Handoff Setup

What to expect when setting up Handoff with HubSpot CRM

Who to involve from your team:

Sales Ops:
To review routing rules and oversee rollout

HubSpot CRM Admin:
To create custom properties for tracing and reporting

PRE-KICKOFF

Gain access to Chili Piper and complete your self-guided initial onboarding.

1. Create your Chili Piper instance.
2. Walk through self-guided onboarding in Chili Piper to understand the basics.

KICKOFF

Meet with Chili Piper to begin initial setup.

1. Review and test Queues.
2. Assign user licences.

BUILD

Together with your onboarding team review Queue Rules, Meeting Templates, and prep to go live

1. Build and review Meeting Templates.
2. Build and review Reminders.
3. Review and configure integrations.
4. Add HubSpot custom properties for tracking and reporting.

LAUNCH

Launch Chili Piper and let the good times roll

1. Review Chili Piper User Guide.

Please note: Every implementation is different - the above is a general guide but might be altered based on your team's tech stack and goals.