



Powerful. Affordable.  
Marketing Automation.

# Power Up Your MarTech With Zapier

Zap Your Way to an Integrated Marketing Stack



**Carlin Sack**

Partner Marketing Manager  
Zapier



**Bryan Tobin**

Product Expert  
SharpSpring



**Rod Ferrier**

Business Growth Specialist  
Create More Business Now

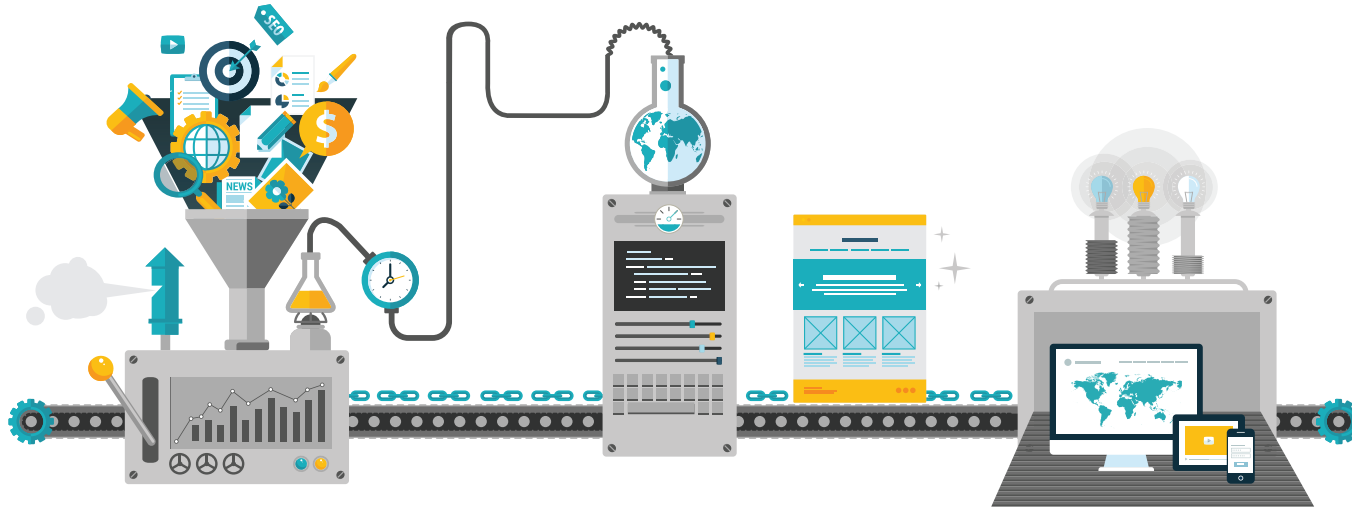
# Greetings

## Who's In The Audience

- SharpSpring Partner Agencies
- Agencies Considering SharpSpring
- In-House Marketing Professionals

## Why Are We Here?

- Learn how to easily integrate marketing automation with third-party apps using Zapier
  - Learn about how integration can drive results
  - Hear real-world stories



#SharpTweet live with us

# Housekeeping

## Questions?

- Phone lines are muted
- Submit via:
  - Chat Box
  - Twitter: #SharpTweet or @SharpSpring

## Webinar Recording & Slides

- Emailed after webinar

## Webinar Survey

- We need your feedback

## Future Presenters:

- Email Koertni Adams
- koertni.adams@sharpspring.com



# Introductions



## Carlin Sack

**Partner Marketing Manager | Zapier**

Carlin Sack is a member of the Zapier marketing team and a Northwestern University journalism alum.



## Bryan Tobin

**Product Expert | SharpSpring**

As Product Expert, Bryan is responsible for creating content to help users get the most out of SharpSpring. This includes maintaining the support forum and creating instructional “how to” videos. Working in collaboration with Marketing, Support, and Development, Bryan helps create an exemplary experience for every user.



## Rod Ferrier

**Business Growth Specialist | Create More Business Now**

Rod Ferrier is a strategic LinkedIn mentor and business growth specialist. He helps business coaches and financial professionals harness the power of LinkedIn to make more profitable connections across multiple business categories and industries.



