

Zap Automations

Trello Prospecting Board

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Zoom Registrations

CRM

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

Email Marketing List

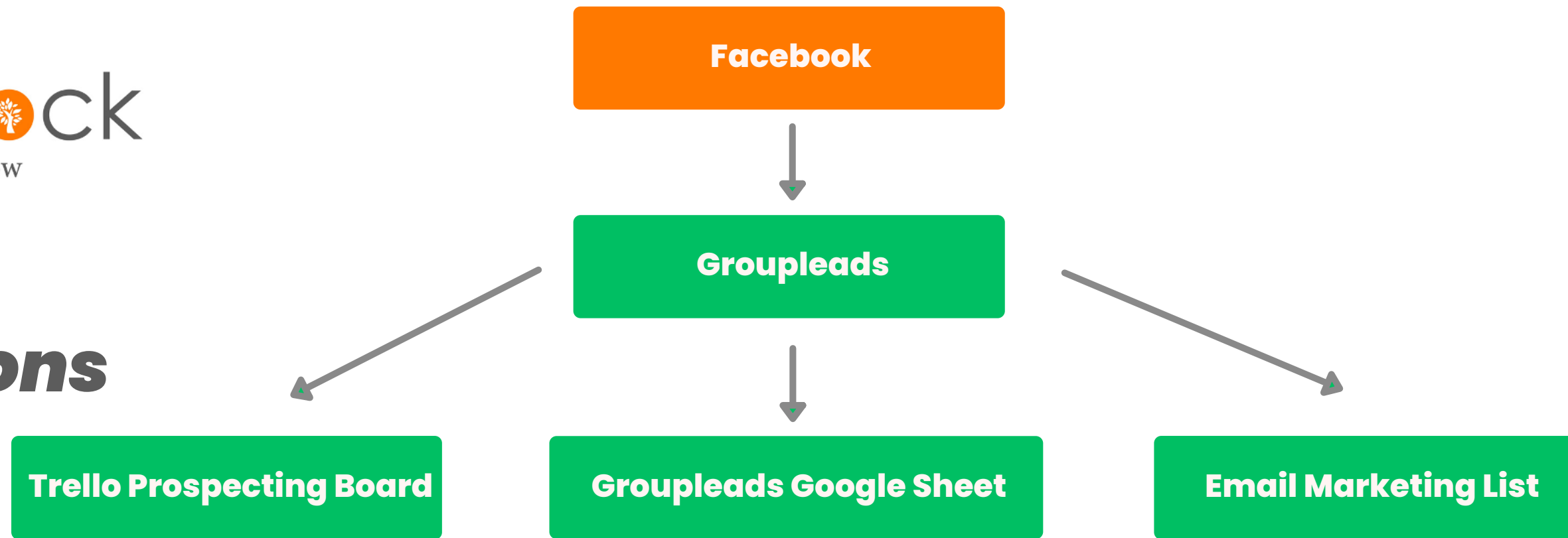


Goal of this automation: Get people who registered for your weekly moment into your CRM, Trello Prospecting Board and Email List

- 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.

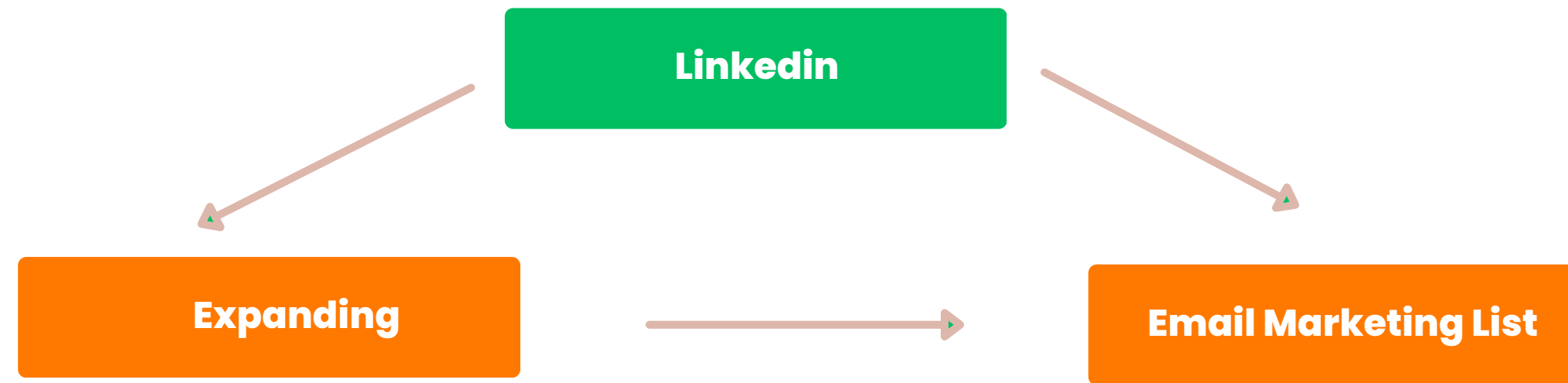


Zap Automations



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.

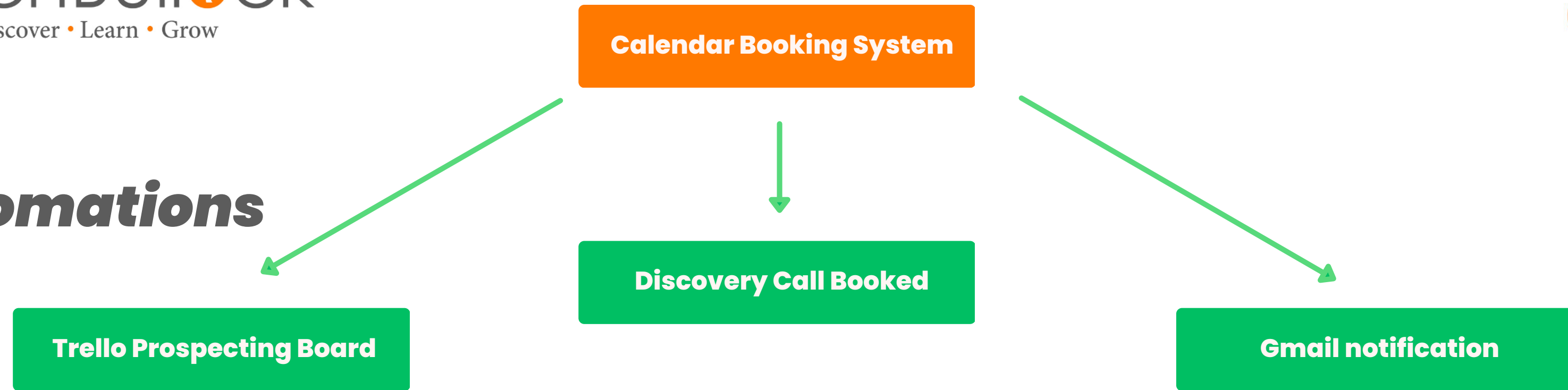


Goal of this automation: Automate your LinkedIn connection requests and messaging to your weekly moment

- **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.**



Zap Automations



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