Your Google Workspace deep dive: Boost productivity and collaboration using Google apps.

:copper

Contents

Click on any chapter below to jump through the guide at your leisure.

Getting the most out of Google Workspace.

You use Google apps to level up your team's productivity — but you can also use it to collaborate and communicate better with your prospects and customers. We've distilled the most actionable steps to help you get the most out of Google Workspace and surface some of the lesser-known features that will keep you and your team effortlessly organized — and on top of your game.

We'll walk you through the most popular Workspace apps, with tips that streamline workflows and help you develop meaningful relationships with your contacts, colleagues and prospects.

Ordering and organizing Gmail for optimal performance.

The simple task of getting organized in Gmail can drastically cut down on time wasted wandering around your inbox.

The average American professional spends

28 % of their working day reading and replying to emails, found McKinsey.

A large slice of that time goes to waste — especially when inboxes lack organization.

Case in point: A crowded inbox leads to an unproductive

27 mins per day, a Harvard Business Review article estimates.

Out of the box, Gmail offers:

- An intuitive experience for organizing your inbox and sending emails
- Direct integrations with the rest of Google Workspace so you can easily send Google Drive files and Google Calendar invites via email
- An option to access previously loaded emails when you're on a plane or anywhere else offline
- Secure access to key conversations happening through email
- Sophisticated filtering to keep spam away

We're just scratching the surface here. Get the most out of Gmail with the tips on the following pages:

CRM TIP

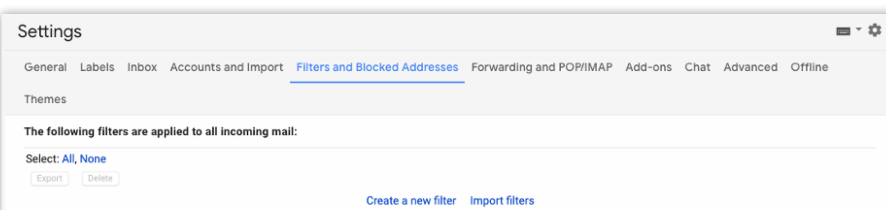
You can also use your CRM as an added layer of organization, to automatically designate which emails are related to a specific deal or other key organizations within your account-based marketing strategies. More on that later, or jump to that section now.

STEP 1

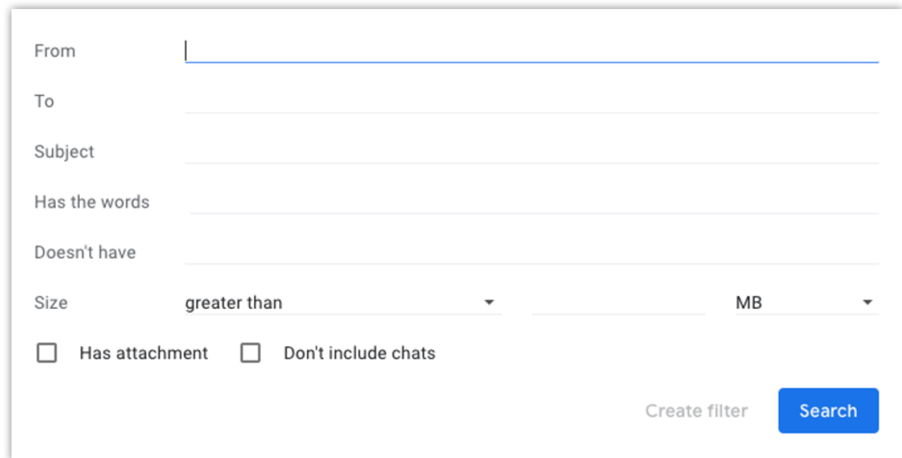
Add filters for important contacts

To ensure high visibility for key contacts in your inbox, you can automatically tag incoming messages from specific contacts as important or add them to designated inbox folders with filters.

To add a new filter, click on the **gear icon** in the top right-hand corner > **See all settings** > **Filters and Blocked Addresses**:



When you click **Create a new filter**, this pop-up appears:



Let's say you want to automatically "star" all messages from fiona.thornglie@gmail.com. Just add her email address to the **From** field. Then, on the next page, apply the filter setting **Star It**.

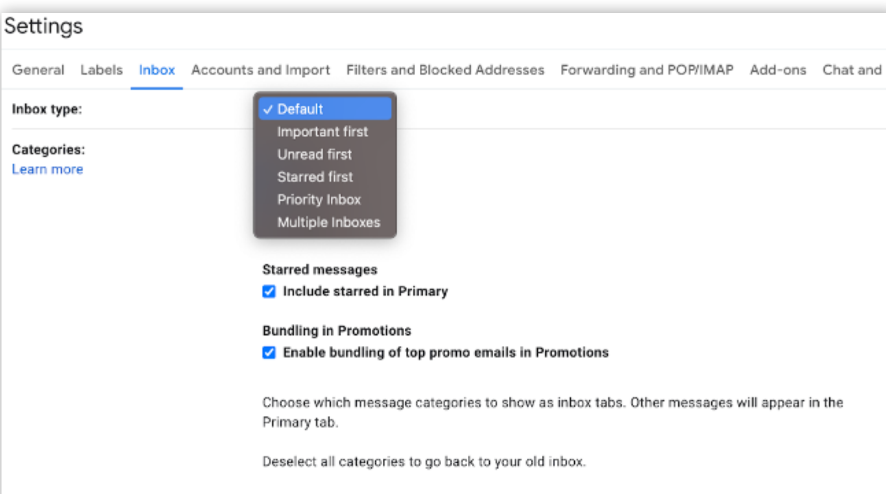
STEP 2

Auto-sort messages by importance

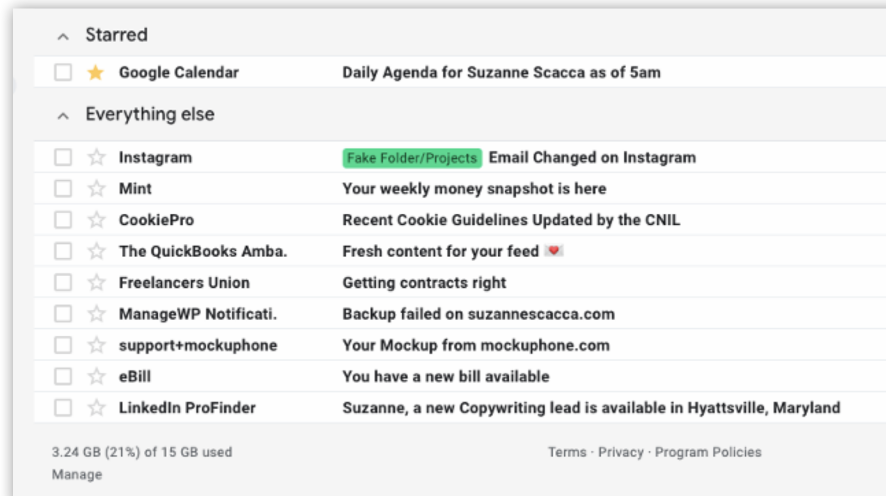
See your starred messages first by auto-sorting your inbox.

Go to **Settings** > **Inbox** and choose **Starred First** or any of these other options:

- Importance (make sure to enable the Importance markers below)
- Read status
- Priority



Here's how starred sorting looks with any starred items shown up top in your inbox:

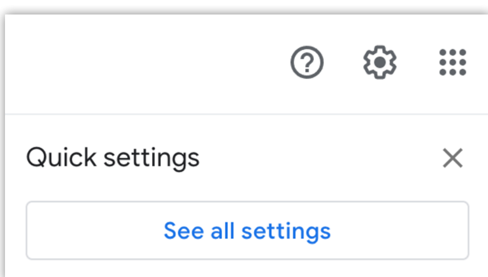


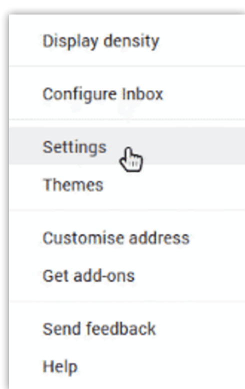
STEP 3

Give yourself more time to recall an email

Yes, you can undo an email send, if you time it quickly enough. By default, the **Undo** button will appear in Gmail when you send an email, but there's only a 5-second window for you to act. Thankfully, you can adjust your settings to allow a little more breathing room for those times when you hit **Send** prematurely.

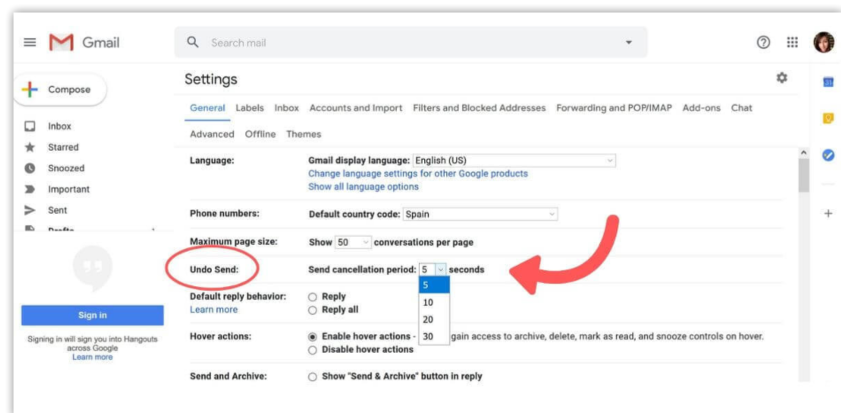
Click on the **gear icon** in the upper right-hand corner and select **See all settings** from the left-hand menu:





Once you're in settings, scroll down to the option that says "**Undo Send**." You can choose to show the **Undo** button for 5, 10, 20 or 30 seconds after your email is sent.

Giving yourself a 30-second window might just save future you from an embarrassing faux-pas.



