

Proof of Concept: Automating Customer Feedback Collection from Emails to Spreadsheet

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Date: May 31, 2024

Objective

The objective of this Proof of Concept (PoC) is to automate the process of collecting customer feedback from emails and storing it in a well-organized Google Sheet. We'll achieve this by using Zapier, a powerful automation tool.

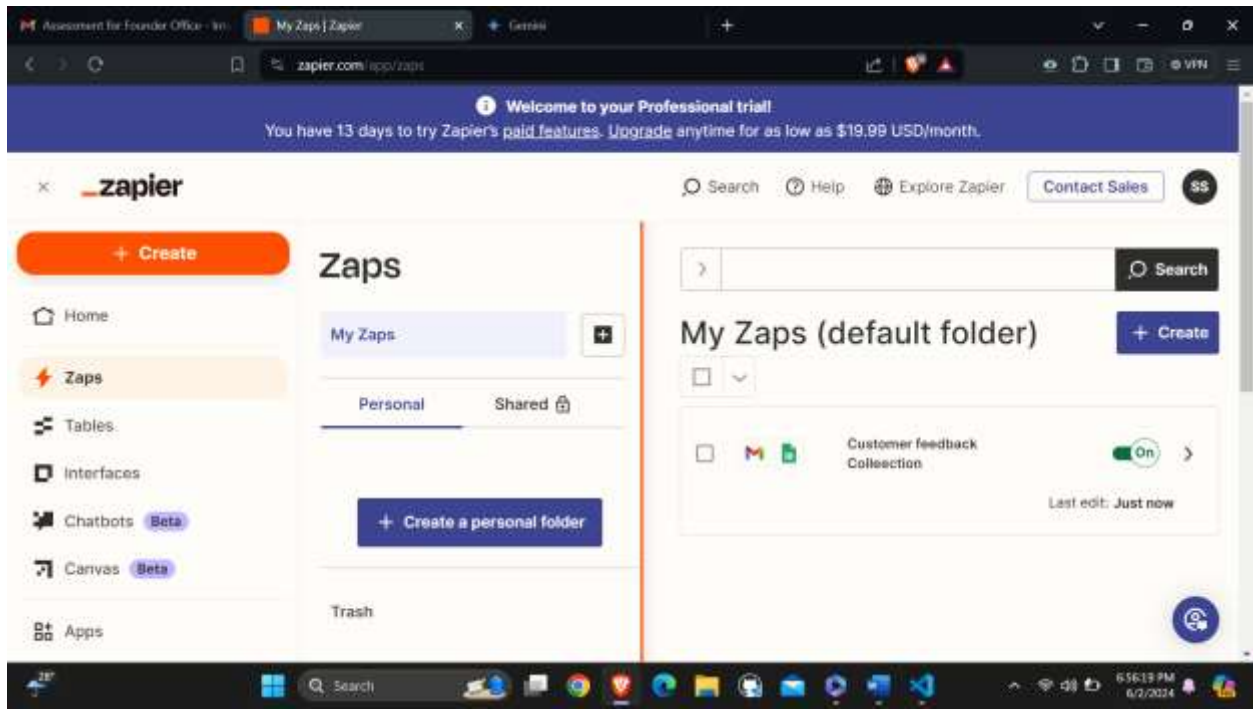
Prerequisites

- **Zapier Account:** If you don't have one already, sign up for a free Zapier account (sufficient for this PoC).
- **Gmail Account:** Ensure you have a Gmail account where customer feedback emails are received.
- **Google Sheet:** Create a Google Sheet where you want to store the extracted feedback.

