Jumpstart Your Marketing Automation

How to Automate Your "Dishes and Laundry"

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TRNDIGITAL

"I don't want robots to make art for me so I can do my dishes and laundry.

I want robots to do my dishes and laundry so I can make art."

– Joanna Maciejewska @AuthorJMac *(paraphrased)*

Where are you currently?

1 — Little or no automation

2 — Some automation, but less than we could

3 — Lots of automation, but some room to grow

4 — We're pros, maybe have a dedicated team/experts

Overview

- **What to automate**
- **How to automate**
- **Examples**

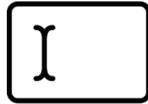An **automation mindset** requires:

1. Dissecting problems into their component parts (steps, tools, conditions)

2. Thinking through solutions in precise, incremental steps

Types of tasks to automate

Repeated/Recurring
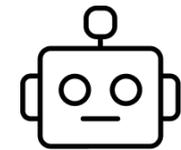
Over and over or at regular intervals, same way every time

Data entry/transfer

Something in one place needs to go elsewhere

Tool integration

Multiple tools need to talk to each other

Standardization

Consistency matters, reduce human error

Bonus: If you have a hunch that "a robot could probably do this," you're probably right.

Automation tools for different purposes

zapier

Workflow automation, app integrations, agents & more

slack

Trello

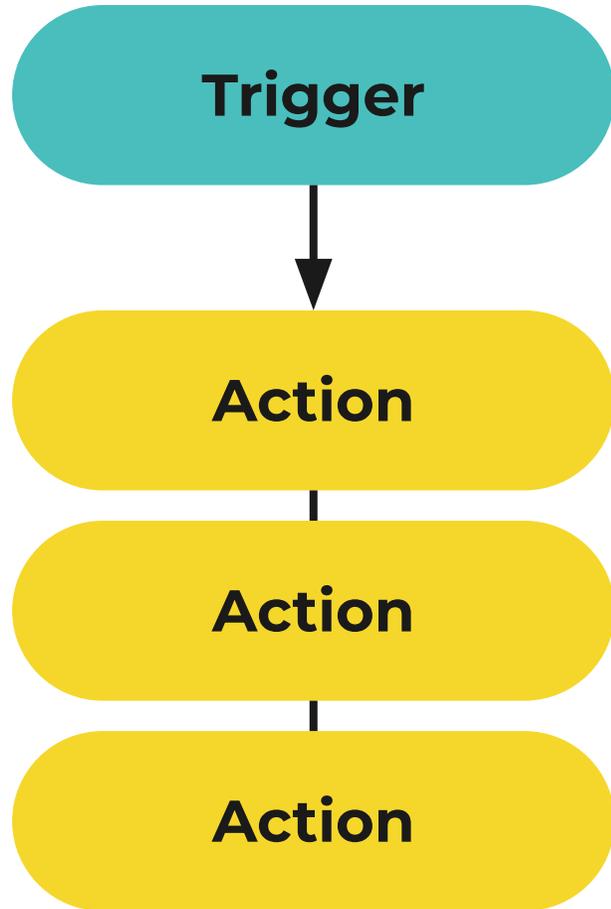Embedded automation features within workspace tools

Custom AI models (GPTs, Gems) & agents

These are just a few examples. For today, we'll focus on **workflow automation** with Zapier (or similar). But the principles we'll cover apply to many types of automation.

Automated workflow components

Trigger

Action

Action

Action

Event that starts the automation *("If this…")*

One or more actions that occur *("…then that")*

- Can use any of 3,000+ app integrations
- Uses trigger data or brings in new data
- Tip: Stack actions with the same trigger into one automation.

Common automation types

Copy

↓

Modify
Reformat, divide, combine, analyze, categorize, etc.

