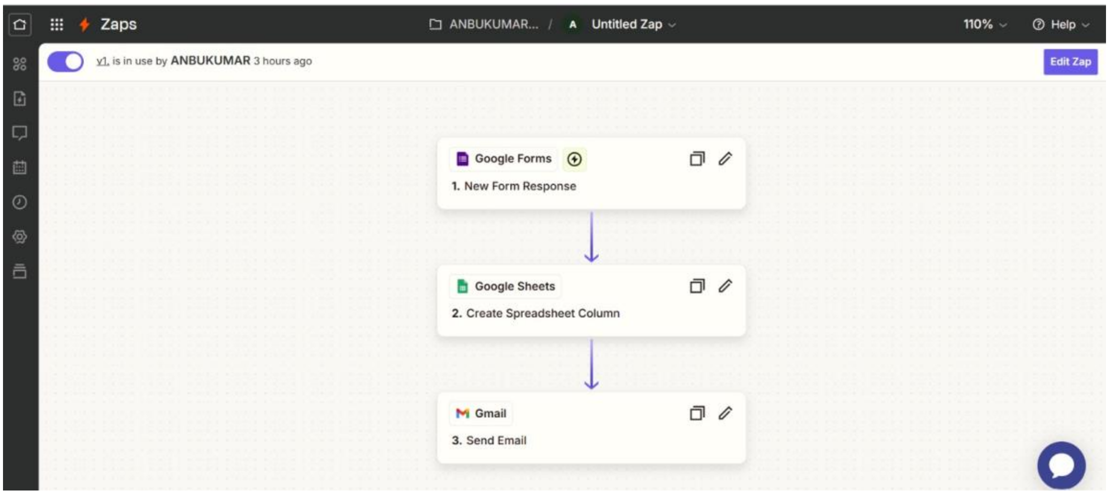
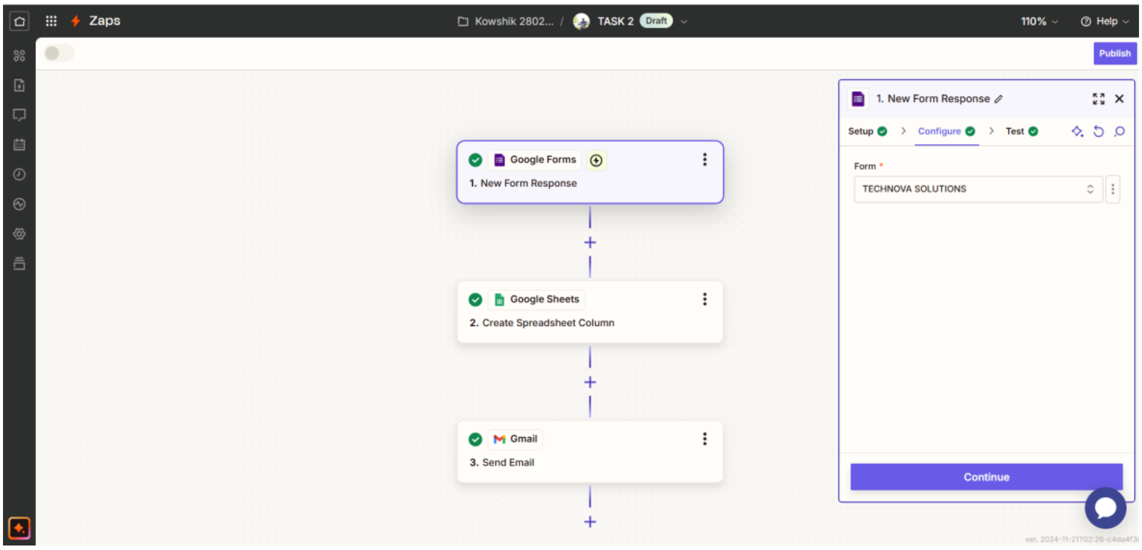
Written Explanation of the Approach to Each Edge Case

