

Task 2: Handling Edge Cases

TechNova has noticed some issues with their lead management process:

1. Some leads are entering the system with incomplete information.
2. Occasionally, high-value leads are slipping through the cracks.
3. There's no process for handling leads from different time zones.

Requirements:

Modify the workflow to address these edge cases. Explain how you would:

1. Handle incomplete data
2. Ensure high-value leads are properly managed
3. Accommodate different time zones

Deliverable:

- A screenshot of your updated Zap addressing these issues

- <https://forms.gle/2rhkKBfeo72gHU118>

- A written explanation of your approach to each edge case

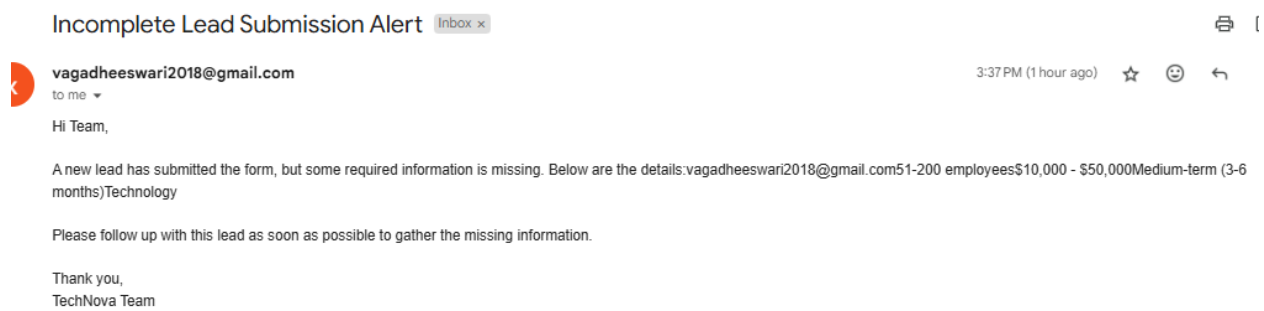
1. Handling Incomplete Data

Incomplete data can lead to inaccurate lead scoring or lost opportunities. To address this, we'll implement the following steps:

Steps to Handle Incomplete Data:

- ### 1. Add Validation Step Using Formatter by Zapier

- After the trigger event (new form submission), use **Formatter by Zapier** to check if any required fields are empty (e.g., Company Size, Annual Budget, Industry, Urgency).
 - Use **Formatter > Text > Extract** to check if any field is missing.
 - If any fields are empty, create a conditional path.
- 2. **Create a Conditional Path for Incomplete Data**
 - **Path 1 (Complete Data):** Proceed with calculating the lead score and adding the lead to the appropriate sheet.
 - **Path 2 (Incomplete Data):**
 - Send an alert or email to your team about the incomplete lead.
 - Optionally, add the incomplete lead to a separate Google Sheet to follow up on missing information.
 - You can send an email to the lead requesting them to complete their form if needed.



2. Ensuring High-Value Leads Are Properly Managed

High-value leads are critical and should be prioritized to avoid slipping through the cracks.

Steps to Ensure High-Value Leads Are Managed:

1. **Use Conditional Logic to Prioritize High-Value Leads**
 - Modify your existing scoring system:
 - **Company Size:** Assign a higher weight to large companies (e.g., 1000+ employees = 30 points).
 - **Annual Budget:** Leads with high budgets (e.g., More than \$100,000) should automatically receive higher scores.
 - Ensure that any lead with a **score above 70** is flagged as high-value.
2. **Create a Conditional Path for High-Value Leads**
 - **Path 1 (High-Value Lead > 70 points):**
 - Send a **priority notification** to the sales team or a key person.
 - Add high-value leads to a **special Google Sheet** for immediate follow-up.
 - Optionally, send a personalized **high-priority welcome email** or a special offer to these leads.
3. **Ensure Immediate Attention for High-Value Leads**
 - **Path 2 (Score ≤ 70):**

- Continue as before with regular workflows for low and medium-value leads.

Hello,

Thanks for your interest in TechNova! Based on your responses, we have calculated your lead score, and we're excited to inform you that your score is over 70! We will be reaching out soon with more information.

Best regards,
The TechNova Team

3. Accommodating Different Time Zones

Leads from different time zones need to be managed carefully to ensure timely follow-up and communication.

Steps to Accommodate Different Time Zones:

1. Add Time Zone Detection

- Use **Zapier's built-in tools** or Google Sheets to add a **Time Zone** column.
- If the form doesn't capture time zone data, use a **Zapier Filter** to detect the location of the lead by IP address or email domain (if available).
- Use a tool like **Zapier's "Formatter"** to convert the lead's time zone based on their country or region.

2. Send Time-Zone-Sensitive Emails

- Create a conditional path based on time zones:
 - **Path 1 (Same Time Zone or Relevant Time Window):** Send an immediate email or notification.
 - **Path 2 (Different Time Zone):** Schedule the email for a more appropriate time (e.g., schedule emails to be sent during business hours in the lead's time zone).
 - Use **Delay by Zapier** to delay email delivery for leads outside your primary time zone, ensuring they receive emails at the right time.