



tmm

JANUARY 2023 | GETTING STARTED WITH AUTOMATION

Free up time, stop dropping the ball and level up your client care with automation.

OUR TEAM

Sandra & Anthony McLemore + the Travel Marketing & Media ® have enjoyed putting this issue of TMM Magazine together for you.

We'd stay and watch you enjoy it but we're already busy working on the upcoming magazines.



UPCOMING ISSUES INCLUDE:

- Pinterest - how to use it for your travel business
- Instagram Reels
- Email marketing platforms - a how-to guide for the best three platforms
- 10 ways to automate your task list and free up time



hello from the EDITOR

the day I learned about automations...

I remember the day that I first learned about Zapier.

I felt robbed of my time and like the whole world had known about this "automation business" while I was manually chugging along missing things, forgetting things and making errors.

I thought back to all the times I have typed data up from a printout and rolled my eyes. And then I remembered how I'd print out spreadsheets to use a ruler and highlighter as I did mind-numbing data entry - literally from one of my files into another.

I thought of the 723 videos I had in zoom and how I had to spend 3 days downloading them on slow WiFi in Mexico because my Zoom storage had maxed out - if only I had known that a Zap could download the video AND transcribe it after every call.

I dried my tears and got excited. I attended two Zapier conferences and started an on-going list of all the things I could automate.

Setting up the automations ranged from ridiculously simple, like "is that all?" through to... "uh oh - I must have missed something".

I have 14 Zaps ready to setup for 2023 and can't wait to SAVE time.

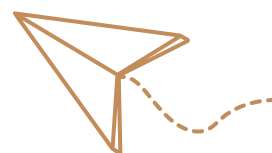
Saving time using automations gives you the same feeling as a 50% off coupon code.

If you are tech shy, trust me on this. Just pick ONE thing from this magazine you can automate. Just one. Create a Zapier account and then copy + install.

Just be careful.... automation is addictive!



Sandra M
Editor in Chief



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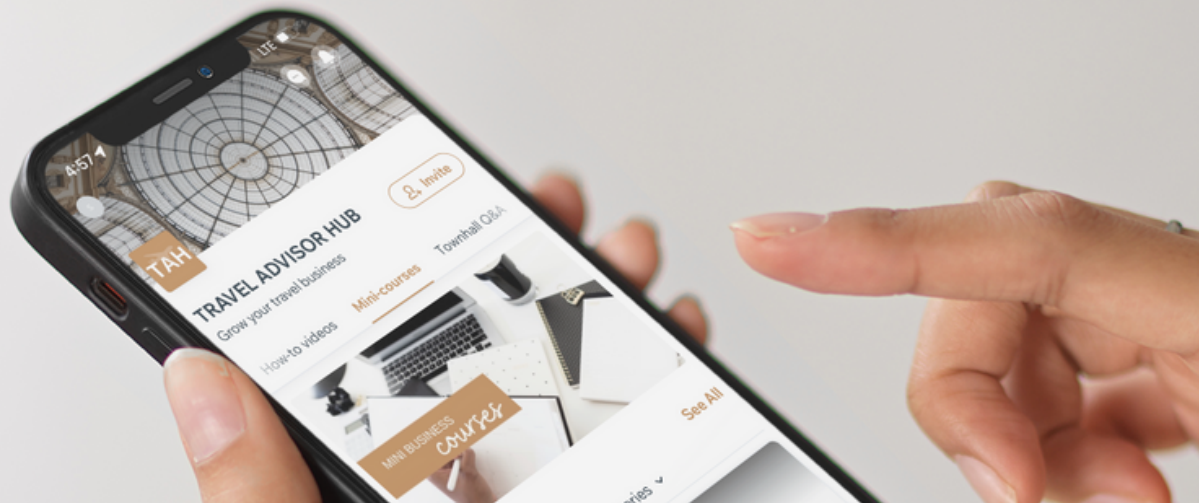
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**STARTING FROM
SCRATCH**



What is automation? Make it make sense please!

