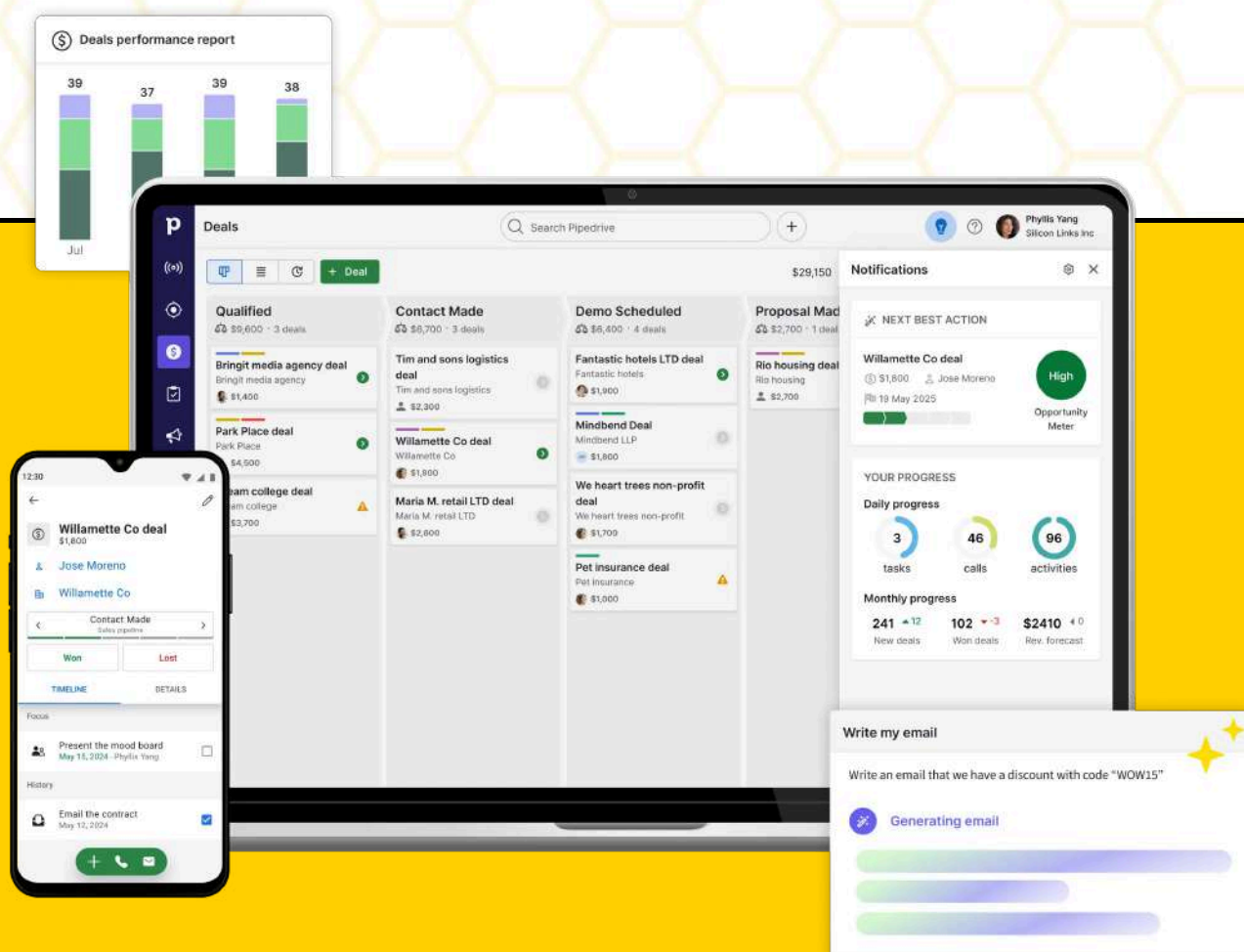


PIPEDRIVE CRM IMPLEMENTATION

Pipedrive automation library

30 ready-to-use automations for your sales process,
plus the integrations we connect most often.



Your CRM should work for you, not the other way round

This library collects **30 automations** we set up in Pipedrive for B2B teams. Each one removes manual work, keeps your process consistent and gives your team a clearer view of the pipeline.

