# Zap Automations

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**Zoom Registrations**

**This can be the signups from your weekly webinar, round table or weekly moment.**

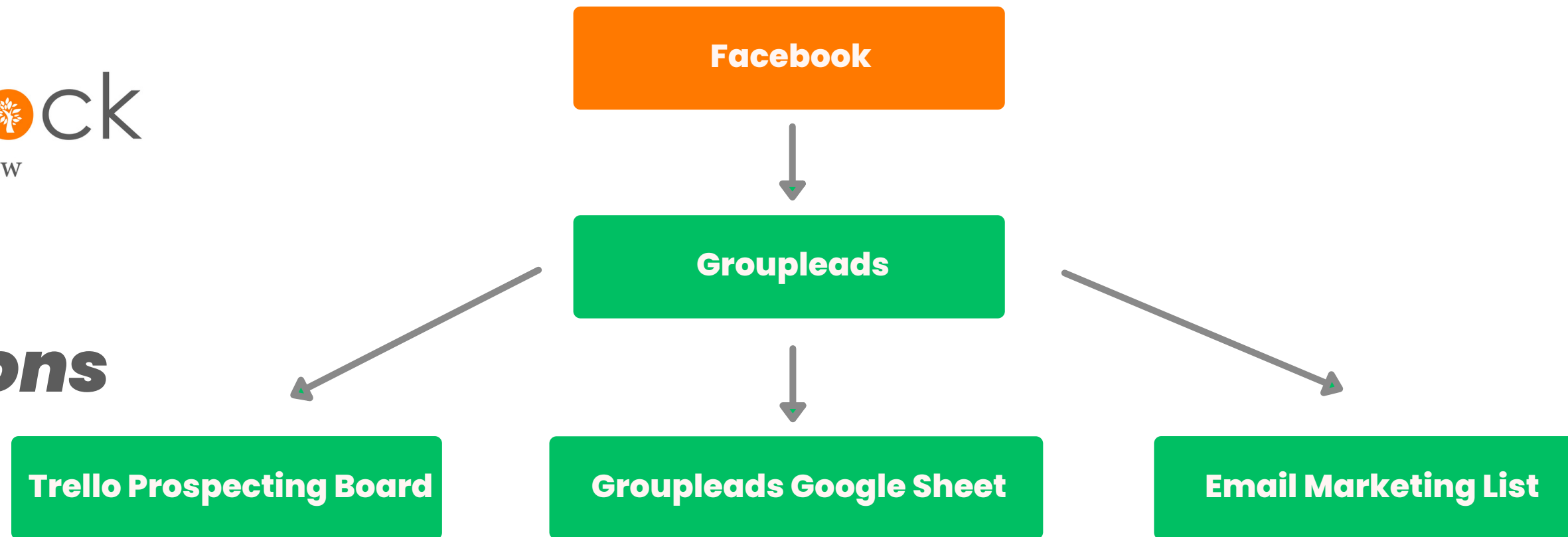**Trello Prospecting Board**

**CRM**

**Email Marketing List**

## Goal of this automation: Get people who registered for your weekly moment into your CRM, Trello Prospecting Board and Email List

- Once you set up your roundtable or weekly moment with Zoom your registrations will need to be filtered through to your processes so that you can begin prospecting

- You should have access to the Trello Prospecting Board Template. Setup a Zap that goes from your registrations to your Weekly Moment Sign-Ups bucket in Trello
You should also have a zap setup to go to your CRM – in my case this is Hubspot. Make sure to create a

- tag for this so that you know where the prospect is coming from

Finally– enter your prospects into an email sequence. For this I am using Convertkit– however you can

- use any mail client you'd like. Setup a zap from your Zoom registrations to your email sequence – be sure to tag your subscribers to make sure you know where they are coming from.

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# Zap Automations

**Facebook** → **Groupleads** → **Trello Prospecting Board** / **Groupleads Google Sheet** / **Email Marketing List**

*Goal of this automation: Get your Facebook group members into your prospecting board, Groupleads sheet and email list.*

- Use Groupleads to automate your Facebook group signups. Once you've set up this tool it should be able to automatically tag your new members into a welcome post and then send their information (including the answers to your 3 questions) to a Google Sheet

- Setup a Zap from this Google sheet to go to your Trello Prospecting board in the New Facebook Group Member bucket.

- Once the new member is tagged in your Welcome post, the next day you should tag them in your Free Gift post which would take them to your landing page.

