



THE MARKETING LAB

Integrations: The Most Utilized Zaps and How to Automate Actions Between Apps

An overview of Zapier and how to best integrate it with your Connect 365 campaigns...

With me today...



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What is Zapier?



For Today:

Why - When - How

Create your own workflow

Know exactly what you want to build? Select the apps you want to connect to start your custom setup.

Connect this app...

Calendly ✕ .. + .. → Connect 365 ✕

with this one!

When this happens...

Calendly Invitee Created ⌵ → → Remove Tag From Contact ⌵

then do this!



Remove tag from contact in Connect 365 when invitee created in Calendly

Calendly + Connect 365

[Try it](#)

Zaps

Zaps are the automation workflows that allow you to communicate between your different software tools.

Trigger

An event within an application that launches the automation workflow.

Action

The task you want Zapier to complete for you next in a different application.

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Connect this app...

with this one!

 Calendly 



 Connect 365 

When this happens...

then do this!

 Invitee Created 



 Remove Tag From Contact 



Remove tag from contact in Connect 365 when invitee created in Calendly

Calendly + Connect 365

[Try it](#)

Why Zapier?

It allows you to *easily* integrate Connect 365 and your other tools.

And to automate repetitive or time-saving tasks without the need for your intervention.

Determine the most critical actions. Or most impactful automations.

When Should You Use It?

- What saves you the most time?
- What simplifies your process?
- What creates the best prospect experience?

When Should You Use It?

- Removing Contacts from Campaigns (based on actions outside of email)
- Adding Contacts into Campaigns
- Moving Connect 365 Contacts into Other Outreach Efforts



Do I need to know how to code?

How Does It Work?



Triggers...

- New Message Sent*
- New Message Opened
- New Message Replied
- New Message Bounced

Actions...

- Add a Contact*
- Add Tag to Existing Contact
- Remove Tag from Contact
- Unsubscribe Contact

Most Common Use Cases

- GetProspect, SeamlessAI (prospecting)
- Mailchimp, InfusionSoft, Hubspot (crms)
- PayPal, Stripe (payment processors)
- ScheduleOnce, YouCanBookMe, Calendly (calendar apps)
- Simplero, Kajabi (online courses)
- Google Sheets, Gmail, Typeform, Gravity Forms

Key Concept:

To begin with – the goal is to engage.

Questions???

On the next Mastermind:



Outbound Sales Mastery

Questioning Strategies

Call Held 5/5 at 1 pm (central)