"Leads land in the wrong inbox."

Routing rules hand every deal to the right person in seconds.

"Nobody notices which deals are going cold."

Alerts and reminders surface them while they can still be saved.

"I'm copying data between five tools."

Integrations keep your systems in sync without manual entry.

What's inside

The automations are grouped into **seven categories**, from deal management to pipeline hygiene. Every card shows the **trigger**, the **action** and **why it matters**.

After the library, you'll find the **integrations** we connect most often, so you can see how Pipedrive fits into the rest of your stack.

Not every automation will fit your team. During the Pipedrive CRM implementation we review how you actually sell and configure only what makes sense. Additional automations can be built on request.

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Built on real projects

These are not a theoretical wish list. They are the kinds of automations we set up for B2B teams, in the order that tends to make the biggest difference to daily work.

From library to your pipeline

You don't need all 30. We start with how your team really sells, then switch on the automations that earn their place.

1 Map your process

We look at your pipeline, stages, roles and the tools around Pipedrive.

2 Pick what fits

Together we choose automations from this library and agree the rules: thresholds, timings and owners.

3 Build and test

We configure everything in Pipedrive and test it with real scenarios before go-live.

4 Hand over

Your team gets a short training and clear documentation, so everyone knows what runs on its own.

pipedrive

Authorized Partner

We're a Pipedrive Authorized Partner

We set up Pipedrive for B2B teams every day: pipelines, custom fields, automations, integrations and training. You get a CRM your team actually wants to use.

How to read the cards

TRIGGER

What happens in Pipedrive or a connected tool.



ACTION

What the automation does for you, automatically.



WHY IT MATTERS

The result you get, in plain words.

Plan limits apply

Pipedrive's automation features depend on your plan. We check this up front and tell you early if a rule needs another approach.

Something missing?

If your process needs an automation that isn't in this library, we can build it on request.

Developers on the team

Diligently is part of Rocksoft, a software house. When a workflow needs custom code or an API connection, we build it.

CATEGORY 01 · AUTOMATIONS 1-6

1

Deal management

Keep opportunities moving and in the right hands.



01 New deal: assign owner by source

TRIGGER A deal is created

ACTION Assign the deal owner based on the lead source field

Why it matters. Every inbound lead goes straight to the right rep, with no manual triage.

02 Deal stuck in stage: notify owner

TRIGGER A deal has not moved stage in X days

ACTION Send a Slack or email notification to the deal owner

Why it matters. Stops deals from going cold by nudging reps to re-engage at the right moment.

03 Deal won: create onboarding task

TRIGGER A deal is moved to Won

ACTION Create a follow-up task or project in a connected tool (e.g. ClickUp)

Why it matters. No gap between closing and onboarding. The handoff happens on its own.

04 Deal lost: log reason and notify manager

TRIGGER A deal is moved to Lost

ACTION Require the lost reason, then notify the sales manager by email

Why it matters. You capture competitive intelligence and give management visibility without extra meetings.

05 High-value deal: escalate to manager

TRIGGER Deal value exceeds a threshold you define (e.g. €10,000)

ACTION Notify the sales manager and add them as a follower on the deal

Why it matters. Big opportunities get the right attention without relying on reps to flag them.

06 Proposal sent: schedule follow-up

TRIGGER A deal moves to the Proposal sent stage

ACTION Create a follow-up activity due in 3 business days

Why it matters. Proposals without a follow-up lose momentum. This prevents silence after the pitch.

Not sure where to start?

A good first set for most B2B teams. Each one is easy to explain and quick to feel in daily work.

01

Route inbound leads

New deal: assign owner by source

09

Skip the copy-paste

Web form: create contact and deal

11

No dead-end meetings

Meeting completed: next step

29

Keep forecasts honest

Inactive deal: mark as stale

CATEGORY 02 · AUTOMATIONS 7-10

2

Contact & lead management

Handle inbound leads fast and keep every record current.



07 New contact: send welcome email

TRIGGER A contact is created

ACTION Send an automated welcome email that introduces the team and next steps

Why it matters. First impressions matter. An instant, personal-feeling message sets the tone.