- Finally, enter all of your new Facebook group members into an email sequence – To do this, set up a Zap from Groupleads sheet to your chosen email sequence.
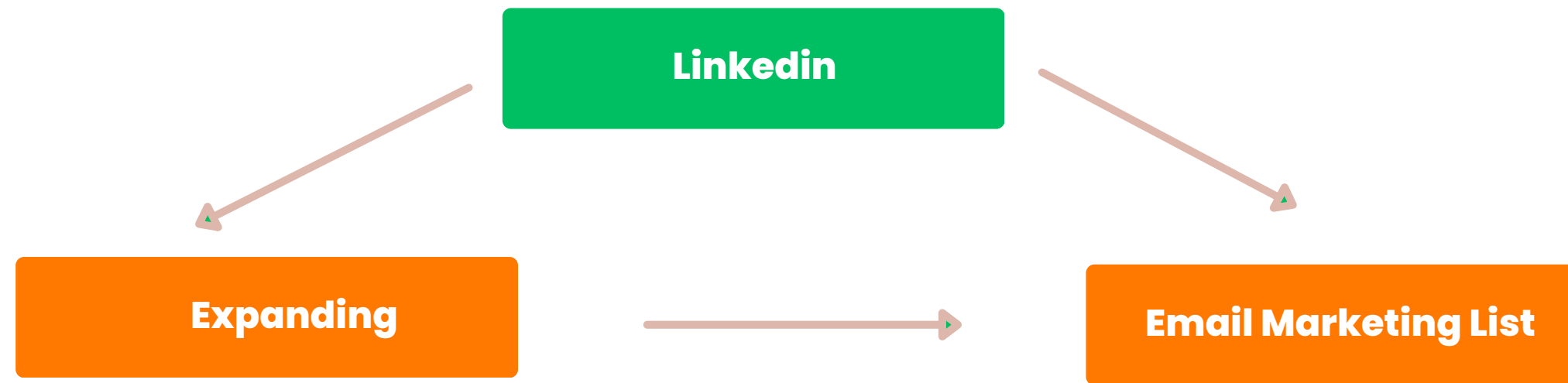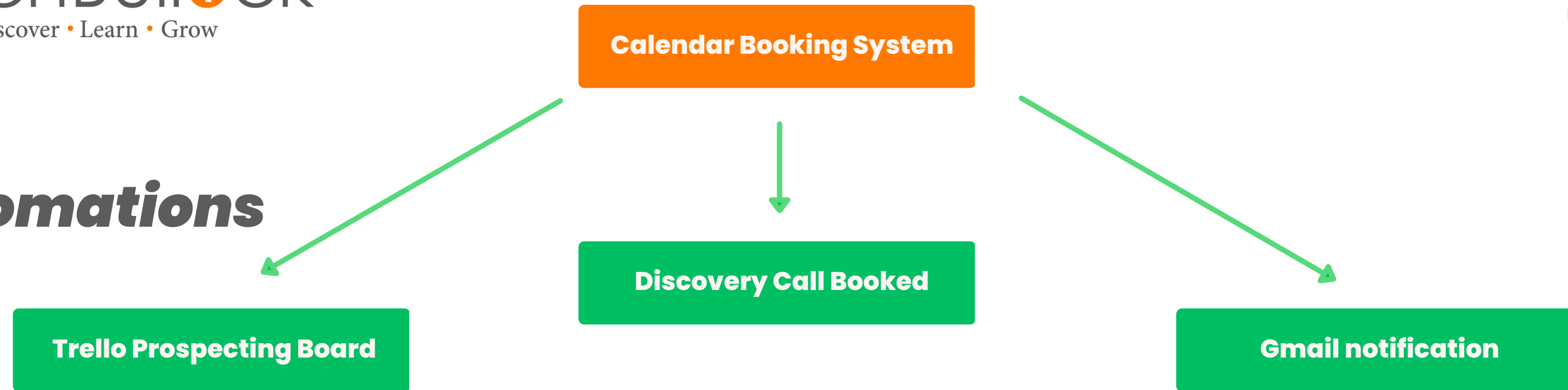
# Zap Automations



**Goal of this automation: Automate your Linkedin connection requests and messaging to your weekly moment**

- Expandi is an excellent tool for expanding your Linkedin reach. Use this tool to create connections based on your Linkedin search criteria.

- Setup automatic replies in the Expandi tool and fully automate your responses.

- Setup your Expandi to add all new connections into an email sequence.

- Use Zapier to connect Expandi to your email marketing tool.

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## Discover • Learn • Grow

# Zap Automations

**Calendar Booking System**

**Discovery Call Booked**

**Trello Prospecting Board**

**Gmail notification**

***Goal of this automation: Collect information about prospective clients who book a discovery call***

- You should have a landing page setup to have a discovery call session booked with you or your prospector.

- Personally, I use Calendly but you could use any other booking software.

- I set up a zap to go from all my Calendly bookings to my Prospecting Trello board in the Discovery Call Booked bucket

- *Bonus* If you have someone else doing prospecting for you, stay on track with another zap that will go from the Calendly Booking to your gmail as an inbox notification