Documentation for TechNova Solutions: Lead Management Workflow

1. Lead Scoring System

The lead scoring system is designed to assign a score to each lead based on their responses to a Google Form. This score helps TechNova Solutions determine the priority of each lead and take appropriate action. The system is based on four key criteria:

- **Company Size**
- **Annual Budget for SaaS Solutions**
- **Industry**
- **Urgency of Need**

Scoring Breakdown:

Criterion	Options	Points Assigned
Company Size	1-50 employees	10
	51-200 employees	20
	201-1000 employees	30
	1000+ employees	40
Annual Budget for SaaS Solutions	Less than $10,000	10
	$10,000 - $50,000	20
	$50,001 - $100,000	30
	More than $100,000	40
Industry	Technology	20
	Finance	15
	Healthcare	25
	Retail	10
	Other	5

Urgency of Need	Immediate (within 1 month)	40
	Short-term (1-3 months)	30
	Medium-term (3-6 months)	20
	Long-term (6+ months)	10

The total score is the sum of points assigned based on the form responses. A lead with a score above 70 is considered a high-priority lead and will receive a welcome email, while a lead with a score below 70 is placed in a nurturing campaign.

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2. Workflow Overview

Trigger:

- **App:** Google Forms
- **Event:** New Response in Spreadsheet
- **Action:** When a new form response is submitted, the Zap is triggered, and the lead data is added to Google Sheets.
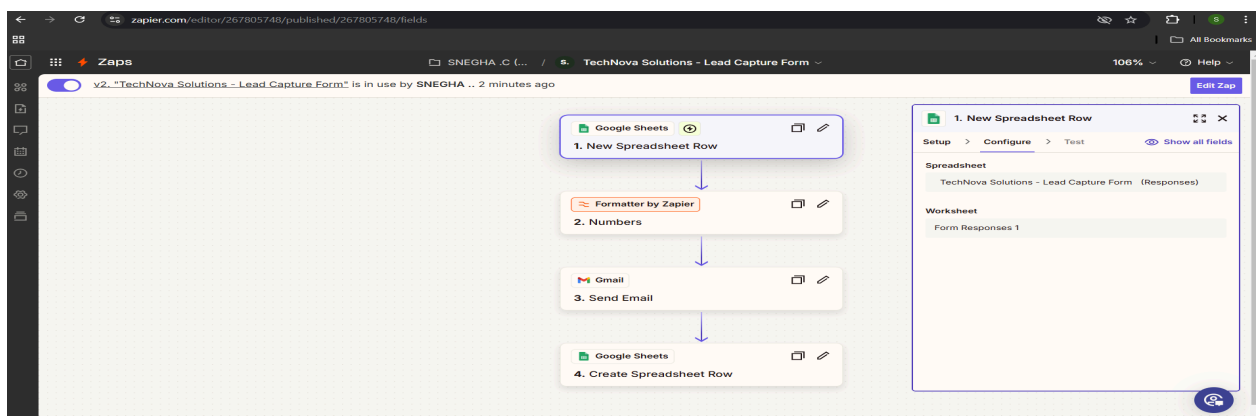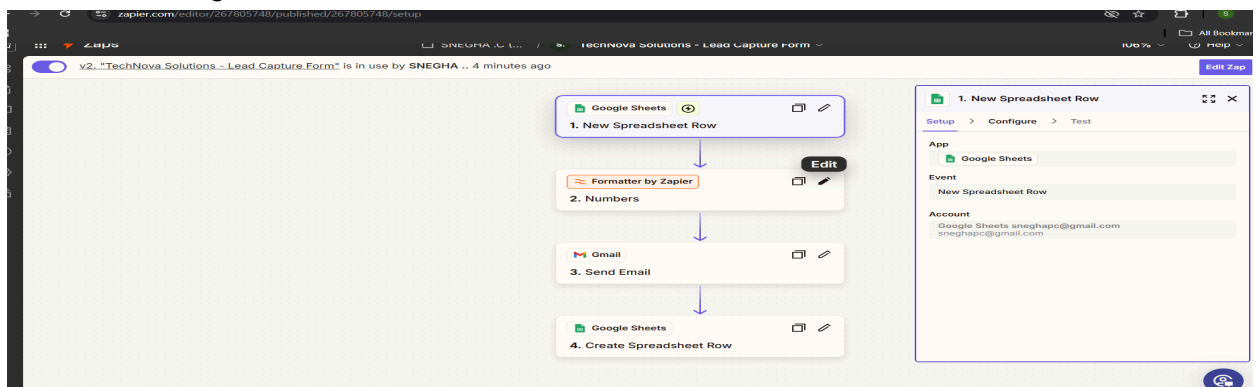
Action 1: Formatter by Zapier

