Project Portfolio - Sales Warm lead generation,Support ticket, Automation & workflow (Sales Nurturing)

This page documents the practical Implementation of an end-to- end support and operations automation system designed to reflex real world workflow

Access live Demo Landing Page od SomVic Company

https://emmaauchenna90.freshdesk.com/support/home

The above Demo is a Live customer support page of SomVic where potential Customers submit Real request/Ticket.
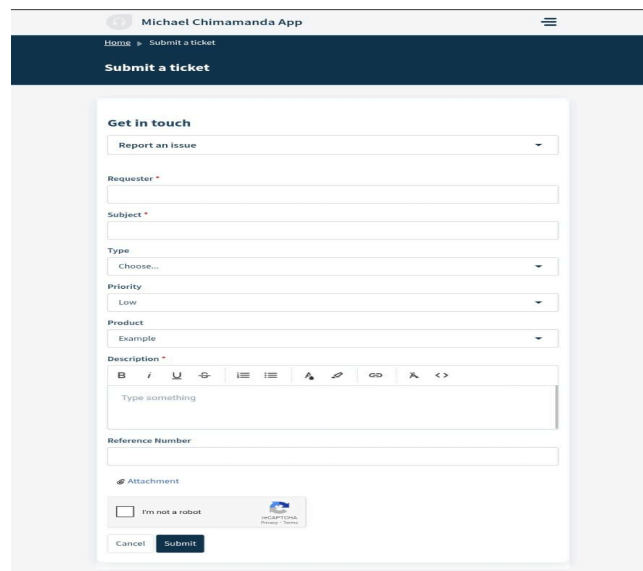
1. (a) Customer Support portal (Frontend)
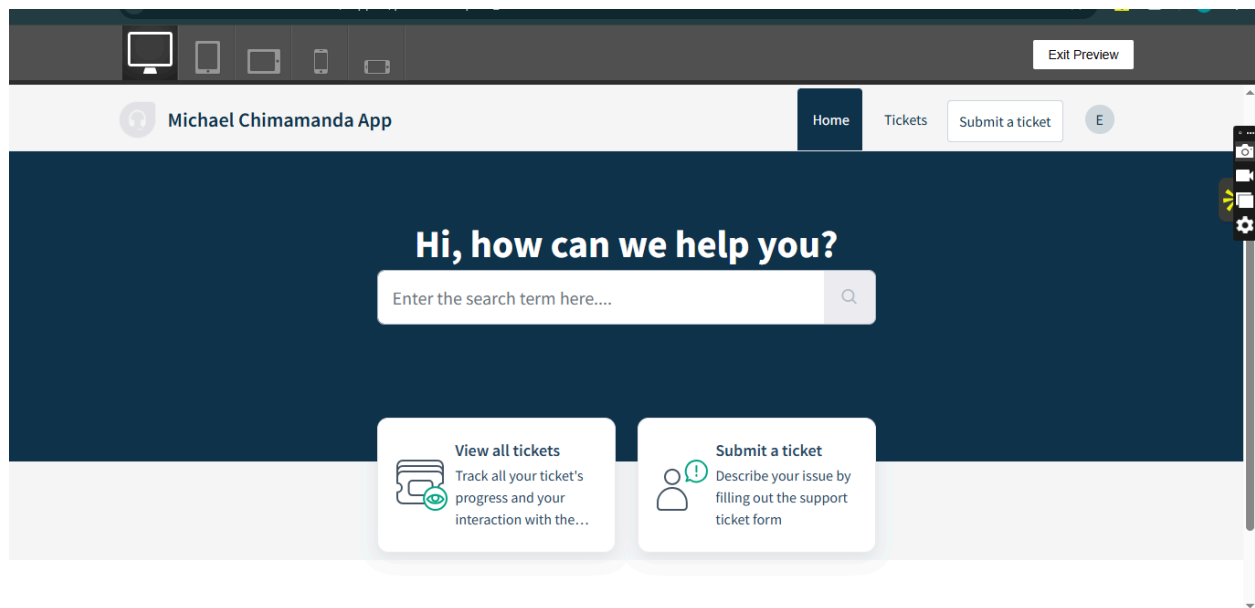
 B. Some Companies may Choose to create from Google form, linking to excel and directly to sales CRM eg HubSpot

