

package.md

02-simple-path/simple-path-walkthrough.md

PS> boring fix lead-followup

status: practical, transparent, no hype

Simple Path Walkthrough

This path is for getting a working follow-up system quickly without adopting a full CRM.

terminal

Tally or Google Forms

→ Google Sheets

→ Gmail

→ Zapier

→ Google Calendar optional

What you will build

A lightweight system where a new form submission creates a lead row, sends a confirmation email, and creates a follow-up reminder.

Tools used

Tool	Use case
Tally or Google Forms	Capture the lead request
Google Sheets	Store the lead and follow-up status
Gmail	Send the response or notification
Zapier	Move the data between tools
Google Calendar	Optional follow-up reminder

Step 1 – Create the lead sheet

Create a Google Sheet with these tabs:

terminal

Leads

Message Templates

Dashboard

Minimum **Leads** columns:

terminal

created_at

lead_name

email

phone

source

service_requested

message

status

last_contacted_at

next_follow_up_at

assigned_owner

missing_info

ai_summary

notes

Step 2 – Create the form

Use Tally or Google Forms.

Recommended fields:

terminal

Name

Email

Phone

What do you need help with?

How soon do you need help?

Anything else we should know?

Keep the form short. The goal is not to collect every detail. The goal is to start the conversation cleanly.

Step 3 – Connect the form to the sheet

If using Google Forms, connect responses directly to Google Sheets.

If using Tally, use Zapier:

terminal

Trigger: New Tally submission

Action: Create spreadsheet row in Google Sheets

Step 4 – Send an instant response

Zapier recipe:

terminal

Trigger: New form submission

Action 1: Create spreadsheet row

Action 2: Send Gmail email

Action 3: Create Google Calendar follow-up reminder optional

Instant response should say:

terminal

We got your request.

Here is the next step.

Here is what we need from you if anything is missing.

Step 5 – Create follow-up logic

In the sheet, set:

terminal

status = Responded

last_contacted_at = now

next_follow_up_at = tomorrow or chosen follow-up window

If using calendar reminders, create a reminder titled:

terminal

Follow up with {{lead_name}} about {{service_requested}}

Step 6 – Test

Submit a fake lead.

Confirm:

- row appears in Sheets
- response email sends
- owner gets notified
- follow-up date exists
- reminder exists if using Calendar

Common mistakes

Symptom	Likely cause	Fix
Email did not send	Gmail account not connected or Zap off	Reconnect Gmail and test Zap
Row missing fields	Form field names changed	Remap fields in Zapier
Reminder date wrong	Timezone mismatch	Check Zapier and Google Calendar timezone
Duplicate rows	Multiple Zaps are active	Turn off duplicate automations

> boring systems_

implementation package draft