Task 1: Basic Lead Capture and Scoring

Requirements:

1. Create a lead scoring system based on the form responses.
2. Set up a Zap that:
    a. Triggers when a Google Form is submitted.
    b. Calculates the lead score.
    c. Adds the lead and score to Google Sheets.
    d. Sends a welcome email if the score is above 70.
    e. Adds low-scoring leads (<70) to a different Google Sheets for nurturing.
    f. Time Zone
    g. Comments

Solution Steps:

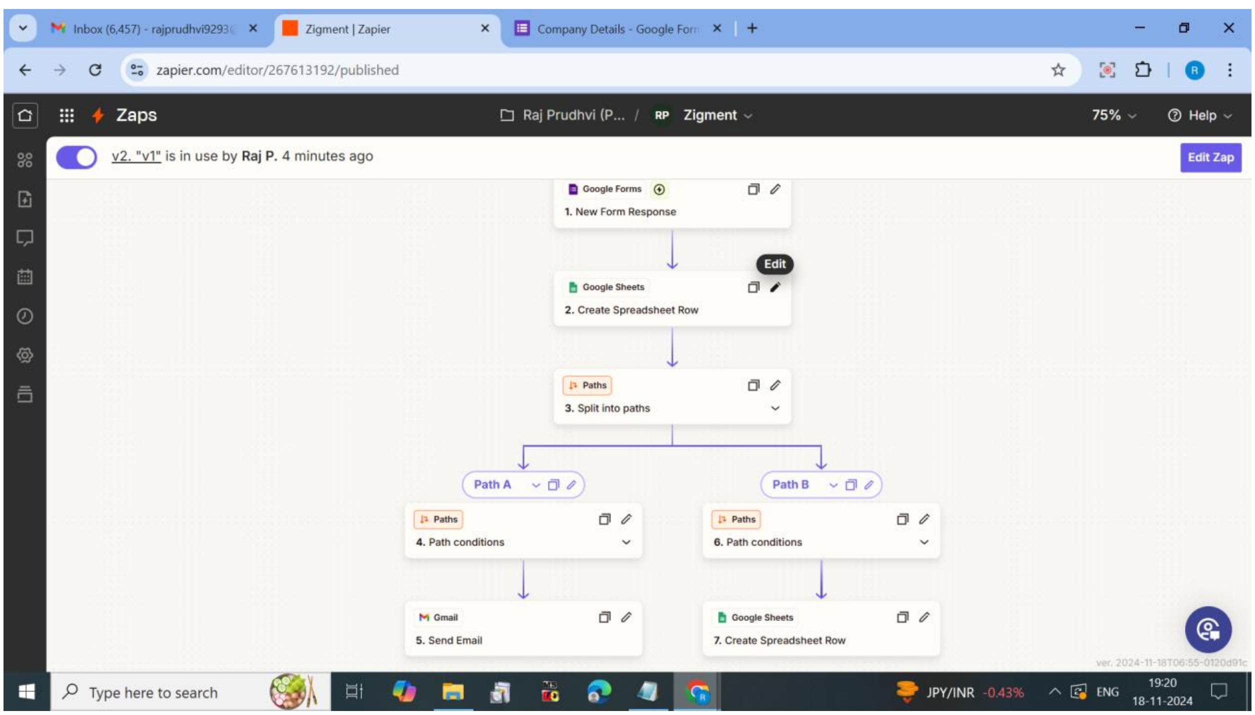
1. **Lead Scoring System:**
    a. Assign points based on form responses:
        i. **Company Size:**
            1. 1-50 employees → 10 points
            2. 51-200 employees → 20 points
            3. 201-1000 employees → 30 points
            4. 1000+ employees → 40 points
        ii. **Annual Budget:**
            1. Less than $10,000 → 10 points
            2. $10,000 - $50,000 → 20 points
            3. $50,001 - $100,000 → 30 points
            4. More than $100,000 → 40 points
        iii. **Industry:**
            1. Technology → 20 points
            2. Finance → 15 points
            3. Healthcare → 25 points
            4. Retail → 10 points
            5. Other → 5 points
        iv. **Urgency:**
            1. Immediate → 30 points
            2. Short-term → 20 points
            3. Medium-term → 10 points

            4. Long-term → 5 points
    b. **Total Score:** Sum of points based on responses (Max score = 140).
2. **Zapier Workflow:**
    a. **Trigger:** New form submission in Google Forms.
    b. **Action 1:** Use Formatter by Zapier to calculate the score.
    c. **Action 2:** Add the lead and score to a Google Sheets spreadsheet.
    d. **Action 3:** Conditional logic:
        i. If score > 70 → Send a welcome email via Gmail.
        ii. If score ≤ 70 → Add to a different Google Sheet for nurturing.