[Read our full guide on recalling an email]

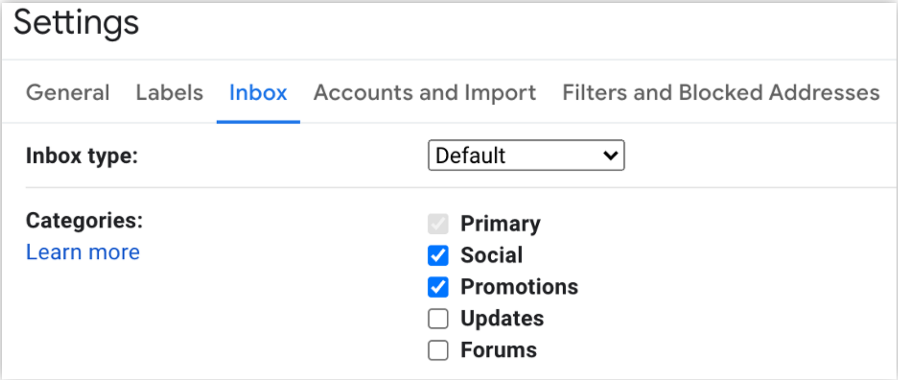
STEP 4

Move social and promotion emails out of sight

Push distractions out of view by updating your inbox settings.

Go to your **Settings** and click on **Inbox**. Then select **Social**, **Promotions** and other category options based on the messages you're subscribed to, but don't need to see during the workday.

These emails then split off into other tabs so you can focus on your primary messages.

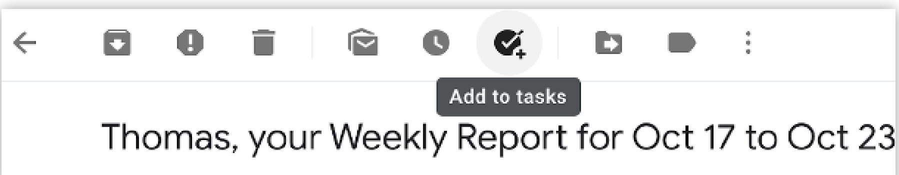


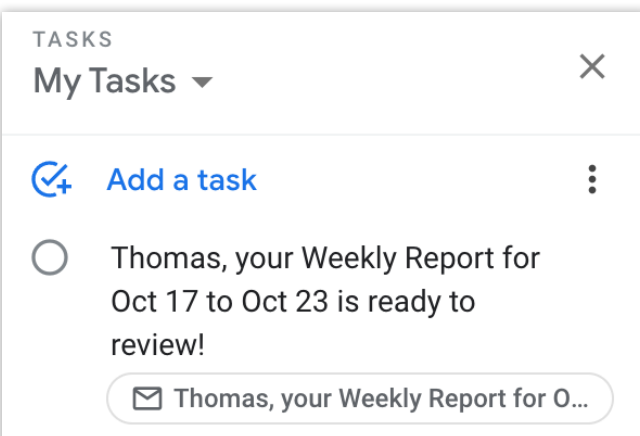
STEP 5

Schedule tasks

Create reminders for yourself to follow up with contacts or complete any assignments.

Open a message in Gmail you want to add a task or reminder for. Click **Add a task**.





CRM TIP

Using a CRM with built-in reminder and task options inside Gmail can help you prioritize without a second thought. More on that later, or [jump to that part now](#).

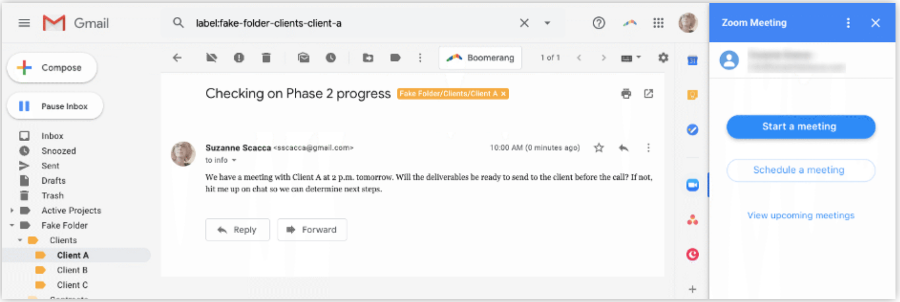
STEP 6

Accomplish more in Gmail by integrating with other software

It's always nice to have one less browser window open. Add software your team already uses into Gmail to save time.

To install these apps, go to **Settings** > **Add-ons** > **Manage**

Then search for your preferred tools, whether it's Zoom or your CRM. Zoom, for example, lets you easily start, schedule, and view upcoming meetings from inside your inbox.

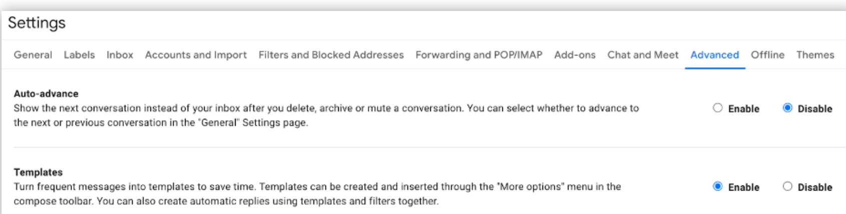


STEP 7

Save time with templates

You likely send some tried-and-true emails to follow up with leads. Or you may send specific emails every time you onboard a new customer.

Enable **templates** by going into **Settings** > **Advanced**.



CRM TIP

You can upgrade your team's productivity and knowledge share when your CRM integrates smoothly with Gmail.

With Copper, easily import your Google Contacts and mobile-device contacts for a full record of your communication history directly alongside Gmail with the Copper Chrome Extension, and within the Copper CRM web app. You can then organize your contacts by relationship type so that your entire network makes more sense. More on this later, or go to that section now.

You'll now see an option for **templates** in new messages.

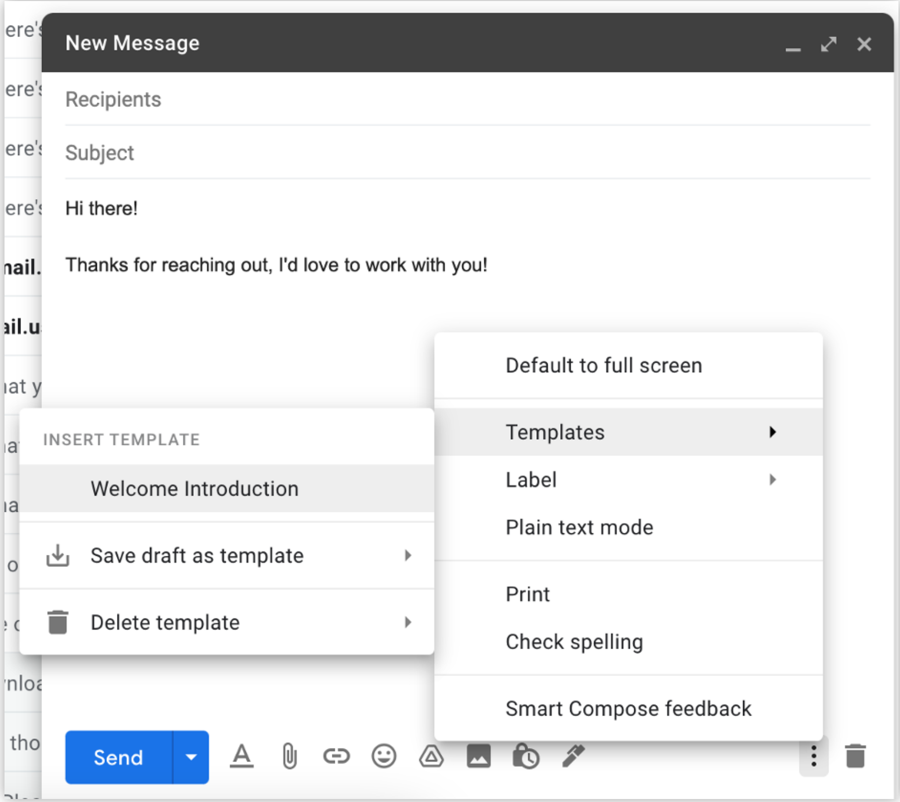
Then you can:

- Save any draft as a new template
- Insert a premade response into any draft
- Delete any template you no longer need

Just remember to clearly name each template so they're easy to find.

And if you're a Copper customer, we offer more robust template options that save you even more time personalizing your outreach and sending emails. More on this later.

We've got even more tips for you: Learn how to add a logo to your Gmail signature and get other Gmail hacks here.



Organize and grow your network with Google Contacts.

Managing your work contacts is one of the easiest ways to help your team function more efficiently.

Google Contacts lets you easily:

- Search contacts by name or email address
- Add phone numbers, notes, job title and the company associated with any contact
- Update contact information when their email address, phone number or organization changes
- Merge duplicate contacts so your team has a single record to manage a client's contact information

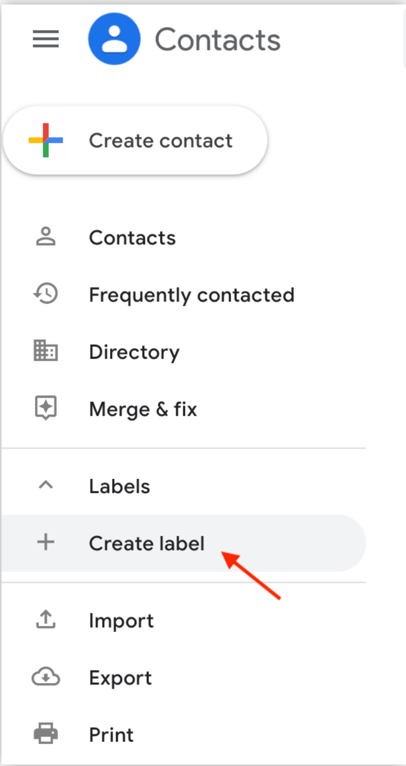
Let's look at a few Google Contacts hacks.

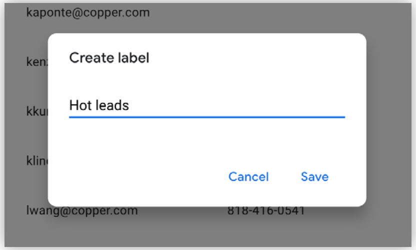
STEP 1

Save time sending group emails

Whether you send weekly reports to specific customers or you want to email your team and ensure everyone gets the message, create contact groups so you can repeatedly send emails to specific people.

In the Contacts home screen, select Create label from the left-hand column. Label it however you'd like. Then you can select multiple contacts and label them accordingly.



