### **Task 1: Basic Lead Capture and Scoring**

#### **Zap Setup Instructions**

1. **Trigger**: Google Forms submission
   * Set up your Google Form with fields for company size, budget, industry, urgency, and any other relevant data.
   * Link your Google Form to a Google Sheets spreadsheet.
2. **Action 1**: Zapier Formatter – Calculate Lead Score
   * Add a "Formatter by Zapier" action.
   * Use a **Numbers > Perform Math Operation** step to calculate the lead score based on the responses.
3. Example:
   * Assign numeric values to each field (as per the scoring system in Task 1).
   * Use conditional logic or simple addition to calculate the total score.
4. **Action 2**: Add to "Qualified Leads" Google Sheet
   * Use Zapier’s Google Sheets integration to append a row to your spreadsheet with the lead details and score.
5. **Conditional Actions**:
   * **Path 1**: If the lead score >70:
     + Action: Send a welcome email using Gmail.
   * **Path 2**: If the lead score ≤70:
     + Action: Add to a separate "Nurturing Campaigns" Google Sheet.

### **Task 2: Handling Edge Cases**

#### **Handling Incomplete Data**

* Use a "Filter by Zapier" step after the form submission trigger.
* Check for empty fields; if data is missing, log the lead in an "Incomplete Leads" Google Sheet.

#### **Managing High-Value Leads**

* Set a filter to flag leads with scores >90.
* Create a Gmail action to notify a designated sales manager of the high-value lead.

#### **Accommodating Different Time Zones**

* Add a "Time Zone" field to the form.
* Use Zapier Formatter to convert times to the lead's local time.
* Include this adjusted time in follow-up actions (e.g., Google Calendar events).

### **Task 3: Scaling and Advanced Implementation**

#### **Lead Distribution**

1. Add a "Lookup Table" in Zapier or Google Sheets with sales reps' names.
2. Use a Formatter step to implement round-robin logic (e.g., cycle through a list of reps).
3. Update the "Assigned Sales Rep" column in the Google Sheet with the selected rep.

#### **Text Analysis**

1. Add a "Comments" field in the Google Form.
2. Use Zapier Formatter's **Text > Extract Keywords** function to identify key terms like "urgent," "budget," or "demo."
3. Add these keywords to a "Category" column in your Google Sheet.

#### **Follow-Up System**

1. Use a Google Calendar action in Zapier.
2. Create an event for each new lead, including:
   * Event title: Lead's name and score.
   * Description: Full lead details.
   * Time: Adjusted to the lead's time zone.
   * Assigned rep as an invitee.

### **Video Walkthrough Script**

**Introduction**

* Briefly explain the goal: automating lead capture, scoring, and management for TechNova using Zapier.

**Task 1: Lead Scoring System**

1. Show the Google Form setup.
2. Demonstrate the linked Google Sheet capturing form responses.
3. Walk through the Zap:
   * Trigger: New form submission.
   * Formatter: Lead score calculation.
   * Actions: Adding to Google Sheets, sending emails, or logging to a nurturing list.

**Task 2: Handling Edge Cases**

1. Demonstrate handling incomplete data:
   * Filter step showing missing fields.
   * Logging incomplete leads in a separate Google Sheet.
2. Show flagging high-value leads:
   * Conditional step based on score.
   * Email notification to the sales manager.
3. Explain time zone adjustments using Formatter and Google Calendar.

**Task 3: Scaling and Advanced Features**

1. Explain lead distribution:
   * Show the round-robin logic for assigning sales reps.
   * Update Google Sheets with assigned reps.
2. Show keyword extraction:
   * Highlight comments and categorized keywords in the sheet.
3. Explain the follow-up system:
   * Demonstrate a Google Calendar event created with lead details.

**Closing**

* Summarize the workflow benefits: time-saving, better lead prioritization, and streamlined follow-ups.
* Highlight the scalability of the solutio