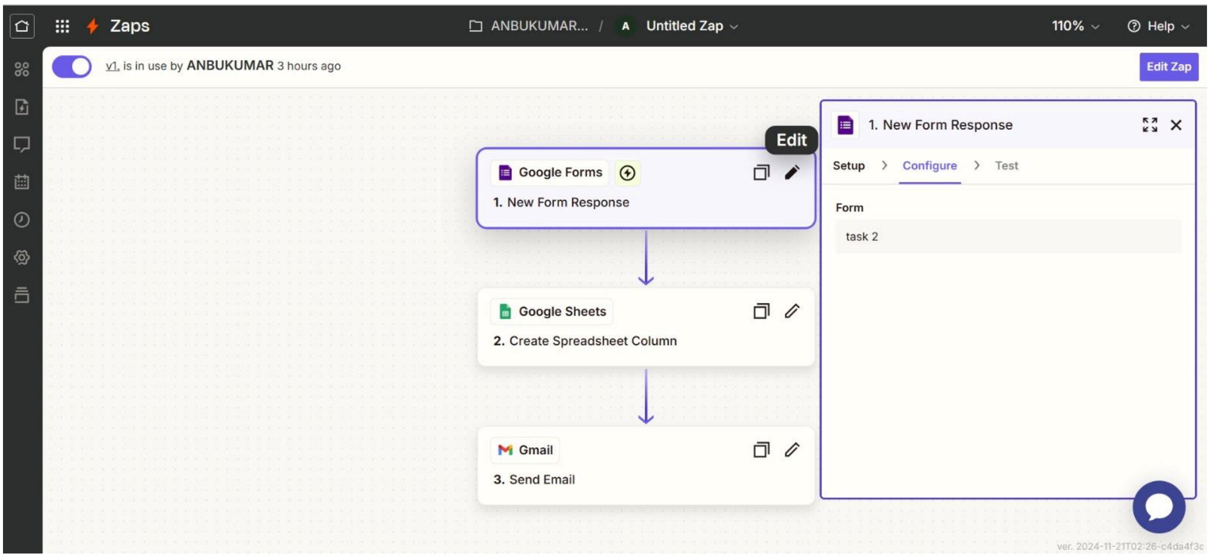
1.Handling Incomplete Data:

The procedure eliminates any submissions that lack important fields like name, email, phone number, or budget in order to solve the problem of incomplete leads. This is how it operates:

- Filter Step: A condition checks if any required field is empty. If data is missing, the workflow triggers specific actions.
- (Upload Screenshot: Filter Step Configuration in Zapier)
- Notifications: An automatic notification is sent to the sales team via Slack or email, alerting them to the incomplete submission.
- (Upload Screenshot: Slack/Email Notification Setup in Zapier)
- Follow-Up Email: The system sends an email to the lead requesting the missing information, providing a direct link to update their details or respond.
- (Upload Screenshot: Automated Email Action Setup in Zapier)
- CRM Update: The lead's status is updated to "Incomplete" in the CRM, ensuring it is tagged for review and action by the team.