↓

Paste

Tool A
Trigger event

↓

Tool B
Unrelated action

Trigger

↓

Filter

Branching paths
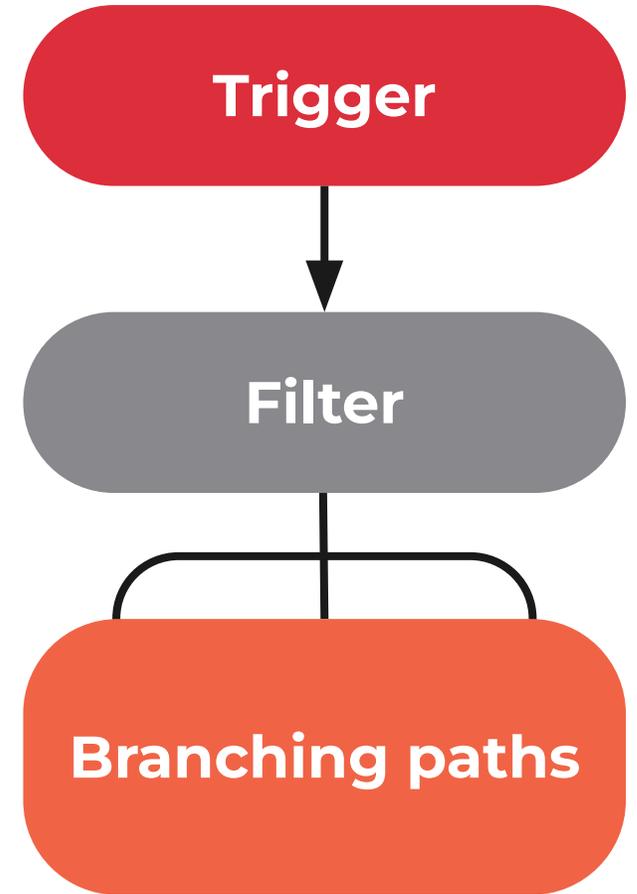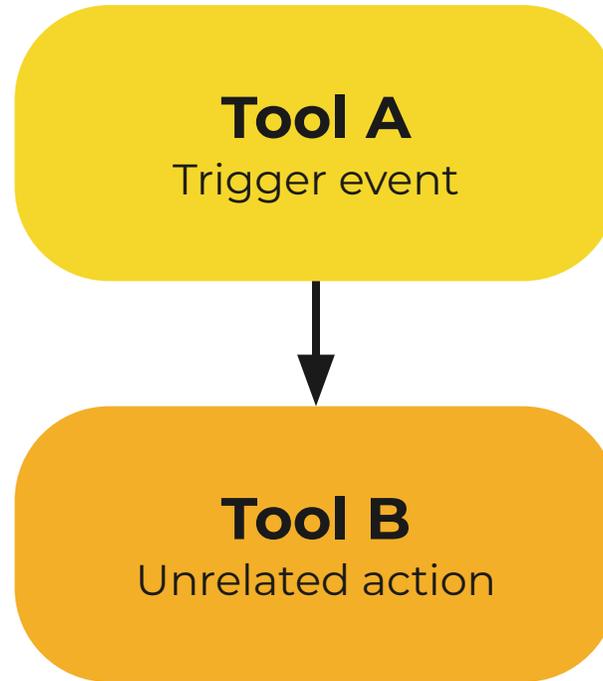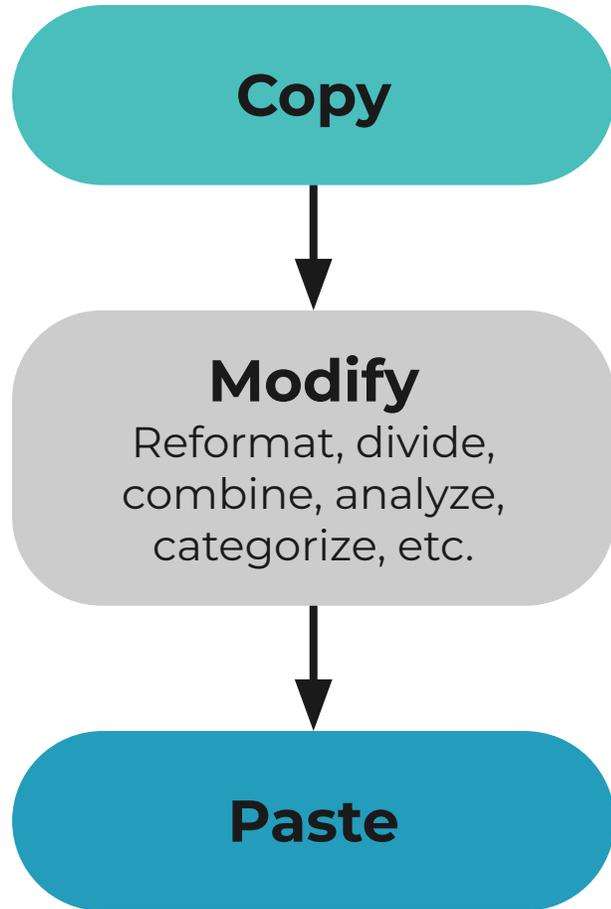
Before you automate

1 Do it manually.

2 Optimize.

3 Automate.

Don't automate a bad process.

Optimize, then automate.

Steps to automate

1 **Mise en place.**
Identify all the tools, conditions, and data you're working with.

2 **Set the trigger.**
App event, date/time, interval, etc. Even chain automations together.