Formal used to find the lead score is

=IF(B2="1-50", 10, IF(B2="51-200", 20, IF(B2="201-1000", 30, IF(B2="1000+", 40, 0)))) + IF(C2="Less than $10,000", 5, IF(C2="$10,000 - $50,000", 15, IF(C2="$50,001 - $100,000", 25, IF(C2="More than $100,000", 35, 0)))) + IF(D2="Technology", 20, IF(D2="Finance", 15, IF(D2="Healthcare", 25, IF(D2="Retail", 10, 5)))) + IF(E2="Immediate (within 1 month)", 30, IF(E2="Short-term (1-3 months)", 20, IF(E2="Medium-term (3-6 months)", 10, IF(E2="Long-term (6+ months)", 5, 0))))

Here we give the lead points according the impotence of the details as per our Tech project

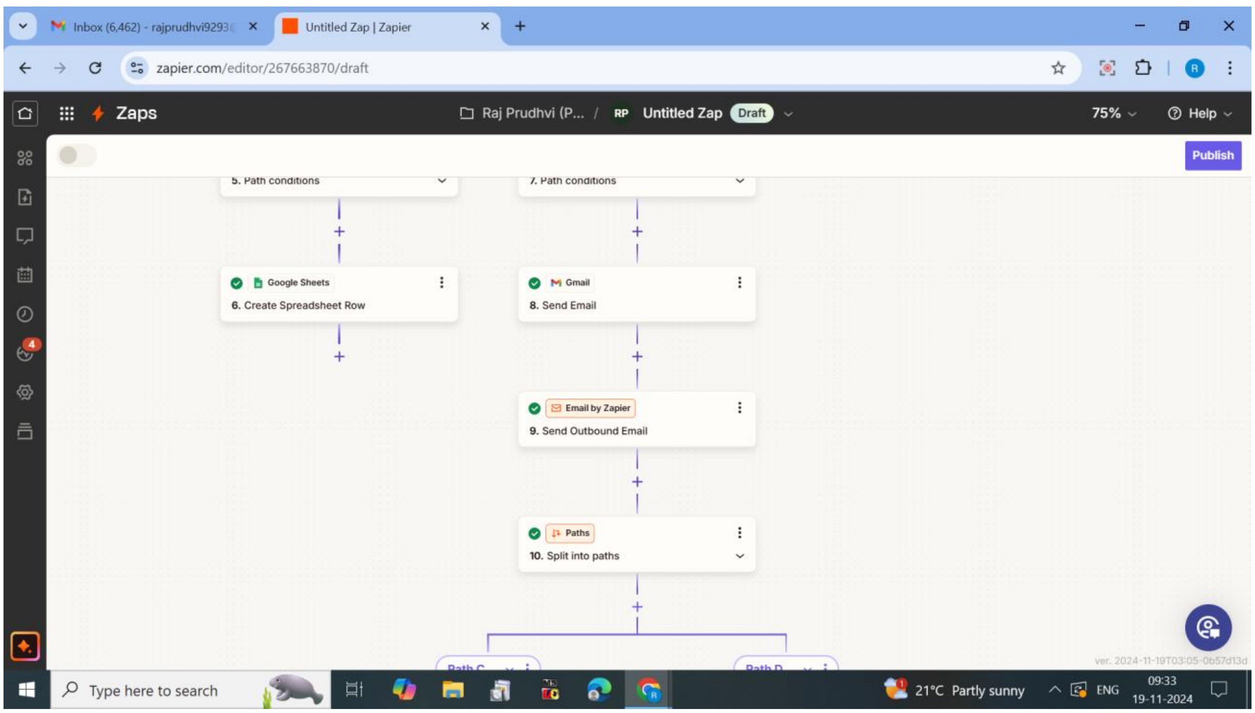


Task 2: Handling Edge Cases

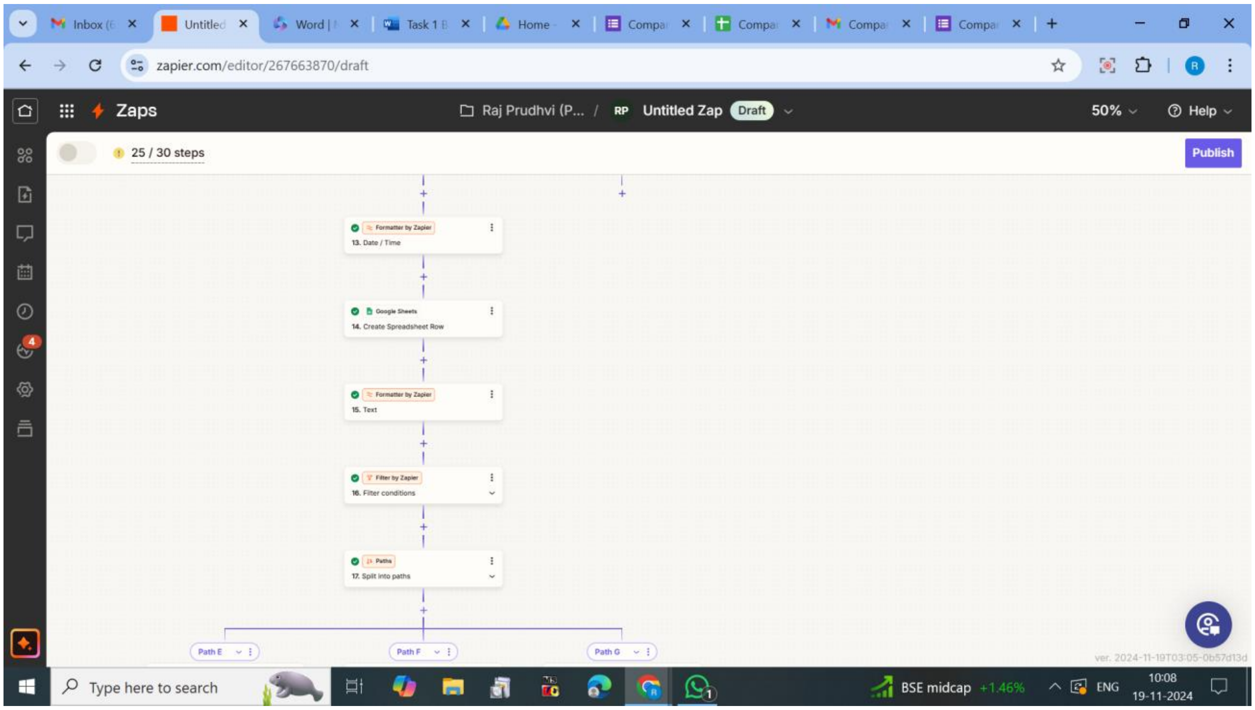
1. **Handling Incomplete Data:**

    a. Use a filter in Zapier to check if required fields (e.g., Company Size, Annual Budget) are filled.
    b. If data is missing, send an email asking the lead to complete their form submission.

2. **Ensuring High-Value Leads Are Managed:**
    a. Define "high-value" leads as those with an annual budget > $50,000 and urgency marked as Immediate.
    b. Use a conditional step in Zapier to send a notification email to the sales team when such leads are detected.



3. **Accommodating Different Time Zones:**
    a. Include a time zone field in the form.
    b. Use Formatter by Zapier to convert the submission time to the lead's local time zone.
    c. Update Google Sheets with the converted time.

