Empowering Innovation:
Unlocking Business Potential with No-Code Tools

_zapier

Presenter:
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Head of Enterprise Innovation @ Zapier

Why No-Code? The Business Case

❓ *60% of automation projects fail because they get stuck in IT backlogs.*

❓ *What if your team could build solutions in hours, not months?*

💡 **No-code enables business users—not just developers—to create automations & internal tools without waiting on IT.**

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No-Code + Lean Thinking: A Natural Fit

✅ Eliminates Waste – Reduces manual work, rework, and delays

✅ Empowers Teams – No more waiting on IT or external developers

✅ Accelerates PDCA Cycles – Enables rapid Plan-Do-Check-Act iterations

✅ Faster Innovation – Shortens lead time from problem to solution

The result? Less waiting, more doing, and faster impact. 🚀

What You'll Gain Today

✅ Understand no-code vs. spreadsheets vs. SaaS

✅ Learn how AI enhances no-code

✅ Watch a live demo solving a real-world challenge

✅ Participate in a hands-on exercise

You at the end of this workshop 👇

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Who Am I?

⚡ 8+ years in automation, operations, & internal systems

📈 Scaled Ops at Compass → Onboarded 15,000+ real estate agents

🚀 Built NoCodeOps → Helping ops pros streamline processes

🤝 Acquired by Zapier → Now the Head of Enterprise Innovation

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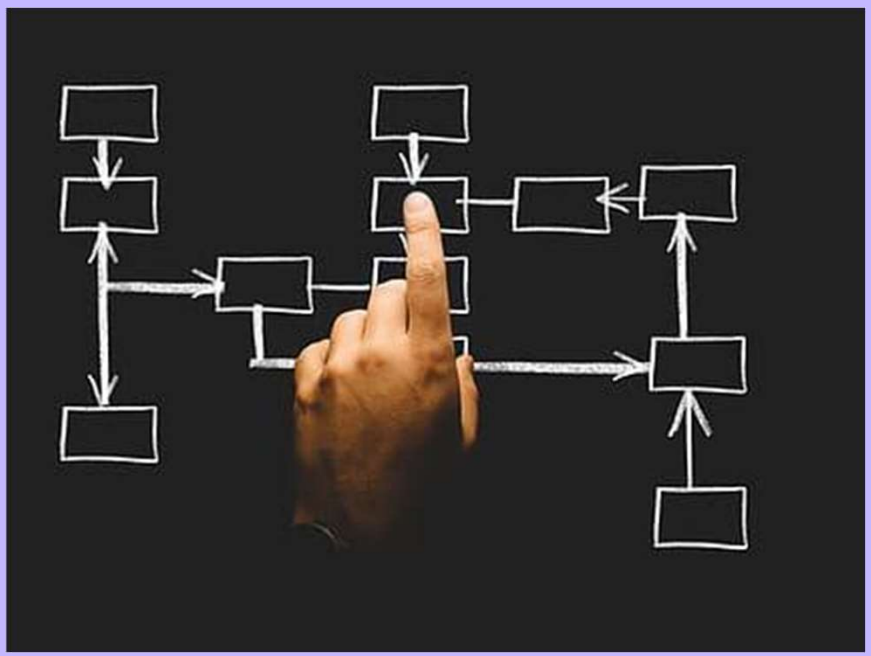
Before we move on...

Think of a process in your work that has **one or more** of the following:

✅ **Spreadsheets** tracking information
✅ **Emails** for approvals or updates
✅ **Manual work** like copying/pasting data
✅ **Notifications** keeping people informed

💡 The more it has, the better! Write it down—we'll come back to this shortly.



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The Problem with Existing Solutions

When teams need to manage processes, they typically have two options:

Approach	Best For	Limitations
Spreadsheets 📊	Quick, informal tracking	Breaks at scale, manual work
SaaS Tools 🏢	Pre-built software for known needs	Rigid, can't customize

💡 **But what if you need something in between?**

- More **flexible** than SaaS
- More **scalable** than spreadsheets
- Without waiting on IT to build custom software

👉 **That's where no-code comes in!**

No-Code – The Best of Both Worlds

No-code bridges the gap between spreadsheets and SaaS by letting you build custom workflows, apps, and automations—without coding.

🚀 Why No-Code?

✅ Faster Solutions – Build in hours, not months

✅ Empowers Problem-Solvers – No waiting on IT

✅ More Flexible Than SaaS – Tailor workflows to fit your needs

✅ Scales Beyond Spreadsheets – Automate, track, and integrate without manual work

Live Demonstration – No-Code in Action

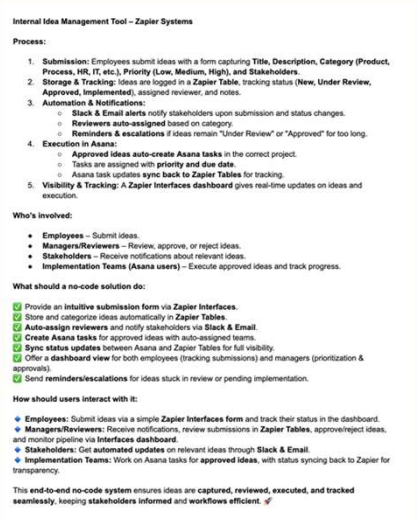
🔴 **Real-World Challenge: Tracking & Managing Internal Ideas Efficiently**