- **App:** Formatter by Zapier
- **Event:** Numbers > Perform Math Operation
- **Purpose:** This action is used to calculate the total lead score based on the form responses by applying the scoring rules defined above. The points are calculated using conditions for each criterion (Company Size, Budget, Industry, Urgency of Need).
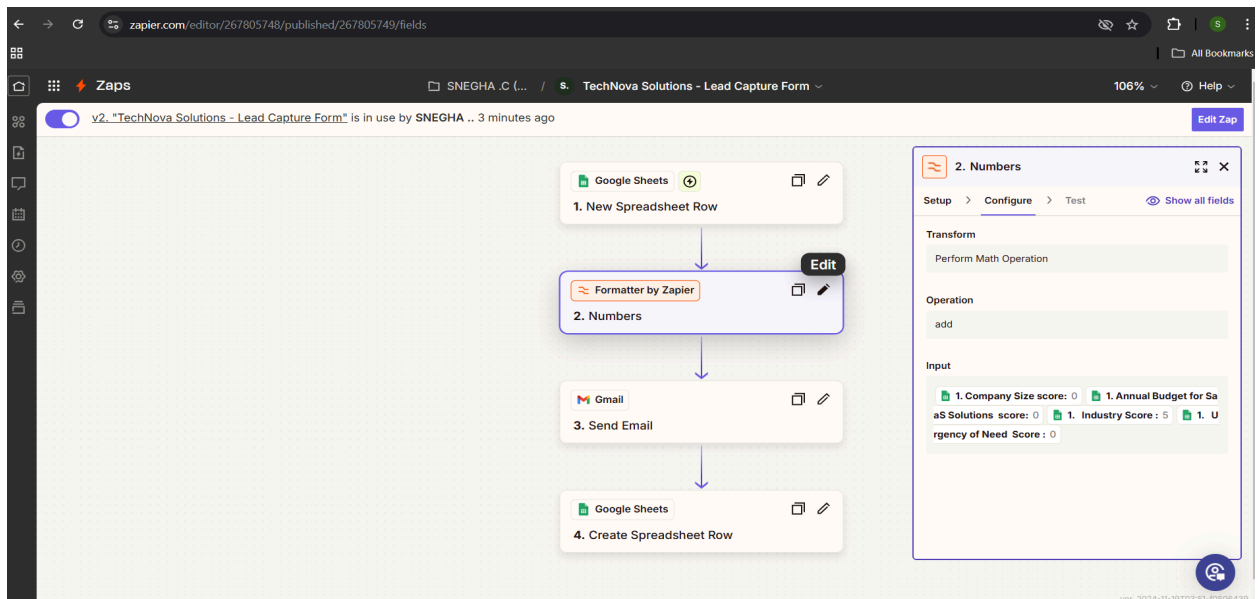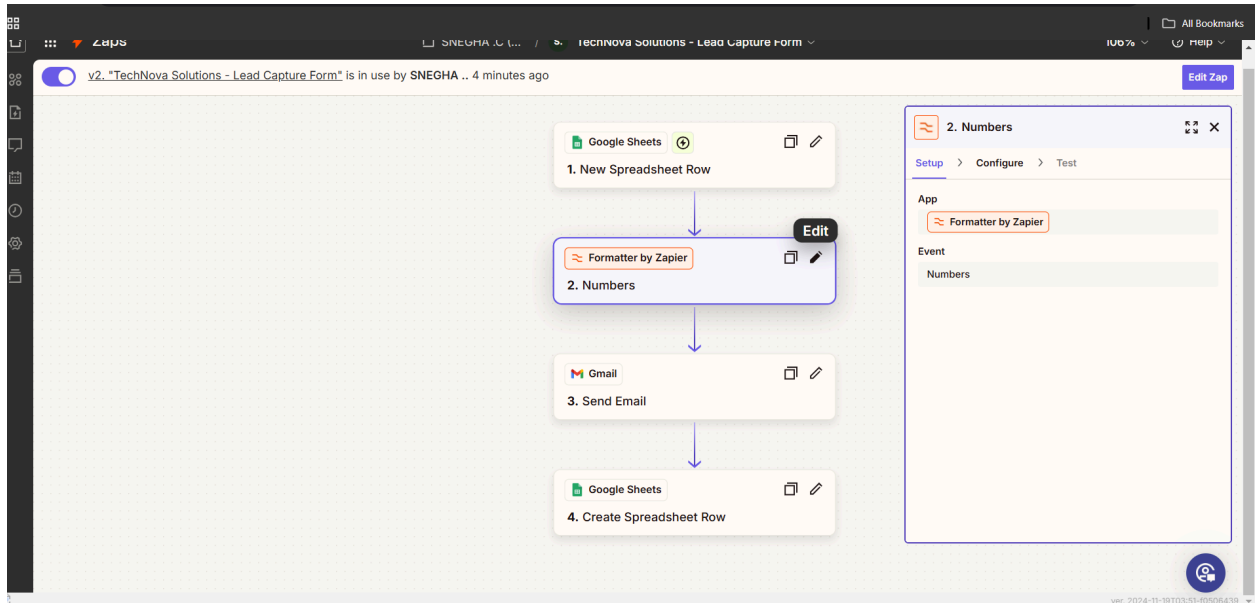
Action 2: Gmail (Email to Leads with Score > 70)

