let's get STRATEGIC

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How Content Marketers Are Using Zapier and Other Automation Tools

This issue, I'm looking at input from content marketers, analysts, and experts on the role that automation can play to streamline processes for content marketers. What types of automation are being used? What best practices have content marketers discovered? What tools do they prefer? What are the pros and cons of these various options?

Zapier's "The 2021 State of Business Automation" report studied how small and medium businesses (SMBs) were using automation. The most commonly automated tasks should be quite familiar to content marketers: data entry (38%) and document creation and organization (32%). Zapier offers business automation solutions for subscribers, albeit arguably at the lower end of the sophistication spectrum when it comes to these rapidly emerging and rapidly developing tools. According to 34% of respondents, automation not only reduces the time spent on administrative work, but also, according to 88%, lets their SMBs compete with larger companies. That's certainly enough of a prompt to get content marketers to perk up their ears. And, in fact, content marketers are already dipping their toes into robotic process automation (RPA). Some are diving right in!

SIMPLE RPA TO STREAMLINE PROCESSES

Salinder Kohli (lead developer at Coffeeble, which is a site dedicated to coffee enthusiasts) says, "Zapier is a very useful and easy tool to use, which helps to connect all your favorite business apps together, such as Gmail, Slack, Mailchimp, and many, many more. Two or more apps can be automated to do repetitive tasks without any coding or relying on developers to build this integration. That's perfect for content marketers with little or no coding experience or tech support." It is, Kohli states, "an easy way to get what you want from your apps, without having to have any technical skill. It saves you time and effort, with just a few clicks of the mouse."

He's not alone in his views. Charles McMillan (founder of Stand with Main Street, which is a site that helps business owners find services to assist in creating LLCs) says, "Zapier is one of the best tools out there; its system connects with a number of our preferred networks, allowing them to communicate with one another." Zapier, he says, allows his company to "quickly simplify basic things on our to-do sheets that don't need a lot of thought, so we can concentrate on bigger-picture goals that need more time and resources."

ZAPIER IN PRACTICE

Michael Alexis (CEO of TeamBuilding, which is a company that runs team-building events) shares an example of how his firm uses Zapier in a practical way to create user-generated content for its blog. "We have one Zap that connects a Google Form to WordPress," he says. "A member of our community can answer questions about themselves, and then the Zap pushes the answers to WordPress, formats the HTML, and adds elements like a title and image." One obvious benefit of a process like this, Alexis notes, is efficiency. "Our content team can go into WordPress, quickly review the content, and then hit publish. A Zap then automatically pushes the new post out to our social media channels."

Tom Carr is part of the marketing department for the U.K.-based automation consultancy startup DigiBlu. The department has integrated a variety of workflows, he says, often using Zapier. "Specifically, we have used its services for linking up multiple applications, websites, and software to make them work simultaneously so that any information updated in one application is automatically updated in another," he says. "This has freed us from copious menial tasks."

Carr points to email campaigns as a good example: "We are in the process of releasing a new product, ARA, the Automated Recruitment Advisor; and in order to raise awareness, inform the public of our product, and gain interested parties, we have

to provide engaging content and a call to action in an appealing, non-bulky way. Without Zapier and other workflows, this would not be possible." To accomplish this, he says, the department has embedded a video from Vimeo (using Zapier) and placed a call to action (through HubSpot) that automatically brings up a consent form, which, when submitted, creates a marketing contact in HubSpot and automatically pulls information into a list indicating whether respondents have or haven't subscribed to the mailing list. "Being able to utilize Zapier's integration capabilities, and taking advantage of automation through workflows, has not only freed us up to focus on more useful, value-add tasks, but it has also created a way for us to seamlessly integrate our back-end operations with our front-end content without losing any design value," Carr says.

OTHER TOOLS

IFTTT is a tool similar to Zapier that integrates with more than 600 services to offer automations that marketers and business owners can quickly put into play. And, of course, these tools can get even more sophisticated. Stephanie Irvin is web content manager for Odyssey Advisors, which is a boutique actuarial firm that uses Salesforce as its CRM platform and Pardot as its marketing automation tool. Without these tools, she says, "some of the tasks we do would be awfully time-consuming." For instance, with Pardot, "we can create an entire email campaign that runs itself, collects data, and generates a report." The system, Irvin says, "can even generate the path a lead follows based on how they interact with our email." In other words, if someone doesn't open the email, another email will be automatically sent within 2 weeks. If a person opens the email and clicks on the call to action, he or she will be automatically added to another campaign to nurture the interest and hopefully lead him or her further into the firm's sales and marketing funnel.

"This behavior-triggered tool alone saves us hours and hours of time," says Irvin. "Aside from email automation, our tools allow us to get to know who our customer is, what they're searching for, how they're finding us. We can see each touch-point they come across, and this allows us to provide content that helps them." The biggest advantage of marketing automation, she states, is improving the customer experience: "Each step allows us to create a personalized experience." Doing this manually "would most likely be a monotonous experience, or we would have to hire a lot more people."

BUT DON'T GET TOO CARRIED AWAY

Despite the many benefits that automation can hold for busy content marketers, practitioners advise caution in using these tools. "While you can find ways to automate almost anything, my advice is to not over-automate the things you don't have to," cautions Alicia Blessing (internal marketing manager for the digital marketing agency OuterBox). "Automation is great for creating greater efficiencies and staying organized, but it can also become a distraction if taken too far." When it comes to automation, Blessing advises thinking about your most time-consuming tasks and considering whether there's a way to automate those activities. "If your automation isn't solving a problem or making a process run smoother, you probably don't need it," she says.

The bottom line is that there are many—and many newly emerging—automation options for content marketers to consider. But maintain a practical perspective to avoid becoming overly enamored by a solution that may prove to be more trouble than it's worth—or be overly annoying to members of your target audience. Customer experience should always be number one.

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