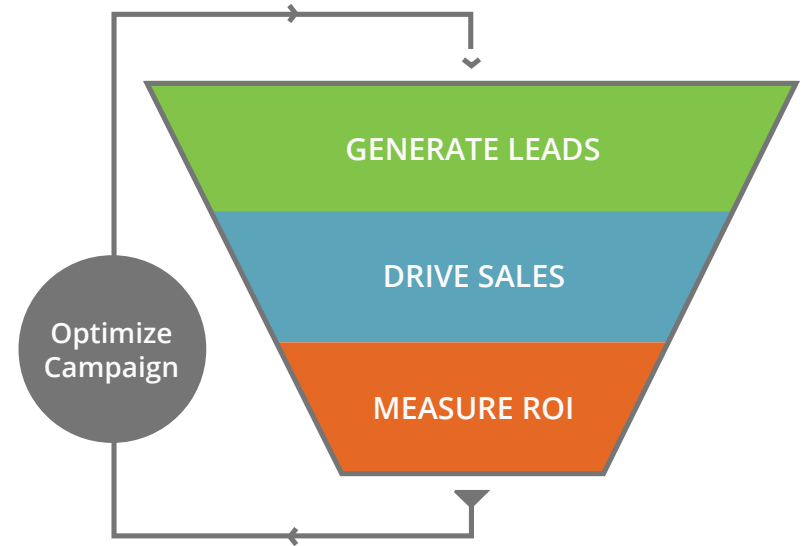
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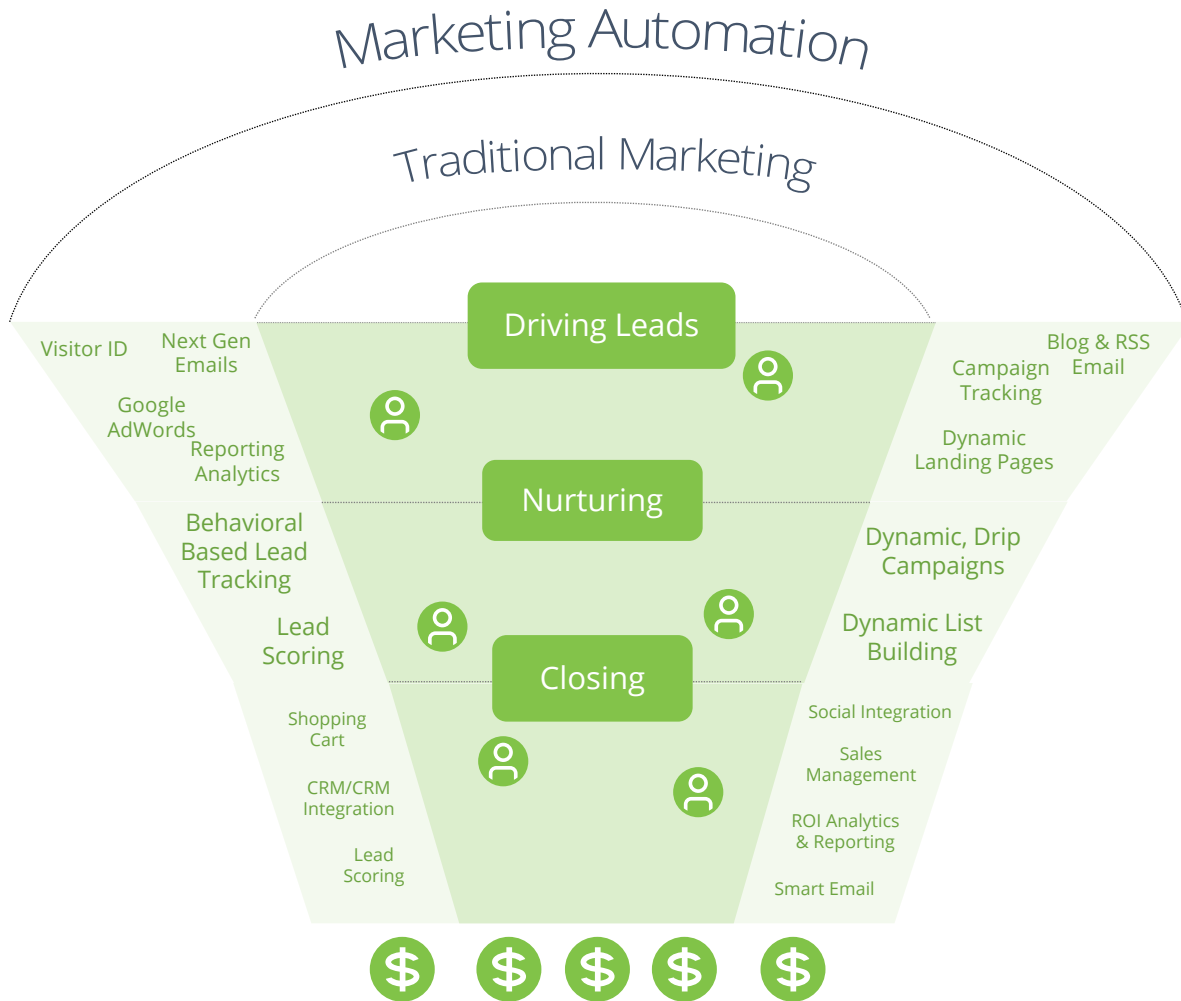


