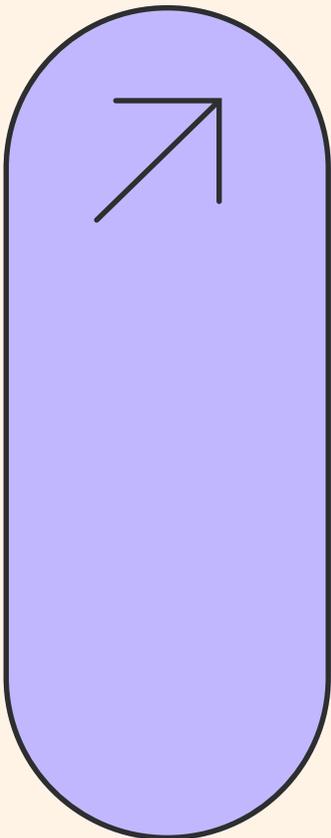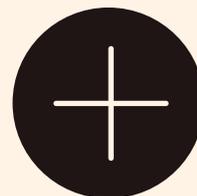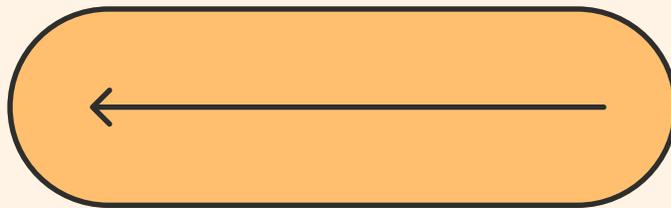# IT automation *checklist*

Streamline workflows and increase impact for you and your company

Automate your IT workflows

As an IT professional, it's your job to make everyone more effective and secure. You provide and maintain the hardware and software needed to get work done and ensure everything is being used correctly. From planned projects to emergency tickets, there's a lot to manage.

You already know automation makes it easier to get things done. **Use this checklist to evaluate your automation efforts and find more ways to leverage automation** for yourself, your coworkers, and your company to increase your impact.
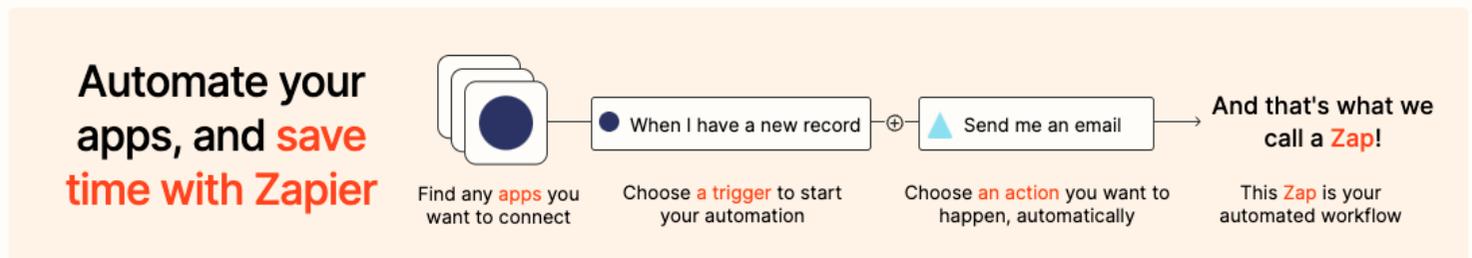
What makes a task good for automation?

(1) It happens **on a schedule**

(2) It involves **moving information between apps**

(3) **It's repetitive** and done the same way each time

Learn more: [Identify automation-ready tasks](#) and [build powerful automated systems](#).

Automation for yourself

⊕ Alerts and notifications

Send customized alerts for new tickets to team chat, email, or by SMS

Get chat or SMS alerts for important emails (use a parser for fine-tuning)

Set up SMS alerts for approaching events

Overwhelmed with alerts? Check out our tips to streamline notifications.

✉ Email

Turn email messages into tasks

Automatically save attachments to the cloud

Log emails in a searchable archive or database

Keep your inbox in line with our tips for automating your email.

📊 Data management

Send new ticket info to spreadsheets or reporting platforms

Add form responses to spreadsheets and databases

Get custom notifications when a spreadsheet is changed

Learn more: Automate spreadsheets for better analysis.

Automation for your team

🔔 On-call schedules

Alert on-call employees about new requests by text, team chat, or email

Remind employees when they're on call with customized alerts

Learn more: [Create an on-call notification bot](#).

📅 Meetings

Create new meetings on a schedule

Automatically create agendas from templates

Remind team members to fill out meeting agendas in advance

Learn more: Add [automation for better meetings](#).

📄 Reporting

Add tasks, tickets, or events to a reporting platform

Summarize completed tasks on a schedule

Push important data to daily dashboards

Learn more: Automatically update or create [reports, charts, and dashboards](#).

Automation for your company

👤 Human resources & recruiting

Automatically share job openings

Add new employees to HR platforms

Assign training courses to new hires

Grant software access to new hires

Send contracts to approved hires

Get notified of onboarding needs

Schedule exit interviews and surveys

Learn more: Automation for [recruiting](#), [human resources](#), and [employee onboarding and offboarding](#).

📣 Marketing

Track leads in a spreadsheet or database

Create retargeting lists for advertising

Automatically email prospects and clients

Crosspost social posts to different platforms

Learn more: [Ways to automate marketing](#).

🌐 Accounting

Track invoices and payments

Automate payment reminders

Track deals through the sales cycle

Learn more: [Automation for invoices and payment processing](#).

Automation inspiration

Visit the Zapier blog to learn about how people automate their work with Zapier. Take a look at the examples below, and then explore on your own!

4 ways to automate IT management workflows →

How to spread automation at work →

How to troubleshoot your Zaps →

Create powerful Zaps with webhooks, filters, formatter, code, and more →

Brought to you by Zapier

Zapier is secure, reliable, and seamlessly connects to the tools you use, like Google, Microsoft, and Amazon Web Services.

Request a demo