

Documentation: Enhancing TechNova's Lead Management Workflow

Objective

To optimize TechNova's lead management process by:

1. Distributing leads evenly among sales representatives.
2. Extracting keywords from the "Comments" field for lead categorization.
3. Automating follow-up reminders using Google Calendar.

This document outlines the steps and highlights the placeholders for screenshots to illustrate the setup process.

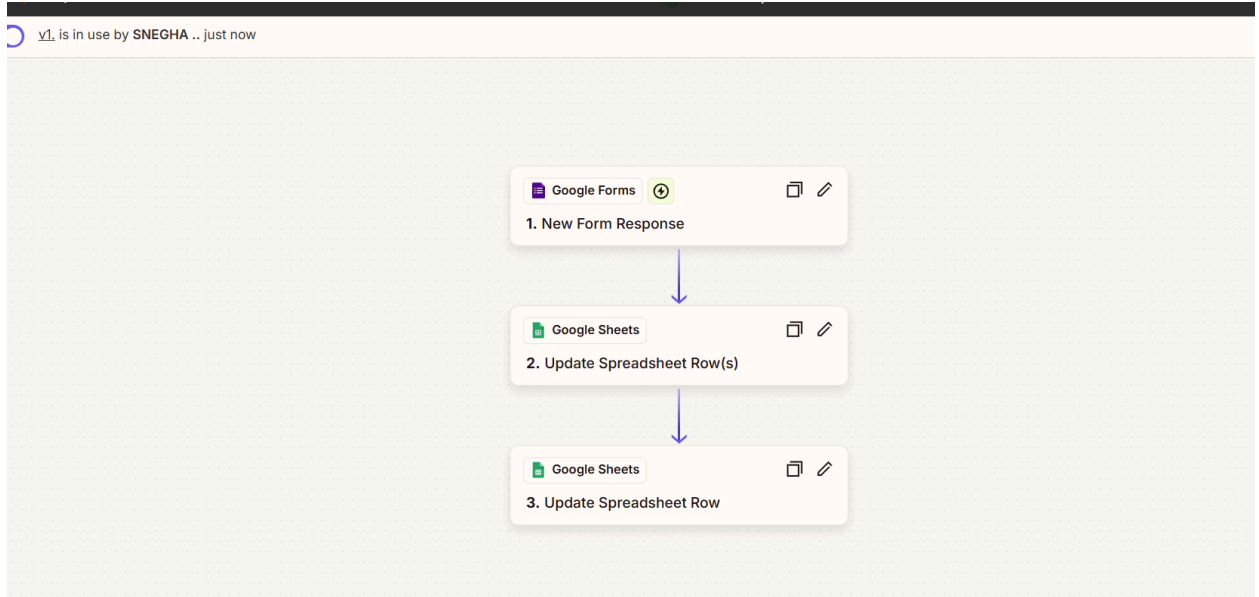
1. Distributing Leads Evenly Among Sales Representatives