# What is SharpSpring?

Marketing automation and CRM tool

- Generate more leads
- Nurture leads with personalized content
- Drive more sales
- Improve up-selling and cross-selling
- See comprehensive ROI





Marketing Automation

+

Hyper-Personalization

=

Wider Funnel

# What is Zapier?

- Workflow automation tool
- "Zaps" take care of tedious work, so you're more productive
- No coding required
- Connects with 750+ apps, including Slack, Dropbox, Trello, Google Calendar



## Integrate

Link your web apps with a few clicks, so they can share data



## Automate

Pass info between your apps with workflows called Zaps



## Innovate

Build processes faster and get more done—no code required












#SharpTweet live with us

# How do SharpSpring + Zapier work together?

Set up Zaps that are triggered by SharpSpring events or vice versa:

- SharpSpring → another tool
- Or another tool → SharpSpring

 ▶ 	<b>Create or update leads on SharpSpring from new responses to Facebook Lead Ads</b>	<a href="#">Use this Zap</a>
 ▶ 	<b>Add or update leads on SharpSpring from new Gravity Forms submissions</b>	<a href="#">Use this Zap</a>
 ▶ 	<b>Send new contacts to Google Contacts for new SharpSpring leads</b>	<a href="#">Use this Zap</a>
 ▶ 	<b>Add or update leads on SharpSpring for new customers on Shopify</b>	<a href="#">Use this Zap</a>

See more [SharpSpring integrations](#) powered by 



# Case Study: Calendly



I specialize in helping business professionals harness the power of social media to build targeted lists faster. Connections turn into conversations which result in more new opportunities.

## Rod Ferrier

Visit me at [www.RodFerrier.com](http://www.RodFerrier.com)

# Does this sound familiar?

What time works best for you...?

How does 1pm on Tuesday look...?



Eliminate phone tag AND talk to more qualified prospects by combining



SharpSpring

+



calendly



#SharpTweet live with us



# What is Calendly?



Rod Ferrier ▾

Welcome to my scheduling page, looking forward to speaking with you. Please follow the instructions to add an event to my calendar. Talk Soon!



- Social Media Automation Consultation** ▶
- LinkedIn Audit Results Consultation** ▶  
Let's jump on a call to discuss how you can successfully harness the power of Linked.
- LinkedIn Success Consultation** ▶
- 15-Minute Introductory Call** ▶



Rod Ferrier ▾

**Social Media Automation Consultation**

Times are in Eastern Time - US & Canada ▾

⊙ Rod Will Call You

Select a Day



- TODAY -

<	Mon Jun 5	Tue Jun 6	Wed Jun 7	Thu Jun 8	Fri Jun 9	Mon Jun 12	Tue Jun 13	>
---	--------------	--------------	--------------	--------------	--------------	---------------	---------------	---

----- THIS WEEK ----- | ----- NEXT WEEK -----

[After Jun 13 ▶](#)

You control your availability!

How it works:



Set up SharpSpring Lead

Step 1 **Email Address** (required)

Step 1 **Invitee Email**

Step 1 **First Name** (optional)

Step 1 **Invitee First Name**

Step 1 **Last Name** (optional)

