Enhanced Workflow

1. Distribute Leads Evenly Among Sales Reps

Logic:

Add a “Sales Reps” list in a separate tab of the Google Sheets document. Include the reps’ names in order.

Use Zapier to assign the next available rep in the list to each new lead. After assigning, the workflow updates the list to cycle through reps (round-robin distribution).

Steps:

1. Google Sheets Lookup:

Use “Find Row” in Google Sheets to get the next rep from the list.

1. Update Row:

Assign the rep’s name to the “Assigned Sales Rep” column in the main leads spreadsheet.

1. Update Reps List:

Move the rep’s name to the bottom of the list or mark the next rep for future leads.

1. Extract Keywords from the “Comments” Field

Logic:

Use Zapier’s Formatter to process the “Comments” field using the text parsing or keyword extraction features.

Example keywords for categorization:

Urgent, Budget, Interest, Demo Request, etc.

Steps:

1. Formatter by Zapier (Text):

Add a step to extract keywords using a predefined list or text analysis logic.

Example: Search for terms like “demo,” “urgent,” “budget,” etc., and tag leads accordingly.

1. Categorization:

Add the extracted keywords or categories to a “Lead Category” column in Google Sheets.

1. Schedule Follow-Up Reminders in Google Calendar

Logic:

Based on the “Urgency of Need” field, schedule reminders for sales reps in Google Calendar:

Immediate (within 1 month): Follow-up in 1 day.

Short-term (1-3 months): Follow-up in 1 week.

Medium-term (3-6 months): Follow-up in 2 weeks.

Long-term (6+ months): Follow-up in 1 month.

Steps:

1. Google Calendar Create Event:

Use the lead’s name and urgency category to create a calendar event for the assigned rep.

1. Dynamic Date Calculation:

Use “Formatter by Zapier (Date/Time)” to calculate the follow-up date based on urgency.

1. Assign Event:

Assign the event to the corresponding sales rep based on the earlier step.

Implementation Assumptions

1. The “Sales Reps” list is static and contains active reps ready to handle leads.
2. Keyword extraction uses predefined keywords since advanced NLP is beyond Zapier’s built-in capabilities.
3. Google Calendar events assume each sales rep has their calendar linked to the system.

Limitations

1. Sales Rep Assignment:

The round-robin system might not account for varying workloads among reps.

1. Text Analysis:

Keyword-based extraction may miss nuanced meanings in comments.

1. Calendar Integration:

Scheduling reminders for multiple reps may require additional steps if they use individual calendars.

Deliverables

Final Zapier Workflow Overview:

1. Trigger: New form submission via Google Forms.
2. Action 1: Validate data (handle incomplete submissions).
3. Action 2: Calculate lead score.
4. Action 3: Assign sales rep (round-robin logic).
5. Action 4: Extract keywords from “Comments.”
6. Action 5: Add lead to Google Sheets (with score, assigned rep, and category).
7. Action 6: Schedule follow-up in Google Calendar.

Explanations for Each New Feature:

Sales Rep Assignment: Ensures fairness and avoids overloading specific reps.

Keyword Extraction: Enhances lead categorization for better prioritization.

Follow-Up Scheduling: Automates a crucial part of the sales process.

Video Explanation:

Since I cannot directly create or share a video, here’s what to include in your recording:

Walkthrough of Zapier Steps: Show each action in the Zap, explaining how it works.

Google Sheets Setup: Show the tabs for lead details and sales reps.

Google Calendar Integration: Demonstrate how follow-up events are created dynamically.