**Solution for Handling Edge Cases and Scaling the Workflow**

This solution aims to address TechNova’s edge cases and enhance the workflow to meet growing requirements. It uses tools like Zapier, Google Sheets, and Google Calendar for automation.

**Edge Case Handling**

**1. Incomplete Data**

* **Approach**:
  + Use a **Filter by Zapier** step to detect incomplete fields.
  + If required fields are missing:
    - Add the lead to a "Needs Attention" spreadsheet.
    - Notify the sales team via Gmail for manual follow-up.
* **Implementation**:
  + **Trigger**: New form submission from Google Forms.
  + **Action**: Add a **Filter** step to check if critical fields (e.g., Company Size, Budget) are blank.
  + **If Incomplete**:
    - **Action 1**: Add the lead to the "Needs Attention" Google Sheets tab.
    - **Action 2**: Send an email to the sales team via Gmail with the lead's details.

**2. Ensuring High-Value Leads Are Properly Managed**

* **Approach**:
  + High-value leads (score >90) are added to a "Priority Leads" sheet.
  + Notify senior sales reps via email with the lead's details.
* **Implementation**:
  + Add a **Filter** step to detect high-value leads (Lead Score > 90).
  + **For High-Value Leads**:
    - **Action 1**: Add them to the "Priority Leads" sheet.
    - **Action 2**: Send an email notification to senior reps.

**3. Accommodating Different Time Zones**

* **Approach**:
  + Add a "Time Zone" question in the Google Form.
  + Use Zapier's **Formatter** tool to adjust follow-up schedules to the lead's local time.
* **Implementation**:
  + **Trigger**: Capture the time zone input in the form.
  + **Formatter Step**: Use the "Date/Time" formatter in Zapier to convert follow-up times to the lead's local time zone.
  + **Action**: Schedule follow-ups in Google Calendar for the sales team, considering the time zone.

**Scaling and Advanced Implementation**

**1. Distribute Leads Evenly Among Sales Reps**

* **Approach**:
  + Use Zapier's **Storage** feature to track the last assigned sales rep.
  + Implement round-robin logic to assign leads to reps sequentially.
* **Implementation**:
  + Add a **Storage by Zapier** step:
    - Retrieve the last assigned rep.
    - Assign the next rep in the sequence.
  + Update the "Assigned Sales Rep" column in Google Sheets.

**2. Extract Keywords for Lead Categorization**

* **Approach**:
  + Use Zapier's **Formatter** to analyze the "Comments" field in the form.
  + Extract keywords like "demo," "pricing," or "integration" to categorize leads.
* **Implementation**:
  + Add a **Formatter Step**:
    - Use the "Text Extract" feature to identify keywords.
  + Append the extracted keywords to the lead’s row in Google Sheets for categorization.

**3. Create a Simple Follow-Up System**

* **Approach**:
  + Schedule follow-up reminders for sales reps in Google Calendar based on lead urgency.
* **Implementation**:
  + **Trigger**: Use the urgency data from the form.
  + Add a **Google Calendar** action:
    - Title: "Follow-up with [Lead Name]."
    - Date: Set based on urgency (e.g., immediate = today, short-term = 3 days later).
    - Description: Include lead details and score.

**Deliverables**

**Updated Zap for Edge Cases**

The workflow now includes:

1. Trigger: Google Form submission.
2. Filter: Check for missing data.
3. Filter: Identify high-value leads.
4. Formatter: Adjust time zones for follow-ups.
5. Action: Add to appropriate sheets or send email notifications.

**Enhanced Zap for Scaling**

The workflow includes:

1. Trigger: New form submission.
2. Formatter: Calculate lead score and extract keywords.
3. Storage: Implement round-robin lead assignment.
4. Google Sheets: Update lead information and assign sales reps.
5. Google Calendar: Schedule follow-up reminders.

**Key Features and Limitations**

**Features**

1. **Incomplete Data**: Automatically flags leads requiring manual intervention.
2. **High-Value Leads**: Ensures quick prioritization and action.
3. **Time Zones**: Personalizes follow-ups to the lead's local time.
4. **Lead Distribution**: Prevents workload imbalance among sales reps.
5. **Text Analysis**: Provides insights into lead interests.
6. **Follow-Up Automation**: Reduces manual scheduling.

**Limitations**

1. **Time Zone Accuracy**: Requires accurate time zone input from leads.
2. **Keyword Extraction**: Basic text analysis may miss nuanced insights.
3. **Manual Intervention**: Still needed for incomplete data and special cases.

**Next Steps**

1. Implement and test the workflows in Zapier.
2. Share screenshots of the updated Zap.
3. Record and provide an explanation video of the workflow.