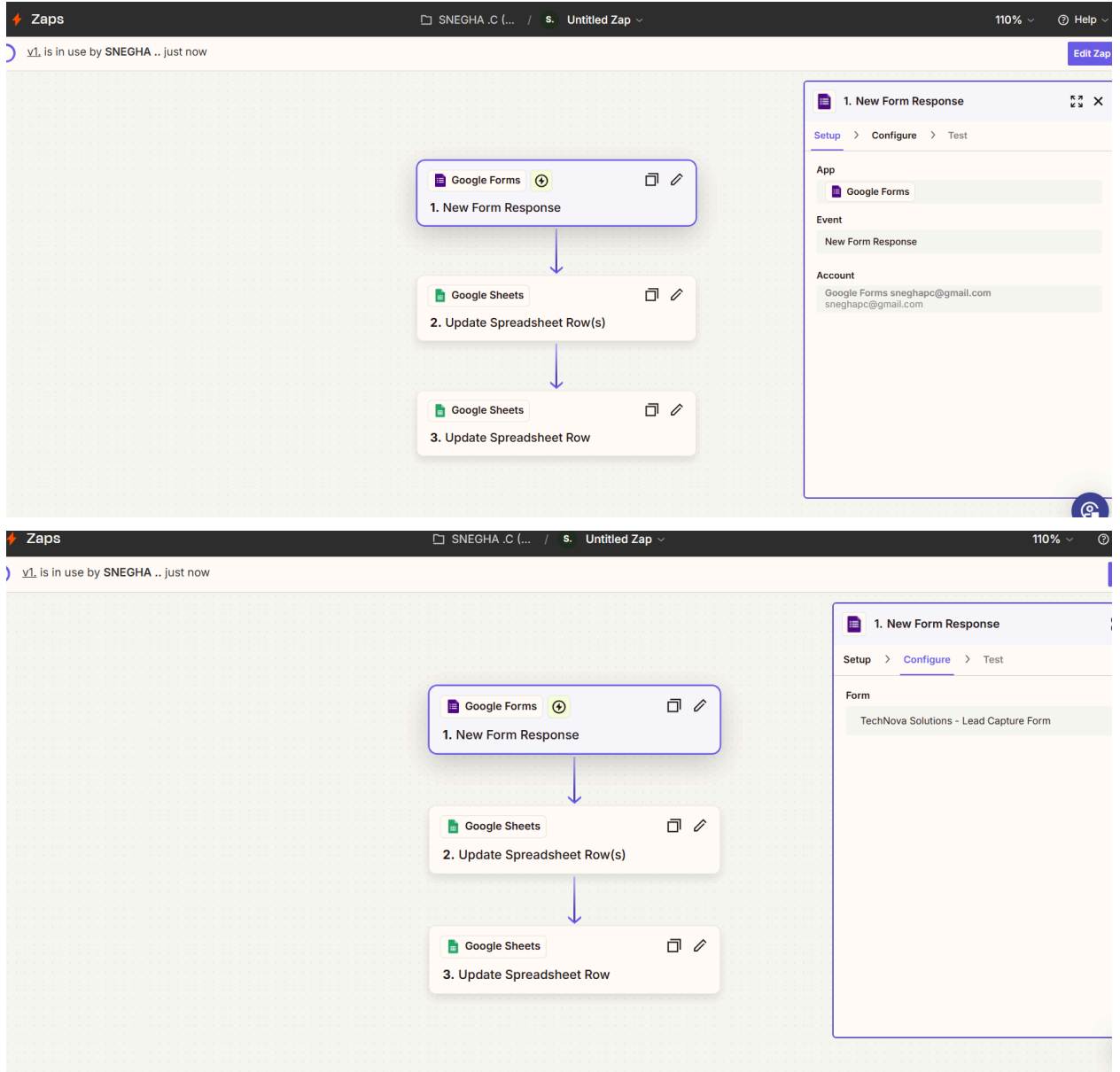
To ensure leads are distributed fairly, a round-robin system updates the "Assigned Sales Rep" column in Google Sheets.

Steps:

1. **Trigger:** Configure the Zap to trigger when a new lead is submitted (e.g., from a Google Form or CRM).
(Upload Screenshot: Lead Submission Trigger Setup)
2. **Retrieve Sales Reps List:** Use Google Sheets to fetch the next available sales rep.
 - Add a column in the sheet to track the current assignment row.
 - Use Zapier's "Lookup Spreadsheet Row" to fetch the next sales rep.
(Upload Screenshot: Google Sheets Lookup Step Configuration)
3. **Assign the Sales Rep:** Update the lead entry in Google Sheets to include the assigned rep's name.
(Upload Screenshot: Google Sheets Update Step Setup)

4. **Round-Robin Logic:** Use Zapier Formatter or another step to increment the assignment row after each lead.





