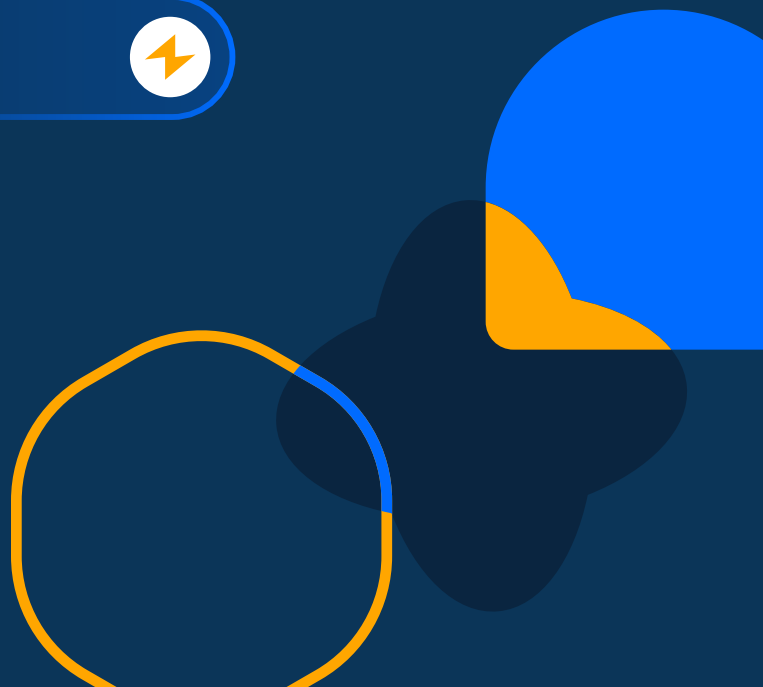


4 ways to automate your lead management

Save time and increase ROI with Zapier + Calendly



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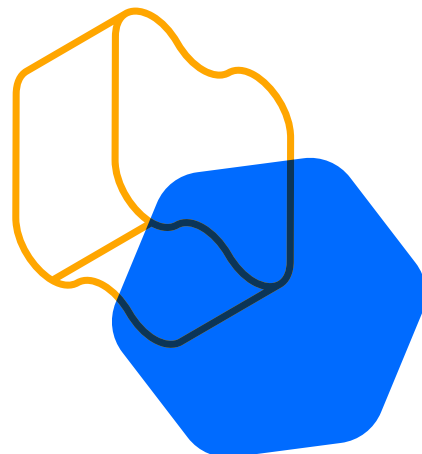
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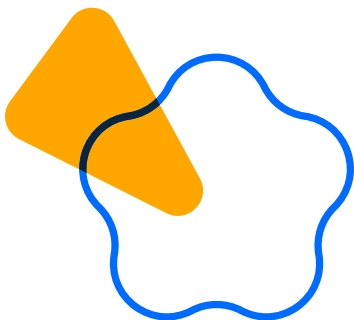
Automate Calendly to save time + money

Calendly is your hub for scheduling meetings professionally and efficiently, eliminating the hassle of back-and-forth emails so you can get back to work. The possibilities are endless with your Calendly link, which lets clients and invitees view your availability and choose the best time for them. You can save time and bring in more revenue by streamlining your scheduling process and cutting out needless phone tag and email chains.

Booking appointments is just one administrative task within your larger lead management process. With Zapier, you can connect Calendly to thousands of other business apps. Easily create a seamless lead lifecycle and get back time to focus on closing those high-value deals.

Did you know?

Calendly users save 15 minutes on average for every meeting booked using the platform.



What is Zapier?

How does it work?

Zapier lets you create automatic workflows with Calendly that streamline repetitive tasks – without any code.

The workflows you create in Zapier are called Zaps, and they can automate both simple administrative tasks and complex processes across apps and teams.

A Zap is always made up of these parts:

- A **trigger** is an event that starts a Zap, like when someone signs up for a meeting from your Calendly link.
- An **action** is an event a Zap performs after it's triggered, like adding that new Calendly signup to your customer relationship manager (CRM).

Did you know?

The average Zapier for Companies customer **saves over \$70,000** in time per year to reinvest in their business.

4 Automations for Marketers

To help your business grow, you need leads. The more leads you have, the more potential for new sales. But scaling lead management is time-consuming. Enter Calendly + Zapier.

Nearly 70% of employees at small and medium-sized businesses say using automation software has helped them be more productive at work.

With Zapier + Calendly, you can automate your lead generation and lead lifecycle tasks. This saves your business time, optimizes your spending, and reduces data entry mistakes.



Send Calendly invitees to the right place, right away

A meeting set up with Calendly is a critical step toward a sale. After that valuable first meeting, it's important to nurture new leads through an intentional lead funnel.

With Zapier, you can send new Calendly invitees straight to your CRM, email marketing app, or any other lead management tool. This ensures no lead slips through the cracks. Instead, they're added to the right funnel, right away – helping you close deals faster.