- Automation is simply setting something up to run automatically. Automation is all around you, even if you don't realize it.
- Take your smartphone, for example. You receive alerts whenever you receive a text message, a voicemail, or an email.
- The heart of any automation boils down to a simple command: WHEN and DO. "When this happens, do that." Even the most complex automation can be broken down into this simple command.

The power of automation for travel advisors

- With the growing number of clients that travel advisors manage, it can be easy to get overwhelmed and find yourself drowning in tedious tasks.
- With all the scattered information about bookings, client needs, and preferences, how do you maximize your time without compromising on quality service?
- Automation could be a powerful resource for streamlining your processes so that you are able to keep up with client demands while providing top-notch care.
- In this issue, we will explore how automation can empower travel advisor efficiency and productivity.
- Whether you're an agency owner, work for an agency, or are just starting out, taking the steps to automate just one process in your business will feel life-changing.

WHAT CAN BE AUTOMATED IN YOUR TRAVEL BUSINESS?

There are many different ways that automation can be used to streamline processes and improve efficiency... basically to save you time and avoid (or at least reduce) errors.

Perhaps the most obvious way that automation can help to streamline a process is by automating tasks that are repetitive and monotonous.

Start a list called ***“things I do and say repetitively”***

Here are some ideas to get you started:

- Typing up the same emails over and over
- Copying and pasting the same emails over and over
- Sending links to websites
- Sending follow-up emails
- Requesting specific information from clients
- Sending reminders to clients
- Scheduling social media posts
- Downloading Zoom recordings of consultations
- Asking for testimonials and referrals
- Sending birthday and anniversary wishes
- Reading emails and then making a to-do list about those exact same emails
- Adding email subscribers to your CRM
- Collecting email addresses of people in your Facebook group to add to your CRM
- Sending text messages
- Scheduling reminders for yourself, your team, or your client

The more specific you can be the better for example....

- Sending text messages
 - Bon voyage text the day before departure
 - Welcome home text the day after they land
 - Upload and schedule social media posts on the 23rd of each month for the next month



THE TECH

WHEN YOUR LIST IS READY, CHOOSE A TOOL

When you have a clear list of tasks, the process to automate each of them becomes very simple.

Your next step will be to choose a tool - we use Zapier and highly recommend it to busy people and business owners. At the time of writing this magazine, we have been using Zapier for two years. We don't receive any commission or benefits for recommending Zapier - it's just what has worked well for us and we know it can for you too.



WHAT IS ZAPIER?

Zapier is a tool that helps you automate repetitive tasks between two or more apps—no code necessary.

When an event happens in one app, Zapier can tell another app to perform (or do) a particular action.

WHAT SHOULD/CAN I AUTOMATE WITH ZAPIER?

- Tasks you have to do frequently.
- Example: Sending an email to clients requesting a copy of their passport (so that you know it really is valid - and you can verify the spelling of their name before you start making bookings)
- Example: Sending a follow-up email to a potential client that doesn't respond to a proposal after a number of days.
- Anything where you have to move information from one app to another.
- Example: Adding information from a client onboarding form or enquiry into your CRM
- Example: Adding booking confirmations to an itinerary builder without typing out the information
- Tasks that don't require much thinking.
- Example: Making a backup copy of your Google Drive or Dropbox each month
- Example Sending a birthday or anniversary text to your clients





ZAPIER PLANS

HOW MUCH DOES IT COST?

Zapier has different types of plans for your automation needs.

Each plan will give you a certain number of tasks to use each month. If you have a lot of Zaps or need a lot of tasks, you may need a higher-tier plan, while folks who only automate one or two things may benefit from a simpler plan.

How do you figure out which plan you need?

When you first sign up for Zapier, you get a 14-day free trial of our paid features.

Create your first Zaps and as you near the end of your trial, look back at what you've made and how many tasks you're using. This will help you figure out which plan is right for you.

PRO TIP: Before you dismiss signing up for a tool because of how much it will cost you, ask yourself... how much will it save you?



POPULAR APPS AND THE ZAPS YOU CAN CREATE

POPULAR ZAPS

HOW TO CREATE THE ZAPS

These are some of the most-used automated workflows people set up with Zapier, covering things like social media, task management, note-taking, feedback collection, and reminders.

