

TechNova: Lead Management Workflow Challenge

Task 3: Scaling and Advanced Implementation

1. Lead Form (Google Forms)

- Collects user responses through a Google Form.

2. Formatter by Zapier: Time zone

- Ensures the form submission timestamps are properly formatted or converted to the correct time zone for consistency.

3. Paths: Form Validation

- Splits the flow into two paths:
 - **Validated Form:** For forms that meet the required validation criteria.
 - **Incomplete Form:** For forms that fail validation.
 - When the form is incomplete it will send the error notification the applicant via Gmail.

4. Validated Form: Path Conditions

- Checks whether the form is filled correctly.

5. Code by Zapier: Run JavaScript

- Runs the Java Script code for calculating the Lead Score.

6. Google Sheets: Lead Data Unfiltered

- Stores the raw, unfiltered lead data in a Google Sheet for record-keeping or further analysis.

7. Paths: Split into Paths

- Splits the leads into two categories based on additional filtering criteria:
 - **Filtered Leads**
 - **Nurturing Campaigns**

Filtered Leads Path

1. Path Conditions: Filtered Leads

- Filters leads further, such as checking if a lead score exceeds a threshold (Greater than [69]).

2. Formatter by Zapier: Sales Team Assigning

- Processes the filtered lead data to assign them to appropriate sales team members.

3. Formatter by Zapier: Pattern Match

- Performs pattern matching on comments or other fields to extract keywords and gives output as lead priority.

4. Google Sheets: Filtered Lead

- Stores the filtered leads in a separate Google Sheet for tracking.

5. Gmail: Welcome Email

- Sends a personalized welcome email to the filtered leads, acknowledging their submission.

6. Higher lead Filter

- Filter the lead which is greater than 90.

7. Email Notification

- When the higher lead is present, it will automatically send the high priority notification the Sales team.

8. Splitting into two Paths for sending the Google Reminder

9. High Priority

- When the lead is higher and lead priority is true the it will send the google reminder to the sales manager with one or two days.

10. Medium Priority

- When the lead is higher then 70 and lesser than 90 and lead priority is false then the reminder will send after two – three days.

Nurturing Campaigns

- When the lead score is lesser than 70 and it directed to nurturing campaigns.
- A separate google sheet will stores and handles the lead.