

AI finds failed payments, creates personalized recovery emails with payment links

## Square

AI analyzes payment data, identifies top-selling products, generates daily reports

## eBay

AI cross-lists Shopify inventory to eBay, adjusting titles and pricing for marketplace

## PayPal

AI monitors disputes, gathers order info, drafts response documentation



## SECTION 5

# Marketing & Email

Company	Key Triggers	Key Actions
Mailchimp	New Subscriber, Campaign, Unsubscribe	Add Subscriber, Send Campaign, Add/Remove Tag
ActiveCampaign	New/Updated Contact, Tag Added	Create Contact, Update, Add Tag, Create Deal
Google Ads	New Lead from Form	Create/Update/Pause Campaign
Facebook Lead Ads	New Lead	Create Lead Ad, Get Leads
ConvertKit	New Subscriber, Purchase, Tag	Add Subscriber, Add/Remove Tag, Create Broadcast



## AI Prompt Example

"AI segments by Q3 purchasers who didn't buy Q4, creates win-back campaign"

# Marketing & Email — Real-World Use Cases

## Mailchimp

AI segments by Q3 purchasers who didn't buy Q4, creates win-back campaign

## ActiveCampaign

AI monitors new contacts, assigns lead scores, triggers nurture sequences

## Google Ads

AI pauses campaigns with CPA above \$50, generates optimization report

## Facebook Lead Ads

New lead fires → AI enriches data, scores, routes to appropriate CRM pipeline

## ConvertKit

AI manages subscriber tags based on engagement, targets right audience per newsletter



## SECTION 6

# Productivity & Workspace

Company	Key Triggers	Key Actions
Google Calendar	New/Updated/Canceled Event	Create/Find/Update/Delete Event
Google Sheets	New/Updated Row	Create/Update/Find/Append Row
Google Drive	New/Updated File	Upload/Create Folder/Move/Find/Copy File
Airtable	New/Updated Record	Create/Update/Find/Delete Record
Calendly	New Invitee, Cancellation	Find Event Types
Microsoft Excel	New/Updated Row	Add/Update/Find Row

# Productivity & Workspace — Real-World Use Cases

## Google Calendar

AI finds meetings with no agenda, adds template with attendee-specific talking points

## Google Sheets

AI pulls closed deals from HubSpot, adds to 'Monthly Wins' sheet with totals

## Google Drive

AI auto-categorizes uploads into folders based on content analysis

## Airtable

AI creates content calendar records, assigns writers, tracks production status

## Calendly

New booking → AI researches attendee company, creates meeting brief in Notion

## Microsoft Excel

AI compiles multi-source data into formatted Excel reports with formulas



## SECTION 7

# Social Media

Company	Key Triggers	Key Actions
LinkedIn	New Post, Connection	Create Post, Share, Image Post
X (Twitter)	New Tweet, Mention, Follower	Create Tweet, Search, Like Tweet
Facebook Pages	New Post, Comment, Lead	Create Post, Photo, Send Message
Buffer	Post Published	Create/Schedule Post
Instagram	New Media Posted	Create Photo/Video, Story



## AI Prompt Example

"AI writes and publishes thought leadership posts from industry report insights"

# Social Media — Real-World Use Cases

## LinkedIn

AI writes and publishes thought leadership posts from industry report insights

## X (Twitter)

AI monitors brand mentions, categorizes sentiment, drafts response templates

## Facebook Pages

AI monitors comments, identifies customer questions, drafts helpful responses

## Buffer

AI generates a week of social posts from content calendar, schedules optimally

## Instagram

AI generates Instagram-optimized captions with hashtags from blog posts



## SECTION 8

# Finance & Accounting

Company	Key Triggers	Key Actions
QuickBooks Online	New Invoice, Payment, Expense	Create Invoice/Customer/Expense/Payment
Xero	New Invoice, Contact, Transaction	Create Invoice/Contact/Payment, Approve
FreshBooks	New Client, Invoice, Payment	Create Invoice/Client/Expense, Send Invoice
Wave	New Invoice, Customer	Create Invoice/Customer



### AI Prompt Example

"AI creates invoices for completed projects with line items from time tracking"