❌ **Before:** Ideas lost in messy email threads, scattered spreadsheets, and slow approvals

✅ **After:** A centralized, no-code system that captures, categorizes, and updates stakeholders automatically

🎯 **Live Demo:** Building an Internal Idea Management Tool in Zapier Systems

From Product Requirement Doc to Custom Business Software in Minutes



Internal Idea Management Tool – Zapier Systems

Process:

1. **Submission:** Employees submit ideas with a form capturing **Title, Description, Category (Product, Process, HR, IT, etc.), Priority (Low, Medium, High), and Stakeholders**.
2. **Storage & Tracking:** Ideas are logged in a **Zapier Table**, tracking status (**New, Under Review, Approved, Implemented**), assigned reviewer, and notes.
3. **Automation & Notifications:**
   - **Slack & Email alerts** notify stakeholders upon submission and status changes.
   - **Reviewers auto-assigned** based on category.
   - **Reminders & escalations** if ideas remain "Under Review" or "Approved" for too long.
4. **Execution in Asana:**
   - **Approved ideas auto-create Asana tasks** in the correct project.
   - Tasks are assigned with **priority and due date**.
   - Asana task updates **sync back to Zapier Tables** for tracking.
5. **Visibility & Tracking:** A **Zapier Interfaces dashboard** gives real-time updates on ideas and execution.

Who's involved:

- **Employees** – Submit ideas.
- **Managers/Reviewers** – Review, approve, or reject ideas.
- **Stakeholders** – Receive notifications about relevant ideas.
- **Implementation Teams (Asana users)** – Execute approved ideas and track progress.

What should a no-code solution do:

✅ Provide an **intuitive submission form** via **Zapier Interfaces**.
✅ Store and categorize ideas automatically in **Zapier Tables**.
✅ **Auto-assign reviewers** and notify stakeholders via **Slack & Email**.
✅ **Create Asana tasks** for approved ideas with auto-assigned teams.
✅ **Sync status updates** between Asana and Zapier Tables for full visibility.
✅ Offer a **dashboard view** for both employees (tracking submissions) and managers (prioritization & approvals).
✅ Send **reminders/escalations** for ideas stuck in review or pending implementation.

How should users interact with it:

🔹 **Employees:** Submit ideas via a simple **Zapier Interfaces form** and track their status in the dashboard.
🔹 **Managers/Reviewers:** Receive notifications, review submissions in **Zapier Tables**, approve/reject ideas, and monitor pipeline via **Interfaces dashboard**.
🔹 **Stakeholders:** Get **automated updates** on relevant ideas through **Slack & Email**.
🔹 **Implementation Teams:** Work on Asana tasks for **approved ideas**, with status syncing back to Zapier for transparency.

This **end-to-end no-code system** ensures ideas are **captured, reviewed, executed, and tracked seamlessly**, keeping **stakeholders informed** and **workflows efficient**. 🚀

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Demo Time

Your No-Code Product Requirement Doc

✍ **Write down key details about your process you selected earlier:**

1. **What's the process?** (What happens manually today?)
2. **Who's involved?** (Who needs access or notifications?)
3. **What should it do?** (Automate? Track? Notify?)
4. **What data is needed?** (Forms, fields, inputs?)
5. **How will people interact?** (Dashboard, triggers, forms?)

Any volunteers to build live with me?

Getting Stakeholder Buy-In for No-Code

📌 **How to Convince Your Team to Use No-Code:**

- ✅ **Show quick wins** → Automate small tasks first
- ✅ **Tie it to business goals** → Efficiency, cost savings, innovation
- ✅ **Scale responsibly** → Start with departmental use cases

💡 **Quick Tip:** You can always build an MVP with AI-Generated Placeholder Data (I'll show you how)

Involving IT for Scalable No-Code Success

- 🔹 **Start small – Automate one workflow at a time**
- 🔹 **Involve IT early for:**
  - Security & Compliance – Data access, permissions, governance
  - Scalability – Ensuring automations don't create tech debt
  - Integration Support – Connecting systems beyond no-code limits
- 🔹 **Ensure visibility – Track who builds what**
- 🔹 **Align teams – Ops & IT collaboration drives long-term success**

💡 **The best no-code initiatives balance speed with IT oversight!**

No-Code = Faster, Smarter Workflows

🎯 **Key Takeaway:No-code empowers you to build, automate, and scale—without IT bottlenecks.**

✅ **Your Next Steps:**

- 🔹 **Choose one manual process to automate this week.**
- 🔹 **Build it with a no-code tool (Zapier, Airtable, Glide).**
- 🔹 **Track how much time it saves—then scale from there.**

💡 **Start small, move fast, and see the impact!** 🚀

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Thank You

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Let’s connect on Linkedin 👉

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