

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

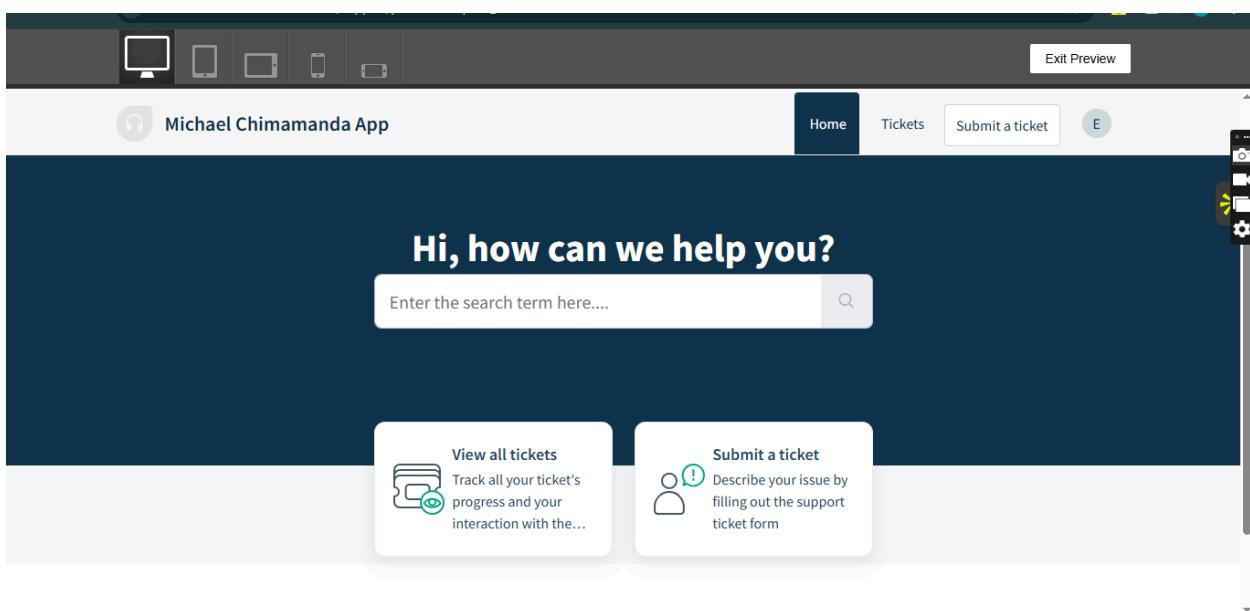
This page documents the practical Implementation of an end-to-end support and operations automation system designed to reflect real world workflow

Access live Demo Landing Page of 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

Two screenshots illustrating the integration of Google Forms and HubSpot. The left screenshot shows a Google Form titled "Contact Information" with fields for Name, Email, and Address. The right screenshot shows the "Form Manager" in HubSpot, displaying a list of forms and their status (Published, Draft, etc.). A specific form titled "Contact Information (Response)" is selected, showing its details and submission statistics.

