

CONNECT. AUTOMATE. SCALE.

Five copy-and-paste workflows. Make or Zapier.
Twenty minutes each.

Automating is not delegating to a machine. **It is buying time to think.**

FIVE WORKFLOWS

READY TO COPY

Make or Zapier. Not both.

Automating means connecting tools so that an action in one triggers actions in others, without you stepping in. A form gets filled, the contact appears in your spreadsheet, receives a welcome email, and you get a Slack notification. All without touching anything.

Two tools dominate the space. The choice is not ideological: it depends on how complex your automation is and how much you enjoy visual interfaces.

SIMPLE RULE

If your workflow has more than three steps or needs conditions (if/else), use Make. If it is a direct connection between two or three apps, Zapier works fine.

Make vs Zapier in one table.

CRITERION**WHEN EACH ONE WINS**

Workflow complexity

Make: branches, loops, filters. **Zapier:** linear, simple.

Price per operation

Make: generous free plan. **Zapier:** expensive, fast setup.

Learning curve

Make: medium, powerful interface. **Zapier:** low, mostly dropdowns.

Available integrations

Make: 1500+. **Zapier:** 6000+.

Quick rule

More than three steps or conditions: **Make.** **Direct 2–3 app connection:** **Zapier.**

Five copy-and-paste automations.

Each with trigger, steps, tools, and setup time. Start with one, not five.

01

Lead capture · 20–30 min

Trigger: new form submission. Steps: create row in Sheets, confirmation email to lead, Slack notification to team. Tools: form + Sheets + email + Slack.

02

Automatic welcome · 15–20 min

Trigger: new subscriber to list. Steps: check duplicate, assign tag, fire welcome sequence, log date and source in Sheets. Tools: ConvertKit/Mailchimp + Sheets.

03

Payment notification · 25–35 min

Trigger: successful Stripe payment. Steps: extract data, send receipt to customer, notify Slack, log sale in Sheets. Tools: Stripe + email + Slack + Sheets.

04

Weekly backup · 20–25 min

Trigger: Sunday 02:00. Steps: export Sheets to CSV, upload to Drive in YYYY-MM folder, confirmation email with link. Tools: scheduler + Sheets + Drive + email.

05

Weekly report · 30–45 min

Trigger: Monday 08:00. Steps: read Sheets metrics, format HTML with summary table, send to team. Tools: scheduler + Sheets + email.

Five rules before touching anything.

Do not build five workflows on day one. Implement one, verify it for a week, then add the next.

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- 01 **Start simple.** One workflow this week, two next week if the first one works. No shortcuts.

 - 02 **Name everything with a convention.** Prefixes like "LEAD-capture", "PAY-notification", "BACKUP-weekly". When you have twenty workflows, you will be glad about the order.

 - 03 **Turn on error notifications.** Both Make and Zapier can email you when a workflow fails. Not optional: always on.

 - 04 **Document the workflows.** A simple Google Doc with name, what it does, what apps it uses, and who owns it. Five lines per workflow.

 - 05 **Review monthly.** APIs change, apps update. Block thirty minutes a month to verify everything still runs.
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Three concrete moves.

01 **Pick one of the five.** The most obvious for your situation. Lead capture if you have an active form. Payment notification if you sell. Backup if losing data scares you.

02 **Implement the workflow this week.** Block thirty minutes. Follow the guide steps. If you get stuck, look up the Make or Zapier video for that specific integration.

03 **Let it run a week before adding the next.** Verify it triggers, does not create duplicates, does not fail. Only then build the next.