Step 1 **Invitee Last Name**

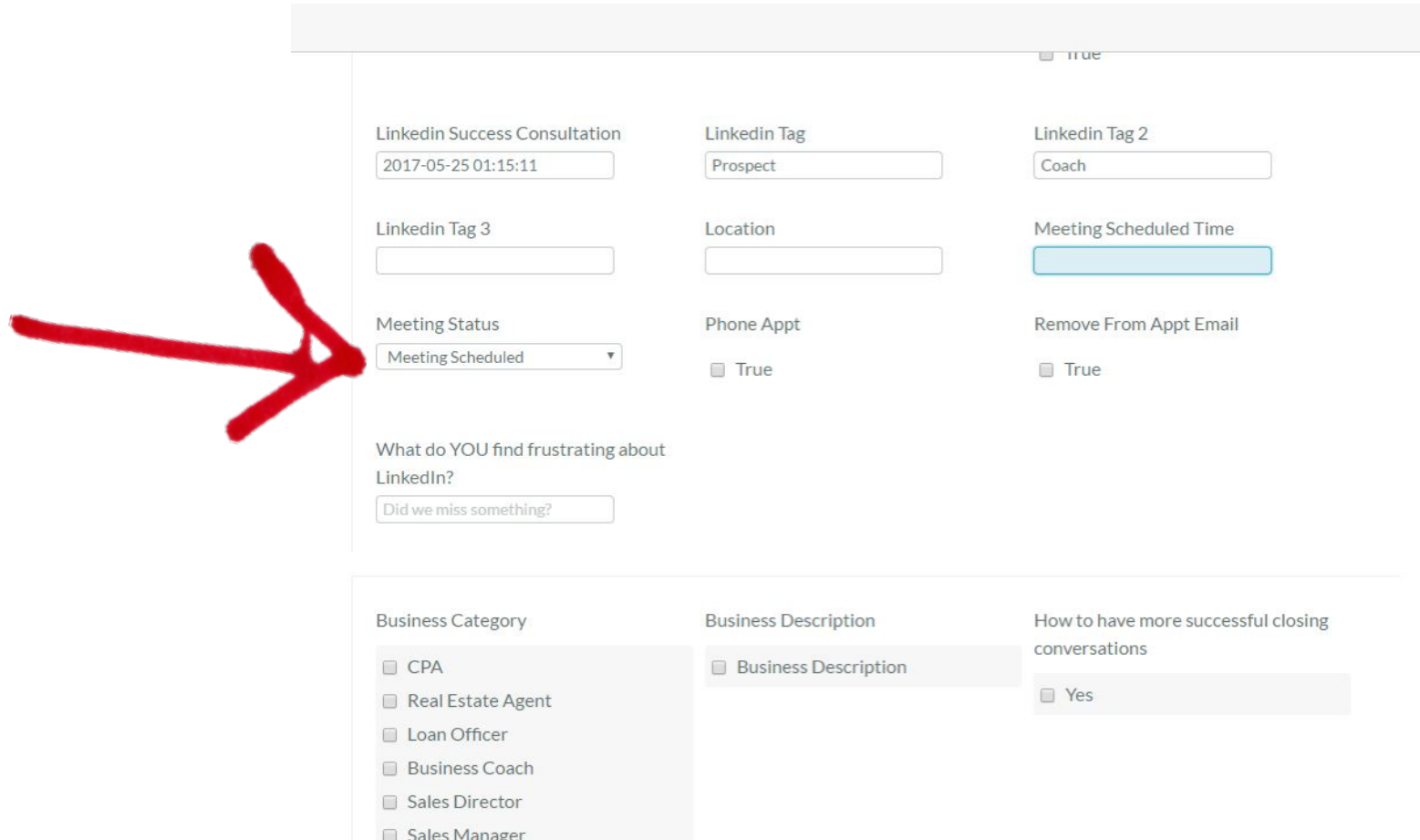
Step 1 **Company Name** (optional)

Step 1 **Lead Status** (optional)

Qualified

Step 1 **Lead Owner** (optional) 1 2 3

# What you can expect:



A screenshot of a SharpSpring form interface. A large red arrow points to the 'Meeting Status' dropdown menu, which is currently set to 'Meeting Scheduled'. The form contains several other fields and sections:

- Linkedin Success Consultation:** 2017-05-25 01:15:11
- Linkedin Tag:** Prospect
- Linkedin Tag 2:** Coach
- Linkedin Tag 3:** (empty)
- Location:** (empty)
- Meeting Scheduled Time:** (empty)
- Meeting Status:** Meeting Scheduled (dropdown)
- Phone Appt:**  True
- Remove From Appt Email:**  True
- What do YOU find frustrating about LinkedIn?:** Did we miss something?
- Business Category:**  CPA,  Real Estate Agent,  Loan Officer,  Business Coach,  Sales Director,  Sales Manager
- Business Description:**  Business Description
- How to have more successful closing conversations:**  Yes