SHARING BLOGS + ARTICLES TO SOCIAL MEDIA

Instead of manually sharing your blog posts or interesting articles you've found online, use these Zaps to share items from an RSS feed directly to social media.

KEEP YOUR NOTES WITH YOUR TASKS

You likely have a favorite notes app and a favorite to-do app. Save your ideas and your tasks both in one place to make sure you never forget to act on an idea.

COLLECT FEEDBACK AND OTHER INFO FROM FORMS

Forms are a great way to collect all sorts of data from your clients. Once someone has filled out your form, you can put it to use in your other favorite apps in minutes with the help of automation. Send that form information to apps like Trello, Dropbox, or Google Sheets where you can put it to work.

TRACK EVENTS AND TASKS WITH YOUR CALENDAR

If you rely on Google Calendar to stay on schedule but use a different app to track everything you need to work on, these workflows are for you. Keep tabs on everything coming up without manually adding events to your calendar.

POPULAR ZAPS

HOW TO CREATE THE ZAPS

TURN YOUR EMAILS INTO TO-DOS

With the daily flood of emails, your inbox isn't the best place for your tasks. Yet many emails are actionable. Never let an email task get buried—instead, let Zapier send it to the proper place so you remember to take action.

SAVE EMAIL ATTACHMENTS TO THE CLOUD

Don't let the files and photos people send you over email get lost in your inbox. Instead, save those attachments to your favorite cloud storage service so you'll always know where they are.

GET AN AUTOMATIC SUMMARY OF ANYTHING WITH DIGEST

Sometimes you don't need to know about new things exactly when they happen—instead, you need to know all of the things that happened over a time period. Perhaps you'd like an email with all of today's headlines each evening, or a list of everything your team's completed this week on Friday afternoons. Zapier's Digest tool can correlate the info for you and send it right when you need it.

START AUTOMATED WORKFLOWS WITH A PUSH

Need to send an email, add a task, schedule a meeting, and more? Don't open those apps—that's how you'll get distracted and waste even more time. Instead, use Zapier's Chrome Extension to create those items at the push of a button.



FILE + FOLDER ORGANIZATION

HOW TO CREATE THE ZAPS

Files have a knack for getting out of control, fast. Whether it's on your computer or in your cloud storage app, files are rarely where you think you saved them—if you even saved them at all. (Looking at your email attachments.)

You don't have to resign yourself to a life of digital chaos, but you also shouldn't spend all your energy on meticulous organization either.

While Zapier can't rename or move your existing files—you're on your own for clean-up duty—they can help you prevent future file messes.

SAVE EMAIL ATTACHMENTS AUTOMATICALLY

I know I mentioned cloud storage and your computer as two dumping grounds for files, but many of us use our email inbox as an unofficial third storage option. These Zaps will save you the hassle of remembering to right-click and save attachments to your cloud storage app.

COPY YOUR FAVORITE SOCIAL MEDIA POSTS

Social media is mercurial. A post you liked one day may be hard to find the next day. Whether you're a content creator, marketer, or a human with a social media account, you can keep a copy of photos, videos, recordings, and other post content automatically.

BACK UP YOUR IMPORTANT FILES

Backing up files is that healthy tech habit we know we're supposed to do, but put off doing it until something catastrophic happens.

Don't let accidental deletion or syncing errors be the reason you start keeping backups.

CREATE NEW FOLDERS AND FILES FOR PROJECTS

It's common to have a process for handling files in regard to a project or client. For example, maybe you use the same templates for each project, and every project has its own folder. Instead of manually creating and copying the same structure, you can use a Zap to create folders and new documents whenever you need it.

GOOGLE TOOLS

CALENDAR - EMAIL

- Create Google Calendar events from new Gmail emails
- Wish clients, BDMS and key relationships a "Happy birthday!" with an automated email from your Gmail inbox
- Send weather updates via email as Google Calendar events approach "here is the weather for your 10-day visit in Rome, Italy"
- Send reminder email 12 hours before an appointment

HOW TO CREATE THE ZAPS





AUTOMATE MARKETING TASKS

VIDEO AUTOMATION

TRANSCRIPTION AUTOMATED

Transcribing your videos is not only necessary to make sure your content is accessible, but it can also boost its performance by making it more SEO-friendly.