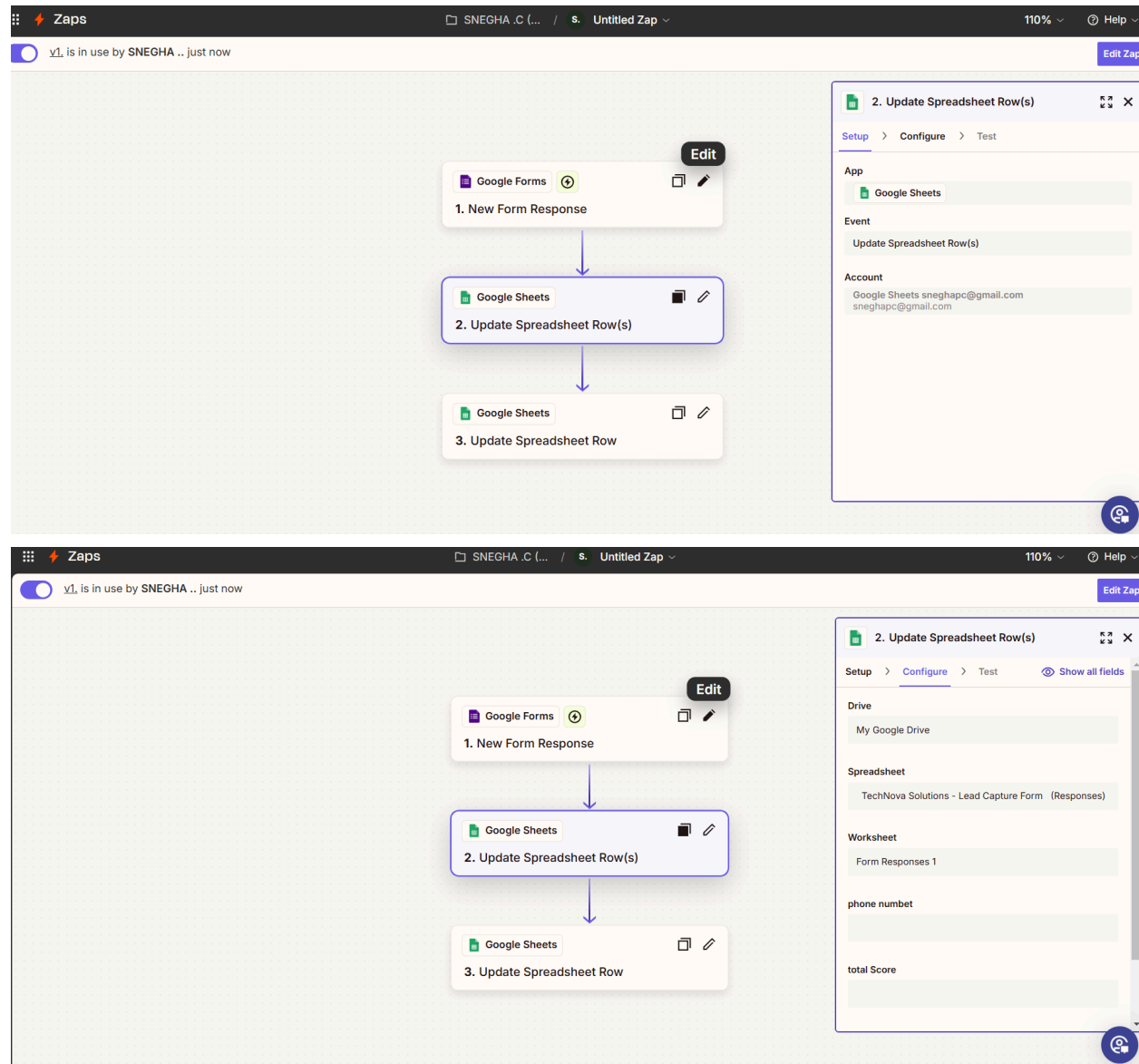
2. Extracting Keywords from the "Comments" Field

To categorize leads based on the "Comments" field, Zapier's Formatter is used for basic text analysis.

Steps:

1. **Trigger:** Use the same lead submission trigger as above.
(Upload Screenshot: Lead Submission Trigger Setup – Reuse from Step 1)
2. **Formatter Step:** Configure the "Text" action in Zapier Formatter to extract keywords.

