Setup

ⓘ **Why?** Zapier is a product that allows end users to integrate the web applications they use and automate workflows. As of 2021, it connects to more than 4,000 apps, with free and paid plans. You will work with this tool to automate the collection of data from multiple data sources.

- Create a free Zapier account here if you have any.
- There is a **14-day trial** but **Zapier is free if you do not activate your workflows** ⚠

🎯 Objectives

Circle does B2B prospecting to sell their clothing 👚 to resellers and companies. They have created a form to sign up.

When a prospect fills in the form, a customer record must be created in the sales team's funnel tracking tool (Trello) to include it at the beginning of the sales funnel and allow for good communication and follow-up/monitoring. Circle does not yet have a highly available IT or data team.

Setup

For this challenge, you will need to have accounts or sign up for the following tools:

- Zapier
- Gmail account
- Trello
- Calendly

1. What type of flow should be put in place: between which tools, what data, at what frequency?

❖ ***Google Forms:***
Data: Collects prospect's email address and full name.
Frequency: Each time a prospect submits the form.

❖ ***Zapier (Automation Tool):***
Trigger: New form response in Google Forms.
Action: Create a new card in Trello's "Interested" list with the prospect's name and email.

❖ ***Trello:***
Data: Represents the sales pipeline with different stages (Interested, Meeting Booked, Confirmed, Lost).
Frequency: Updated in real-time whenever a new card is created or moved.

❖ ***Gmail:***
Data: Sends personalized emails to prospects for scheduling meetings.
Frequency: Triggered whenever a new card is created in Trello's "Interested" list.

❖ ***Calendly:***
Data: Allows prospects to book appointments.
Frequency: Triggered when a prospect schedules an appointment.

2. What type of tools can be used for this, taking into account the characteristics of the company?

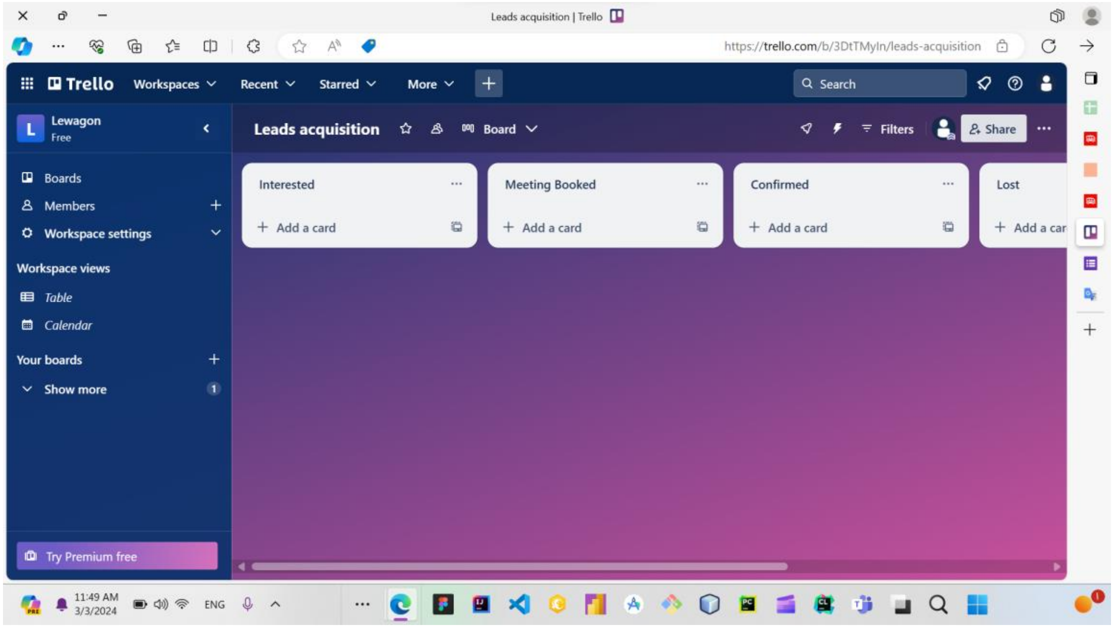
3. Create a new Google form that collects the email address and full name. Make sure your form is not limited to a specific domain. Send an initial response with your email address.

