

# WORKFLOWS, TRIGGERS, ACTIONS & CONDITIONS

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## What we're learning:

In this lesson, you learned how automation works behind the scenes. **You now understand** how workflows are built, how data flows through them, and how each part - triggers, actions, and conditions - works together to automate tasks smoothly.

## Why it matters:

Automation is not just about saving time - it helps make smarter, data-driven decisions. It improves reporting, increases visibility, and lets you use your resources (time, money, energy) more efficiently. Predictable workflows also ensure tasks are done consistently and accurately.

## What is a workflow?

A **workflow** is a series of steps that tell the system what to do, when to do it, and under what conditions. Think of it like your morning routine - but automated.

## The 3 Core Parts of a Workflow:

- **Trigger** – The starting point (e.g. someone fills out a form or sends a message)
- **Actions** – The tasks that follow (e.g. send an email, update a spreadsheet, notify the team)
- **Conditions** – The logic that decides what happens next (e.g. only notify the sales team if the lead is from a high-value company)

Each part ensures the right steps happen at the right time - automatically.

## Real-world example (Lead Automation):

When someone submits your contact form:

- Their info is saved to your CRM (action)
- If it's a high-value lead, assign it to your top rep and notify via Slack (condition + action)
- If it's a regular lead, send an email sequence
- If info is missing, send a follow-up asking for more details

This shows how a single workflow can handle complex decisions - and it all runs automatically.

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## What about edge cases and AI?

Sometimes automation needs help. For complex decisions, AI can help your workflows react intelligently. In later lessons, you'll learn how to add AI agents and handle errors to make your systems even more reliable.

## Pro tips for building better workflows:

- **Map it out first** – Sketch the steps before building
- **Start simple** – Begin with small workflows, then expand
- **Test often** – Make sure it works step by step
- **Document everything** – Add notes so others (or you) can understand it later

## Homework:

Think of **one repetitive task** you do daily. We'll use it later to build your first workflow.