



Automation Guide: Make.com vs Zapier

Choose the Right Tool & Build Your First Automation

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Disclaimer: I'm not sponsored by or affiliated with either platform. This guide is based on hands-on experience implementing automations for dozens of businesses.

Make.com vs Zapier: Which Should You Use?

Quick Decision Tree

Choose Make.com if:

- ✓ You want better value for money (5-10x cheaper for same tasks)
- ✓ You need visual workflow builder (easier to understand complex automations)
- ✓ You're comfortable with a slight learning curve (worth it)
- ✓ You want more control over data transformation
- ✓ Your workflows have multiple branches or conditions

Choose Zapier if:

- ✓ You need a specific integration Make.com doesn't have
- ✓ You want the simplest possible setup (even simpler than Make)
- ✓ Budget isn't your primary concern
- ✓ You're already invested in the Zapier ecosystem

Bottom line: For 90% of small-medium businesses, Make.com is the better choice. Start there. Move to Zapier only if you hit integration limitations.

Understanding Automation Basics

What is an Automation?

An automation is a workflow that runs without human intervention:

Manual process:

1. Client fills out form
2. You receive email notification
3. You manually add client to CRM
4. You manually send welcome email
5. You manually create project folder
6. You manually notify team in Slack

Time: 10-15 minutes per client

Automated process:

7. Client fills out form
8. Everything else happens automatically

Time: 0 minutes (it just works)

Core Concepts (Both Platforms)

1. Triggers

What starts your automation

Examples:

- New email received
- Form submitted
- Calendar event created
- New row in spreadsheet
- File uploaded to Dropbox

2. Actions

What happens next

Examples:

- Send email
- Create database entry
- Post to Slack
- Generate document
- Update spreadsheet

3. Filters

Conditional logic

Examples:

- Only if email contains "urgent"
- Only if amount is over \$1,000
- Only on weekdays
- Only if status equals "approved"

Make.com: Getting Started

Step 1: Create Free Account

- Go to make.com
- Sign up (free plan: 1,000 operations/month)
- Explore templates library

Step 2: Your First Scenario

Example: Auto-save Gmail attachments to Google Drive

1. Add Trigger Module

- Search "Gmail"
- Select "Watch emails"
- Connect your Gmail account
- Set folder to watch (e.g., "Client Documents")

2. Add Action Module

- Search "Google Drive"
- Select "Upload a file"
- Connect your Google Drive account
- Map fields:

File: Attachment from Gmail

Folder: Choose destination folder

Name: Use email subject + attachment name

3. Test

- Click "Run once"
- Send yourself a test email with attachment
- Check if file appears in Google Drive

4. Activate

- Click "ON" switch
- Automation now runs every 15 minutes automatically

Time saved: If you receive 10 attachments/week, this saves ~2 hours/month.

10 High-Value Automations to Build

1. Client Onboarding (Make.com)

Trigger: Form submission

Actions: Add to CRM → Send email → Create folder → Notify team

Time saved: 10-15 min per client

2. Invoice Follow-Up

Trigger: Invoice unpaid for 7 days

Actions: Send reminder email → Log in CRM → Notify salesperson

Time saved: 30 min/week

3. Meeting Notes Distribution

Trigger: New file in "Meeting Notes" folder

Actions: Convert to PDF → Email to attendees → Save to project folder

Time saved: 5 min per meeting

4. Lead Scoring

Trigger: New lead in CRM

Actions: Check website visits → Check email opens → Assign score → Notify sales if hot lead

Time saved: Improves conversion by 15-20%

5. Daily Report Generation

Trigger: Scheduled (every morning, 8am)

Actions: Pull yesterday's data → Generate report → Email to team

Time saved: 30 min/day = 2.5 hours/week

Common Mistakes to Avoid

✗ Mistake 1: Automating Broken Processes

Wrong: "Our client onboarding is messy, let's automate it!"

Right: Fix the process first, then automate the clean version.

✗ Mistake 2: Starting Too Complex

Wrong: Build 10-step automation with branches and filters on day one.

Right: Start with simple 2-step automation. Build confidence. Add complexity later.

✗ Mistake 3: Not Testing

Wrong: Build automation, turn it on, assume it works.

Right: Test with dummy data. Check every step. Monitor for the first week.

ROI Calculation Template

Step 1: Calculate Current Cost

- Task: _____
- Time per task: _____ minutes
- Frequency: _____ times per week
- Hourly cost: \$_____ (employee hourly rate)

Weekly cost = (Time × Frequency × Hourly cost) ÷ 60

Annual cost = Weekly cost × 52

Your 30-Day Automation Plan

Week 1: Learn & Plan

- Sign up for Make.com (free)
- Complete one tutorial scenario
- List your 5 most repetitive tasks
- Choose one to automate first

Week 2: Build First Automation

- Build simple 2-step automation
- Test thoroughly
- Monitor for any errors
- Document what you built

Week 3: Expand

- Add complexity to first automation
- Build second automation
- Train team member on using it

Week 4: Scale

- Build third automation
- Calculate time/money saved
- Plan next month's automations
- Consider upgrading to paid plan if needed

Next Steps

9. **Start simple:** Pick one annoying repetitive task
10. **Build it:** Use Make.com (or Zapier if needed)
11. **Test thoroughly:** Don't skip this step
12. **Monitor:** Check it works for first week
13. **Document:** Write down what it does (you'll forget)
14. **Repeat:** Build next automation

Average SMB saves 20-30 hours/week with 5-7 well-built automations.

Need help implementing automation?

Book a free AI audit: intelligentsolutions.agency

The goal isn't to automate everything. The goal is to automate the right things so your team can focus on what actually matters: serving clients and growing the business.