   https://forms.gle/iCSiw6ZmPgwAqXVq7

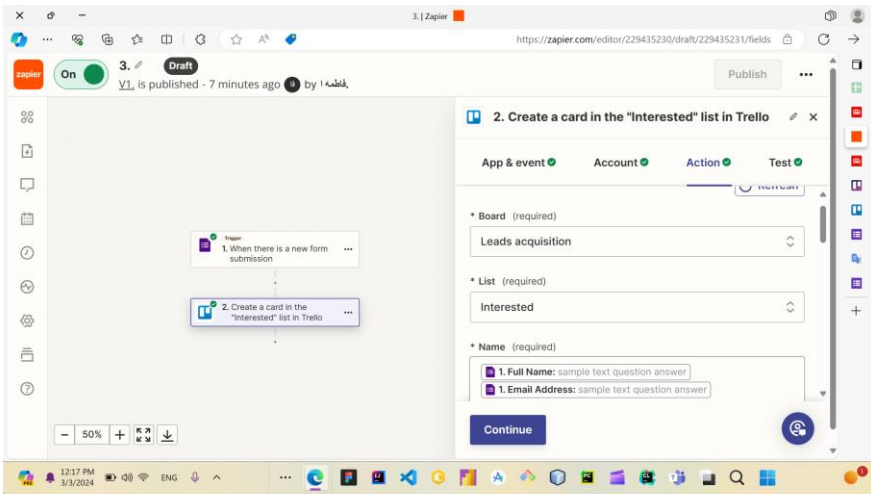
4. Create a new Trello dashboard with four states: Interested, Meeting Booked, Confirmed and Lost.

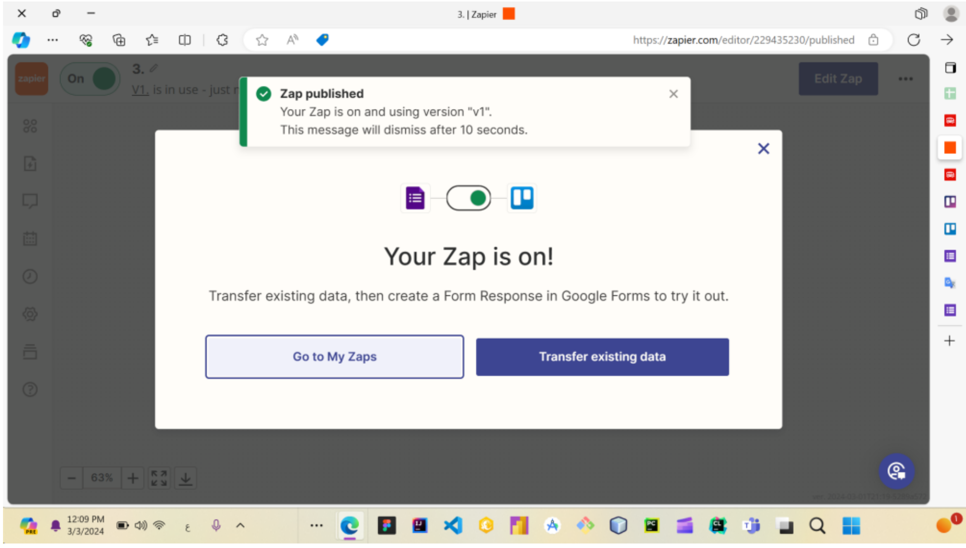
   The board is called "Leads acquisition"

   https://trello.com/invite/b/3DtTMyIn/ATTIb4a9067da21adcabfbf3e25c2c0e78831F706208/leads-acquisition