3 **Add actions.**
Use apps, format, delay, filter/paths, run code or AI, connect to APIs, etc.

4 **Test.**
Tip: Set up a #testing channel or sandbox workspace.

5 **Publish!**
Label your workflows and actions clearly so you can easily revisit.

6 **Maintain and iterate.**
Monitor for errors, inconsistencies, and opportunities to improve.

Quick tips for better automation

- Structured data is your best friend (fields, tags, etc.).

- Consolidate actions with a shared trigger into one workflow.

- Give your workflows and actions clear, descriptive names. Organize into folders.

- Use API calls to go beyond built-in app functionality.

- Set up a #testing channel or sandbox workspace for prototyping.

- Copy/paste actions or duplicate workflows to templatize setup (but don't forget to re-map fields).

Example 1

Form submission processor

Form submission processor

Webhook

Or substitute any other form intake

Filter
Spam filters for common junk patterns

Formatter
Format date/time, split names & company, etc.

"Modify" steps

Add to spreadsheet

Send to Slack

Add to CRM

Filter

Add to Mailchimp
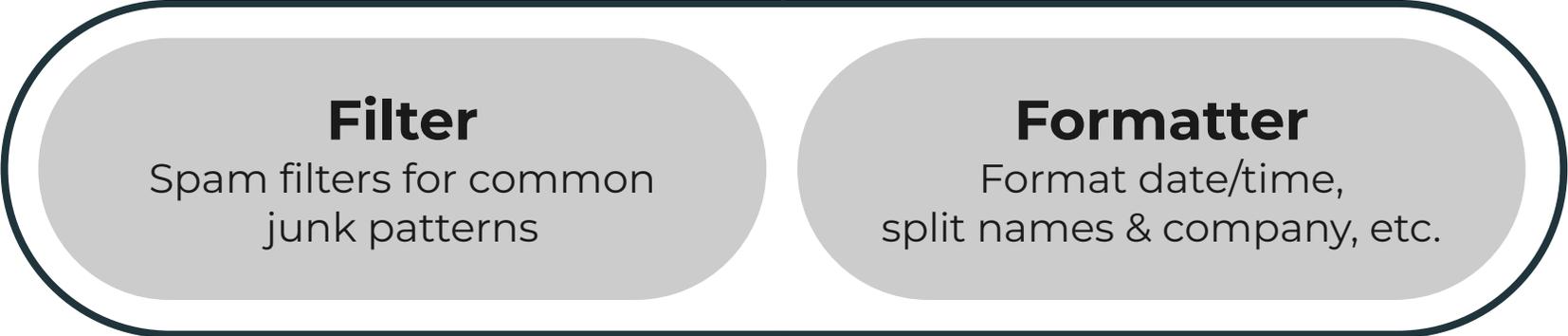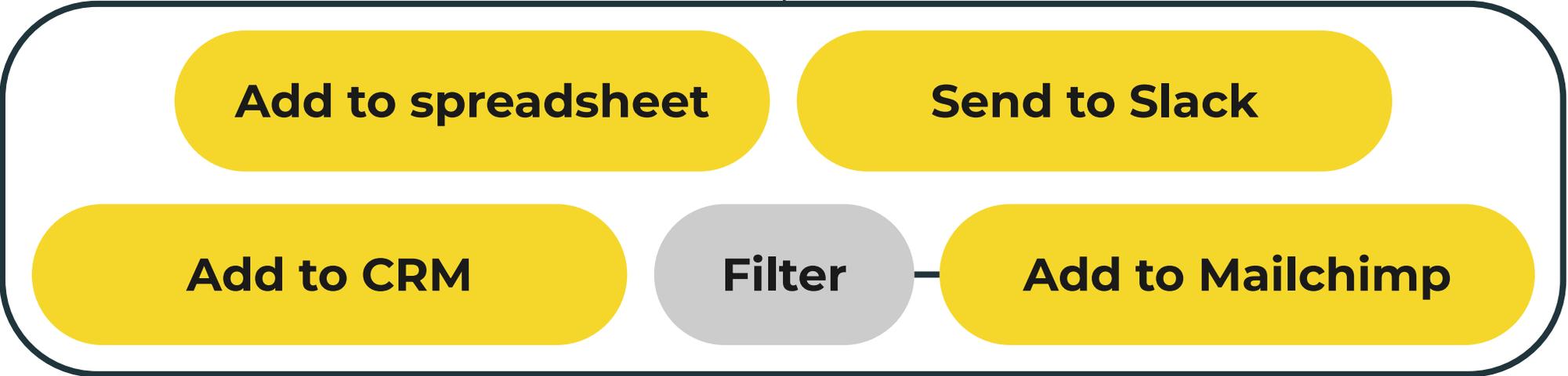
Actions