The above shows a workflow Automation, where a Profile visitor Sign or submit a ticket or request on google form embedded on the companies website. The form is lined to an excel sheet for contact information, and also submitted on Hubspot
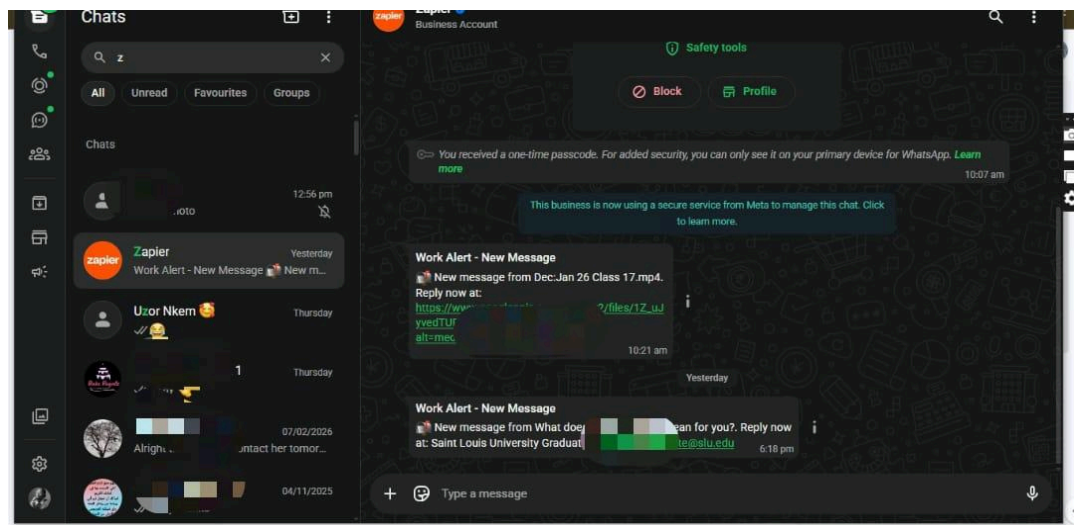
2. Embedded Support Widget

This is a Freshdesk widget that allows customer to submit service request and Ticket issue for better service

3. Notification of Ticket or Form submitted on the Company's website or Portal on Whatsapp.
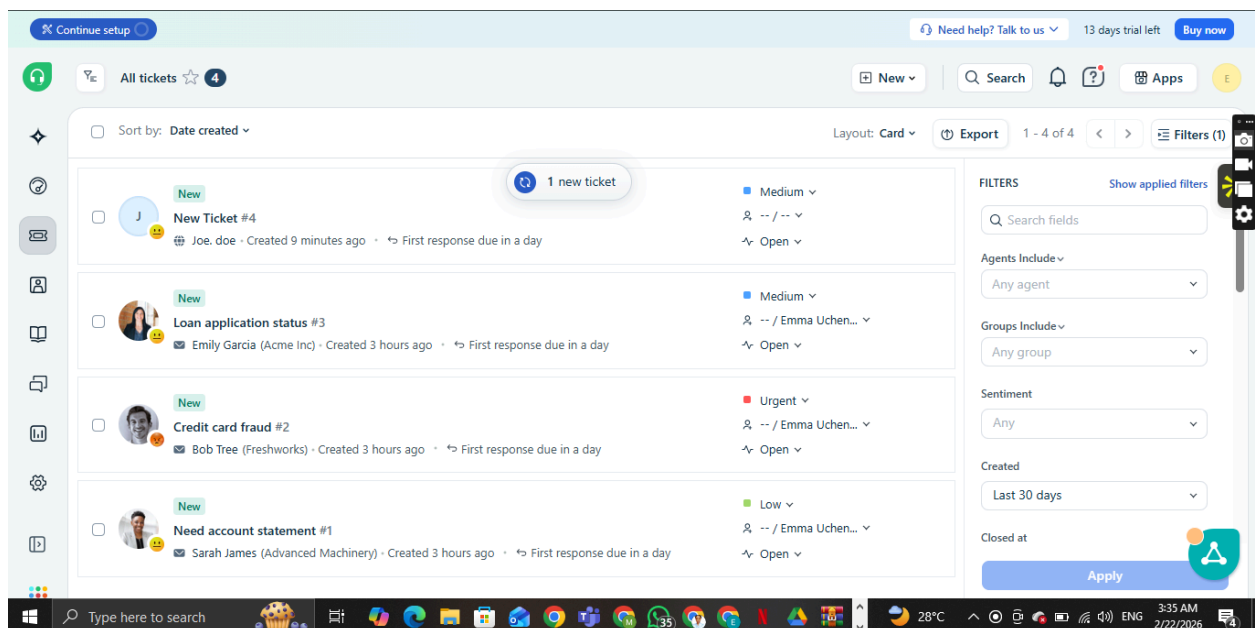
From the integration made on zapier. Immediate;y a form or ticket is submitted on the portal, a notification is sent to whatsapp. To avoid missed tickets, thereby violating the SLA POLICIES.

