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**

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

3. **Formatter by Zapier: Pattern Match**

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

4. **Google Sheets: Filtered Lead**

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

5. **Gmail: Welcome Email**

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

6. **Higher lead Filter**

   o Filter the lead which is greater than 90.

7. **Email Notification**

   o 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**

   o 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**

   o 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

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

Limitations:

   o Some Time zones are not able to convert to local time.
   o Assigning the sales team in random manner leads to overload certain member.
   o All these workflows depend on static rules and which may ineffective.