# Finance & Accounting — Real-World Use Cases

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## QuickBooks Online

AI creates invoices for completed projects with line items from time tracking

## Xero

AI identifies overdue invoices, generates aging reports, drafts follow-up emails

## FreshBooks

AI creates invoices based on completed Trello cards with project details

## Wave

AI categorizes transactions, creates recurring invoices, generates monthly summaries



## SECTION 9

# Customer Support

Company	Key Triggers	Key Actions
Zendesk	New/Updated Ticket, New User	Create/Update Ticket, Comment, Find
Intercom	New User, Conversation, Lead	Create User, Send Message, Add Tag
Freshdesk	New/Updated Ticket	Create/Update Ticket, Reply, Add Note
Help Scout	New Conversation, Customer	Create/Reply Conversation, Update, Tag



## AI Prompt Example

"AI finds 48hr+ billing tickets, adds account status notes, escalates to billing team"

# Customer Support — Real-World Use Cases

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## Zendesk

AI finds 48hr+ billing tickets, adds account status notes, escalates to billing team

## Intercom

AI identifies users who visited pricing 3+ times, triggers personalized outreach

## Freshdesk

AI categorizes tickets, assigns priority/department, sends personalized acknowledgment

## Help Scout

AI analyzes ticket content, identifies matching help articles, includes in response



## SECTION 10

# Databases

Company	Key Triggers	Key Actions
PostgreSQL	New/Updated Row	Create/Update/Find Row, Run Query
MySQL	New/Updated Row	Create/Update/Find Row
MongoDB	New/Updated Document	Create/Update/Find Document
Supabase	New/Updated Row	Create/Update/Find Row
Firebase	New Document, Child Object	Create/Update/Find Document



## AI Prompt Example

"AI queries customers with LTV >\$10K inactive 60 days, adds to HubSpot re-engagement list"

# Databases — Real-World Use Cases

## PostgreSQL

AI queries customers with LTV >\$10K inactive 60 days, adds to HubSpot re-engagement list

## MySQL

AI runs integrity checks, identifies orphaned records, generates cleanup scripts

## MongoDB

AI queries logs for error patterns, generates incident reports on anomalies

## Supabase

AI pulls data, calculates KPIs, updates reporting dashboards automatically

## Firebase

AI queries user behavior data, generates cohort analysis reports



## SECTION 11

# AI & Machine Learning

Company	Key Triggers	Key Actions
OpenAI (ChatGPT)	New Completion	Create Completion, Chat, Image, Analyze
DALL-E	—	Generate Image, Edit Image, Variation
ElevenLabs	—	Generate Audio, Text to Speech
Perplexity AI	—	Chat Completion, Search



### AI Prompt Example

*"Multi-model orchestration: Claude sends questions to GPT-4 for second opinions"*

# AI & Machine Learning — Real-World Use Cases

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## OpenAI (ChatGPT)

Multi-model orchestration: Claude sends questions to GPT-4 for second opinions

## DALL-E

AI generates product images for e-commerce listings based on brand guidelines

## ElevenLabs

AI converts blog posts to audio narration, creating podcast episodes automatically

## Perplexity AI

AI routes fact-checking queries to Perplexity for real-time web-sourced answers



## SECTION 12

# Developer & DevOps

Company	Key Triggers	Key Actions
GitHub	New Issue, PR, Commit, Star	Create Issue/PR/Comment, Add Label, Gist
GitLab	New Issue, MR, Pipeline	Create Issue/MR, Comment, Update
PagerDuty	New/Acknowledged Incident	Create/Resolve/Acknowledge Incident
AWS (Lambda/S3/SNS)	New S3 Object, SNS Notification	Invoke Lambda, Put S3, Publish SNS



## AI Prompt Example

"AI creates GitHub issues for every TODO in codebase, categorizes by severity"

# Developer & DevOps — Real-World Use Cases

## GitHub

AI creates GitHub issues for every TODO in codebase, categorizes by severity

## GitLab

AI watches CI/CD pipelines for failures, identifies breaking commit, creates bug reports