Since video content doesn't have text that Google can crawl, it can be more difficult to rank on keywords related to your video topic.

A video transcript can make it easier for Google—and your readers—to understand what the video is about.

If you regularly transcribe your videos, you likely work with a transcription app or service. Setting up automated workflows between your transcription app and the other tools you use can help you streamline your entire transcription production process.

Once you receive your transcripts, you can also automatically save them wherever you store your content.

HOW TO CREATE THE ZAPS

ZOOM CALLS

Download Zoom calls into Google Drive and have them transcribed (you can then search the transcription for keywords). This is a great way to preserve storage space in Zoom and safeguard your consultation calls should you ever need to reference them.

TRELLO

HOW TO CREATE THE ZAPS

Whether you use Trello as your team's to-do list, editorial calendar, or event planner, Zapier helps you save time by automatically updating your Trello cards with info from your other apps. You can use Zapier to create cards whenever there are new event sign-ups or move cards to lists when there are new deals in your CRM. The magic doesn't stop there. You can send emails, update your CRM, or run almost any tasks in the 1,000+ apps supported on Zapier right from your Trello board.

TRY THESE ZAPS - ALL YOU HAVE TO DO IS CLICK AND INSTALL

- Create Trello cards from new form responses
- Create new Trello cards from new Google Calendar events
- Create new Trello cards from new rows on Google sheets
- Create new Trello cards from new Gmail threads
- Create new Trello cards from new starred Gmail emails (business account only)
- Create new Trello cards at weekly scheduled times
- Create Google Calendar events from new Trello cards
- Create rows in a Google sheet from new Trello cards
- Copy new or moved Trello cards from one board or list to another board or list
- Create Trello cards from new Google Tasks
- Create Trello cards from new Office 365 emails
- Add new Pinterest Pins to Trello boards
- Add new Trello card activity as a new row on Google sheet
- Create Trello cards for new inboard emails
- Add new Facebook Lead Ads leads to Trello cards
- Send or receive Gmail emails for new Trello activity
- Create Trello cards from new RSS feed items
- Add checklists to Trello cards when they reach specified lists
- Create Trello cards for new Calendly events
- Save new Trello card attachments to Google Drive
- Get SMS messages with new activity on Trello
- Create Trello cards when HubSpot contacts properties are updated

SOCIAL MEDIA

HOW TO CREATE THE ZAPS

If you try to keep up, social media management can quickly consume your entire day, taking you away from core tasks and giving you little in return. Here's how to use automation to make social media management easier and more productive.

AUTOMATICALLY SHARE CONTENT ACROSS SOCIAL NETWORKS

One of the ways social media can consume your time is if you treat all networks the same and manually craft posts for each one. In the days of automation, this just isn't necessary. Rather than spread yourself thin, research where your audience spends the most time. Optimize your post for that social network, concentrate your efforts there, and then let automation extend your content to other networks.

If you start from Twitter, you can use Zapier to update your audience across networks like Facebook or LinkedIn without any extra effort from you.

SHARE YOUR BLOGS/ARTICLES TO SOCIAL MEDIA

Your followers will want to know when you put out new content, but they might be splintered across a variety of networks. Promote your new posts on all of your branded channels automatically.

TRACK YOUR SOCIAL MEDIA PERFORMANCE

Integrate your social media output with tracking and collaboration tools so your entire team can work on developing your social media presence.

MONITOR MENTIONS OF YOUR BUSINESS AND OTHER KEY TOPICS

Social media automation isn't all output. The best brands don't treat social media as a stage—they listen just as much as they talk. Automated workflows instantly let you know whenever someone mentions your brand so you can react accordingly.



NEXT LEVEL

HOW TO SCALE YOUR AUTOMATION

Once you've got the hang of creating Zaps, learn how to take your productivity to the next level with features like:

- [Multi-step Zaps](#)
- [Search actions](#)
- [Filters](#)
- [Zapier's built-in apps](#)



QUESTIONS?

If you have Qs, we have As.

SUBMIT A QUESTION FOR SANDRA TO ANSWER