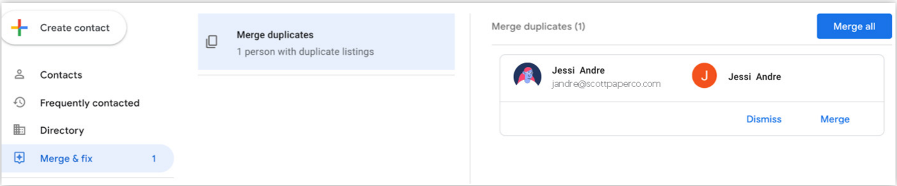


STEP 2

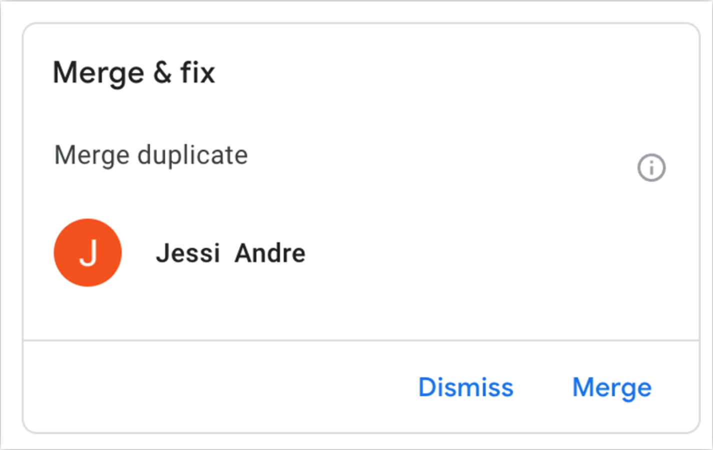
Merge duplicate contacts

You can bring down your total contact count (Google limits your contacts to 25,000) by getting rid of unnecessary duplicates. Google Contacts has a handy algorithm that suggests possible duplicates.

In **Contacts**, click **Merge & fix** to see their suggestions.



If you spot any other duplicates scrolling through your contacts, you can also click the box next to each. Then select the **merge icon**.

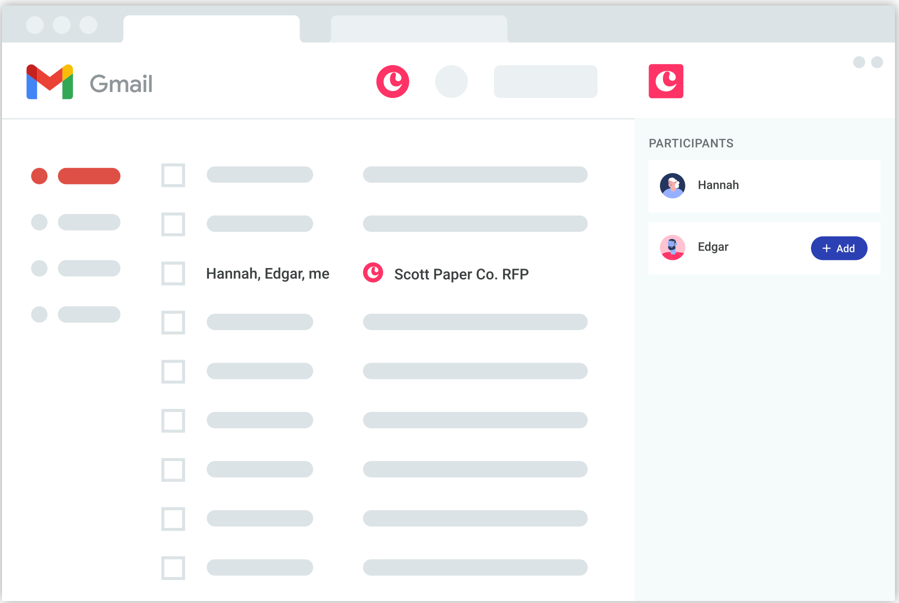


STEP 3

Sync your CRM to Contacts

Nurture your customers, leads and other contacts for the long term by syncing your CRM with Google Contacts. A CRM like Copper that integrates natively with Google Workspace makes growing your network a smooth process.

When you click the Copper icon in your inbox, you can add anyone as a contact or lead to Copper. Copper's Google Contacts integration offers a one-way sync that applies the changes made in Copper to your Google Contacts. By adding a new contact to Copper or updating an existing contact, you'll also add or update a contact to Google Contacts.



Construct a crystal-clear schedule with Google Calendar.

Juggling business and personal commitments can sometimes feel like mayhem, not to mention your ever-fluctuating schedule. Google Calendar can help keep you sane.

With Google Calendar, you can:

- Schedule meetings and events
- Add a location, agenda and link to a conference call in any invite
- Send everyone an automatic reminder of an upcoming calendar event
- Automatically send calendar invites, reminders and updates when events get canceled, moved, or have agenda changes

Let’s dig into key Calendar hacks you can turn on right now.

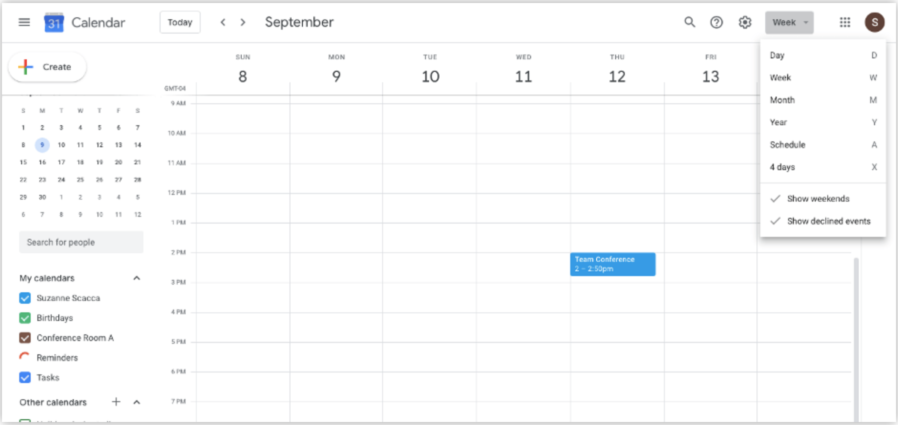
STEP 1

Set a better default calendar view

By default, your Google Calendar shows the current week. But the way you work will help determine the timeline and calendar view that work best for you.

For example, you may be responsible for managing projects, so a month view makes more sense. Or you like to be laser-focused on the tasks at hand, so you prefer seeing what's on your schedule today.

Set a **default calendar view** that works for your schedule under the following dropdown:

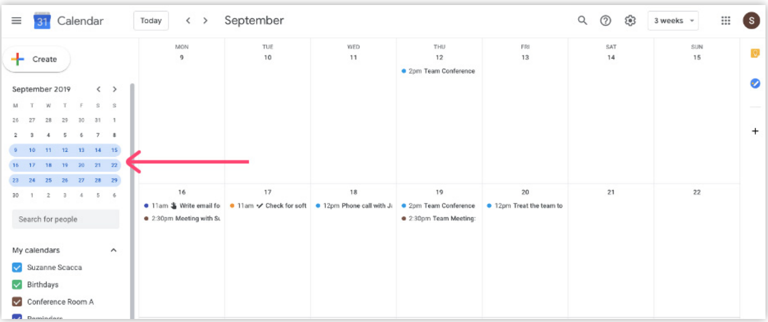


STEP 2

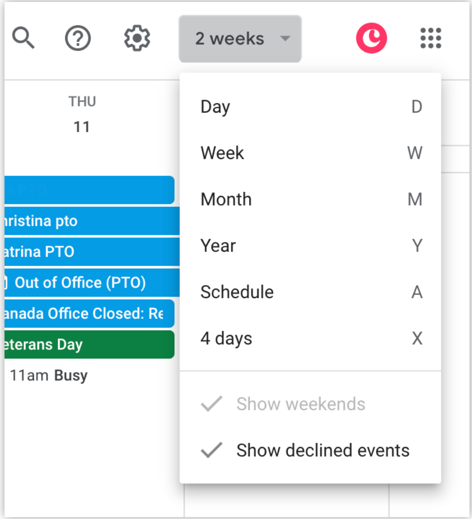
Quickly check a specific timeframe

Let's say you're on a call and want to get a follow-up meeting with someone on the books. You can easily see your availability and upcoming meetings for any range of dates instead of having to click into specific weeks or days.

Simply use the **calendar widget** on the left in Google Calendar. Click the **first date** you want to see and drag the mouse to highlight as many other dates you want to include in the view:



To return to single-day view, click the dropdown menu at the top right that shows what view you're seeing, and select Day.



STEP 3

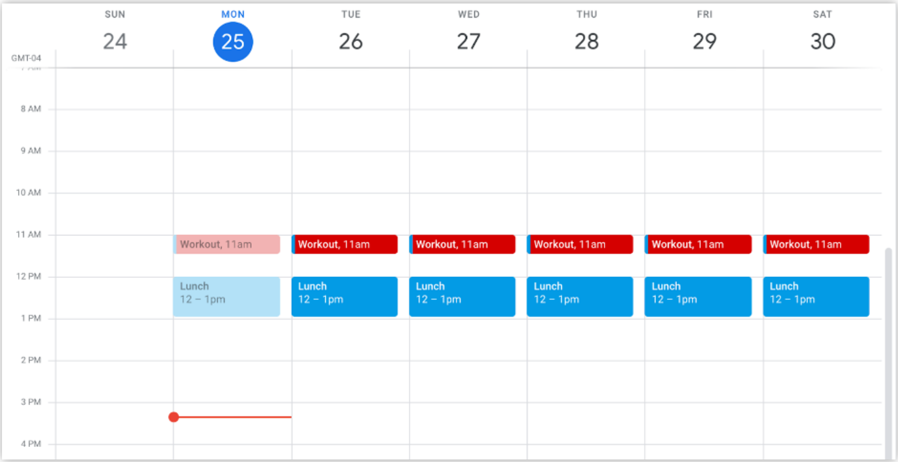
Color-code your calendar

Color coding lets you clearly organize your calendar and quickly see how your workdays break down.

In Google Calendar, there are two ways to do this: The first involves adding a color code when you create a new event. If you work from home or just want a clearer view of your commitments, structuring and color-coding your schedule and breaks can help.

