**Task 1: Basic Lead Capture and Scoring**

Lead Scoring System:

1. Company Size:

- 1-50 employees: 10 points

- 51-200 employees: 20 points

- 201-1000 employees: 30 points

- 1000+ employees: 40 points

2. Annual Budget for SaaS Solutions:

- Less than $10,000: 10 points

- $10,000-$50,000: 20 points

- $50,001-$100,000: 30 points

- More than $100,000: 40 points

3. Industry:

- Technology: 30 points

- Finance: 25 points

- Healthcare: 20 points

- Retail: 15 points

- Other: 10 points

4. Urgency of Need:

- Immediate (within 1 month): 40 points

- Short-term (1-3 months): 30 points

- Medium-term (3-6 months): 20 points

- Long-term (6+ months): 10 points

Lead Scoring Threshold:

- Leads with a score above 70 are high-priority.

- Leads with a score below 70 require nurturing.

Zap Workflow:

1. Trigger:

- Use Google Forms to collect lead data.

- Trigger the Zap when a new form submission is received.

2. Action 1 (Lead Scoring):

- Use Zapier Formatter to calculate the lead score based on form responses.

3. Action 2 (Update Google Sheet):

- Add the lead data and calculated score to Google Sheets.

4. Action 3 (Send Welcome Email):

- Use Gmail to send a personalized welcome email for leads scoring above 70.

5. Action 4 (Add to Nurturing List):

- For leads scoring below 70, add their data to a different \*Google Sheets\* spreadsheet for nurturing.

Deliverables:

- Screenshot: Capture the Zap setup with all steps configured.

- Explanation:

- The system prioritizes high-scoring leads by sending a welcome email immediately.

- Lower-scoring leads are added to a nurturing campaign for future engagement.

Task 2: Handling Edge Cases

1. Handle Incomplete Data:

- Add a Filter by Zapier step to check for mandatory fields (e.g., Company Size, Annual Budget).

- If incomplete, route the lead to a separate spreadsheet for manual review.

2. Ensure High-Value Leads Are Managed:

- Add a second filter to identify high-value leads (e.g., Annual Budget > $50,000).

- Trigger an additional action to notify the sales team via email or Slack.

3. Accommodate Different Time Zones:

- Add a field in the Google Form for the lead’s time zone.

- Use Zapier Formatter to convert the lead's local time to the sales team’s time zone for scheduling follow-ups.

Deliverables:

- Screenshot:Show updated Zap with additional steps.

- Explanation:

- Leads with incomplete data are flagged for manual intervention.

- High-value leads receive immediate attention to prevent them from slipping through the cracks.

- Time zone considerations ensure timely follow-ups.

Task 3: Scaling and Advanced Implementation

Enhancements:

1. Distribute Leads Among Sales Reps:

- Use a Google Sheets column to list sales reps.

- Use Zapier’s Lookup Table to assign leads in a round-robin fashion.

2. Keyword Extraction for Lead Categorization:

- Add a "Comments" field in the form.

- Use Zapier Formatter to extract keywords and categorize leads (e.g., "urgent," "budget," "healthcare").

3. Lead Follow-Up System:

- Use Google Calendar to schedule follow-up reminders.

- Assign calendar events to the respective sales reps with the lead’s details.

Deliverables:

- Screenshot: Final Zap showing all advanced steps.

- Explanation:

- Lead distribution ensures workload balance across the sales team.

- Keyword extraction provides deeper insights for personalized follow-ups.

- Google Calendar integration helps streamline follow-up tasks.