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

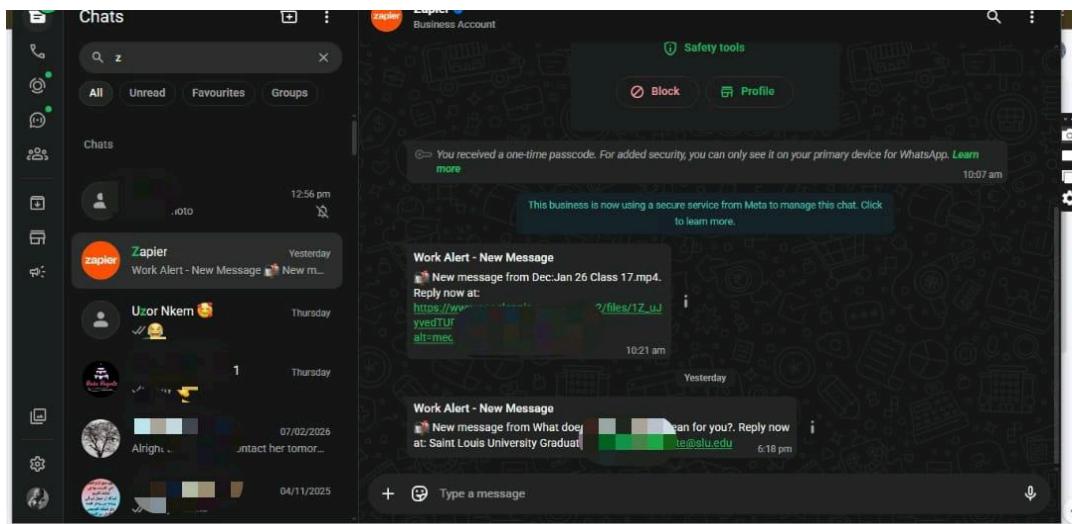
2. Embedded Support Widget

A screenshot of a web-based ticket submission form. The title bar says "Michael Chimamanda App" and "Submit a ticket". The form fields include:

- Get in touch**: A dropdown menu showing "Report an issue".
- Requester ***: An input field.
- Subject ***: An input field.
- Type**: A dropdown menu showing "Choose...".
- Priority**: A dropdown menu showing "Low".
- Product**: A dropdown menu showing "Example".
- Description ***: A rich text editor with a toolbar and a placeholder "Type something".
- Reference Number**: An input field.
- Attachment**: A file upload section with a checkbox for "I'm not a robot" and a reCAPTCHA button.
- Cancel** and **Submit** buttons at the bottom.

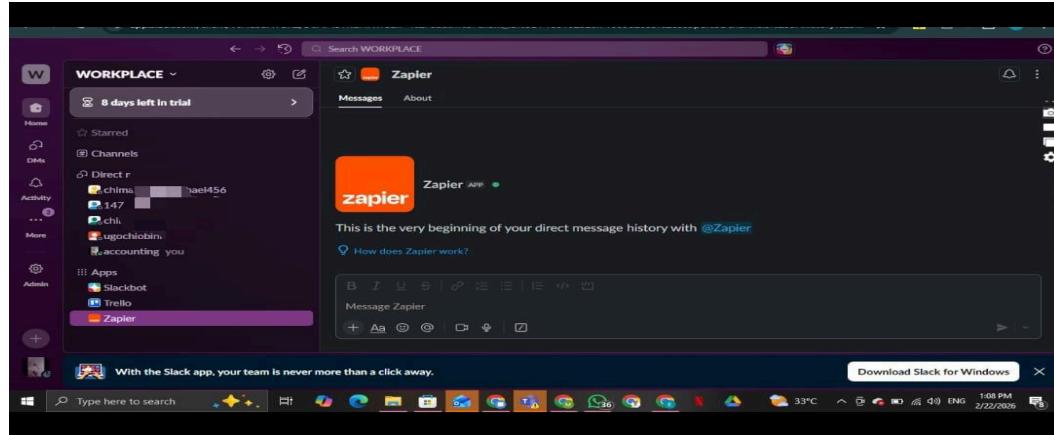
This is a Freshdesk widget that allows customer to submit service request and Ticket issue for better service

3. Notification of Ticket or Form submitted on the Company's website or Portal on Whatsapp.



From the integration made on zapier. Immediately 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