Example 2

Client/industry news alerts

Client/industr y news alerts

Google Alert(s)
RSS feed(s)

Use syntax for complex queries, multiple feeds for many items

AI action
Summarize, compare to client list, evaluate relevance based on provided criteria

Filter
Remove irrelevant articles

Formatter
Format date/time, strip HTML

Send to Slack

Title, link, publish date, client name, & summary
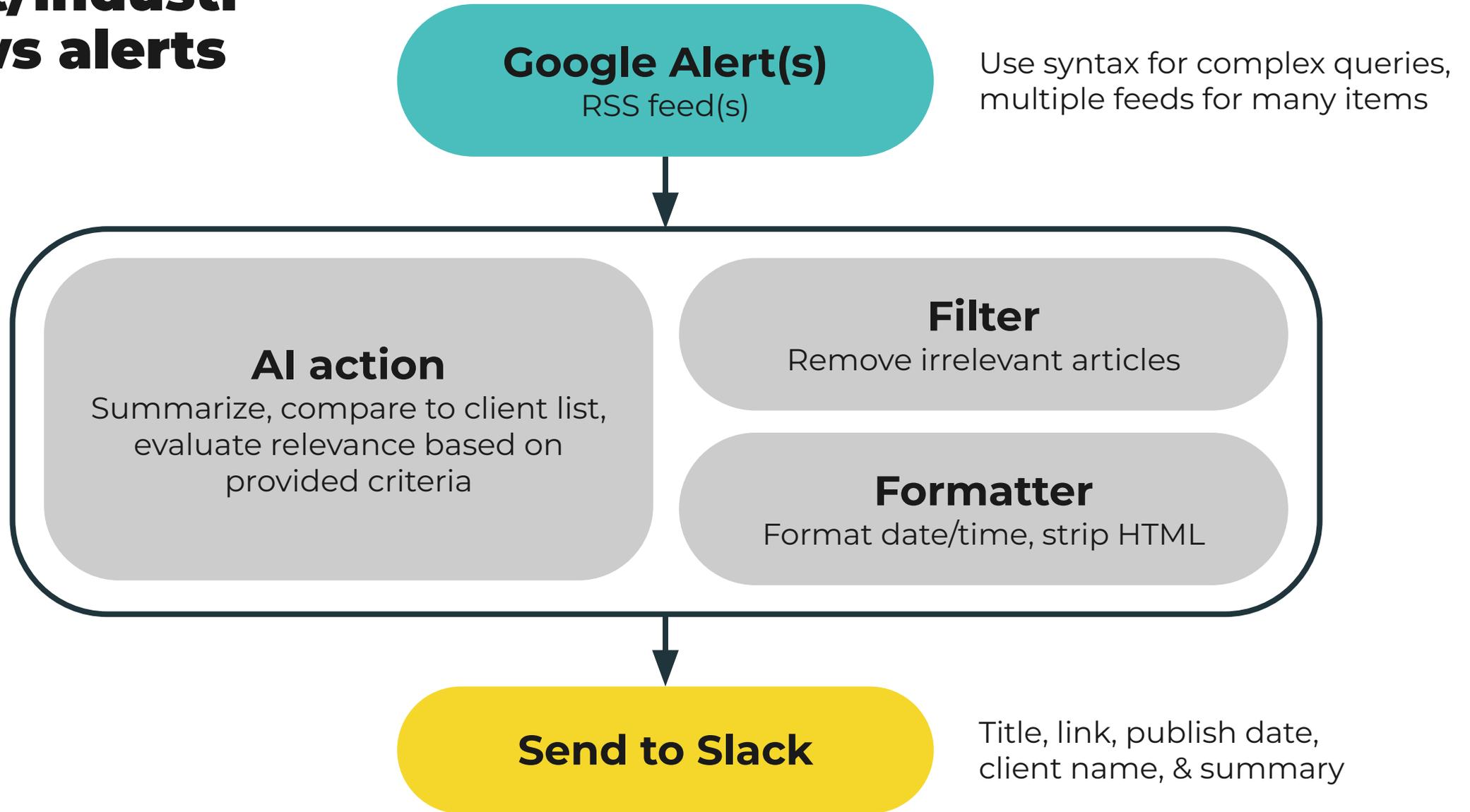
Slack alert example

Client News Alert APP 6:22 PM

Lohr College helping move SDSU towards R1 designation | South Dakota State University

Link
Publication date: 02/03/26

Client: South Dakota State University

Summary: SDSU's Jerome J. Lohr College of Engineering has substantially increased research expenditures and nearly doubled its doctoral output, strengthening the university's research profile. These developments and investments are positioned to help SDSU advance toward Carnegie R1 research classification.