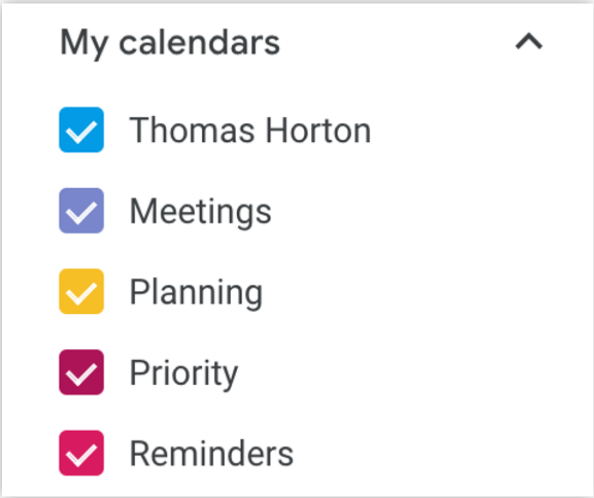
For example, by labeling your midday workouts red and lunch breaks blue, your calendar could look like the image on the right.

Consider also color-coding your schedule based on the urgency of tasks.



Another way you can color-code your schedule involves creating different calendars. With a dedicated meetings calendar, you can add any upcoming sessions within that calendar when you send out invites.

To create a new calendar, click the **gear icon** to open your **Calendar settings**. Click **Add calendar** > **Create new calendar**. After you **save**, navigate back to the main calendar page, and hover over your new calendar to select a new color.

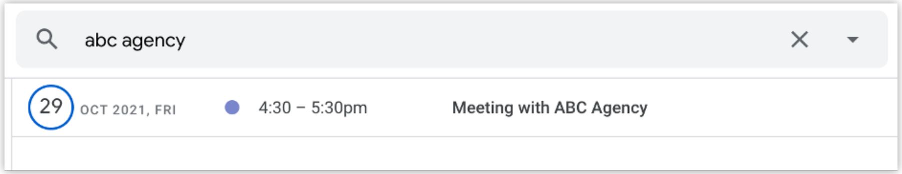


In the right example, you can see five calendars that appear in the left-hand sidebar, with a color assigned to each. Events within those calendars will automatically feature different colors.

STEP 4

Find an event in seconds

Most people don’t realize you can search calendar events. Just click the **search icon** in the top navigation of your **Calendar**. Type in any word associated with the invite to retrieve the event.



STEP 5

Never miss a meeting

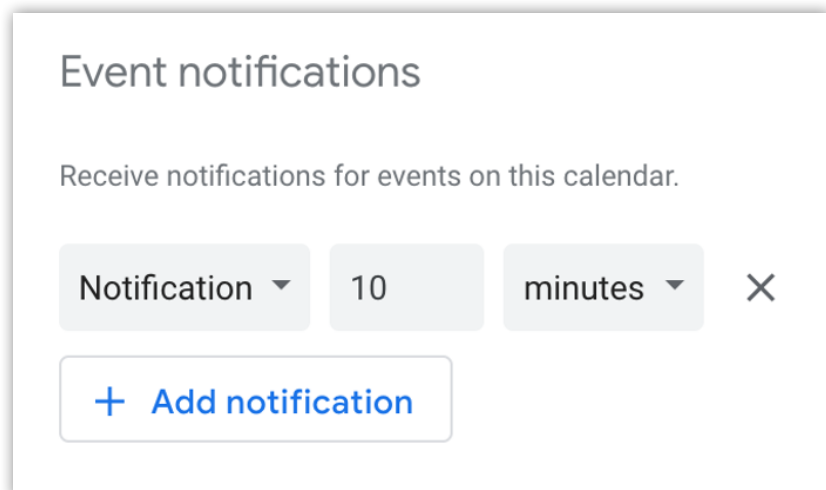
Avoid missing important meetings by customizing how you receive event reminder notifications.

Click **Settings** up top. From the left-hand menu, select a **specific calendar** to update its settings.

Scroll down to **Event notifications**. You can set up **notification receipts** that pop up on the corner of your screen (or as a **push notification** on your phone). Or if you want **email reminders**, select that option. Next, choose how far ahead of an event you want to receive a reminder.

Click **+Add notification** if you want to receive notifications through more than one method. Then add **notification settings** to get notifications for all-day events.

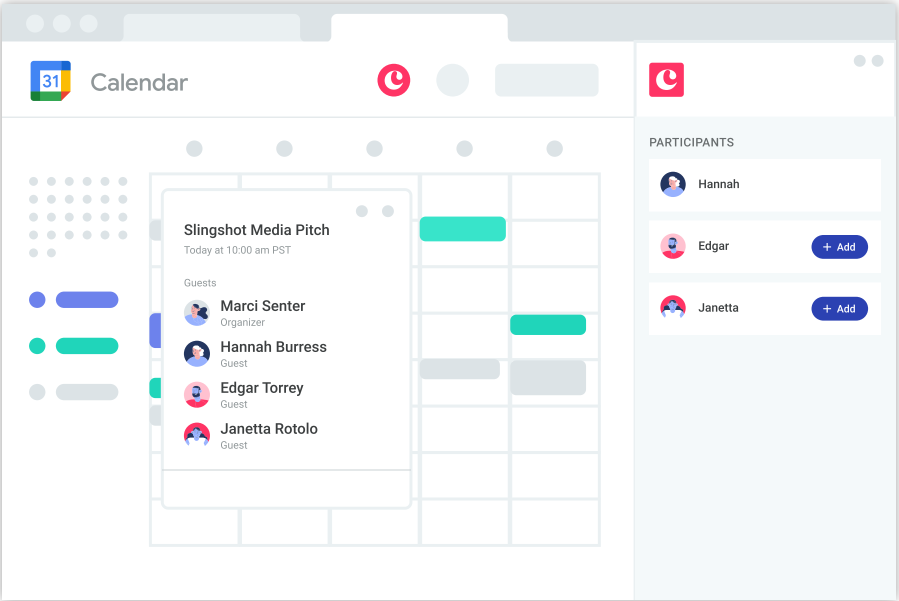
You'll never need to add a reminder manually again; these updates apply to all future events on your calendar.



STEP 6

Add all attendees to your CRM for easy follow up

Expand your network effortlessly with Copper's native Google Calendar integration: You can add Google Calendar event participants to Copper CRM with one click using the Copper Chrome extension. Don't worry, we'll get more into this later.



Get even more Google Calendar hacks here: 30 Google Calendar hacks to boost your productivity

Collaboratively track your data using Google Sheets.

Let's take a second to celebrate the end of storing 20 similar versions of the same spreadsheet on your computer.

Google Sheets lets anyone on your team:

- Review and collaborate on spreadsheets in a secure space
- Track changes and add comments as updates occur and revert to previous versions if needed
- Create formulas, filters and pivot tables to make data-driven decisions
- Avoid data silos; easily import information from another source via a CSV file
- View and organize the information you receive from Google Forms
- Visualize your team's results so anyone you present to can quickly interpret the data

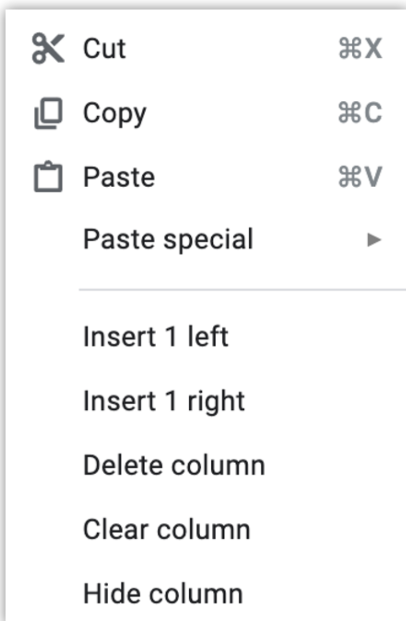
Keep these tips in mind to help you slice and dice data in Google Sheets:

STEP 1

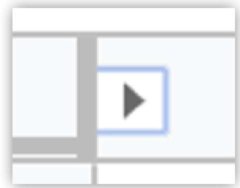
Hide data

Some data that's helpful to you for number crunching may be less relevant to teammates when you're sharing the spreadsheet with them.

In Google Sheets, you can hide columns and rows by right-clicking on either and selecting Hide.



To unhide, look for the arrow icon next to where that row or column once displayed. Hover over the arrow until you see a white box framing it. Then click to show that data.

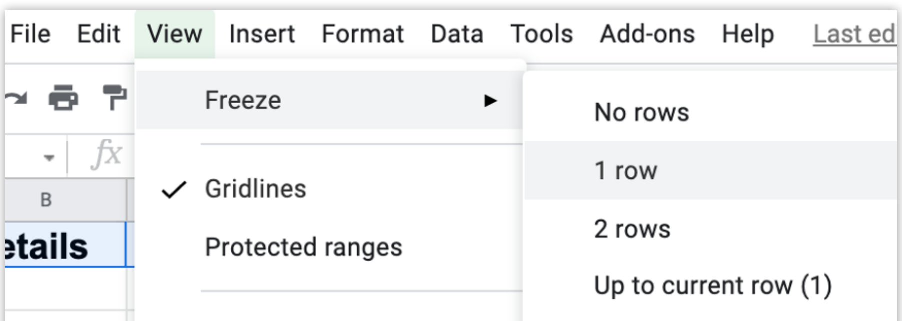


STEP 2

Freeze rows and columns

Don't worry about having to remember what each row or column contains when you scroll. You can freeze rows and columns so their names always show.

Select **View** > **Freeze** > **the number of rows and columns** you want.