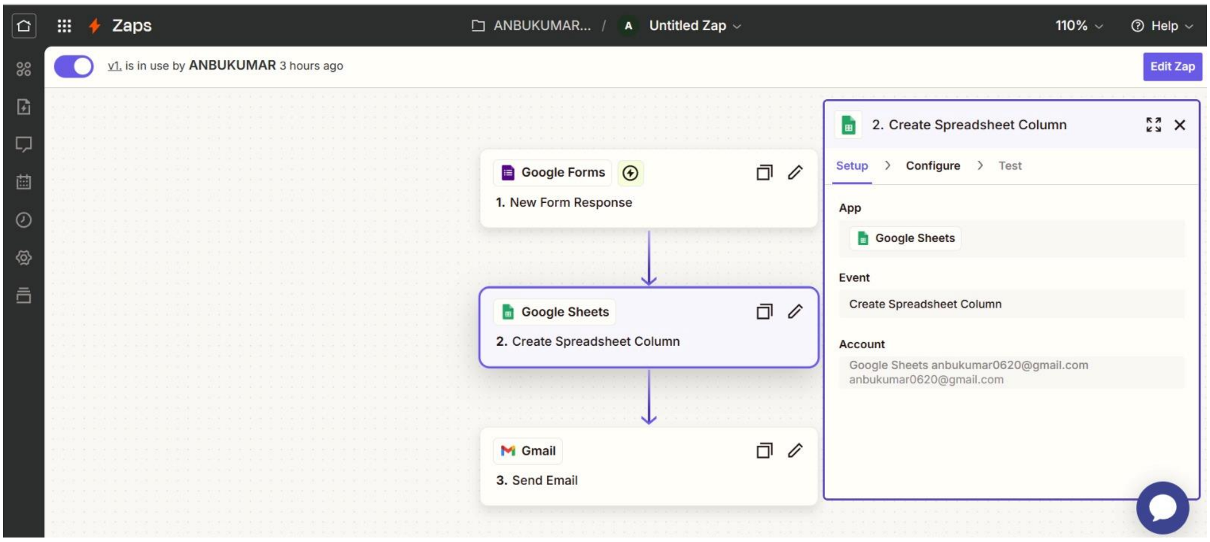


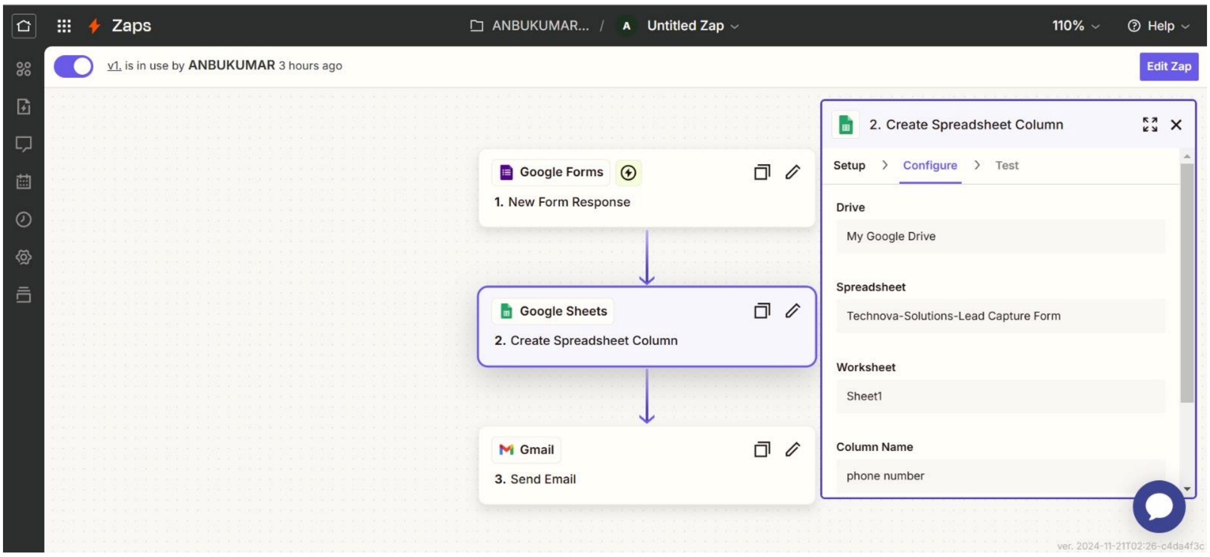
This procedure guarantees that missing information is immediately rectified without completely losing the lead.

2.Ensuring High-Value Leads Are Properly Managed:

Predetermined criteria, such as budget exceeding a particular threshold, industry specificity, or significant designations, are used to select high-value leads. The following is the workflow for managing these leads:

- Conditional Filtering: Leads meeting high-value criteria are routed through a separate workflow path for immediate action.
- (Upload Screenshot: Conditional Path or Filter for High-Value Leads)
- Assignment: These leads are automatically assigned to specific sales representatives in the CRM or tagged as "High Priority" for quick follow-up.
- (Upload Screenshot: CRM Assignment Setup)
- Notifications: Notifications are sent in real time to alert the team or manager about the high-value lead.



