

Lead Scoring Criteria and Zapier Workflow Explanation

Lead Scoring Criteria:

1. Lead Source:

- Referral: 20 points
- Organic Search: 15 points
- Social Media: 10 points
- Paid Ads: 5 points

2. Industry:

- SaaS: 30 points
- E-commerce: 25 points
- Health Tech: 20 points
- Other: 10 points

3. Job Title:

- CEO/Founder: 25 points
- Director/VP: 20 points
- Manager: 15 points
- Staff: 10 points

4. Interest Level:

- Highly Interested: 30 points
- Somewhat Interested: 20 points
- Not Interested: 5 points

5. Budget:

- High (over \$50K): 40 points
- Medium (\$10K - \$50K): 25 points
- Low (below \$10K): 10 points

6. Timeline:

- Urgent (within 1 month): 30 points
- Medium (1-3 months): 20 points
- Long-term (3+ months): 10 points

Total Score Calculation:

The total score is the sum of points from all criteria. For example, a highly interested lead from a referral in the SaaS industry scores:

30 (Interest) + 20 (Source) + 30 (Industry) = 80 points.

Lead Scoring Ranges:

- 70–100 points: High-value leads (target immediately with welcome emails)
- 40–69 points: Medium-value leads (nurture further)
- 0–39 points: Low-value leads (requires more engagement)

Zapier Workflow:

Trigger: New Form Submission (Google Forms)

- Why: Starts the lead scoring process when a form is submitted.

Action 1: Calculate Lead Score

- What Happens: Zapier's "Formatter" assigns points based on form data. A custom formula calculates the total score.
- Why: Automates scoring to categorize leads efficiently.

Action 2: Add Lead to Google Sheets

- What Happens: Lead details and scores are added to a "Leads" spreadsheet.
- Why: Centralized storage for tracking and segmentation.

Action 3: Send Welcome Email (for high-value leads)

- What Happens: Leads scoring above 70 receive a welcome email via Gmail.
- Why: Ensures immediate engagement with high-value leads.

Action 4: Add to Nurturing Spreadsheet (for low/medium leads)

- What Happens: Leads scoring below 70 are added to a "Nurturing" Google Sheet.
- Why: Facilitates further engagement through marketing campaigns.