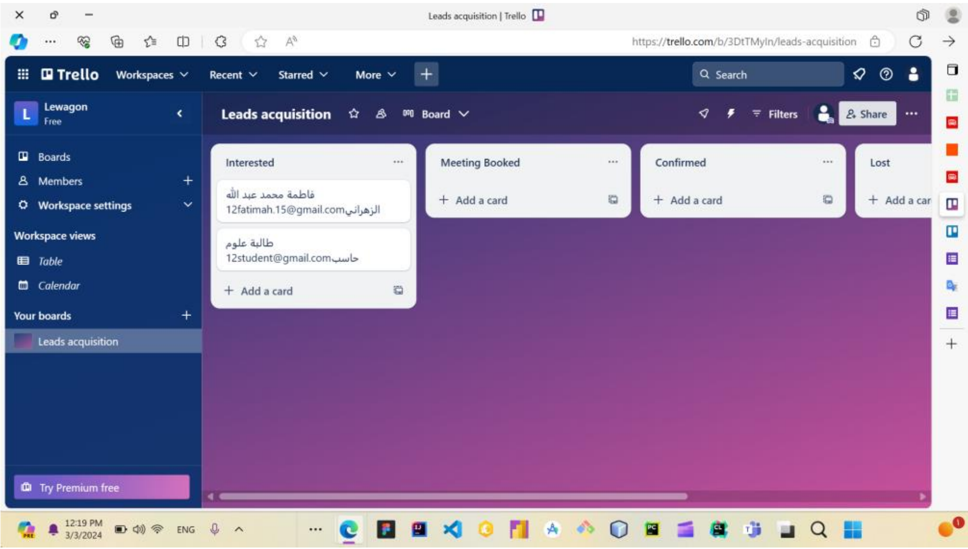


5. Create a first zap that creates a new card in the "Interested" list in your Trello dashboard when someone submits the form. The card name should be the prospect's full name and email in the card description.



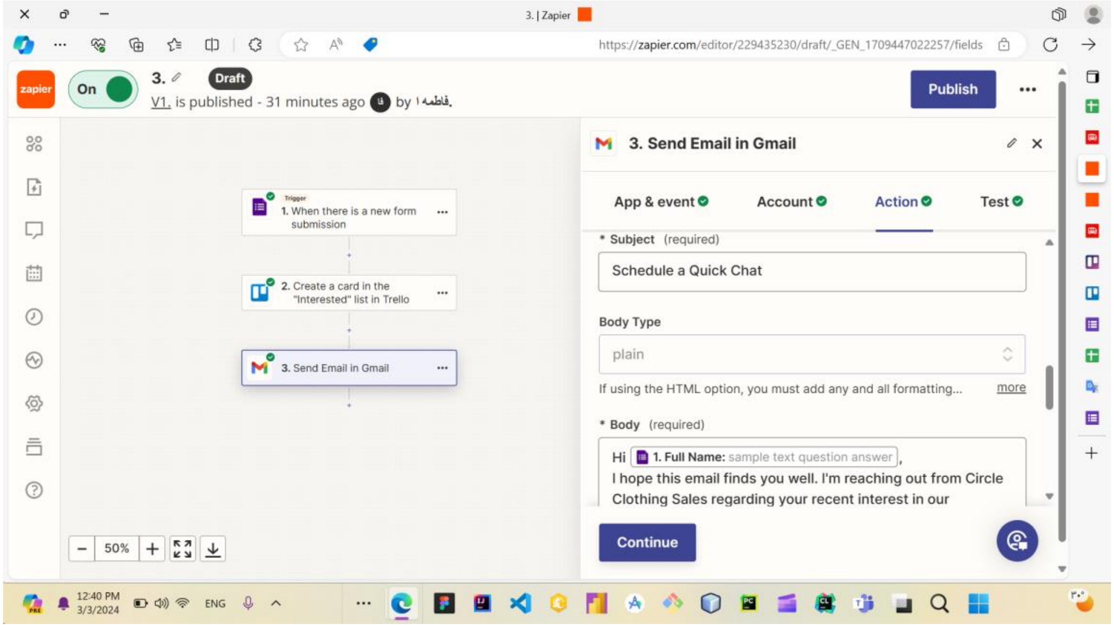


After testing all the steps in the zap, you should see a card at the top of the Interested list.

