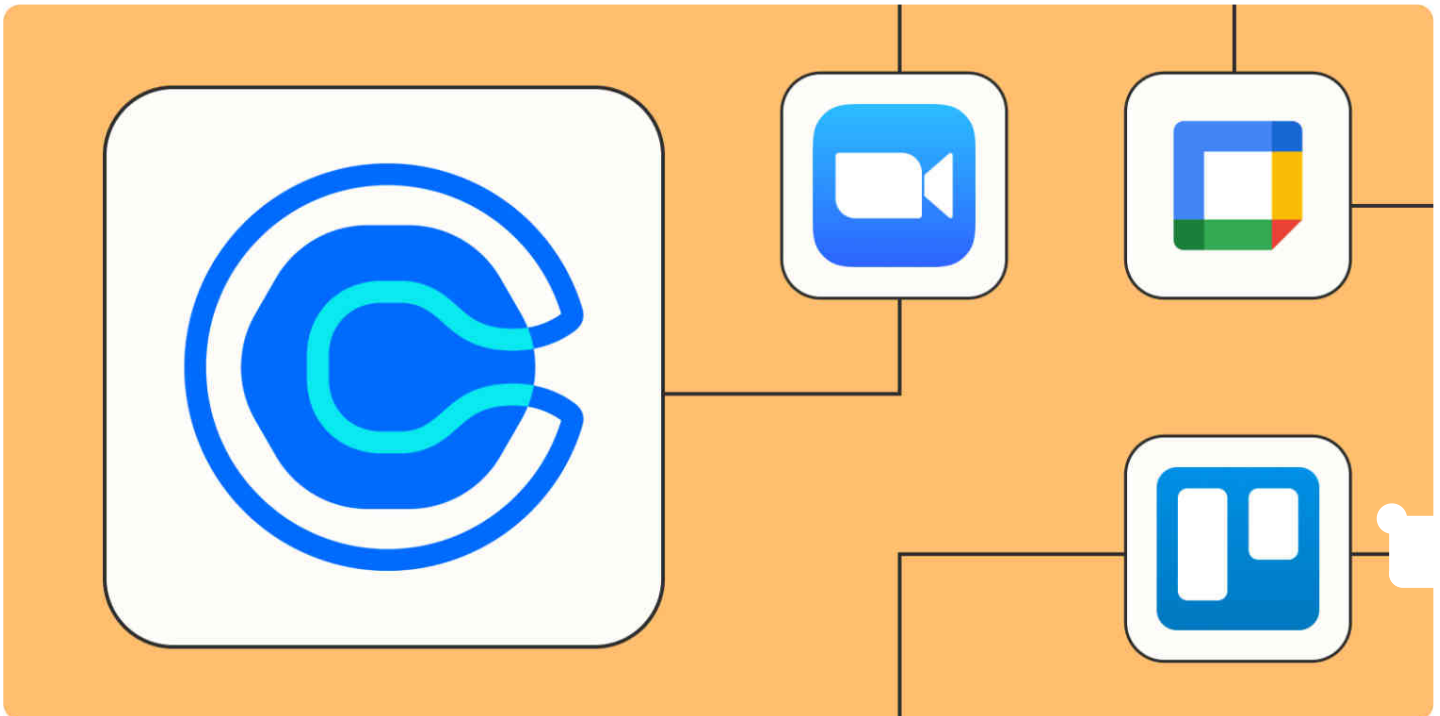


Automation inspiration 4 min read

5 ways to automate Calendly

These workflows will help you be a Calendly pro

By Jack Beaudoin · July 25, 2022



Booking meetings doesn't have to be a chore. Instead of playing endless email tag, a simple click on a Calendly link can set an appointment that works for all parties.

But booking appointments is usually just one administrative task within your larger meeting workflow. With a Zap—our word for Zapier's automated workflows—you can connect Calendly to thousands of business apps. Here's how to [automate Calendly](#) to send out meeting reminders, add video conferencing, and more.

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How to integrate Calendly with almost any app using Zapier

Add Calendly bookings to your other calendars

Add Calendly events to your work calendar quickly and automatically helps eliminate double-booking, especially if work colleagues have access to your free/busy times.

While Calendly has a built-in connection with some popular calendar apps, sometimes you may want events to show up in more than one place or on a calendar that isn't connected to your account.

Use the Zaps below to connect [Google Calendar](#) or [Outlook](#) to Calendly. In addition to automatically populating the new event's title, start and end times, you can also specify a standard meeting location, include a personal conference dial-in or video meeting, and set an event's color, visibility, and reminder schedule.



Create Google Calendar events from new scheduled Calendly events

Try it

Calendly + Google Calendar



Create Microsoft Outlook events for new invitees created in Calendly

Try it

Calendly + Microsoft Outlook

Set up video conferencing for Calendly meetings

By now, we've probably all experienced that moment of panic when you miss the start of the meeting because you can't find the right video conferencing link. That short delay gets your meeting off on the wrong foot, leaving you frazzled and apologetic before you even say hello.

Automation ensures this never needs to happen again. Use these Zaps to automatically set up video conferencing for Calendly events.