- Use “Extract Pattern” to isolate specific terms (e.g., "urgent," "budget," "priority").
(Upload Screenshot: Formatter Configuration for Keyword Extraction)
- 3. **Categorize Leads:** Add conditional paths or filters based on keywords.
 - Example: If “urgent” is found, assign to senior reps or flag for priority.

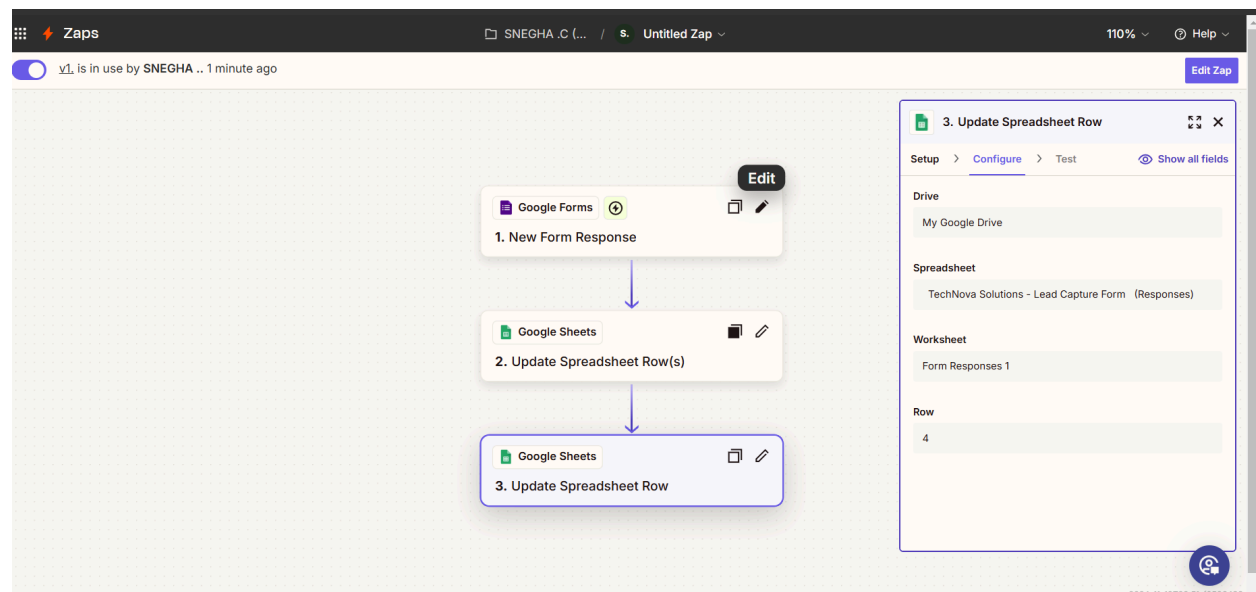
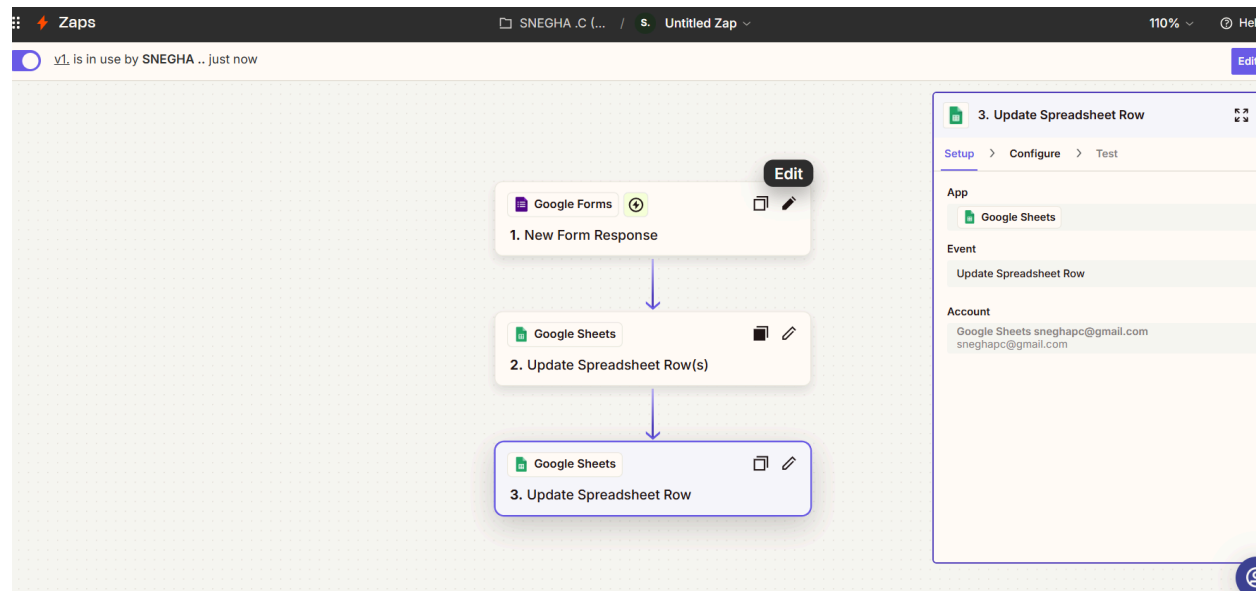