Client News Alert APP 9:43 AM

Sanford Health Makes Transformation a Rural Priority | HealthLeaders Media

Link
Publication date: 02/03/26

Client: Sanford Health

Summary: HealthLeaders Media reports that Sanford Health is prioritizing system transformation with an emphasis on improving rural healthcare; EVP and Chief Transformation Officer Tommy Ibrahim says "We need to change how we think of healthcare." The piece highlights Sanford's strategic focus on rethinking care delivery to better serve rural communities.

Google Alert setup example (RSS feed)

AI action prompt example

Your job is to help my team keep up with news about some of our company's clients. You will analyze online news articles to determine their relevance, then share a summary of the article with my team.

1. Read the linked article.
2. Evaluate the article's relevance based on the criteria listed below and client list provided in the "Client News Alerts - Automation Notes" document, which lists client names, websites, and company type to help you know which specific company is our client. Determine whether the article is relevant or not relevant, output as "Relevant" or "Not relevant".
3. Summarize the article in 1 to 3 sentences, making sure to capture the main idea of the article and any key details my team should know about.
4. List the client name the article is about. This should be the company name that matches the client list provided. If the company is not included in the provided client list, the article is not relevant.

Relevance criteria:
- Make sure is specifically about one of the companies in our client list. Relevant articles should have one of our clients as the main subject of the article. Double-check the client list to make sure, and factor this into your relevance assessment.
- We're generally looking for major corporate news (IMPORTANT: excluding stock market reports, earnings calls, investor news, or similar financial updates), company updates, major announcements, or other business news that would be relevant for us to know about our clients.
- IMPORTANT: The following types of articles are NOT relevant: Trivial news updates, stock market reports, financial or investor reports, earnings calls, sports game recaps, or articles that briefly mention our client but aren't principally about our client.

AI actions vs. agents

AI actions

- Structured actions within workflows

- Run the same prompt repeatedly with new inputs
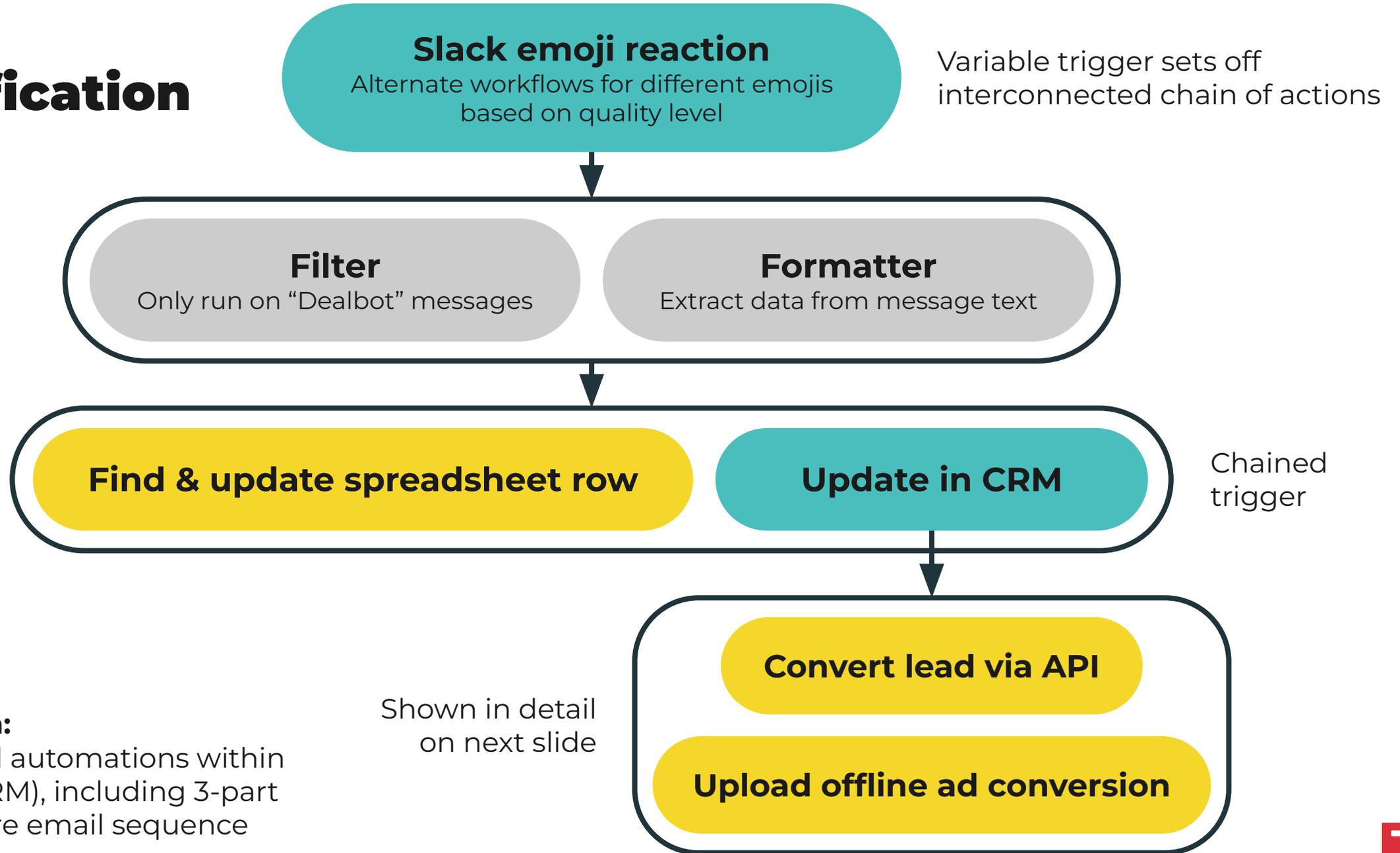
- Recommended in most cases