4. For proper internal control measure a reminder is sent to slack, is SLA time is about to be due
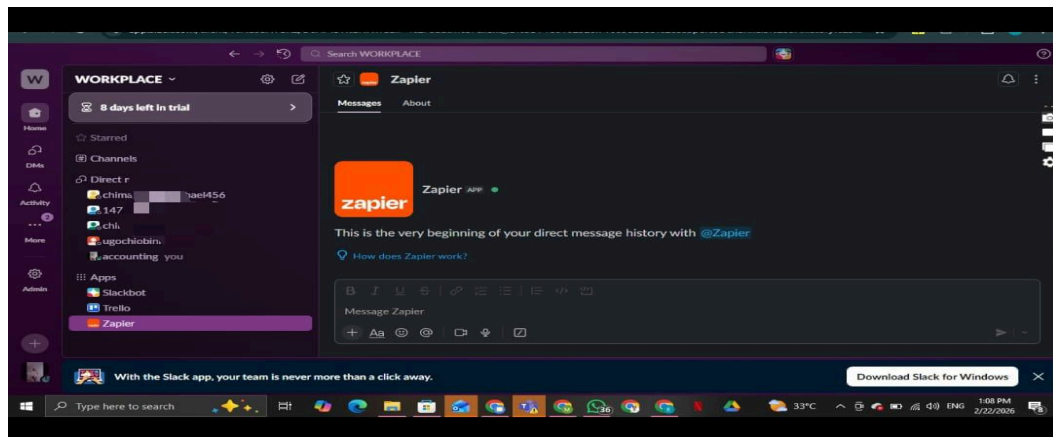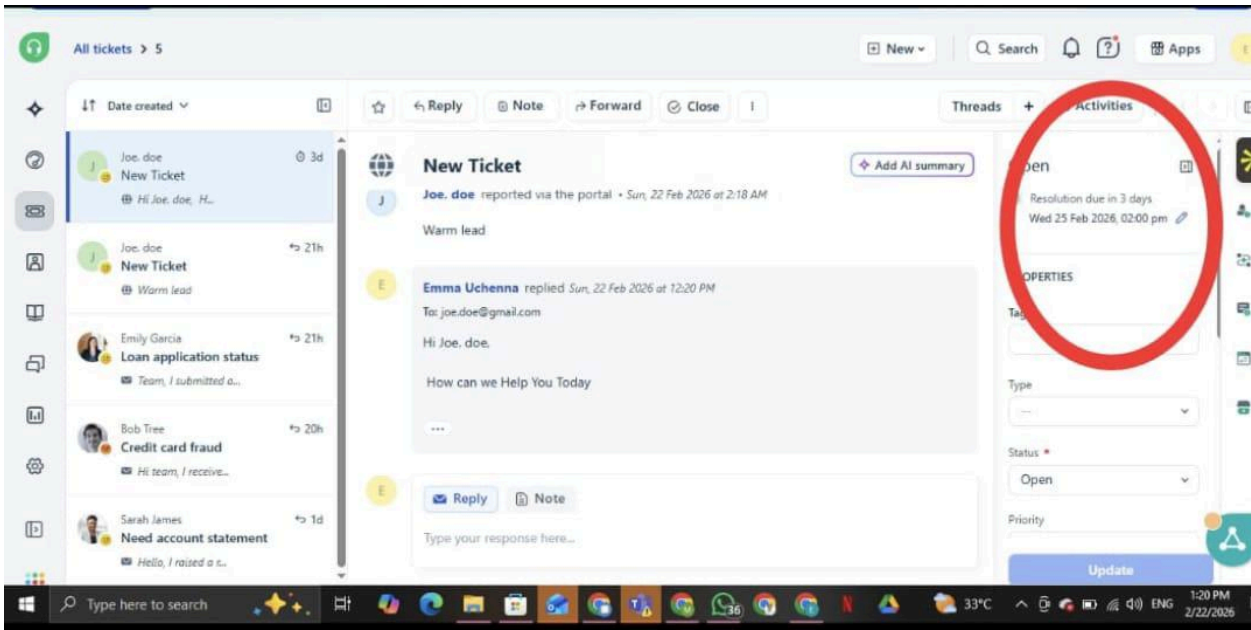

5. Ticket Created on freshdesk - Maintaining SLA policies

Following the Automation workflow, a Ticket is automatically created on Freshdesk. Either to resolve and issue or to get a warm lead for sales nurturing. The first Ticket from Joe.

6. SLA Policy - First Response To Customer maintained

Automated Freddy Ai response to first message, ensuring SLA policy maintained, before assigning it to a Customer support person or a Virtual assistant.