08 Contact goes cold: re-engagement nudge

TRIGGER No activity on a contact for 30 days

ACTION Create a task for the owner: re-engage or archive

Why it matters. Keeps the CRM tidy and forces a deliberate decision on every contact.

09 Web form submission: create contact and deal

TRIGGER A form is submitted on your website (Webflow, Typeform, etc.)

ACTION Create the contact, open a deal in the first pipeline stage and assign an owner

Why it matters. No manual entry for inbound inquiries. Leads reach the pipeline within seconds.

10 Contact updated: sync to email tool

TRIGGER A key contact field changes (e.g. company, job title)

ACTION Update the record in your email marketing platform

Why it matters. Segmentation stays accurate across tools without anyone updating two systems.

CATEGORY 03 · AUTOMATIONS 11-14

3

Activity & task automation

Make sure every conversation has a next step.



11 Meeting completed: create next step

TRIGGER An activity of type Meeting is marked done

ACTION Create a follow-up task due in 24 hours

Why it matters. Every conversation needs a next action. This makes it non-negotiable.

12 Overdue task: escalate to manager

TRIGGER A task is overdue by more than 2 days

ACTION Notify the manager and re-assign or duplicate the task

Why it matters. Overdue tasks are an early sign of pipeline risk. Managers see it before deals slip.

13 Call logged: update deal stage

TRIGGER An activity of type Call is created on a deal

ACTION Move the deal from Lead in to Contacted

Why it matters. The pipeline stays up to date after every call, with no manual stage changes.

14 Discovery call scheduled: send prep email

TRIGGER A Discovery call activity is created

ACTION Send the contact a preparation email with the agenda and what to expect

Why it matters. Prepared prospects show up better: fewer no-shows and more useful calls.

4

CATEGORY 04 • AUTOMATIONS 15-18

Email & communication

Send the right message at the right stage.



15 Stage change: send stage-specific email

TRIGGER A deal moves to a specific stage

ACTION Send a pre-written email template to the linked contact

Why it matters. The right message at the right stage, and reps stay consistent without writing from scratch.

16 Proposal opened: notify rep immediately

TRIGGER The email with your proposal is opened (via email tracking)

ACTION Send a push notification to the rep via Slack or mobile

Why it matters. A prospect who opens a proposal is engaged. Reps can follow up while attention is high.

17 No reply in 5 days: send follow-up

TRIGGER A sent email gets no reply within 5 days

ACTION Send a short follow-up email from the rep's own address

Why it matters. Persistent follow-up wins replies. Automation removes the friction of doing it by hand.

18 Contract signed: start onboarding sequence

TRIGGER A deal moves to Won or a contract field is updated

ACTION Trigger a multi-step onboarding email sequence

Why it matters. New clients need structured communication. This starts the relationship right.

5

CATEGORY 05 • AUTOMATIONS 19-22

Reporting & notifications

Keep managers informed without anyone building a report.



19 Weekly pipeline summary to manager

TRIGGER Every Monday at 8:00

ACTION Email a pipeline summary to the sales manager

Why it matters. Managers start the week with a clear view of pipeline health, with no manual reports.

20 Monthly revenue report to leadership

TRIGGER The first business day of each month

ACTION Send a summary of monthly revenue and deal velocity

Why it matters. Leadership stays informed on key revenue metrics without scheduling a meeting.

21 Deal closes this week: alert the team

TRIGGER A deal's expected close date is within 7 days

ACTION Notify the team channel with deal name, value and owner

Why it matters. Everyone knows what is closing soon, so support and coordination arrive on time.

22 Pipeline below target: alert management

TRIGGER Total open deal value drops below a threshold you define

ACTION Send an alert to the sales manager

Why it matters. An early warning lets management act well before end-of-quarter pressure.

6

CATEGORY 06 • AUTOMATIONS 23–26

Integration & data sync

Connect Pipedrive to the tools you already use.



23

Deal reaches Proposal: create project in ClickUp

TRIGGER A deal moves to the Proposal stage

ACTION Create a linked project or task list in ClickUp (or your project tool)

Why it matters. Sales and delivery stay in sync from the moment a deal gets serious.