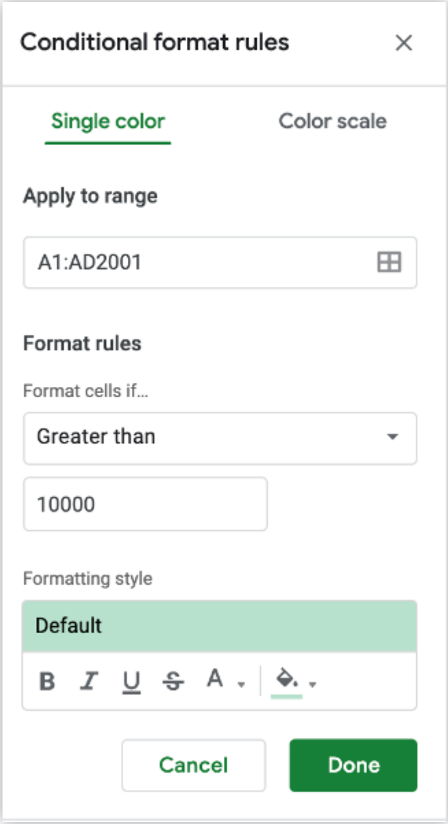


STEP 3

Set conditions

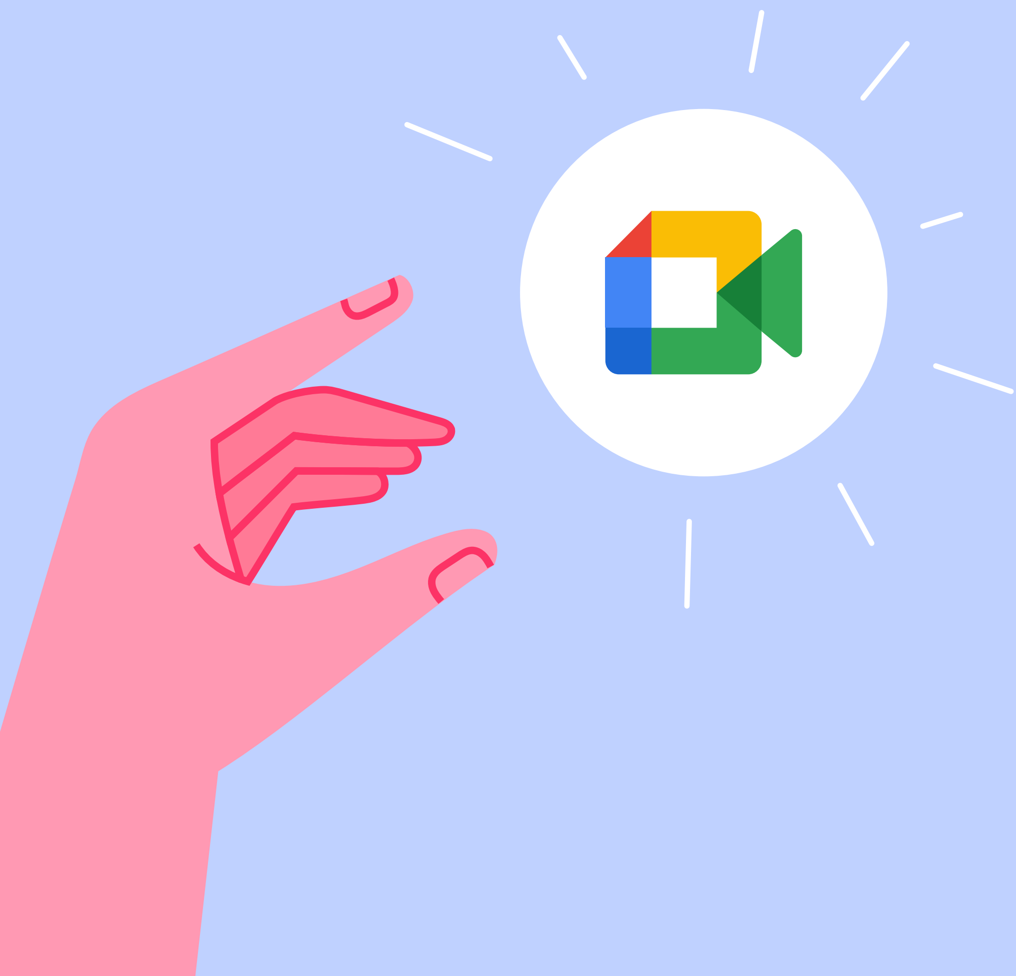
Automatically apply formatting to any cell in your spreadsheet based on any condition. For example, Sheets can automatically highlight a cell in green when the potential value of a deal is over $10,000.

Select **Format** > **Conditional Formatting**. Under **"Format cells if…"**, select **"Greater Than"**, then type 10,000 as the **value**.



Stay connected and tuned in with Google Meet.

With Google Meet, start impromptu brainstorm sessions, client meetings, team huddles and more.



Run through your sales deck in a video meeting while still reading nonverbal cues from your potential clients. Host remote one-on-ones. Organize and run a video meeting any time from mobile or desktop.

Best of all, Meet can run straight from your desktop browser, so you don't have to deal with slow loading times and managing settings in a separate app.

Here are our top hacks for getting the most out of Meet:

STEP 1

Use keyboard shortcuts

Some shortcuts that can help you run meetings more effectively include:

	Mac	Windows
Turn your camera on or off	Cmd + E	Cmd + E
Mute or unmute your microphone	Cmd + D	Cmd + D
Display the current users	Ctrl + Cmd + P	Ctrl + Alt + S
Announce who is currently speaking	Ctrl + Cmd + S	Ctrl + Alt + P

STEP 2

Adjust the video resolution

If you're working from somewhere with a slow internet connection, updating your resolution settings can help keep the meeting running smoothly.

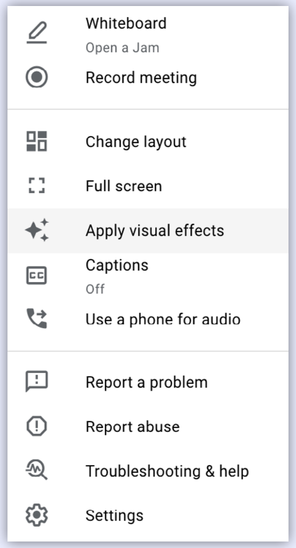
Click > Settings > Video. Adjust your send and receive resolution to 360p. In case your video still lags, consider running or participating in the meeting on audio-only.

STEP 3

Blur your background

Add a blurred background in Google Meet to minimize distractions so viewers can focus on the content of what you're saying and not your cat sunbathing in the background.

Click ⋮ > Apply visual effects. You can select from a blurred or slightly blurred background, depending on your preference.



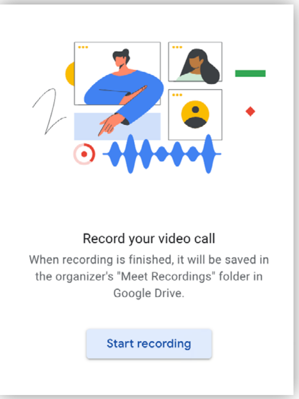
STEP 4

Record your call

Record team meetings so you and collaborators can go back and reference them after the fact. Plus, if someone isn't able to attend, they can watch and catch up.

Click ⋮ > **Record meeting**. A righthand column will pop up with a **Start recording** button (click the button).

Google Meet will notify everyone when you start recording. Remember to give people a heads up before clicking this option.



CRM TIP

Quickly prep for your Google Meet events with Copper inside Google Calendar. View context around meeting participants, including communication, files and activities, and even add new meeting attendees to Copper with one click for easy follow up. [More on this feature here](#).

Find, store, and share all your files with Google Drive.

Life's too short to waste time hunting down files. Google Drive helps keep teams and companies organized and on the same page through a robust cloud storage system built around collaboration.

With Google Drive, teams can:

- Store, retrieve, and share files in an instant
- Keep track of the most up-to-date version of a file
- Securely manage who can view and edit anything saved in Drive
- Automatically scan files for sensitive information and block anyone outside your organization from accessing a file

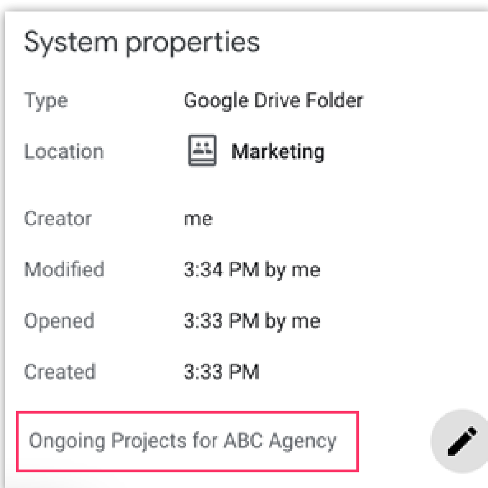
Here are a few key productivity tips for using Drive:

STEP 1

Create a shared drive for your team

Make finding files easier for all your co-workers by building out an organized shared drive.

If you haven't already created a shared drive, select **Shared Drives** from the left-hand menu in **Google Drive**. Then click **+New** and enter a **Name** for the new drive.



Establish the shared folders' organization based on the project, client, campaign or anything else that makes sense around your team's frameworks.

PRO TIP

Insert a description for Drive files and folders to provide additional information to your team. Select any file or folder, then click View Details. Under Details, scroll down to add a description.

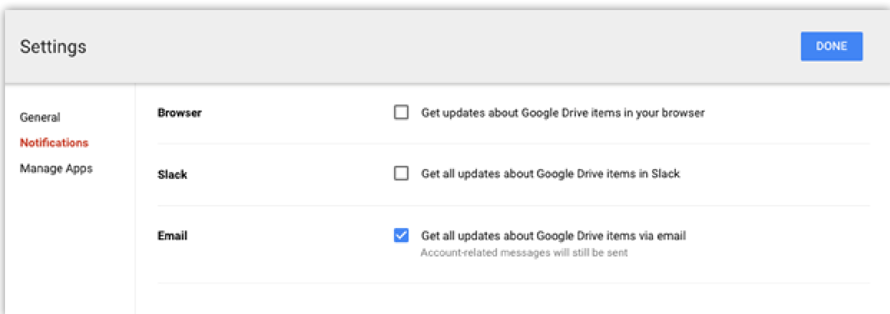
STEP 2

Turn on notifications

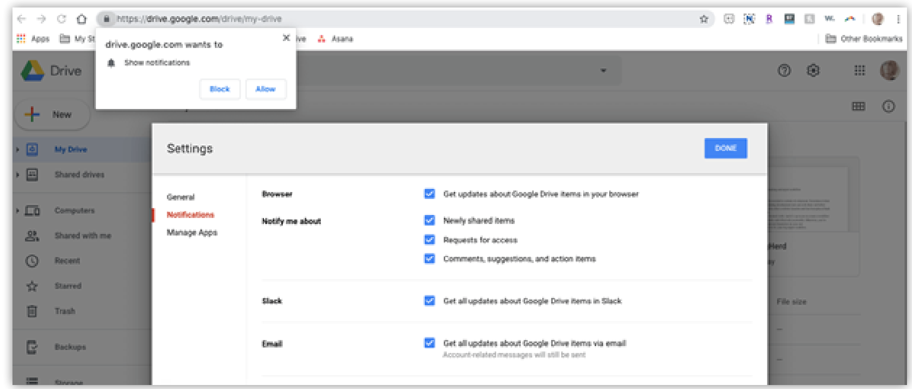
Stay in the loop on updates, new files and comments using Google Drive notifications.

