

Automate Your First Workflow

Turn form submissions into follow-ups with zero effort

If you've ever thought, "I wish I didn't have to manually follow up with every form submission..." — this one's for you. Automation can save you time, reduce errors, and make sure no potential client slips through the cracks. In this handout, you'll learn how to set up a simple workflow using Zapier (free version) that connects Google Forms to your email and contact list. No tech wizardry required.

PROBLEM:

You create a Google Form to collect sign-ups or inquiries — but then what? You're left copying and pasting emails, digging through responses, and manually replying to every person. It's inconsistent, time-consuming, and easy to forget.

SOLUTION:

With a free Zapier account, you can set up an automation (called a "Zap") that does this for you:

1. When someone fills out your Google Form →
2. Their info is added to a Google Sheet (or CRM) →
3. They receive a personalized thank-you email automatically.

This saves you time, ensures immediate follow-up, and creates a system you can build on later.

STEP-BY-STEP: SETTING UP THE WORKFLOW

(You'll need a free Zapier account and a Gmail address connected to your Google Forms.)

Step 1: Create Your Google Form

- Add fields like: Name, Email, Message (or other relevant info)
- Responses should be saved to a linked Google Sheet (click "Responses" → green Sheets icon)

Step 3: Set Up Your Zapier Automation

Zapier Trigger: Google Forms (via Google Sheets)

1. Log in to zapier.com and click "+ Create Zap"
2. Trigger App: Google Sheets
 - Trigger Event: New Spreadsheet Row
 - Connect your Google account and select the sheet linked to your form

Test trigger to make sure Zapier sees your data

Zapier Action #1: Add to Master Contact List (optional)

App: Google Sheets
Action Event: Create Spreadsheet Row
Choose your CRM sheet or contact log
Map fields: Name → Name, Email → Email, etc.
(Skip this if you're already collecting submissions in your primary list.)

Zapier Action #2: Send a Thank-You Email

App: Gmail
Action Event: Send Email
Choose your connected Gmail account
Compose your email using dynamic fields from the form

Here's a Prompt You Can Use in the Email Body

plaintext

CopyEdit

Hi {{Name}},

Thanks so much for reaching out! I received your message and I'll be in touch shortly. In the meantime, feel free to explore our resources at [\[yourwebsite.com\]](#).

Looking forward to connecting!

— [Your Name]

- Subject line: "Thanks for getting in touch!"
- Be sure to insert the Email field from the form into the "To" section

Final Step: Test & Turn It On

Use Zapier's built-in test for each step

If all looks good, name your Zap something like: Google Form → Email Follow-Up

Turn your Zap ON

You're done! Give yourself a high five - it will feel great!

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in our Business Toolkit here!