3. Automating Follow-Up Reminders with Google Calendar

A follow-up system is implemented using Google Calendar to ensure timely communication with leads.

Steps:

1. **Trigger:** Configure the trigger to activate when a lead is assigned to a rep.
(Upload Screenshot: Lead Assignment Trigger Setup – Reuse from Step 1)
2. **Formatter Step:** Use Zapier Formatter to calculate the follow-up date (e.g., 1 or 2 days after submission).
(Upload Screenshot: Formatter Date Calculation Setup)
3. **Google Calendar Action:** Create an event in Google Calendar.
 - **Title:** Include lead details (e.g., “Follow-Up with [Lead Name]”).
 - **Date/Time:** Set to the calculated follow-up date.



Summary of Deliverables

1. **Screenshot of Lead Submission Trigger Setup:** Demonstrates how the Zap starts when a new lead is submitted.
 2. **Screenshot of Google Sheets Lookup Step Configuration:** Shows how the sales rep is retrieved for round-robin assignment.
 3. **Screenshot of Google Sheets Update Step Setup:** Illustrates updating the lead with the assigned rep's name.
 4. **Screenshot of Formatter Configuration for Keyword Extraction:** Explains the keyword extraction setup.
 5. **Screenshot of Conditional Path or Filter for Keyword-Based Categorization:** Displays how leads are categorized based on keywords.
 6. **Screenshot of Formatter Date Calculation Setup:** Highlights how follow-up dates are calculated.
 7. **Screenshot of Google Calendar Event Creation Configuration:** Shows the setup for creating follow-up reminders.
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Potential Limitations

1. **Round-Robin System:** Requires maintenance if new reps are added or removed.
2. **Keyword Extraction:** Limited to predefined patterns and cannot handle advanced text analysis.
3. **Follow-Up System:** Relies on calendar notifications, which may be overlooked if reps do not check their calendars regularly.

Conclusion

The enhanced lead management workflow ensures that TechNova can efficiently handle and optimize its growing lead database.

1. **Lead Distribution:** The round-robin system ensures fair distribution among sales representatives, minimizing workload imbalances and improving lead response times.
2. **Keyword Extraction:** Utilizing Zapier's Formatter for text analysis allows for quick categorization of leads, helping prioritize urgent or high-value opportunities.
3. **Follow-Up System:** Automating Google Calendar reminders guarantees timely engagement with leads, reducing the risk of missed follow-ups.

These enhancements streamline lead processing, improve team efficiency, and ensure a higher quality of customer interaction. While there are some limitations, such as dependency on accurate data and manual updates for certain configurations, this workflow provides a robust foundation for scalable lead management.