Click **Settings** > **Notifications** and select **browser**, **email** or even **Slack notifications**.

By default, you receive email notifications.



If you want **push notifications**, make sure to enable them in the browser first.



With **browser notifications**, you can specify which ones you want to receive.

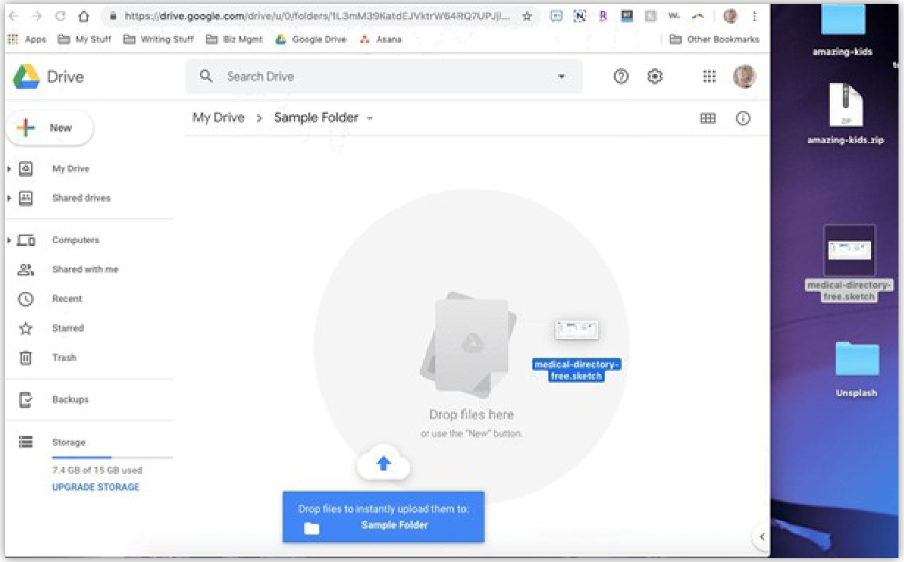
Since push notifications will interrupt you as you work in the browser, you may only want to allow the most urgent communications to come through that way.

STEP 3

Save all your files

Google Drive supports 100+ file types. Simply drag and drop anything saved on your computer into any folder your team has in **Google Drive** (or click **My Drive** > **New folder** to create one).

You can upload entire folders too.



STEP 4

Conduct more specific searches

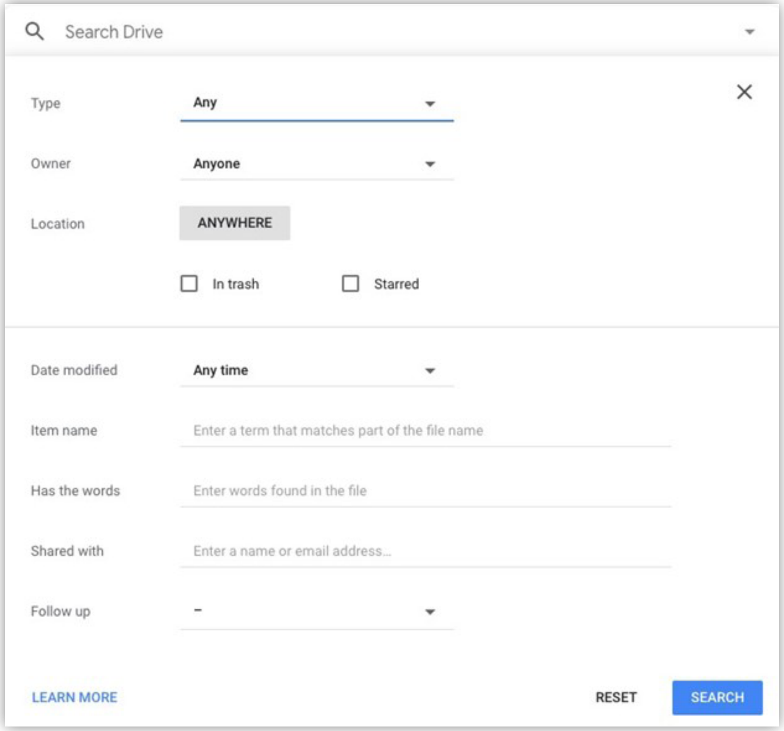
Don't waste half an hour trying to locate a file — Drive's search function can help.

Basic search only allows you to locate certain words in files or image names. Sure, you could narrow down the options slightly by selecting the file type (if you remember what it is)...

A more robust option is to click into the search bar and select More search tools. You'll unlock advanced search capabilities here.

This feature is helpful for not only quickly locating files you're struggling to find, but also pulling up a list of specific results.

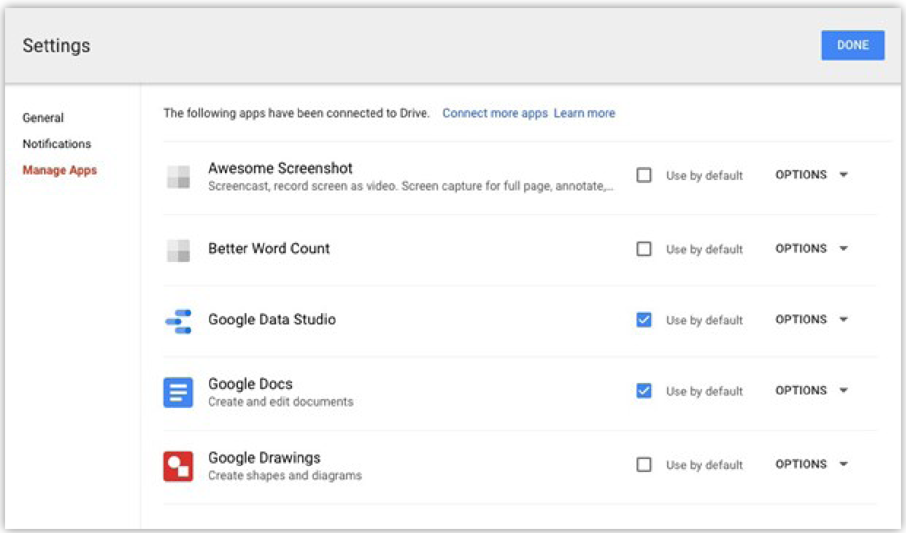
For instance, you'd be able to look for Docs owned by you and created after a specific date.



STEP 5

Do more with Google Drive files using Apps

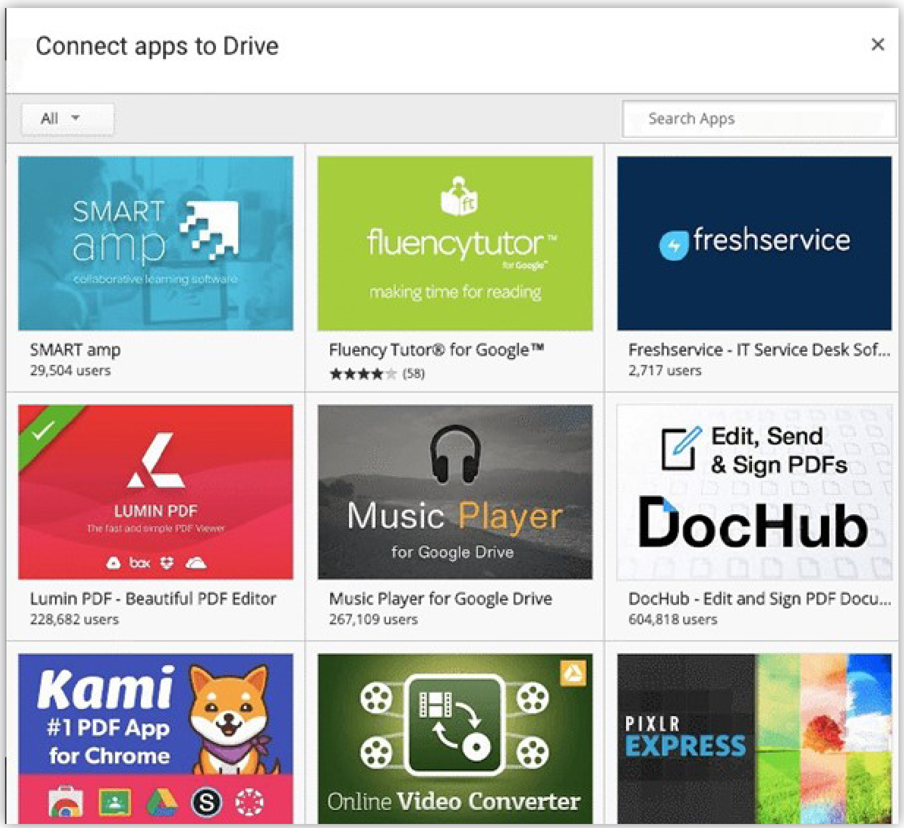
To access Google Drive's apps, go to your **Settings** and locate the **Manage Apps** tab:



As you can see, there are already a few apps installed to streamline work between Google and other platforms.

Click on **Connect more apps** to bring other helpful tools into the mix.

There are hundreds of apps you can connect to Drive. Your best bet is to search based on what you're looking to get done.



Here are a few apps that may help you manage files and save your team time:

- **PDF Converter Online:** Convert PDFs into other document types
- **DocuSign:** Sign, merge, or edit PDFs
- **Optimizer:** Optimize images
- **Video Converter:** Convert videos
- **Lucidchart:** Create collages, graphics and other design files
- **Moqups:** Build storyboards or wireframes
- **Slack:** Communicate and collaborate with teammates
- **Zapier:** Automate processes and connect apps with no code required

Get useful insights to take the right actions with Google Forms.

Spending ten minutes creating a form can save you hours of unnecessary back and forth with clients or heading down a rabbit hole with an unqualified lead.