Create Zoom meetings for new Calendly events

Try it

Calendly + Zoom



Create meetings in GoTo Meeting from new Calendly events

Try it

Calendly + GoTo Meeting



Schedule Join.me meetings with new Calendly invitees

Try it

Calendly + join.me

Keep track of meeting info

If you need to report on sales goals or performance to other teams, keeping an automatic record of your meetings can save you from frantically scrolling through your calendar when someone asks for an update.

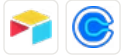
Use one of these Zap to automatically add your Calendly meeting info to your spreadsheet tool.



Create Google Sheets rows from new scheduled Calendly events

Try it

Calendly + Google Sheets



Add Airtable records for new Calendly events

Try it

Airtable + Calendly



Update rows on Google Sheets with new cancelations on Calendly

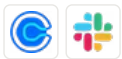
Try it

Calendly + Google Sheets

Automatically send meeting notifications

Remote and hybrid work has also made it more challenging to keep the entire team in the loop. Notifying attendees about upcoming meetings, time changes, or cancellations is an administrative task that just begs for automation. You can use Zapier to help with fine-grained notification schedules, reminders, and alerts.

Use these Zaps to let the team know about new meetings the moment they're created.



Send Slack messages for new Calendly invites

Try it

Calendly + Slack



Send SMS messages for new Calendly events

Try it

Calendly + SMS by Zapier



Post Microsoft Teams messages with new Calendly invitees

Try it

Calendly + Microsoft Teams

If you want to send a reminder to yourself or your meeting attendees right before a meeting starts, you can with a [multi-step Zap](#).

Start by selecting Calendly as your trigger app and **Invitee created** for your trigger event. Then add a [delay step](#) to hold the reminder for a specific time (we recommend starting with 15 minutes) before the scheduled start of the meeting. Then add your notification step in your text or chat app.

Automatically email or text meeting attendees

You can make appointments more productive by automatically reaching out to meeting attendees before your meeting begins. Using a new event in Calendly as the trigger, you can automatically send sales brochures, share directions, or provide a standard agenda to invitees to help them prepare. Here's how:

Automatically email Calendly attendees

Emailing an information packet to a meeting attendee is a rote task that takes up valuable time. What makes the problem worse is that your wasted time scales—multiply the lost time by the number of meetings you set, and it adds up quickly. Use these Zaps to reach out automatically:



Send emails via Gmail for new scheduled Calendly events

Try it

Calendly + Gmail



Send Microsoft Outlook emails for new invitee created events in Calendly

Try it

Calendly + Microsoft Outlook

And if you need to personalize an email before you send it, Zapier has you covered. Just set the action to "create draft email" instead of "send email".



Prepare draft emails on Gmail for new Calendly events

Try it

Calendly + Gmail

Automatically text Calendly attendees

With apps like [Twilio](#), it's just as easy to text invitees (or yourself) as it is to email them. You can use these Zaps to confirm meeting details, send a greeting, or push a link to a pre-meeting questionnaire.



Send Twilio SMS messages for new Calendly events

Try it

Calendly + Twilio



Send Twilio SMS messages for new invitee created events in Calendly

Try it

Calendly + Twilio

Add Calendly invitees to your CRM and email marketing funnels

An introductory meeting is often just the first step toward a sale. Making sure your client gets the right follow-up is an important next step.

These Zaps add invitees and contacts to your customer relationship management (CRM) tool of choice, so you can track relationships as they develop.



Create or update Keap Max Classic contacts from new Calendly events

Try it

Calendly + Keap Max Classic



Create or update Hubspot contacts for new Calendly invitees

Try it

Calendly + HubSpot



Add new Calendly invitees to ActiveCampaign automations

Try it

ActiveCampaign + Calendly



Record new Calendly events as contact activities in Pipedrive

Try it

Calendly + Pipedrive



Create Salesforce leads from new Calendly events

Try it

Calendly + Salesforce

Another way to ensure that you and your organization remain top-of-mind during the purchasing decision is to automatically add invitees to your email marketing newsletters. This way, even when you're not speaking to prospects directly, you can share value, show them compelling information, and gently convince them to convert. Just make sure they've opted in to receive these types of emails before you add them.



Add or update ActiveCampaign contacts for new Calendly invitees

Try it

ActiveCampaign + Calendly



Create Mailchimp subscribers from new Calendly invitees

Try it

Calendly + Mailchimp



Add tagged subscribers to ConverKit from new Calendly events

Try it

Calendly + ConvertKit



Add invitees who cancel Calendly events to an AWeber list

Try it

AWeber + Calendly

Do more in less time with Calendly and Zapier

Calendly makes it easy to schedule meetings without resorting to long email conversations. But with a little imagination and Zapier's ability to connect Calendly with dozens of other productivity, sales, and marketing tools, you can automate the entire meeting workflow. Think about it—no more double-booking, no more missed starts, and no rush to follow up when the meeting ends. What will you do with all your free time?

This piece was originally published in August 2020, written by Nick Moore. It was substantially updated in December 2021 by Jack Beaudoin and lightly updated in July 2022.

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Jack Beaudoin

An inveterate note-taker and journalist, Jack Beaudoin has covered healthcare IT, the environment, pro cycling, global fisheries, grandparents, high school football rivalries, and ontology. He's based in Maine, but you can find him on LinkedIn.

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