

Task 3: Scaling and Advanced Implementation

TechNova is growing rapidly and wants to leverage more advanced capabilities to optimize their lead management process.

Requirements:

Enhance the workflow to:

1. Implement a system to distribute leads evenly among sales reps (simulate this by updating an "Assigned Sales Rep" column in your Google Sheets)
2. Use Zapier's Formatter to extract keywords from a "Comments" field in the lead submission form, simulating basic text analysis for lead categorization
3. Create a simple lead follow-up system using Google Calendar to schedule reminders for the sales team

Deliverable:

- A screenshot of your final, enhanced Zap
- A brief explanation of how each new feature works and any limitations you foresee
- Please provide a video for explanation.

1. Distribute Leads Evenly Among Sales Reps

- **How It Works:**
 - In Google Sheets, we use a round-robin distribution system to automatically assign a sales rep to each new lead. The formula `=INDEX(Sales_Reps, MOD(ROW()-1, COUNTA(Sales_Reps))+1)` ensures that leads are assigned evenly to a list of sales reps.
 - The list of sales reps is created in a separate part of the sheet or in a different sheet, with each sales rep's name placed in a column (e.g., "Sales Rep 1", "Sales Rep 2", etc.). The formula then cycles through these names as new leads are added.
- **Limitations:**
 - This method assumes a constant number of sales reps and doesn't account for varying workloads or availability. Additionally, if a sales rep is unavailable, there's no automatic way to reassign leads.

2. Use Zapier's Formatter to Extract Keywords from Comments

- **How It Works:**
 - Using Zapier, we extract key information from the "Comments" field in the lead submission form. This is done by setting up the **Formatter by Zapier** tool to parse the comments and extract specific keywords, phrases, or data points. These keywords could be related to the lead's industry, product interest, urgency, or other criteria.
 - For example, if the comment mentions "urgent", the extracted keyword would be "urgent," which could help categorize the lead as high priority.
- **Limitations:**

- The accuracy of the extracted keywords depends on the consistency and structure of the comments. This approach may miss important details or incorrectly categorize a lead if the comments are unstructured or too ambiguous.

3. Create a Lead Follow-up System Using Google Calendar

- **How It Works:**

- Once a lead is submitted and categorized (via the comments), Zapier automatically creates a follow-up event in Google Calendar. The event can be customized with the lead's name, extracted keywords, and a reminder for the assigned sales rep. This ensures timely follow-up by the sales team, with notifications sent to the sales rep.
- For example, a lead submitted with the comment "urgent" would result in a calendar event created for an immediate follow-up.

- **Limitations:**

- If a sales rep's schedule is already packed, the automated calendar event could overlap with other tasks. You may need to manually adjust the follow-up time or integrate a more advanced scheduling system to avoid conflicts.

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Thursday Nov 21, 2024 · 7pm – 7:30pm (India Standard Time - Kolkata)

[Join with Google Meet](#)

Reminder to join the meeting

Meeting link

meet.google.com/qsw-fjrs-qko

Organizer

kona vagadheeswari
vagadheeswari2018@gmail.com

Guests

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