Forms can also help you get feedback on any internal initiatives by quickly spinning up a survey and sending it to your team.

Google Forms lets you:

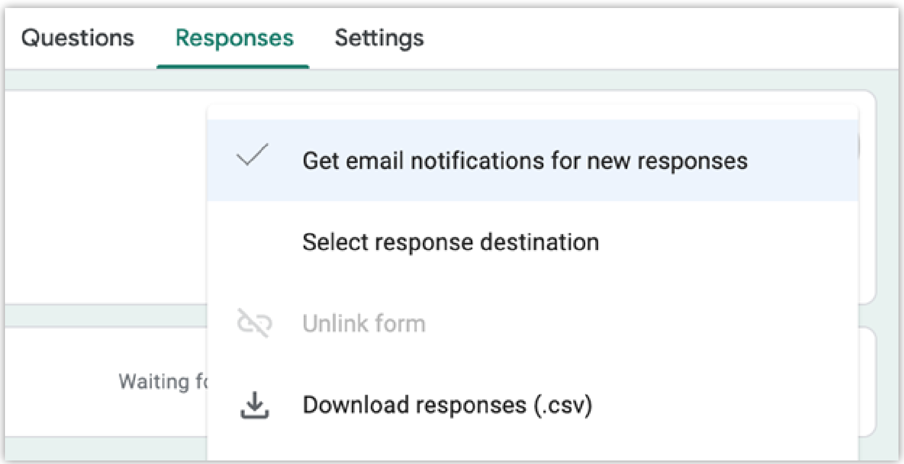
- Create as many surveys and forms as your team needs
- Easily add open-ended and multiple-choice questions
- View information entered by anyone who completes your form in Google Sheets
- Indicate required fields in your form so you can qualify prospects

Let’s look at two features that are especially helpful in Google Forms.

STEP 1

Stay in the loop

Receive notifications when new form submissions come in. From the editable version of your form, click **Responses** > ⋮ > **Get email notifications for new responses**.

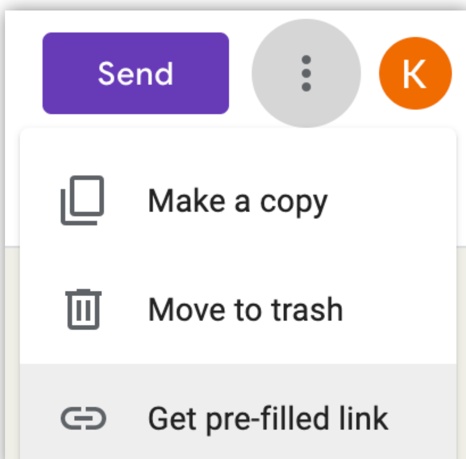


STEP 2

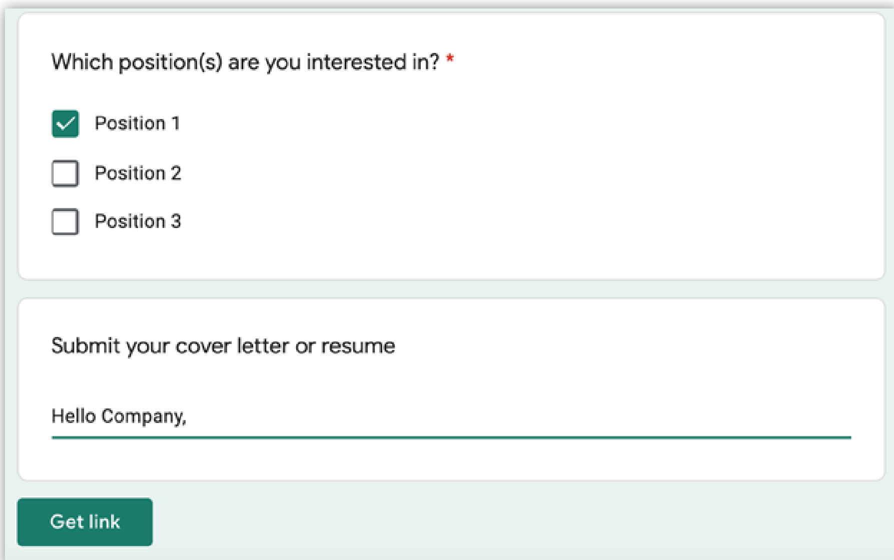
Share a pre-filled link

You may have discussed certain details already with a prospect, but you still need to gather more information. Share a partially completed client intake form.

Click ⋮ from the top right of your form and select **Get pre-filled link**.



A new browser tab will open up where you can partially fill out the form based on what you already know. Click **Get link** when you're done so you can share it with your client.



Pitch like a pro with Google Slides.

Closing deals. Reporting results. Sharing the latest news during your team meetings.

Google Slides gives you the keys to:

- Create and collaborate together on presentations
- Comment and chat about specific items in slides to fine-tune your presentation
- Work off existing templates and save new ones so creating future presentations takes less time
- Track revisions and revert back to a previous version
- Convert Powerpoint files to Slides so all your team's presentations are in one place
- Easily present slides on video calls or in-person through Chromecast

Here are five tips that can save your team time working in Slides:

STEP 1

Make your base template's file name clear

As you're tweaking sales decks for specific clients, you can ensure no one on your team overwrites the base template file. Name it something clear such as **"Master File"** or even put in parentheses **"MAKE A COPY"**.

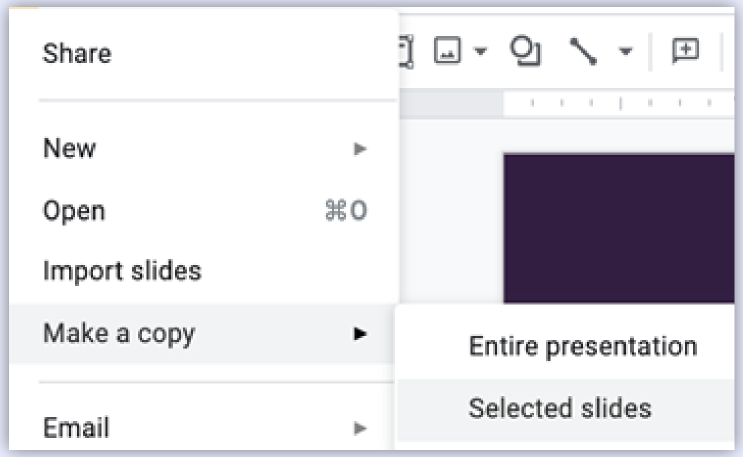
Then anyone on your team can click **File** > **Make a copy** to duplicate and tweak.

STEP 2

Copy specific slides into another presentation

If you need to pull slides from one file to use in another Slides presentation, **File** > **Make a Copy** has an option where you can select specific slides to add into a new file.

You can also select a specific slide and click **Cmd (Ctrl) + C** to copy. Then go into the other presentation and paste with **Cmd (Ctrl) + V**.



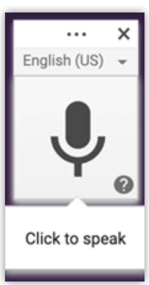
STEP 3

Dictate notes

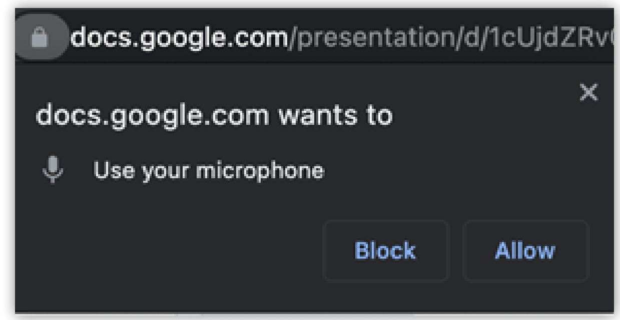
Make sure your talking points are clear by capturing them as you dictate out loud.

First, double check that your computer microphone is on and working. Microphone settings are typically in the **System Preferences** on a Mac or the **Control Panel** on a PC.

If you're not yet using Chrome's browser, open your Slides presentation in Chrome to use dictation. Click **Tools** > **Voice type speaker notes**. A menu will pop up where you select **Click to speak**.



Chrome will also ask for access to your mic to capture your **voice notes**. Voice dictation is available in many other Google apps too, we just happen to love using it for Slides.



STEP 4

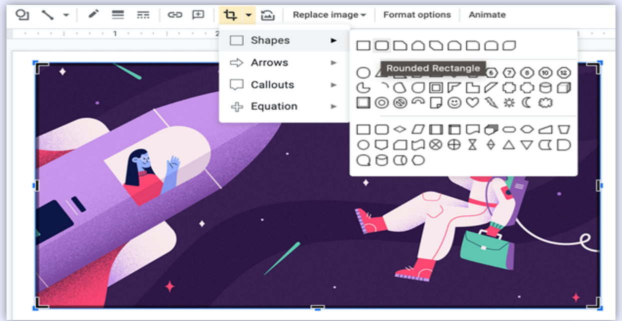
Flag typos

Don't let one typo undermine an otherwise great presentation. Click **Tools** > **Spelling** > **Underline errors** to quickly spot potential spelling or grammar errors.

STEP 5

Add Image Masking

If your team meeting presentations are starting to look stale, consider using image masking. Image masking lets you take any image and apply a shape crop to it. Simply select an image and then click **Mask Image icon** from the **Crop tool**, and select a **shape** for the mask.



Here's the image with rounded edges:

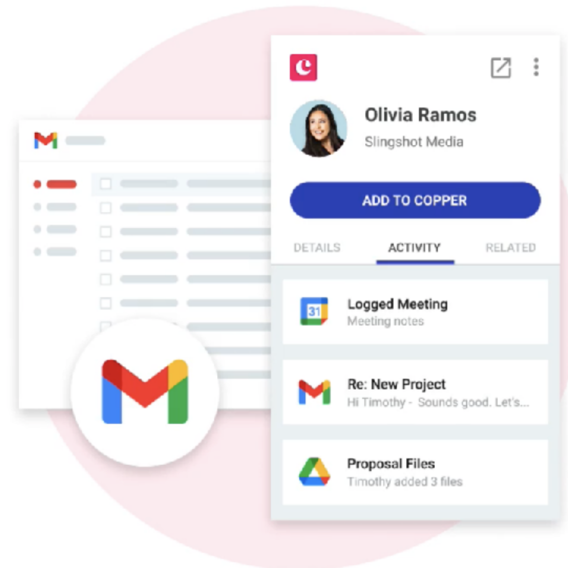
Elevate your team's productivity with the Copper Chrome Extension.

