📦 Zap 1: Prospect Moved to Onboarding Table

Trigger:

- App: Zapier Tables
- Event: Updated Record
- Condition: Status = "Close in Presentation"

Steps:

1. Filter record by status
2. Create personalized video (e.g., via [Video Tool])
3. Format go-live date (MM/DD/YYYY)
4. Draft welcome email

Purpose:
Initiates onboarding sequence automatically when a lead is marked as closed.

🔹 Zap 2: Live Date Reminder Email + Intro to Chatbot

Trigger:

- App: Zapier Tables
- Event: New or Updated Record
- Condition: Live Date is not blank

Steps:

1. Filter by client type
2. Delay until specified Live Date
3. Conditional Path Logic:
   - Client A: Create email draft
   - Client B: Create email draft + Onboarding task in [Project Manager Tool]
4. Send reminder emails based on go-live timing

Purpose:
Schedules communications based on the client's launch timeline.

🔹 Zap 3: Onboarding Activity Assignments + Weekly Reviews

Trigger:

- App: Zapier Tables
- Event: New or Updated Record
- Condition: Live Date field added

Steps:

1. Filter by onboarding table
2. Delay 4-7 days from Live Date
3. Create task in [Project Manager Tool] (e.g., ClickUp)
4. Draft and schedule weekly check-in emails (Weeks 1 to 4)

Purpose:
Automates recurring onboarding activity assignments and follow-ups.

◆ Zap 4: New Client Added to Onboarding Table

Trigger:

- App: Zapier Tables
- Event: Updated Record

Steps:

1. Filter for new onboarding entry
2. Delay 1-2 days for review
3. Create secondary onboarding record (if needed)

Purpose:
Prepares downstream automations for new client onboarding.

◆ Zap 5: Email 1 of 4 – Account Specific Details

Trigger:

- Scheduled Event

Steps:

1. Delay for scheduled timeframe (e.g., 2 days post-live date)
2. Conditional Path:
   - Client A: Create Gmail draft

○ Client B: Create Gmail draft

Purpose:
Delivers the first onboarding content email based on client type.

◆ Zap 6: Email 2 of 4 – Intro to Campaigns

Trigger:

- Scheduled Event

Steps:

1. Delay 3-5 days post-live date
2. Path logic by store type
3. Create Gmail draft

Purpose:
Sends introduction to campaign options and usage.

◆ Zap 7: Email 3 of 4 – ROI Insights

Trigger:

- Scheduled Event

Steps:

1. Delay based on onboarding schedule
2. Conditional Path (e.g., Client A vs Client B)
3. Draft email in Gmail

Purpose:
Provides analytical insights into expected ROI and success benchmarks.

◆ Zap 8: Invoice Reminder + Task in Project Manager

Trigger:

- Field: Purchase Date or Invoice Sent field

Steps:

1. Filter for records with invoice due soon
2. Delay until invoice reminder timeframe
3. Draft invoice reminder email
4. Format purchase date
5. Create follow-up task in [Project Manager Tool]

Purpose:
Keeps billing tasks visible and creates reminders for internal tracking.

◆ **Zap 9: Survey Invite**

Trigger:

- App: Zapier Tables
- Event: New Record

Steps:

1. Delay 7-10 days post-onboarding
2. Draft survey invite email (link to [Survey Tool] like Typeform or Google Forms)

Purpose:
Gathers client feedback after onboarding experience completes.

✅ **Pro Tip:** Replace specific tools like Gmail, ClickUp, SendSpark with placeholders ([Email Tool], [Project Manager], etc.) if you're sharing externally.

Canva Walk Through🎥