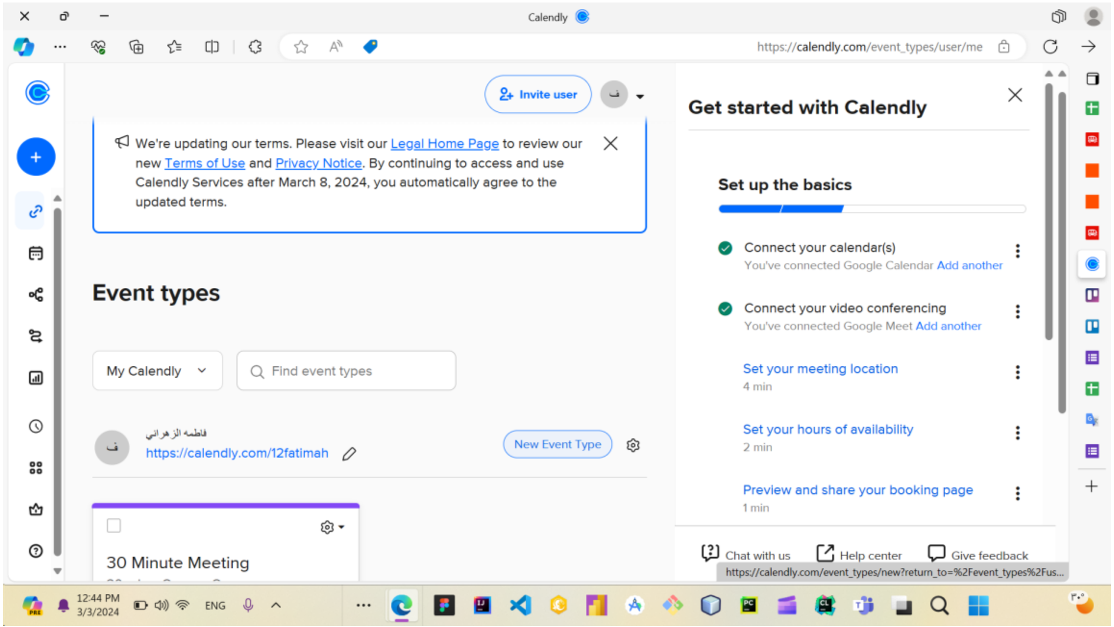


6. The sales team is happy with your automation but wants you to email the prospect to ask when they are available for a quick chat.

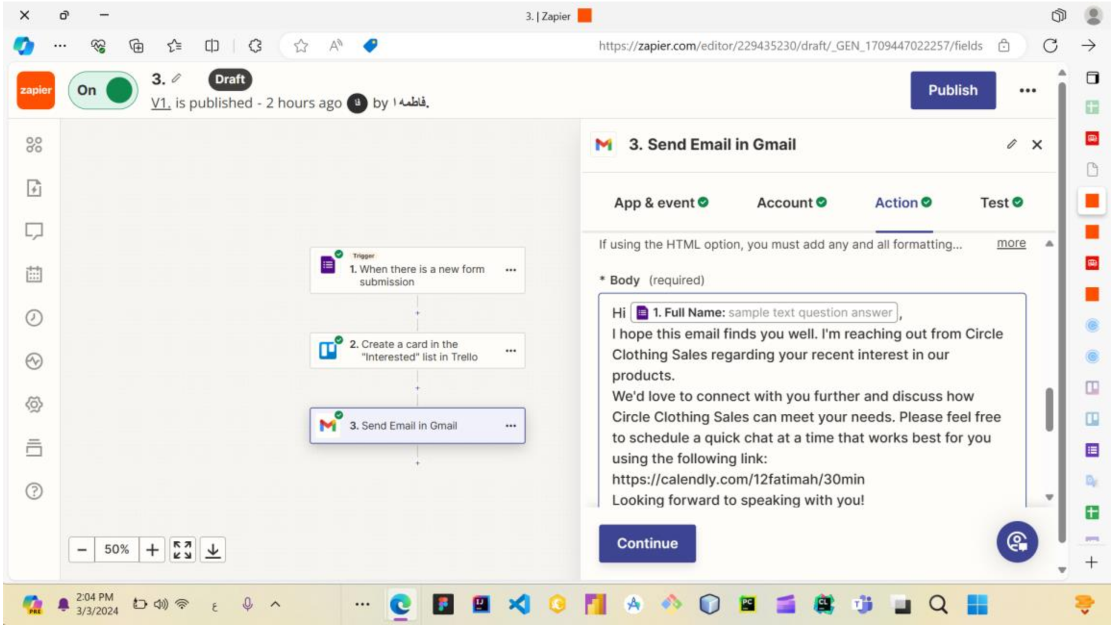
   Modify your workflow by using Gmail to send a personalised email to the prospect with their full name.