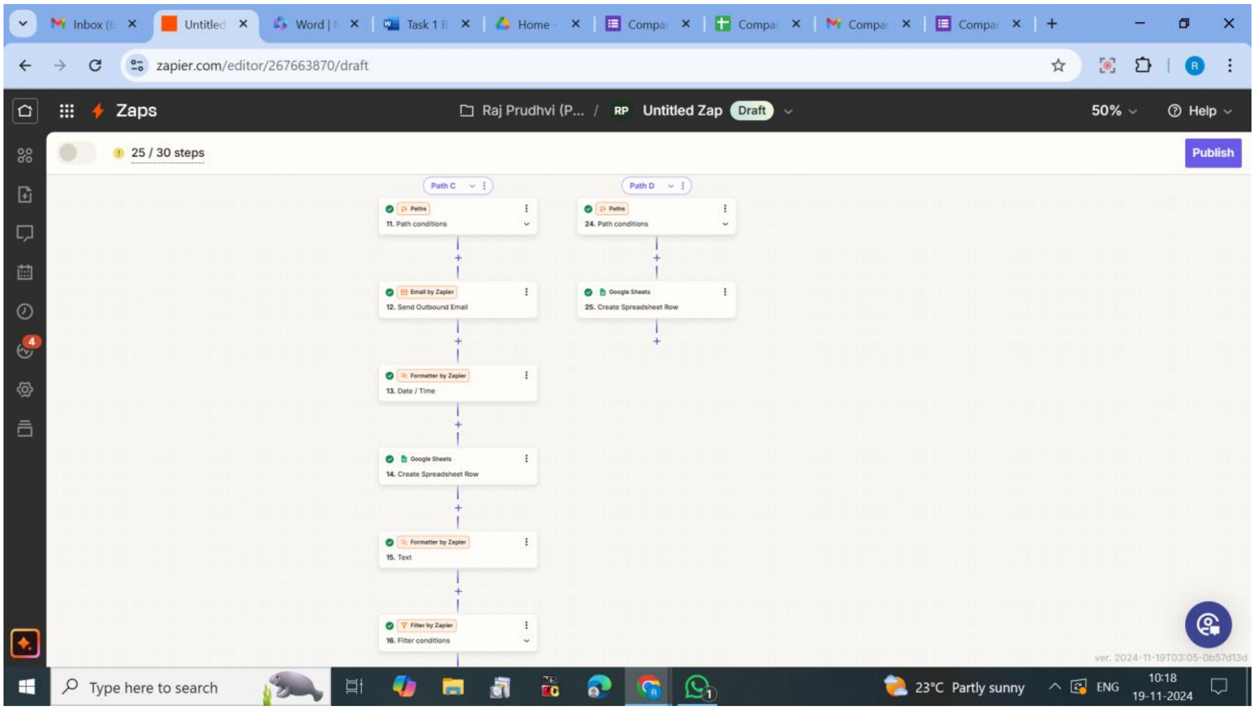


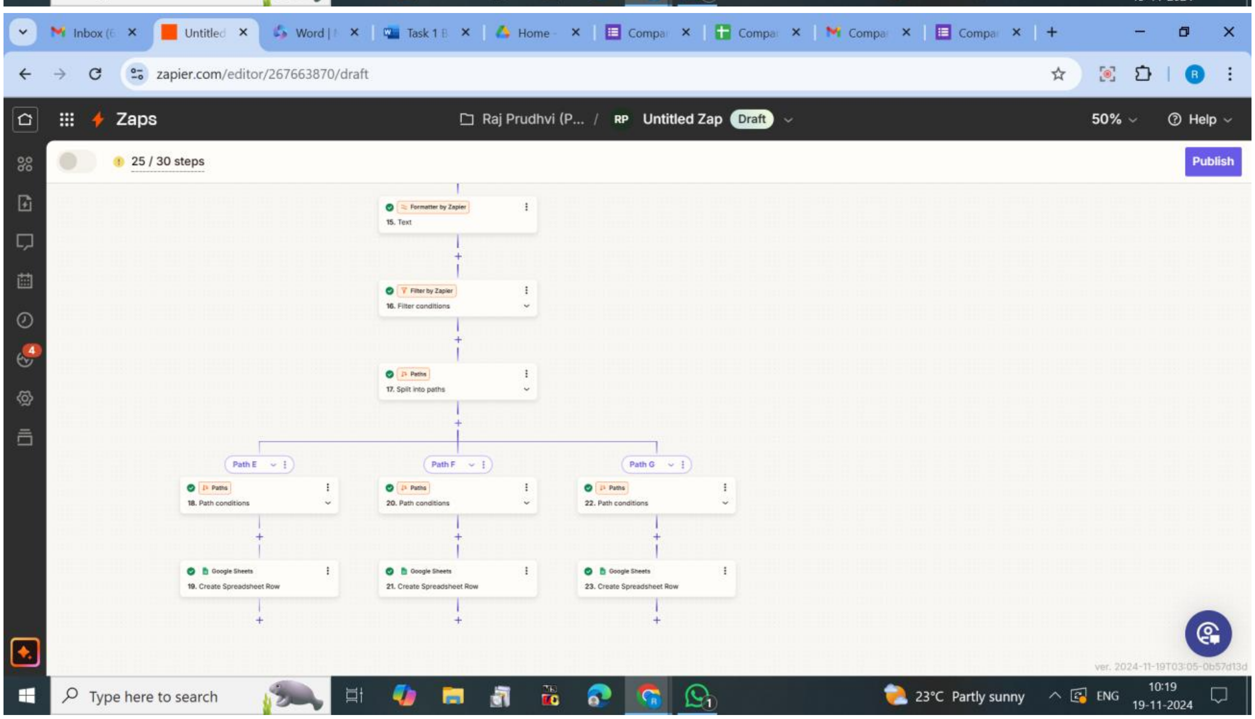
Task 3: Scaling and Advanced Implementation

1. **Distributing Leads Among Sales Reps:**
    a. Create a column "Assigned Sales Rep" in the Google Sheets.
    b. Use the "Round Robin" feature in Zapier to evenly distribute leads among sales reps.
    c. Formal used =CHOOSE(MOD(ROW()-1, 3) + 1, "Rep 1", "Rep 2", "Rep 3")
    d. Here we used these above formal to assign the Assigned sales Rep according to formal as above

2. Extracting Keywords from Comments:

a. Use Formatter by Zapier's "Text Extract" function to extract keywords from the "Comments" field.
b. Categorize the lead based on detected keywords (e.g., "budget," "integration," "demo request").





I. Lead distribution ensures fair workload among sales reps.
II. Keyword extraction helps categorize leads for targeted follow-ups.
III. Follow-up events in Google Calendar automate reminders for sales reps.