

TechNova Solutions : Lead Management Workflow Challenge

Task 1: Basic Lead Capture and Scoring

Assigning point values for each form response:

1. Company Size
 - 1–50 employees: 10 points
 - 51–200 employees: 20 points
 - 201–1000 employees: 30 points
 - 1000+ employees: 40 points
2. Annual Budget
 - Less than \$10,000: 10 points
 - \$10,000–\$50,000: 20 points
 - \$50,001–\$100,000: 30 points
 - More than \$100,000: 40 points
3. Industry
 - Technology: 40 points
 - Finance: 30 points
 - Healthcare: 20 points
 - Retail: 10 points
 - Other: 10 points
4. Urgency of Need
 - Immediate: 40 points
 - Short-term: 30 points
 - Medium-term: 20 points
 - Long-term: 10 points

Score Thresholds

- Leads scoring >70 : Consider high-priority leads.
- Leads scoring ≤ 70 : Place in nurturing campaigns.

Step-by-Step Zap Configuration

1. Trigger: Google Forms
 - Create a Google Form to collect lead data.
 - Link the form to a Google Sheets spreadsheet.
 - In Zapier : Set the Trigger Event to "New Spreadsheet Row" (Google Sheets).
2. Action: Lead Scoring Calculation
 - Add a Zapier Formatter (Numbers) step.
 - Use lookup tables or custom formulas to assign points to each field response:
 - Example: $\{company_size_score\} + \{budget_score\} + \{industry_score\} + \{urgency_score\}$.

3. Action: Add Lead to Spreadsheet
 - Add a Google Sheets step : Append the lead data and calculated score to a "Master Leads" sheet.
4. Conditional Steps for Scoring
 - Add a Zapier Filter:
 - For scores >70 , send a Gmail email as a welcome message.
 - For scores ≤ 70 , append the lead to a "Nurturing Leads" sheet for follow-up campaigns.

Task 2: Handling Edge Cases

1. Handling Incomplete Data
 - Add a filter step to check for missing fields (e.g., "IF {Field} IS EMPTY").
 - Send incomplete entries to a "Follow-Up Needed" Google Sheets tab.
2. Managing High-Value Leads
 - Add a conditional step to flag leads with scores >100 .
 - Notify the sales team with a high-priority email using Gmail.
3. Handling Time Zones
 - Use Zapier Formatter to standardize timestamps into a specific time zone.

Task 3: Scaling and Advanced Implementation

1. Distribute Leads Evenly
 - Use Google Sheets to maintain a list of sales reps.
 - Use a Zapier Formatter step to rotate through reps and update the "Assigned Sales Rep" column.
2. Keyword Extraction
 - Use Zapier Formatter (Text) to extract important keywords from a "Comments" field.
 - For example: Extract "urgent," "enterprise," or "high priority" for categorization.
3. Schedule Follow-Ups
 - Use a Google Calendar action to create events for follow-ups.
 - Customize events based on the lead's urgency score.

Output :

```
Lead Score: 100
Sending welcome email...

Lead Score: 120
Sending welcome email...
```

1.0 Console output

Company Size	Budget	Industry	Urgency	Lead Score	Action
1-50 employees	< \$10,000	Technology	Immediate	100	Welcome Email Sent
201-1000 employees	\$50,001-\$100,000	Healthcare	Short-term	120	Welcome Email Sent

1.1 Lead Data