7. The sales team is satisfied but wonders if it is possible to get the prospect to make an appointment in your calendar. Have a look at what Calendly does.



8. This tool looks very promising! Create a Calendly account and modify your last workflow by adding the default booking link in your email. Prospects can now be independent to apply and book an appointment.



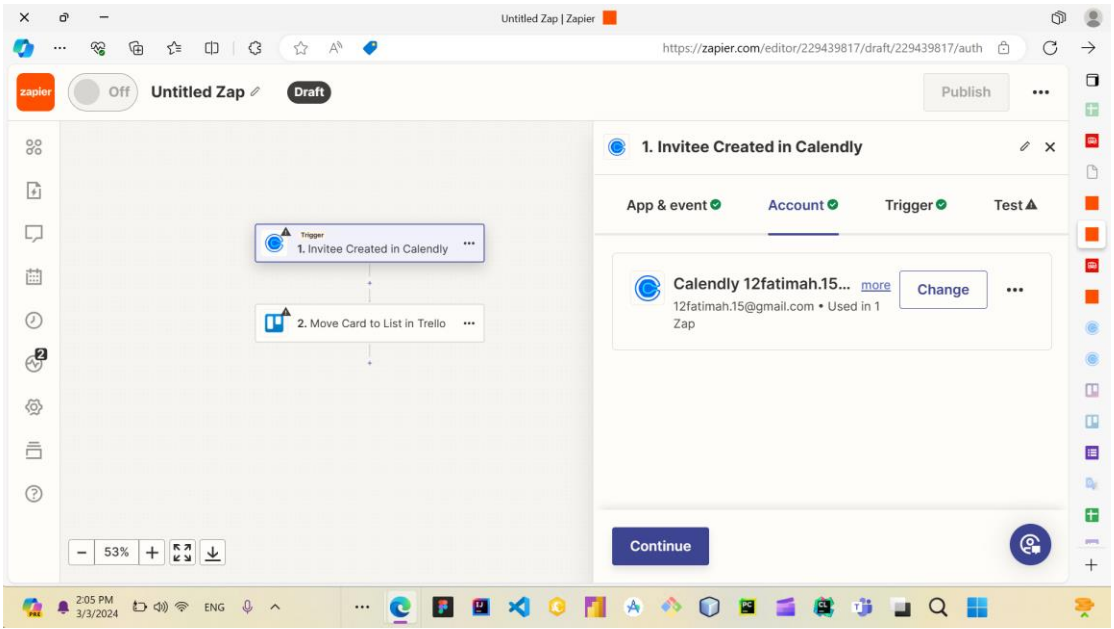
9. You have saved the sales team a lot of time but they think you can do more.

   When a prospect makes an appointment, their record in Trello isn't automatically moved to the "Meeting Booked" list, they still have to do it by hand.

   Do you think you can do this with your current workflow? Which trigger should you use?

   No

10. Create a new workflow with a Calendly trigger that will move an existing card to the "Meeting Booked" list when someone makes an appointment. To move a card to a specific list, you will need to know the ID of the card… Look at all the possible actions and keep in mind that you can combine several actions.



11. Congratulations on setting up this workflow! ✨

But some problems have arisen… Can you guess what you can improve?