**TechNova Solutions: Lead Management Workflow Challenge Solution**

Below is a detailed explanation of how to implement the workflow for each task using **Zapier**, **Google Forms**, **Google Sheets**, **Gmail**, and **Google Calendar**. While no custom code is required (as Zapier handles most of the automation), I’ll explain the logic in pseudocode where applicable.

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

**Step 1: Lead Scoring System**

Assign point values based on form responses:

| **Criteria** | **Option** | **Points** |
| --- | --- | --- |
| **Company Size** | 1-50 employees | 10 |
|  | 51-200 employees | 20 |
|  | 201-1000 employees | 30 |
|  | 1000+ employees | 40 |
| **Annual Budget** | Less than $10,000 | 5 |
|  | $10,000 - $50,000 | 20 |
|  | $50,001 - $100,000 | 35 |
|  | More than $100,000 | 50 |
| **Industry** | Technology | 30 |
|  | Finance | 20 |
|  | Healthcare | 25 |
|  | Retail | 15 |
|  | Other | 10 |
| **Urgency of Need** | Immediate (1 month) | 40 |
|  | Short-term (1-3 months) | 30 |
|  | Medium-term (3-6 months) | 20 |
|  | Long-term (6+ months) | 10 |

**Step 2: Zap Workflow**

1. **Trigger**:
   * **App**: Google Forms
   * **Event**: New Form Submission
2. **Action: Calculate Lead Score**:
   * **App**: Zapier Formatter (Numbers)
   * Logic:

pseudocode

Copy code

score = 0

score += points for company size

score += points for annual budget

score += points for industry

score += points for urgency

* + Use conditional logic in Zapier to map each response to its score.

1. **Action: Add to Google Sheets**:
   * **App**: Google Sheets
   * **Event**: Create Spreadsheet Row
   * **Data**: Add lead details and their score.
2. **Action: Send Email (Conditional)**:
   * **App**: Gmail
   * **Event**: Send Email
   * **Condition**: If score > 70, send a "Welcome Email" to the lead.
3. **Action: Nurturing Campaign (Conditional)**:
   * **App**: Google Sheets
   * **Event**: Create Spreadsheet Row
   * **Condition**: If score <= 70, add the lead to a separate nurturing campaign sheet.

**Deliverables**

* **Screenshot**: Show the Zap with all steps.
* **Explanation**:
  + Leads are scored based on responses.
  + High-scoring leads receive immediate attention.
  + Low-scoring leads are added to a nurturing list for future campaigns.

**Task 2: Handling Edge Cases**

**1. Handle Incomplete Data**

* **Solution**: Add a filter in Zapier to reject submissions with incomplete fields.
  + **Action**: Filter
  + **Condition**: All required fields must be non-empty.

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

* **Solution**:
  + Add a conditional action to notify a specific sales rep via email or Slack when the lead score is above 90.
  + Use a Gmail/Slack integration in Zapier to send notifications.

**3. Accommodate Different Time Zones**

* **Solution**:
  + Use the Schedule by Zapier feature to send emails or take actions based on the lead’s timezone.
  + Add a "Timezone" field in the form and convert it using Zapier Formatter's Date/Time utilities.

**Deliverables**

* **Screenshot**: Updated Zap with new filters and conditions.
* **Explanation**:
  + Filters prevent incomplete data from polluting the workflow.
  + High-value leads are flagged for quick action.
  + Scheduling ensures personalized communication.

**Task 3: Scaling and Advanced Implementation**

**1. Distribute Leads Among Sales Reps**

* **Solution**:
  + Add a column in Google Sheets: "Assigned Sales Rep."
  + Use Zapier's "Find & Update Spreadsheet Row" to round-robin assign reps.

**2. Extract Keywords from Comments**

* **Solution**:
  + **App**: Zapier Formatter (Text > Extract Pattern).
  + **Logic**: Extract key phrases from the "Comments" field using regex or predefined patterns.
  + Use extracted keywords for lead categorization (e.g., "urgent," "enterprise," "custom").

**3. Lead Follow-Up System**

* **Solution**:
  + Create a follow-up reminder in Google Calendar for each new lead.
  + **App**: Google Calendar
  + **Event**: Create Event
  + **Data**:
    - Title: Follow up with [Lead Name]
    - Date: Set based on urgency (e.g., 1 day for high urgency, 7 days for medium urgency).

**Deliverables**

* **Screenshot**: Enhanced Zap with new steps.
* **Explanation**:
  + **Lead Distribution**: Assign leads evenly, ensuring no sales rep is overwhelmed.
  + **Keyword Extraction**: Basic NLP for lead categorization.
  + **Follow-Up**: Automated reminders prevent leads from slipping through the cracks.

**Project Summary**

1. **Tools Used**:
   * Google Forms (Lead Capture)
   * Google Sheets (Data Storage)
   * Zapier Formatter (Scoring & Text Analysis)
   * Gmail (Email Communication)
   * Google Calendar (Follow-Up)
2. **Scalability**:
   * The system is modular and can easily integrate with CRM tools like HubSpot or Salesforce.
3. **Limitations**:
   * Advanced NLP requires external tools (e.g., Google Cloud NLP).
   * Free tools may have API or usage limitations.
4. **Next Steps**:
   * Scale using paid tools for better analytics and automation.
   * Integrate with CRM for advanced lead tracking.