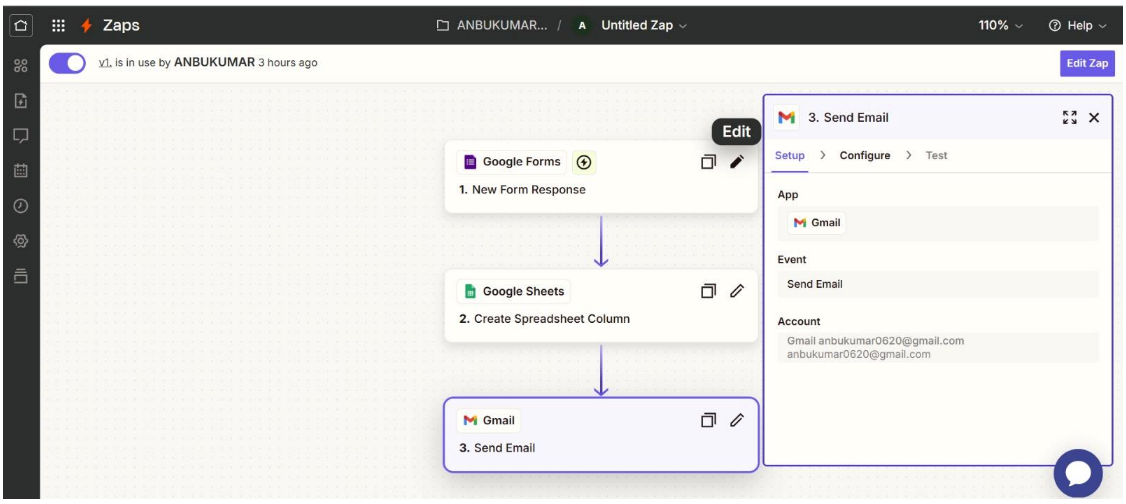


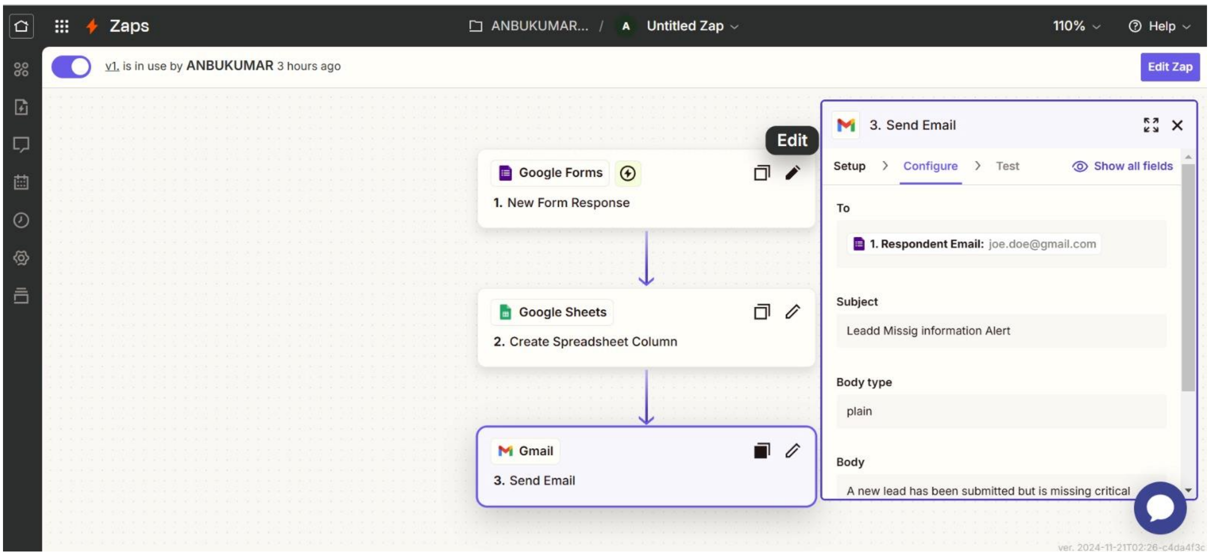
This ensures that valuable opportunities are not missed and receive the necessary attention.

3.Accommodating Different Time Zones

The procedure dynamically modifies follow-up timings based on geolocation or time zone information obtained after lead submission in order to manage leads from various time zones.

- ❖ Time Zone Detection: The workflow identifies the lead's time zone using the location field or an IP-based geolocation tool.
- ❖ (Upload Screenshot: Time Zone Conversion Step Setup)
- ❖ Adjust Follow-Ups: Follow-up emails or meeting schedules are automatically converted into the lead's local time.
- ❖ (Upload Screenshot: Email/Calendar Action with Time Zone Integration)
- ❖ Optional Meeting Booking: The lead is sent a link to book meetings in their local time zone through tools like Calendly or Google Calendar.





This ensures that communication is timely and convenient for the lead, improving engagement and response rates.