7. Asana - Task, creating a Warm lead
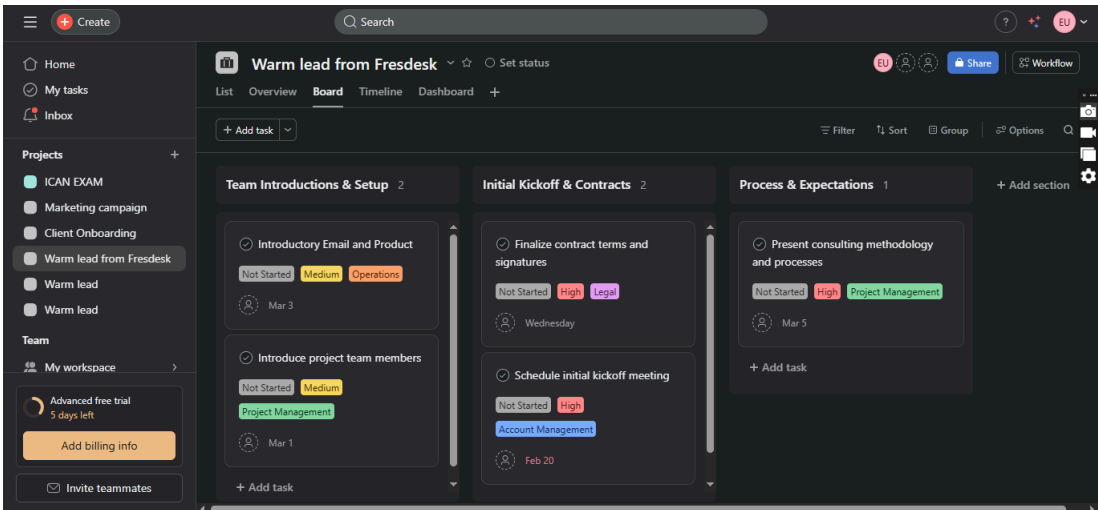
Automatically, a Task is created on Asana, showing board on introduction, sales pipeline, status,and SLA tracking.

8. Hubspot - Contact for email Campaign

From the Ticket submitted on the portal, it is sent to Hubspot as warm lead for sale and marketing campaign

9. Zapier Workflow Automation
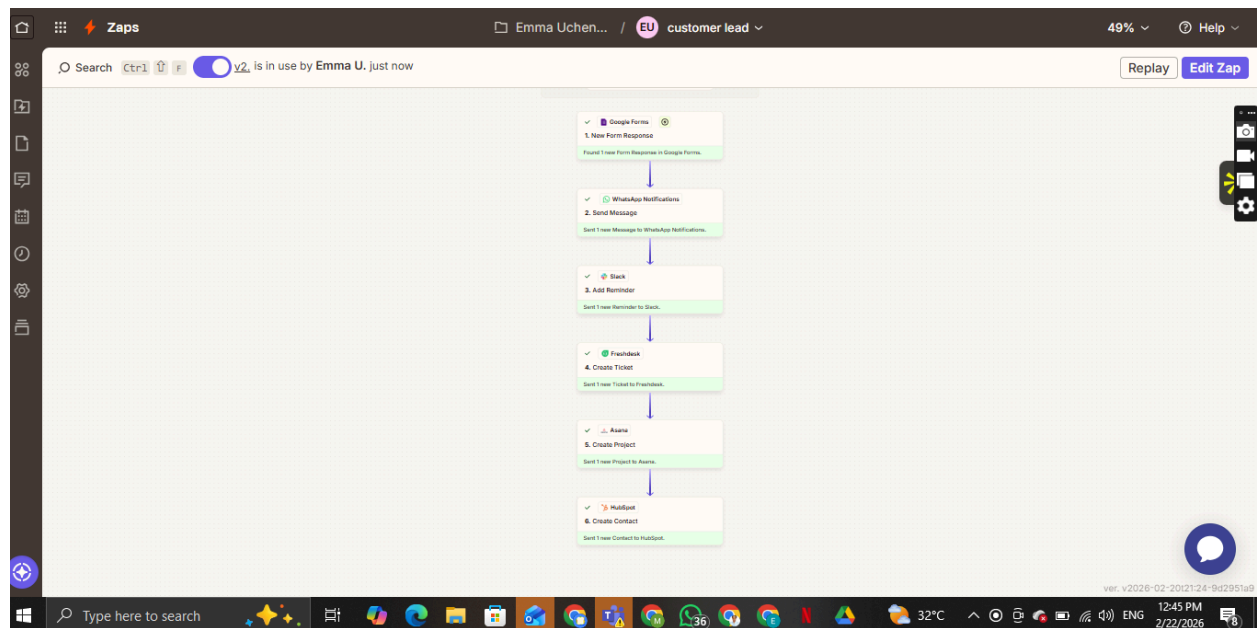
The full workflow automation support.

10. [Zapier work flow Automation](#)

11. [Freshdesk exploration, automation and workflow](#)

12. [Hubspot exploration Automation and Workflow](#)

13. [Clickup & Asana](#)

Other project and CRM tools, Appointment and scheduling & Lead generation project Are available on request