## PagerDuty

AI assesses severity, gathers diagnostics, routes to appropriate responder

## AWS (Lambda/S3/SNS)

AI monitors S3 uploads, triggers Lambda processing, publishes results



## SECTION 13

# Documents & Content

Company	Key Triggers	Key Actions
WordPress	New Post, Comment, Page	Create/Update Post, Upload Media
DocuSign	Envelope Sent, Completed	Create/Send Envelope
Dropbox	New/Updated File	Upload/Create Folder/Move/Find File
Webflow	New CMS Item, Form Submit	Create/Update/Delete CMS Item



## AI Prompt Example

"AI writes 1,500-word SEO blog post, adds meta descriptions, publishes as draft"

# Documents & Content — Real-World Use Cases

## WordPress

AI writes 1,500-word SEO blog post, adds meta descriptions, publishes as draft

## DocuSign

AI generates contracts in Google Docs, sends via DocuSign, tracks signing status

## Dropbox

AI monitors uploads, extracts key terms from contracts, creates summary docs

## Webflow

AI generates Webflow CMS items from product databases, creating pages at scale



## SECTION 14

# HR & Recruiting

Company	Key Triggers	Key Actions
BambooHR	New Employee, Time Off Request	Create/Update/Find Employee
Greenhouse	New Candidate, Stage Changed	Create Candidate, Add Note
Lever	New Candidate, Opportunity	Create Candidate/Note, Update Stage
Gusto	New Employee, Payroll	Create/Update Employee



## AI Prompt Example

"New hire → AI triggers Google Workspace + Slack + project board onboarding"

# HR & Recruiting – Real-World Use Cases

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## BambooHR

New hire → AI triggers Google Workspace + Slack + project board onboarding

## Greenhouse

AI nudges hiring managers when candidates sit in 'Interview' stage 7+ days

## Lever

AI generates personalized follow-ups based on interview notes and culture fit

## Gusto

AI monitors payroll events, triggers accounting entries in QuickBooks



## SECTION 15

# Forms & Surveys

Company	Key Triggers	Key Actions
Typeform	New Entry	Create Form, Get Responses
Google Forms	New Response	Create Response
SurveyMonkey	New Response, Survey	Create Collector/Survey
JotForm	New Submission	Create Submission



### AI Prompt Example

*"AI analyzes responses in real-time, scores leads, routes qualified ones to CRM"*

# Forms & Surveys — Real-World Use Cases

## Typeform

AI analyzes responses in real-time, scores leads, routes qualified ones to CRM

## Google Forms

AI processes survey responses, performs sentiment analysis, generates exec summary

## SurveyMonkey

AI compiles NPS responses, identifies trends, creates action items for teams

## JotForm

AI reviews submissions for completeness, flags missing info, sends follow-ups

## SECTION

# Cross-Category Power Workflows

## Meeting Intelligence Pipeline

**Calendar → Gmail → LinkedIn → Salesforce → Docs → Slack**

AI researches attendees, pulls CRM data, creates meeting brief, DMs summary 30 min before call

## Webinar Lead Pipeline

**Typeform → HubSpot → Gmail → Slack → Sheets**

Registration → CRM contact → confirmation email → sales notification → tracking sheet

## Support Escalation Engine

**Zendesk → Salesforce → Slack → PagerDuty → Docs**

High-priority ticket → account check → manager notification → SLA incident → impact report

# Cross-Category Power Workflows (cont.)

## **Content Repurposing Machine**

**WordPress → OpenAI → LinkedIn → X → Mailchimp → Buffer**

Blog post publishes → AI generates platform-specific social posts, newsletter, and schedules distribution

## **E-Commerce Order Intelligence**

**Shopify → Stripe → QuickBooks → Slack → Sheets → Gmail**

New order → payment verification → invoice creation → fulfillment notification → revenue tracking → confirmation email

## **Automated Recruiting Pipeline**

**Greenhouse → LinkedIn → Gmail → Calendar → Slack → Notion**

New candidate → profile research → interview scheduling → panel calendar events → team notification → candidate profile