Like the moon landing, getting started with Copper is one small step for you, but one giant leap in your team's journey to become more productive.

If you haven't already, download the Copper Chrome Extension. Copper sits right inside your Gmail inbox and Google Calendar so you can stay on top of all your relationships.

After you install the Copper Chrome extension, getting up and running begins with your contacts. Anyone you email who isn't already a lead or person in Copper will be sent to a Suggested Contacts section in your dashboard. The Chrome extension searches across the internet for your contact's company name, website and other key details, providing you with additional context and eliminating data entry while you add them to Copper.

Once new contacts have been added, any interactions between you, your team and the contact sync to their contact record, and will appear in the Chrome extension alongside your inbox and calendar. Emails from the last year will also show in the interaction history. That way, everyone stays on the same page.



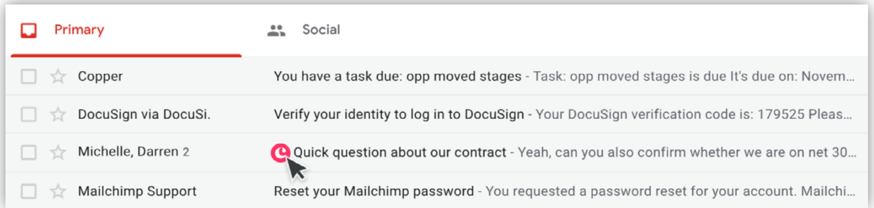
Getting the most out of the Copper Chrome extension

The Copper Chrome extension goes beyond syncing and displaying your upcoming deals. It also helps streamline your workflow and eliminate tab-switching. Here's how:

01

Zero in on the emails that matter.

Inboxes can feel noisy and cluttered. Filtering through and determining priority emails that matter can consume a lot of precious time. The Copper Chrome extension automatically spotlights your tracked emails using the Copper icon, so you and your team can easily surface the emails that can drive growth and nurture your business relationships.



02

Take back hours drafting repeat emails.

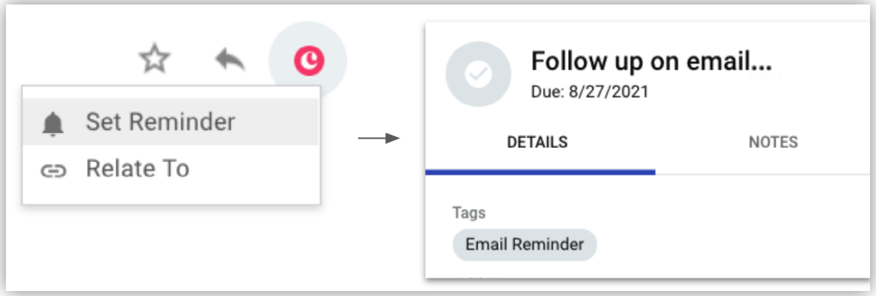
You likely have emails that perform particularly well during outreach, and find yourself copying, pasting, and then slightly tweaking them with every new prospect. In Copper, you can save them as templates so you don't have to waste time sending routine emails like customer or new-hire onboarding.

Copper templates can also be shared across your team and include merge fields to automatically personalize greetings.

03

Unify your inbox, to-do list and CRM.

You won't need to struggle to stay on top of your important tasks. Whether your current workflow involves using your inbox as a to-do list, switching to another tool in another tab, or referencing sticky notes covering your desk, it all takes work to maintain. With the Copper Chrome extension, you can create tasks and follow-up reminders directly within an email. From there, they'll surface to your dashboard and schedule themselves to your calendar.



04

Make your CRM your single source of truth.

The Copper Chrome extension also helps keep your Copper app up-to-date to serve as a reliable single source of truth for your organization. If your legal or billing departments are interacting with their counterparts at an organization you're responsible for, they can add a conversation to an Opportunity, Company or Person record from the Chrome extension with one click.

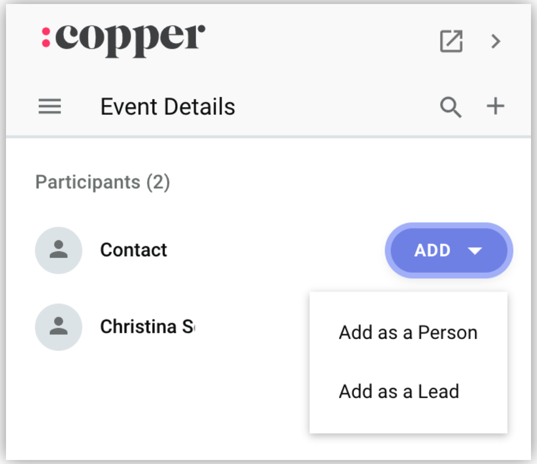
05

Add new meeting attendees directly from Google Calendar with one click.

The Copper Chrome extension is integrated with Google Calendar, so you and your team can easily view event details, participants and materials. Plus, you can one-click add anyone as a Copper contact that's part of an upcoming Calendar event. This enables easy follow up and relationship building with new contacts in a customer or prospect's organization.

No one needs to break their workflow to learn more about event attendees — just click on their names to see any past interactions between them and your team.

And with Meeting Scheduler enabled, you can quickly send meeting invites to customers and prospects and allow them to pick any open slot on your calendar ([learn more here]).



More reasons teams love Copper.

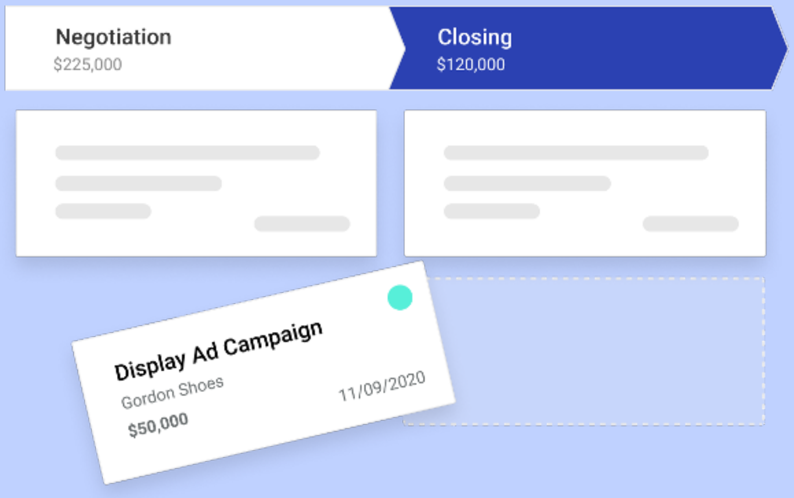
01

Quickly see the big picture

Track leads along a visual pipeline and review how long deals remain in different stages before closing. From the Dashboard on the Copper web app, select Opportunities to check out a tile-style view of your pipeline.

Once you have a clearer idea of where leads spend the most time, you can fine-tune processes, identify friction points, and more effectively drive your most important deals forward.

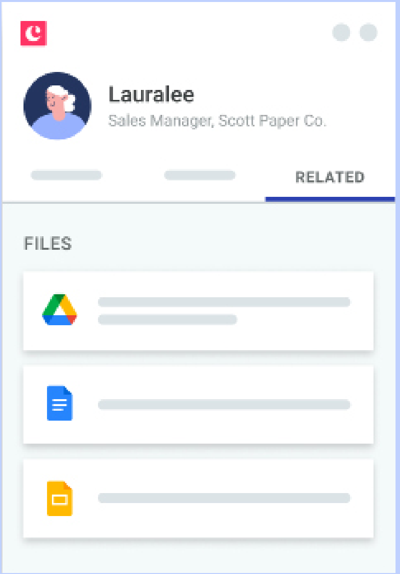
After the deal is closed, Copper's Projects functionality allows a seamless handoff and better collaboration across your business.



02

Associate files with contacts

A sales proposal. An executed agreement. Onboarding docs. Tie any of these Google Drive files to a specific contact using Copper. That way, everyone on your team can easily retrieve files, enabling you to more effectively manage those key relationships.



03

Sync from every device

On top of syncing from Google Contacts, contacts from your mobile device can also be synced using the Copper mobile app. This lets you view communication between your teammates and any saved contacts while on the go. You can also add notes, log calls, attach files and pretty much anything else you need to provide more context, even while you're not at your desk.

Connect Copper with even more apps through Zapier.

Zapier is an automation platform that lets you connect apps together in your tech stack without code using Zaps. Zaps consist of a **trigger** (an event that initiates a workflow) and an **action** (an event Zapier automatically performs for you after the workflow is triggered).

Here are the most popular Zaps Copper customers use:

1

If you use Google Forms to qualify leads, Zapier can automatically add them to Copper. To create a brand new lead in Copper for each form submission, use this zap.

2

Zapier also works with more complex workflows. If someone fills out a form, and you want to first check if they're already in Copper as a person or lead and update their existing record, check out this Zapier Playbook.

3

When your team's out networking at trade shows, take information scanned from business cards into a spreadsheet. Then use this Zap to automatically push their contact information into Copper.

4

You can even deliver automatic updates to your team in Google Chat when an Opportunity closes. Try out this Zap to auto-send out a chat message.

Zapier also works with Slack, Mailchimp, Intercom and thousands of other apps. The opportunities to save hours on routine tasks are endless. Just think of what your team can do with that extra time.

Copper and Google: Work the way you want to.

Communication and collaboration tools that can integrate with each other to more naturally capture the nuances of IRL relationships, keep teams connected, and increase productivity are vital to your success. Companies can maintain a leg up when they foster and preserve: the unique human culture that develops among its employees; the effervescence of creative innovation that comes from collaboration; and the adaptability to go with the flow while prioritizing the wellness and needs of team members.

We're committed to continually strengthening Copper's Google integration so our customers can easily work uninterrupted out of their Workspace apps. As Workspace evolves along with the future of work, Copper will walk in step, helping our customers build lasting relationships through the Google ecosystem.

Copper is the Google-recommended CRM for businesses that grow through strong relationships. Visit us at copper.com.

:copper