Steps

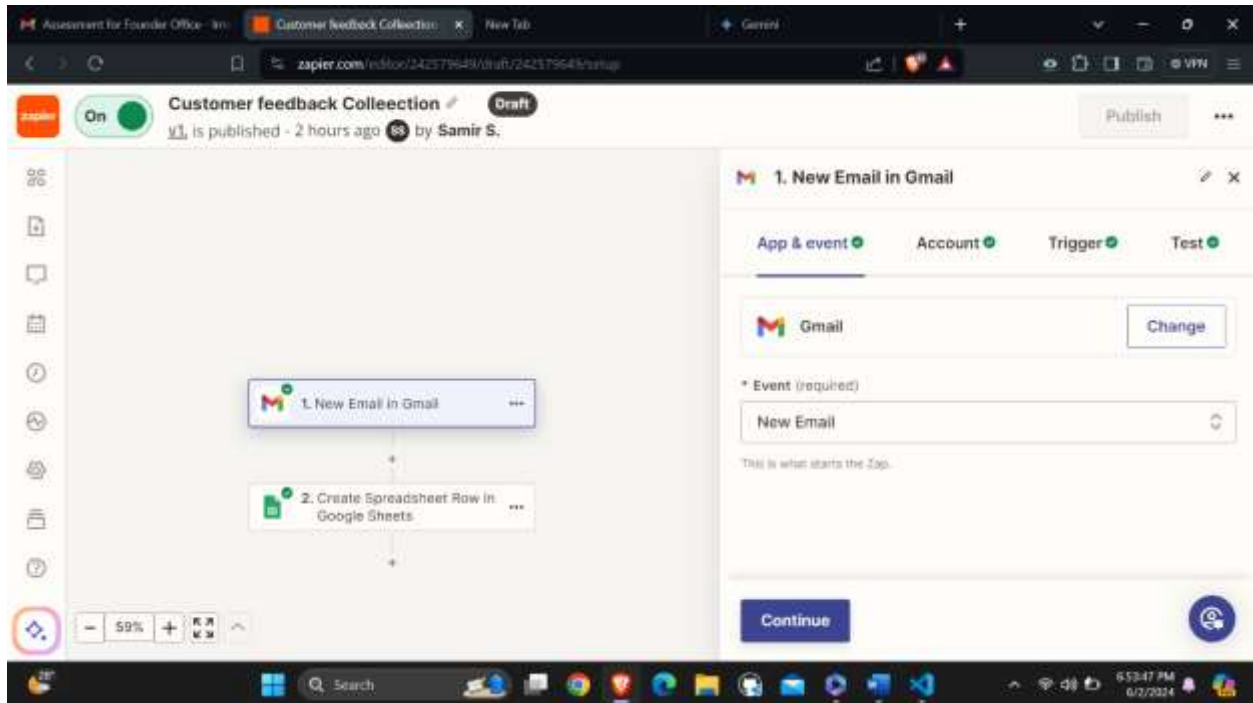
1. Set Up a Zap on Zapier

Log in to your Zapier account and click "Make a Zap" to create a new automation workflow.



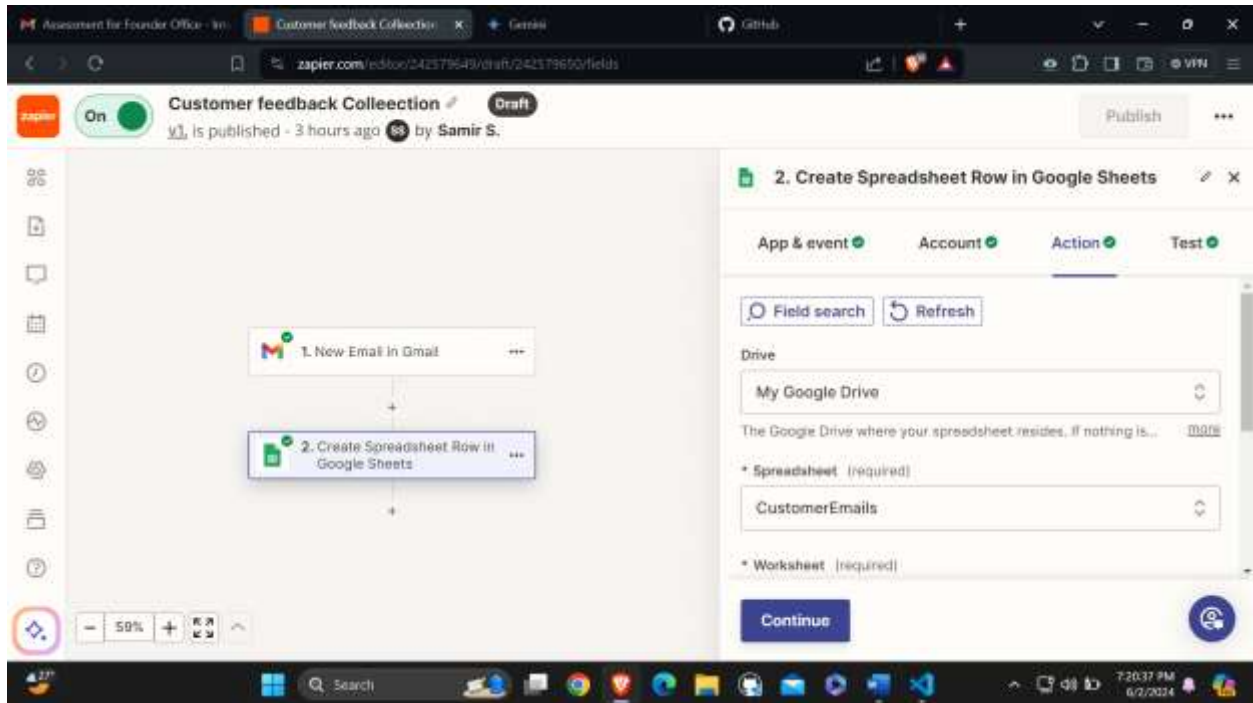
2. Configure the Trigger

Choose "Gmail" as the trigger app and select the trigger event: "New Message in a Label." Connect your Gmail account and authorize Zapier. Specify the Gmail label where customer feedback emails are categorized (e.g., "Customer Feedback").