## SECTION

# Industry-Specific Applications

Industry	Primary Apps	Top Use Case	Time Saved
SaaS / Tech	Salesforce, Slack, GitHub	Lead-to-close pipeline	15-20 hrs/wk
E-Commerce	Shopify, Stripe, QuickBooks	Order processing & comms	10-15 hrs/wk
Prof. Services	HubSpot, Workspace, Calendly	Meeting prep & proposals	8-12 hrs/wk
Financial Svcs	QuickBooks, Xero, PostgreSQL	Reconciliation & reporting	15-20 hrs/wk
Marketing Agency	Buffer, Mailchimp, Trello	Campaign mgmt & reporting	15-25 hrs/wk
Real Estate	Salesforce, DocuSign, Gmail	Lead nurture & doc mgmt	12-18 hrs/wk
Art & Collectibles	Shopify, eBay, Stripe, Sheets	Cross-listing & auth tracking	10-15 hrs/wk
Healthcare	BambooHR, Zendesk, Sheets	Patient intake & scheduling	10-15 hrs/wk

## SECTION

# ROI Analysis Framework

Component	Estimate	Annual Value (10 Users)
Time Saved	5 hrs/user/week @ \$50/hr	\$130,000
Error Reduction	40% fewer data entry errors	\$25,000
Speed to Action	30% faster processing	\$50,000
Tool Consolidation	2-3 fewer subscriptions	\$15,000
Zapier MCP Cost	Team Plan + ~5K calls/mo	-\$15,000
NET ANNUAL ROI	Conservative estimate	\$205,000+



### Key Insight

These estimates are conservative. Organizations with heavy cross-platform workflows (agencies, e-commerce, SaaS) typically see 2-3x these numbers. The key variable is the number of manual, repetitive tasks convertible to natural language AI commands.

## SECTION

# Implementation Roadmap

Phase 1 Day 1

## Setup & Config

Create MCP server at [mcp.zapier.com](http://mcp.zapier.com), connect AI client, add first 3-5 tools (Slack, Calendar, Gmail, CRM, Sheets)

Phase 2 Week 1-2

## High-Value Workflows

Identify 5 most time-consuming manual tasks. Map to MCP actions. Start with read-only actions before write actions.

Phase 3 Week 3-4

## Cross-Platform

Build multi-step workflows chaining 3+ apps. Example: Lead form → CRM → Slack → Sheet → Email. Test thoroughly.

Phase 4 Month 2

## Team Rollout

Deploy per-team MCP servers. Sales gets CRM+email. Marketing gets social+analytics. Engineering gets GitHub+Jira.

Phase 5 Month 3+

## Enterprise Scale

Integrate MCP into custom AI apps via API. Implement SAML SSO, domain capture. Monitor task economics.

## SECTION

# Competitive Landscape

Platform	Apps	MCP	Strengths	Limitations
Zapier MCP	8,500+	Native	Largest ecosystem, no-code, enterprise security	2 tasks/call, beta
Make	1,500+	Limited	Visual builder, complex logic	Smaller ecosystem
Lindy.ai	3,000+	Native	AI-native, fast-moving	Newer, smaller community
n8n	400+	Community	Self-hosted, open source	Technical setup required
Power Automate	1,000+	Via Azure	Microsoft integration, enterprise	MS-centric, complex licensing
Custom MCP	1/server	Full	Purpose-built, max control	High dev cost, maintenance



Strategic Insight: Zapier's competitive moat is its 8,500+ app integration library built over a decade. For broad cross-platform automation, Zapier MCP remains the most practical choice. For narrow, deep integrations in specific verticals, purpose-built MCP servers offer more flexibility.

# Strategic Recommendations

## **Business Leaders**

Treat Zapier MCP as strategic infrastructure, not an IT experiment. Start with 2-3 high-impact revenue-affecting use cases and expand based on measured ROI. First-movers gain compounding advantages.

## **Solopreneurs & Small Teams**

Your force multiplier. One person + Claude + Zapier MCP = efficiency of a 3-5 person team. Automate email, CRM, content, and finance first. Free/Professional plans are sufficient.

## **Developers & AI Builders**

Eliminates the most tedious part of building AI agents: integration work. 30,000+ actions on day one instead of weeks of custom connectors. Focus your effort on intelligence, not plumbing.

## **Enterprise Organizations**

Standardized, secure, auditable AI-to-app connectivity. RBAC, audit trails, SOC 2 compliance. The alternative — custom MCP servers per app — requires massive engineering investment.



# GLOBAL GAUNTLET AI

Where M&A Strategy Meets AI Execution

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