- **App:** Gmail
- **Event:** Send Email
- **Purpose:** If the lead score is above 70, an automatic welcome email is sent to the lead to initiate the sales process.

Action 3: Google Sheets (For Leads with Score < 70)

- **App:** Google Sheets
- **Event:** Create Spreadsheet Row
- **Purpose:** If the lead score is below 70, the lead is added to a different Google Sheets file dedicated to nurturing campaigns, where further action can be taken over time.
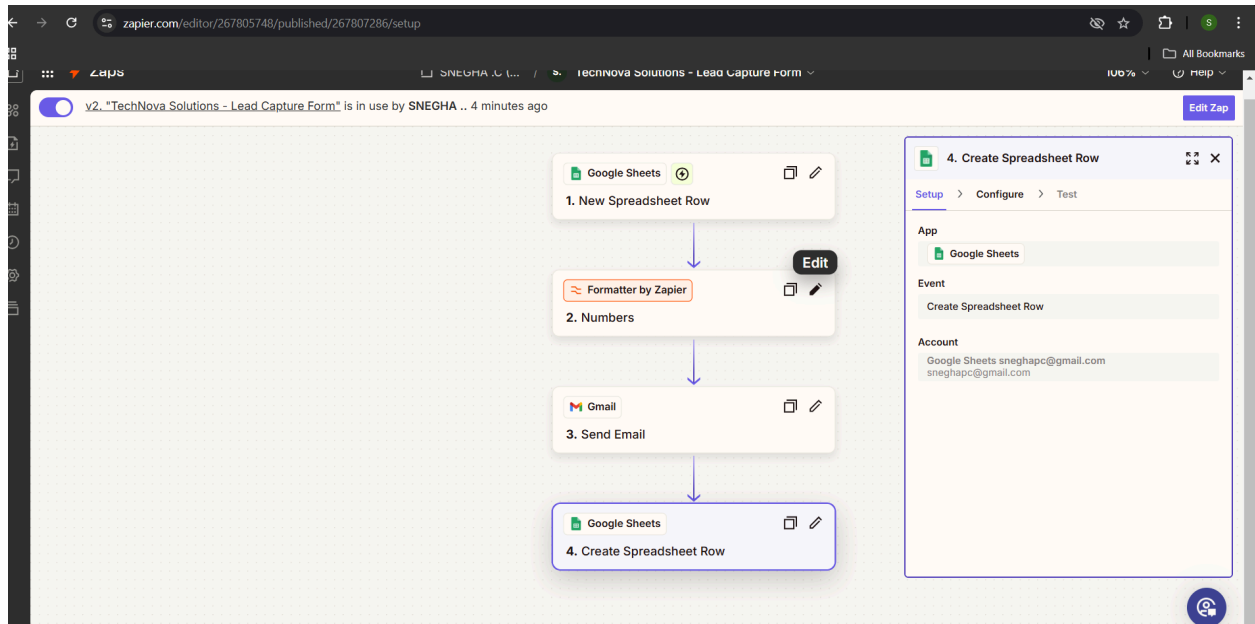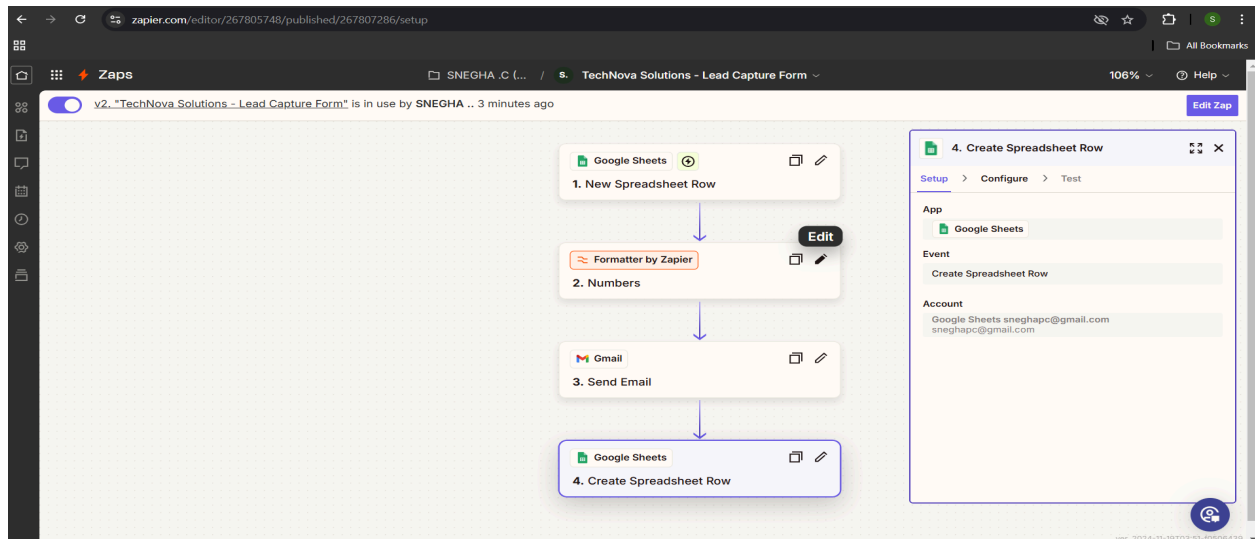
3. Workflow Explanation

1. **Lead Capture**: The potential customer fills out a Google Form that asks for their company size, annual budget, industry, and urgency of need.
2. **Trigger**: Once the form is submitted, the data is automatically sent to a Google Sheets file.
3. **Scoring**: Using the Zapier Formatter, the lead score is calculated based on the responses, with points assigned to each response.
4. **Action 1 - High Priority Leads**: If the lead score is greater than 70, a welcome email is sent to the lead to initiate the sales process.
5. **Action 2 - Nurturing Campaign**: If the lead score is below 70, the lead is added to a different Google Sheets file dedicated to nurturing campaigns, where further action can be taken over time.

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4. Handling Edge Cases

TechNova identified a few edge cases that were addressed in the workflow:

1. **Incomplete Data**: If a form response needs key information, the lead is processed and no score is calculated. We can add validation steps in the form or use filters in Zapier to handle incomplete data.
2. **High-Value Leads**: The scoring system ensures that high-value leads (those with higher scores) are given priority, and appropriate actions are taken. Additional conditions (e.g., specific budget and urgency responses) can be set to fine-tune lead prioritization further.
3. **Time Zone Handling**: The workflow does not currently account for time zone differences, but Zapier's Formatter can be used to add time zone conversions if needed. Alternatively, setting time zone-aware reminders in Google Calendar can be explored for follow-up actions.

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5. Conclusion

This lead management workflow for TechNova Solutions optimizes the process of capturing and scoring leads from form submissions, enabling automatic actions based on lead priority. The use of Google Forms, Google Sheets, Gmail, and Zapier provides an efficient, low-cost solution for automating lead management and improving lead response times.