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:

- o 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.

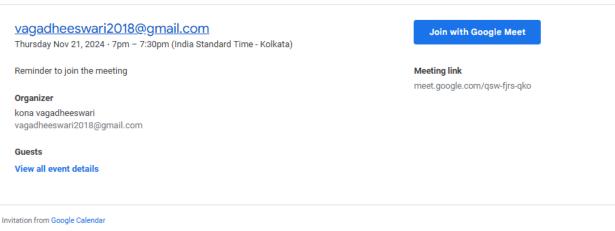
3. Create a Lead Follow-up System Using Google Calendar

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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