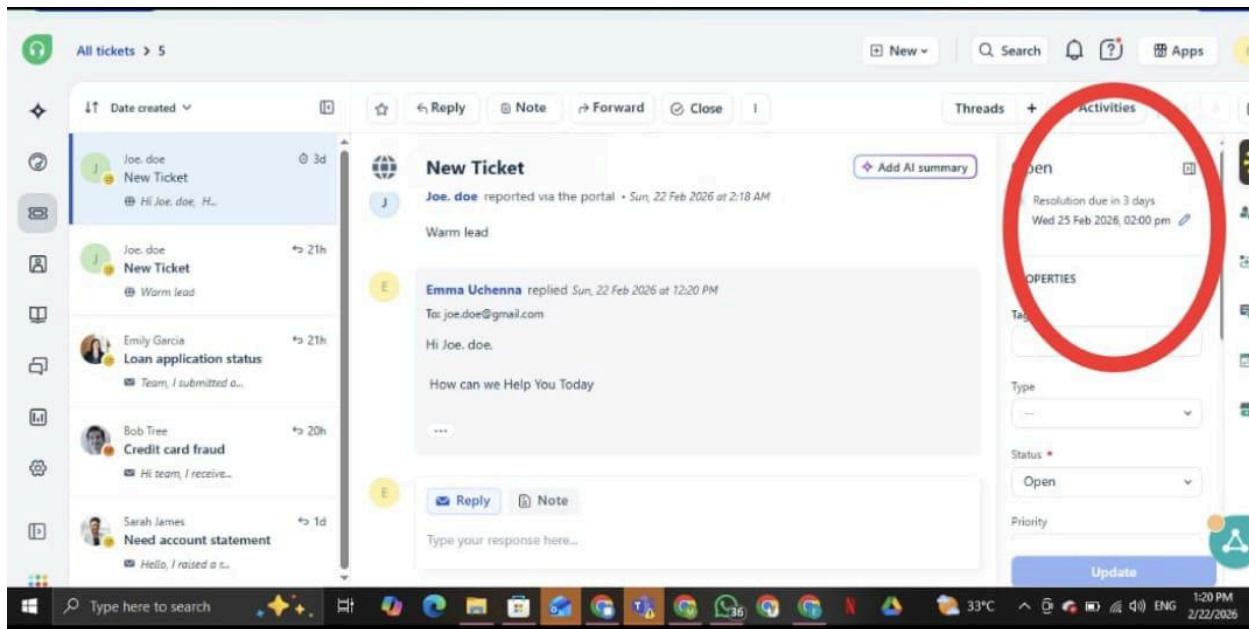


5. Ticket Created on freshdesk - Maintaining SLA policies

A screenshot of the Freshdesk ticket management interface. The top navigation bar includes 'Continue setup', 'Need help? Talk to us', '13 days trial left', and a 'Buy now' button. The main area shows a list of four new tickets: 1. 'New Ticket #4' from 'Joe. doe' created 9 minutes ago, with a note 'First response due in a day'. 2. 'Loan application status #3' from 'Emily Garcia (Acme Inc)' created 3 hours ago, with a note 'First response due in a day'. 3. 'Credit card fraud #2' from 'Bob Tree (Freshworks)' created 3 hours ago, with a note 'First response due in a day'. 4. 'Need account statement #1' from 'Sarah James (Advanced Machinery)' created 3 hours ago, with a note 'First response due in a day'. On the right side, there are filters for 'Agents Include' (Any agent), 'Groups Include' (Any group), 'Sentiment' (Any), and 'Created' (Last 30 days). A large blue 'Apply' button is at the bottom right of the filter panel. The bottom of the screen shows a Windows taskbar with various application icons and a status bar indicating '28°C', '3:35 AM', 'ENG', and '2/22/2026'.

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

The screenshot shows an Asana board view for a project titled 'Warm lead from Fresdesk'. The board has three columns: 'Team Introductions & Setup', 'Initial Kickoff & Contracts', and 'Process & Expectations'. The 'Team Introductions & Setup' column contains two tasks: 'Introductory Email and Product' (due Mar 3) and 'Introduce project team members' (due Mar 1). The 'Initial Kickoff & Contracts' column contains two tasks: 'Finalize contract terms and signatures' (due Wednesday) and 'Schedule initial kickoff meeting' (due Feb 20). The 'Process & Expectations' column contains one task: 'Present consulting methodology and processes' (due Mar 5). The left sidebar shows the project structure and some workspace info like an advanced free trial.

Automatically, a Task is created on Asana, showing board on introduction, sales pipeline, status, and SLA tracking.

8. Hubspot - Contact for email Campaign

The screenshot shows the Hubspot Submissions page. At the top, there are tabs for Performance, Analyze, and Submissions, with Submissions selected. Below the tabs, there is a date range selector set from 01/24/2026 to 02/22/2026. A 'Manage columns' button is also present. The main table displays one row of data:

CONTACT	CONVERSION PAGE	SUBMITTED ON
Michael Chimamanda	Form	February 21, 2026 7:42 PM EST

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 screenshot shows a Zapier workflow (Zap) titled "Emma Uchen... / EU customer lead". The workflow consists of six steps:

1. New Form Response (Google Forms): Trigger step. "Found 1 new Form Response in Google Forms."
2. Send Message (WhatsApp Notifications): Action step. "Sent 1 new Message to WhatsApp Notifications."
3. Add Reminder (Slack): Action step. "Sent 1 new Reminder to Slack."
4. Create Ticket (Freshdesk): Action step. "Sent 1 new Ticket to Freshdesk."
5. Create Project (Asana): Action step. "Sent 1 new Project to Asana."
6. Create Contact (Mailchimp): Action step. "Sent 1 new Contact to Mailchimp."

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