24

Deal won: create invoice in accounting tool

TRIGGER A deal is marked Won

ACTION Create a draft invoice in your accounting tool (e.g. Xero, QuickBooks, Fortnox, Tripletex)

Why it matters. Closes the gap between sales and finance. No manual invoice creation or re-entering data.

25

Contact created: enrich company data

TRIGGER A new contact is created

ACTION Pull company size, industry and job title from a data provider via Zapier, Make or n8n

Why it matters. Reps get context automatically. No manual research before the first call.

26

Deal value updated: sync to Google Sheets forecast

TRIGGER Deal value or close date is updated

ACTION Update your Google Sheets revenue forecast

Why it matters. Finance teams that forecast in spreadsheets stay current without manual exports.

7

CATEGORY 07 • AUTOMATIONS 27–30

Pipeline hygiene

Protect data quality and flag problems early.



27

Duplicate contact detected: flag for review

TRIGGER A contact is created with a matching email or phone number

ACTION Create a task for the owner: review and merge the duplicates

Why it matters. Duplicates cause confusion and skew reporting. This surfaces them immediately.

28

Required fields missing: remind owner

TRIGGER A deal sits in a given stage but key fields are empty (e.g. company size, budget)

ACTION Remind the owner and list the missing fields

Why it matters. Data quality fades quietly. This enforces your standards without manual audits.

29

Inactive deal: mark as stale

TRIGGER No activity on a deal for 60 days

ACTION Change the deal label to Stale and notify the owner

Why it matters. Stale deals inflate the pipeline and distort forecasts. Regular cleanup keeps numbers honest.

30

Email bounced: update contact status

TRIGGER A bounce event arrives from your connected email tool

ACTION Set the contact status to Invalid email and create a task to find the right address

Why it matters. Bad email data silently kills outreach. Flagging bounces keeps your contact base clean.

Connect Pipedrive to the rest of your stack

Most teams run Pipedrive next to a website, an accounting tool, a project tool and a few more. These are the connections we set up most often.

1 Website & forms

Webflow WordPress
Shopify Typeform Fillout

Inquiries, UTM source and consent land in Pipedrive without copy-paste.

2 Ads & lead sources

Google Ads Meta Lead Ads
LinkedIn Lead Gen GA4

See which campaigns bring deals, not just clicks.

3 Email marketing

Mailchimp Brevo
ActiveCampaign
Pipedrive Campaigns

Segments, subscriptions and engagement stay in sync.

4 Accounting & invoicing

Xero QuickBooks Fortnox
Tripletex Fakturownia

From a won deal to a draft invoice.

5 Project & delivery tools

ClickUp Asana Jira
Monday.com

From a won deal to a ready project with the right context.

6 Chat & calendars

Slack Microsoft Teams
Outlook Google Calendar

Alerts where your team already works, meetings that log themselves.

7 Documents & e-signature

Pipedrive Smart Docs
PandaDoc DocuSign
SharePoint Google Drive

Offers, contracts and signatures tied to the deal.

8 Reporting & BI

Google Sheets Excel
Looker Studio Power BI

One source of truth for sales numbers and forecasts.

9 ERP & custom systems

ERP customer portals
booking systems internal apps

Custom connections through the Pipedrive API and webhooks.

How we connect them

Native integrations

Ready-made connections from the Pipedrive Marketplace when they fit.

Automation platforms

Zapier, Make or n8n for flexible workflows between apps.

API & webhooks

Custom-built connections when your systems need something specific.

AI-assisted steps

Summaries, classification and drafting inside the workflow, where it helps.



Every integration is scoped and quoted separately, because it depends on your tools, your data and how you work. Tell us what you use and we'll tell you what's possible. Don't see your tool? There's a good chance it can be connected through its API.

YOUR NEXT STEP

Let's put your pipeline on **autopilot**

Book a 30-minute meeting. We'll look at how you sell today and show you which automations and integrations would help most.

[Schedule a 30-min meeting](#)diligently.pl/services/pipedrive-crm-implementation

What you get from the call

- 1 A look at your pipeline, stages and tools
- 2 A shortlist of automations that fit how you sell
- 3 Honest advice on what to connect first and what can wait

