We are seeking a skilled Zapier expert to help us streamline our CRM processes in Asana by setting up five key automations. These automations are essential for improving our workflow efficiency and ensuring consistent communication with our leads.

Scope of Work:

1. Folder Creation and Subtask Automation

•Trigger: When a lead reaches the "Ready to Start" column in Asana.

• Action:

• Automatically create a folder in Google Drive named after the lead.

• Create a subtask titled "Social Media Content within the lead's task.

• Include the link to the newly created Google Drive folder in the description of this subtask.

2. Follow-Up Automation for Unresponsive Leads:

•Trigger: When a lead reaches the "No Response" column.

• Action: Automatically send follow-up text messages or emails until the client responds. The follow-ups should be consistent and escalate if no response is received.

3. Quote Follow-Up Automation:

• Trigger: When a lead reaches the "Quoted" column.

• Action: Automatically send text messages or emails once a week to follow up on the quote sent to the client.

4. Welcome Email Automation

•Trigger: When a lead reaches the "Approved" column.

• Action: Automatically send a welcome email to the client, including a personalized message and an attached PDF.

5. Service Recommendation Email Automation:

Trigger: When a lead reaches the "Paid and Closed" column.

• Action: Automatically send a recommendation email to the client for maintaining their service. The email will have three variations depending on the type of service installed.

Requirements:

•Proven experience with setting up automations in Asana using Zapier.

•Experience with Google Drive integrations and email automation.

•Familiarity with GoTo as a platform for sending text messages.

• Ability to ensure the reliability of the automations

•It's a plus if you are fluent in Spanish.

To Apply:

Please start your cover letter with the phrase "I love tacos" and share examples of similar automations you've created in the past. Confirm your experience with Asana, Zapier, and GoTo. Applications without this information will not be considered.