Our Favourite Free Marketing Automations for Real Estate Firms

Using **zapier**

Intro

Zapier is an amazing platform that allows different online tools and services to connect and communicate with one another.

For example, if you have a new contact that has completed a form on your website, you can set up a "zap" to then transfer their information to your email marketing platform (eg. Mailchimp) and also to your sales CRM tool (eg. Pipedrive).

But the opportunities to automate are endless and only depend on your ambition and imagination.

Here we've outlined our favourite **free** quick-win workflows that allow you to open up your time to do more important strategic thinking.

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Tools Needed

The following automations can be setup using the **free** tier of Zapier, which allows you to setup five 2-step workflows. This is a great way to start and see the power of automation without spending any money.

You can setup the zaps using the platforms that you're already using for marketing, sales and running your business, including:
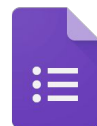
Zapier	Gmail	Twitter
RSS by Zapier	Google Drive	LinkedIn
Email Parser by Zapier	Google Forms	Facebook
Your Website	Mailchimp	ClickSend

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1️⃣ How to Make Your First Ever Zap!

This zap will allow you to capture details from your customers when they fill in a form, and then send a notification email with the data to you and your team.

1. Create a new Zapier account at zapier.com ([help video](#))
2. Create a Google Form in Google Drive and use it once
3. In Zapier, select Googles Form to connect with Gmail
4. In Zapier editor, connect Google Forms account
5. Select the appropriate Google Form as **trigger**
6. Run test of trigger to get example data
7. Connect Gmail account for step 2, the **action**
8. Add details for the Gmail email as you require
9. Run test of action and get email
10. Turn on zap, Name zap to remember, and enjoy!

Watch the step-by-step tutorial on YouTube for more information

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Find out more
www.terrific.digital

Automatically

2️⃣ Promote Blog Posts on Social Media

Using three 2-step zaps and your website's RSS feed you can set-up automatic posting to Twitter, Linkedin and Facebook to promote your content and save you time.

1. Create a new Zap and select 'RSS by Zapier' as the **trigger**
2. Find your website's RSS feed and add as Feed URL
3. Run test of trigger to get example data
4. Connect Twitter account for step 2, the **action**
5. Customise tweet using 'Insert a field' button (on right) and selecting the dynamic fields from RSS trigger step
6. Run test of action and view tweet in Twitter account
7. Create Zap for Linkedin & Facebook Page and repeat all steps
8. Remember to run tests for each trigger and action
9. Turn on each zap, rename to remember, and enjoy!

Watch the step-by-step tutorial on YouTube for more information

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2-Step Zap

Promote your articles on **Social Media** [Beginner's Guide]

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3️⃣ Promote Articles in Email Newsletter

Don't just promote your articles and blog posts to social media, but also send to your Email Newsletter subscribers so they know when there's new content. Use these two zaps to set-up for free.

1. Create a new Zap and select 'RSS by Zapier' as the **trigger**
2. Same as before, find website's <u>RSS feed</u>, add as Feed URL
3. Run test of trigger to get example data
4. Connect Mailchimp account for step 2, the **action**
5. Select 'Create Campaign' as the **action event**
6. Customise details of campaign using 'Insert a field' button (on right) and selecting the dynamic fields from RSS step
7. Run test of action and view Campaign in Mailchimp account
8. Create a second Zap with Mailchimp **trigger** of 'New Campaign'
9. Choose Mailchimp Send Campaign for step 2, the **action**
10. Select custom value for 'Campaign ID' and using 'Insert a field' button (on right) choose 'Campaign ID' from trigger step
11. Turn on both zaps, rename to remember, and enjoy!

Watch the step-by-step tutorial on YouTube for more information

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2-Step Zap

Promote your articles in **Email Newsletter** [Beginner's Guide]

zapier   mailchimp

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4️⃣ Respond Immediately to Enquiries

Don't jeopardise your relationships by leaving clients wondering after they submit an enquiry. This zap allows you to automatically send an email to follow-up their contact form submission.

1. Submit a new enquiry on your contact form used for setup
2. Create a new Zap with **trigger** 'Email Parser by Zapier'
3. Log-in to [Email Parser](#) and create a new Mailbox
4. Forward contact form submission email to new Mailbox
5. In Email Parser, highlight data that you wish to extract
6. In your email client (eg. Gmail) setup an autoforward of contact form submission email to the new Email Parser Mailbox address
7. Back in Zapier, setup the **trigger** Email Parser and test
8. Connect Gmail account for step 2, the **action**
9. Customise email using 'Insert a field' button (on right) and selecting the dynamic fields from Email Parser trigger step
10. Run test of action and get email
11. Turn on zap, Name zap to remember, and enjoy!

Watch the step-by-step tutorial on YouTube for more information

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2-Step Zap
Reply immediately to your website enquiries
Zapier Mail Parser

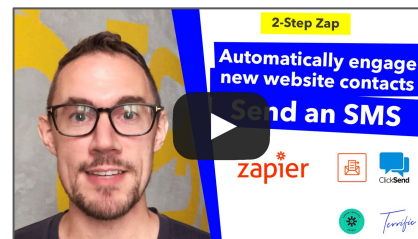Terrific

5️⃣ Send an SMS to Prospects

When a customer completes your website's Contact form and you collect their mobile number, why not send them an SMS and show you really care.

1. Submit a new enquiry on your contact form including mobile number
2. Create a new Zap with **trigger** 'Email Parser by Zapier'
3. Log-in to Email Parser and create a new Mailbox
4. Forward contact form submission email to new Mailbox
5. In Email Parser, highlight data that you wish to extract (eg. number)
6. In your email client (eg. Gmail) setup an autoforward of contact form submission email to the new Email Parser Mailbox address
7. Back in Zapier, setup the **trigger** Email Parser and test
8. Connect ClickSend account for step 2, the **action**
9. Customise SMS using 'Insert a field' button (on right) and selecting the dynamic fields from Email Parser trigger step
10. Run test of action (make sure you use your number) and get SMS
11. Turn on zap, Name zap to remember, and enjoy!

Watch the step-by-step tutorial on YouTube for more information

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2-Step Zap
Automatically engage new website contacts
Send an SMS

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Find out more
www.terrific.digital

🎉 BONUS: Email to Calendar Reminder

As a special treat here's a zap designed to help you stay on track and never forget to follow-up a monthly invoice or any other important email again with this calendar reminder zap.

1. Create a new Zap and select Gmail as the **trigger**
2. Select 'New Email Matching Search as the trigger event
3. In Gmail, create a search string as specific as possible to find the email you wish to be reminded of, but only those emails
4. Back in Zapier, add the search string from Gmail
5. Run test of trigger to get example data
6. Connect Google Calendar account for step 2, the **action**
7. Select 'Detailed Event' and customise using 'Insert a field' button (on right) and the dynamic fields from Gmail step
8. Run test of action and view tweet in GCal account
9. Turn on the zap, rename to remember, and enjoy!

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Thank you

We hope these guides and videos are useful

We'd love to hear your feedback and questions

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