AI agents

- Decision-making & tool access

- Less control (good or bad)

- Beta/experimental

- Usage limits

Example 3

Lead qualification tree

Lead qualification tree

Slack emoji reaction
Alternate workflows for different emojis based on quality level

Variable trigger sets off interconnected chain of actions

Filter
Only run on "Dealbot" messages

Formatter
Extract data from message text

Find & update spreadsheet row

Update in CRM

Chained trigger

Not shown:
Embedded automations within Copper (CRM), including 3-part lead nurture email sequence

Shown in detail on next slide

Convert lead via API

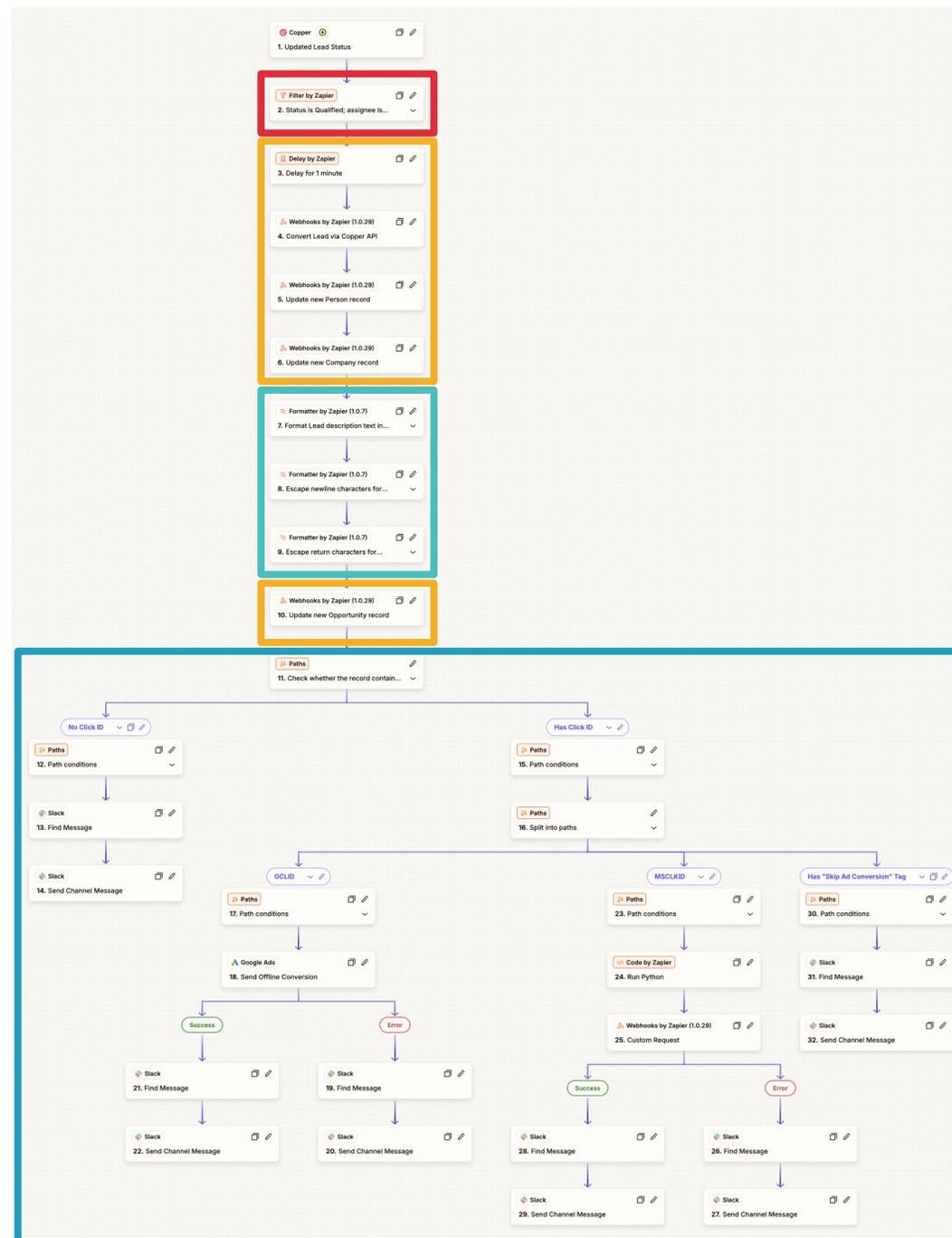**Upload offline ad conversion**

Lead qualification tree

Filter isolates run conditions.

API calls update records in Copper (CRM).

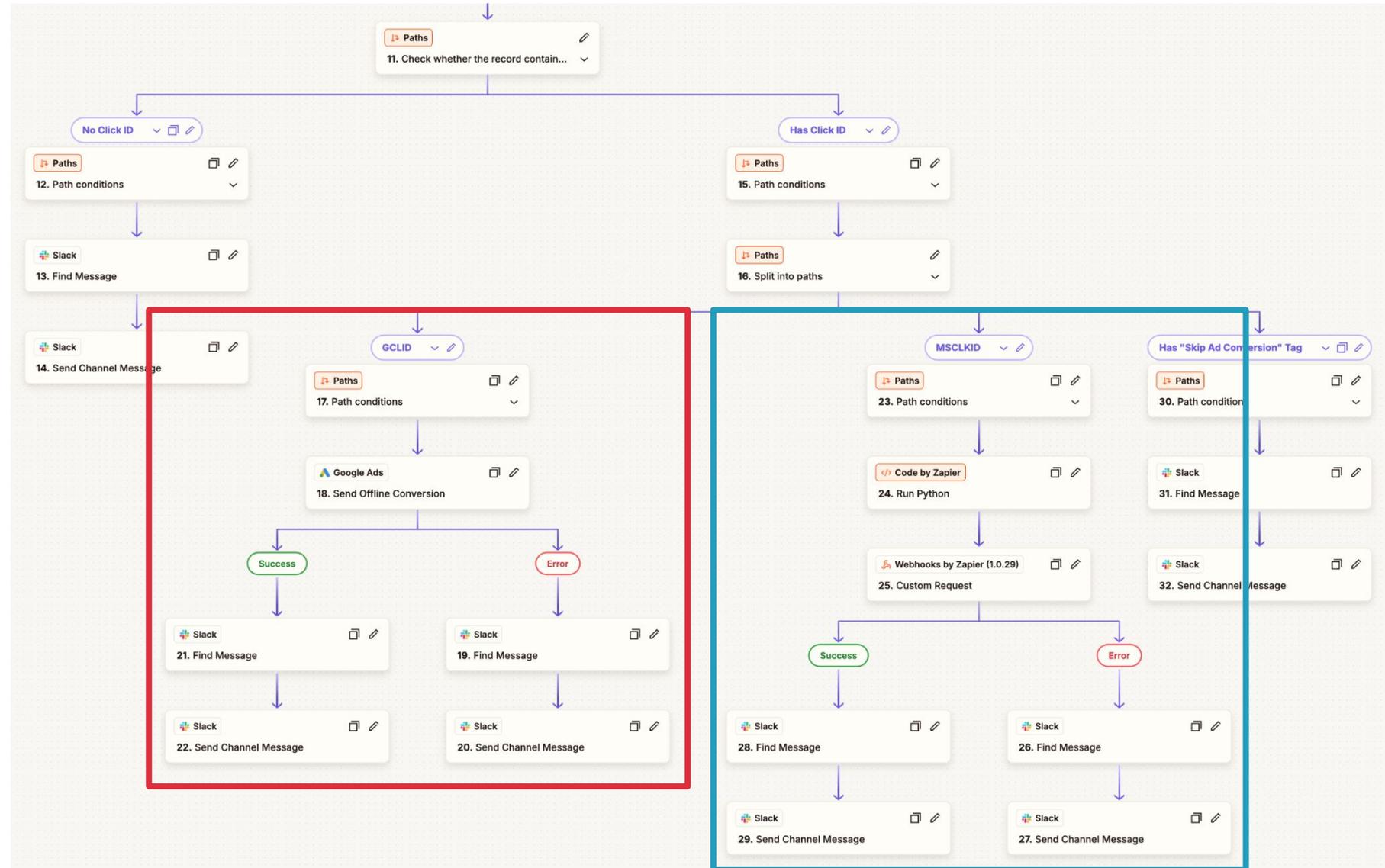**Formatter** processes text and preps JSON.