# Fast Results

**Google** Search Calendar

Calendar Today < > Sep 11 - 17, 2016 Day Week Month 4 Days Agenda More

CREATE

Sun 9/11 Mon 9/12 Tue 9/13 Wed 9/14 Thu 9/15 Fri 9/16 Sat 9/17

GMT-04 Boys Visitation

September 2016 < >

S M T W T F S

28 29 30 31 1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 1

2 3 4 5 6 7 8

My calendars

- Rod Ferrier
- Birthdays
- Jack's Calendar
- Reminders

Other calendars

Time	Sun 9/11	Mon 9/12	Tue 9/13	Wed 9/14	Thu 9/15	Fri 9/16	Sat 9/17
6am							
7am							
8am						8 - Rilyn bday	
9am	9 - Sonja Stetler-Follow up	9 - booked: Charles Charles.H.	9 - booked: Akili akili.king47@g	9 - booked: Joshua josh.d.cropl		8:30 - 10 Block	
10am	9:30 - booked: Jean Chandler j	9:30 - booked: Paul paulnewma	9:30 - booked: Larry lwilliamsor				10 - Kelly Marianno: 15-Minute
11am	10:30 - booked: Duane didonal	10:30 - booked: Kelly kelly@make	10 - 11 Michael Fitzgerald - LinkedIn		10:30 - booked: Cynthia Cynssp		10:30 - 6p Block
12pm	11 - 12p Block	11 - Erin Maher - Rod Ferrier - [	11 - booked: Denise mentoring	11 - booked: kathy kkables@gm	11:30 - 1p CMBN Live		12p - booked: F
12:30p	12p - booked: Paul pauldsouza	11:30 - 1p CMBN Live	11:30 - 12:30p booked: Steve smartin@valle	11:30 - booked: ron rwarner@rd	11:30 - 6p Block		
1pm	12:30p - booked: Haim haimc@	12p - Block	12p - Block	12:30p - Janice Berthold - Linke	1p - Rod Ferrie		1p - 2p SharpSpring https://www.goto
2pm	1p - 2p booked: Doc Doc@docbrady.com	1p - booked: Kelly kelly.leonard	1p - Doc Drady - Follow -Up	1:30p - Canceled-Introductory-C			
3pm	2p - 3p Sean Dalcerro - Monthly Coaching	1:30p - BLOCK	2p - booked: Edward edthetaxr	2p - booked: Edward edthetaxr	2p - booked: Tc		
4pm	3p - Jessica Huttig - LinkedIn	2p - booked: Michelle michelle@	2:30p - booked: Sharon Sharon	2:30p - 3:30p booked: Matt mattp@advisorrecruiting.com	2:30p - 3:30p booked: Paul pauldsouza.sa		
5pm	3:30p - Denise Hedges - Rod F	3p - booked: DJ Debbi-Jo@DJF	3:30p - booked: Nancy nacottien	3:30p - booked: Nancy nacottien			
6pm	4p - 5p Gregg - SS	4p - booked: Dave dave@ipwm	4p - booked: Mark mwillareal@	4p - booked: Mark mwillareal@	4p - 5p booked: Duane		4p - Ron Suker
7pm	4p - 5p SharpSpring https://www.goto	4:30p - booked: Justin jpence@	4:30p - Marie Gilman - Discuss I	4:30p - Marie Gilman - Discuss I	5p - booked: W		
	5:30p - booked: Thomasine clas	5p - booked: mike booksonbool	5p - booked: Johnnie Johnnie@	5p - booked: Johnnie Johnnie@			
		5:30p - booked: Robert Robshe	5:30p - booked: Robert Robshe	5:30p - 6:30p Block			



# Three important items to consider:

- Use Calendly to automate the appointment reminder notifications
- Utilize Zapier to connect multiple event types
- Ask additional questions and send the answers directly to your SharpSpring account

# More Zaps to make your world go 'round



SurveyMonkey®

mailparser 



Lead Ads



Office 365

Google  
G Suite



HELLOSIGN



slack



shopify



#SharpTweet live with us

 SharpSpring

# Poll

# Questions?

# Continue The Conversation



**Carlin Sack**  
Partner Marketing Manager  
Zapier

Email: [carlin.sack@zapier.com](mailto:carlin.sack@zapier.com)



**Bryan Tobin**  
Product Expert  
SharpSpring

Email: [bryan@sharpspring.com](mailto:bryan@sharpspring.com)



**Rod Ferrier**  
Business Growth Specialist  
Create More Business Now

Email: [rod@createmorebusinessnow.com](mailto:rod@createmorebusinessnow.com)

LinkedIn: [www.linkedin.com/in/rodferrier](http://www.linkedin.com/in/rodferrier)