3. Configure the Action

Choose "Google Sheets" as the action app and select the action event: "Create Spreadsheet Row in a Sheet." Connect your Google Sheet and authorize Zapier. Specify the spreadsheet and worksheet where you want to store the feedback.

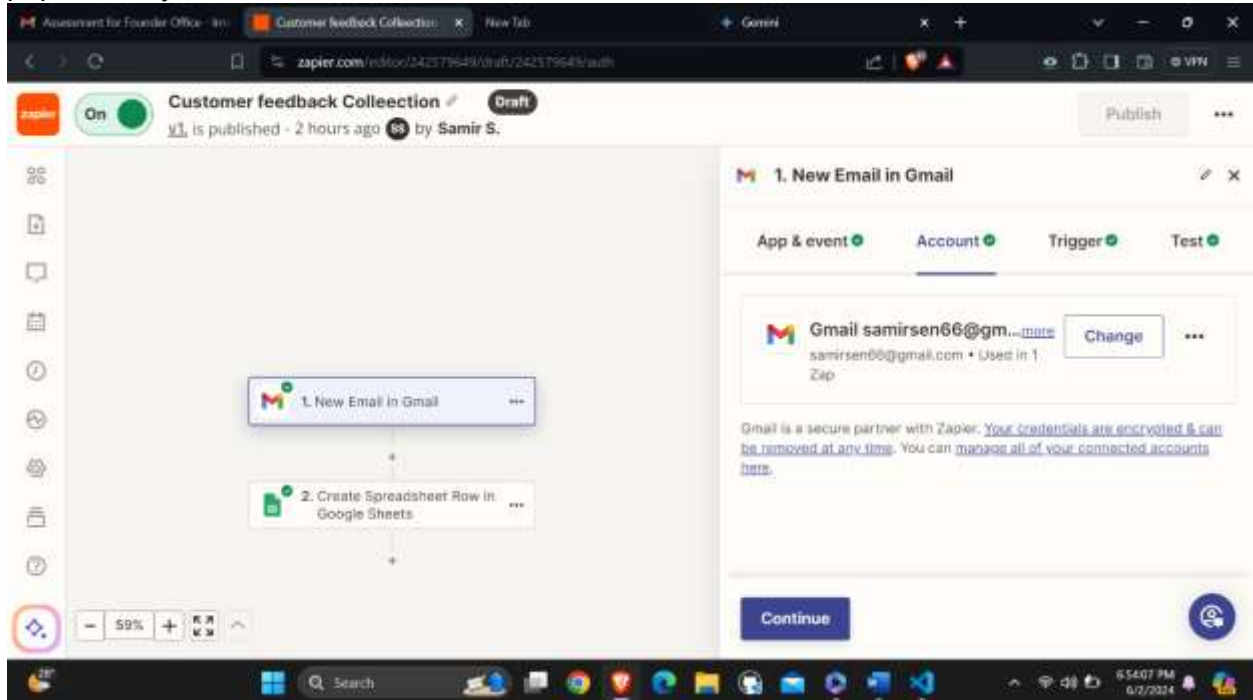


4. Example Zap Configuration

Trigger: New Message in a Label (Gmail) - Label: "Customer Feedback" Action: Create Spreadsheet Row in a Sheet (Google Sheets) Spreadsheet: CustomerEmail

5. How It Works

Whenever a new email arrives with the specified label ("Customer Feedback"), Zapier triggers the process. It extracts the sender's email address and the entire email body content. A new row is created in your designated Google Sheet, with the "Email" and "Feedback" columns populated by the extracted data.



Limitations

This PoC captures the entire email body as feedback. You might need to refine the extraction process based on specific keywords or patterns within the email content. Free plans on Zapier and Google Sheets have limitations on the number of Zaps and rows processed.

Further Enhancements

- Modify the Zap to extract specific parts of the email body (e.g., sentiment analysis, keywords using filters).
- Add conditional logic to categorize feedback automatically based on keywords or content.
- Integrate the collected feedback with other tools for deeper analysis and actionable insights.
- Implement error handling and data validation within the Zap and spreadsheet to ensure data integrity.