Branching paths upload offline ad conversions.

Lead qualification tree

Branching paths upload offline conversions for both **Google Ads** and **Microsoft Ads**.

Confirmation or error messages help monitor performance (error handlers).

Let's recap!

1   Automate repeated/recurring, data entry, or error-prone tasks

2   Automation workflows are made up of triggers and actions

3   Build "copy-modify-paste" automations to process data

4   Use AI actions for structured prompts within workflows

5   Add filters and paths to process differently based on conditions

6   Get started, tinker, test, and improve over time

Lemonly automation by the numbers

2025			Jan 2026
79 Workflows run	**30,524** Tasks automated	**$1,644** Total investment	**55** Workflows run **3,191** Tasks automated
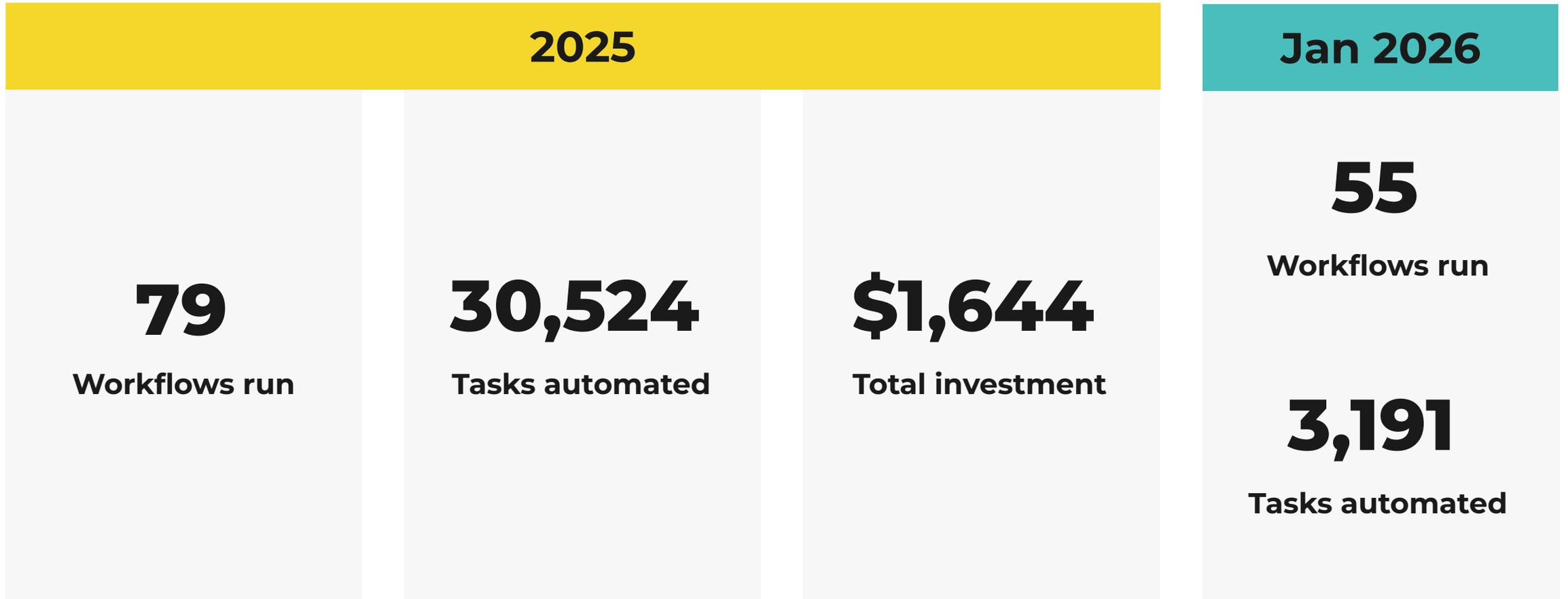
Numbers are from Zapier only. Lemonly also uses multiple embedded automations in Slack and other tools.

Thanks!

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