While there are several native CRM and marketing integrations available directly from Calendly – including [Salesforce](#), [Hubspot](#), [Zoom](#), and [more](#) – Zapier offers thousands of [additional apps](#) that your team may use. Plus, when you connect Calendly to Zapier, you can create endless, multi-step Zaps to send invitee information to multiple apps at once, or create multiple actions from one trigger.

RECOMMENDED ZAPS

 Add new Calendly invitees to your email marketing tool, like [Drip](#), so you can begin marketing to them

 Create a multi-step Zap to send invitee information to your CRM, then notify your team via [Slack](#) or [Teams](#)

 Send Calendly invitee data to a [tracking spreadsheet](#) to keep your data organized

 Update lead data in your CRM, [such as Pipedrive](#), when a Calendly call is canceled

Send Calendly invitees prompt, personalized messages

Prompt responses show your customers they're your No. 1 priority. But a quick follow-up email can fall by the wayside when you have a lot of other pressing tasks to get done.

With automation, you can send sales brochures, confirm meeting details, or provide meeting agendas to help invitees prepare. You can also schedule customized follow-ups as soon as the meeting ends. This ensures your customers get the best customer service – without adding extra items to your to-do list.

With Calendly alone, you can use [Calendly Workflows](#) to send reminder or follow-up emails and texts to invitees directly from Calendly, Gmail, or Outlook. But with Zapier, you can use other marketing and communication apps to build custom messages, add contacts to ongoing campaigns, and attach relevant materials.

RECOMMENDED ZAPS

-  Send a branded welcome email to newly scheduled Calendly invitees via your [email marketing tools](#)
-  Text Calendly invitees meeting event details via a variety of [SMS apps](#) to utilize owned or custom phone numbers
-  Automatically feed contacts into custom follow-up nurture campaigns

Keep your team (and yourself) informed

Notifying attendees about upcoming meetings, time changes, or cancelations is an admin task that just begs for automation.

As a Calendly user, you can edit your Event Types or use Workflows to send basic updates like meeting reminders, date changes, and follow-up emails.

You can add Zapier to share updates with your team on the channels where they spend their time. That way, you can skip juggling your calendar and focus on client calls that need a personal touch instead.

RECOMMENDED ZAPS

 Send a message to a specific group or channel in Slack, Teams, or another [team chat app](#) when a new meeting is booked or canceled to keep them in the know

 Use your team's preferred email or SMS tool to send notifications to invitees when a meeting is booked or canceled

Automatically wrangle your to-do list

Having a calendar filled with sales calls is the ultimate goal! But keeping track of all you need to get done before, in between, and after meetings can get overwhelming.

Let automation wrangle your to-do list. Create Zaps that automatically add an item to your task-management tool whenever you get a new Calendly event, like a reminder to prep your sales deck. That way, you'll never let another meeting (or deal) fall through the cracks.

RECOMMENDED ZAPS

- + Add a new task on a contact account in your CRM, like [Keap](#), for new Calendly events
- ≡ Create a new project in your task tool, such as [Asana](#) or [monday.com](#), for new Calendly events
- 📅 Add a new task to prepare for new Calendly events

The ROI of automating your work

\$10,000+

The average amount Zapier customers save in time per year



92% of marketing agencies are [investing more time, resources, and budget](#) into marketing automation

On average, seven emails are sent over several days to schedule a single meeting. Users save an average of 15 minutes for every meeting booked with Calendly.



88% of sales customers report no-shows decreased after using Calendly's Workflows feature

25 hours

The amount of time marketing departments save each week on average using Zapier

By implementing Calendly across their organization, Bitly saw a 100% increase in demos scheduled by outbound SDRs, and a 40% increase in sales qualified opportunities through their website.

4 hours

The number of hours people who set up a Zap save on average in their first week



[98% of knowledge workers](#) who use automation at work say it benefits them

CASE STUDY

How Searchant saves time *(and makes more sales)* using Calendly + Zapier

Company

[Searchant](#) is a digital marketing agency helping businesses grow their organic traffic.

Challenge

A manual lead intake process made scaling their business impossible.

Solution

Searchant created a Zap that instantly sends a pre-sell email to new Calendly invitees, adds new Calendly invitees to their CRM, and sends a message to the team member scheduled to take the call.

Results

- Call show-up rates increased by 25%
- 10 hours of time saved every month
- Every lead now gets tracked while minimizing data entry

“ Adding automation to your processes means a few small changes can lead to massive time savings each month. This saved time is yours to play with, and can be used to alleviate your workload and drive you towards growth.”

Marcus Clarke, Founder of Searchant

Calendly + Zapier for your business

Calendly makes it easy to schedule meetings. And Zapier's ability to connect Calendly with your favorite productivity, sales, and marketing tools allows you to automate the entire lead lifecycle.

Seamless scheduling, automatic data entry, organized to-do lists — what more could you ask for?

**Unlock scheduling efficiencies for
your team with Calendly**

[Set up a call](#)

**See how Zapier can help streamline
your lead management across teams**

[Schedule free demo](#)



Calendly

—zapier