



- Information is sent to Eloqua, per usual (UTM values, hidden fields, lead source, etc.)
- CP looks to see if the Lead/Contact record exists in SFDC, based on email
- CP looks to see if the the Lead/Contact is a member of an existing Account, or a net new Lead
- If existing, CP uses existing Contact/Account data + form data to qualify the lead

### QUALIFIED

- If existing Lead/Contact or matches existing Account by domain, CP displays calendar availability of existing owner if owner is a CP Assignee within the Ownership Queue (optional)
- Else, CP determines the correct user or group of users based on routing rules and displays calendar availability

### UNQUALIFIED

Lead already exists in Eloqua and Salesforce from previous step

- Javascript does not show calendar to prospect
- (Optional) Chili Piper routes and assigns the record to sales rep based on Queue Rules

Prospect doesn't book meeting

Prospect books meeting

Taken to Thank You page #2 - Prospect alerted they have not booked time

Sees Thank You Page #1 - Success

Eloqua flow triggered (i.e. sends email prompting to book a meeting)

Eloqua campaign flow triggered via "Meeting\_Type\_CP\_c" data value change on Lead/Contact (i.e. add interesting moment, update score)

- CP sends calendar invite to prospect from Sales rep
- CP sends email/slack alert to Sales rep w/ date/time & link to SFDC
- Creates event in SFDC (option to configure other record creation and process triggers)
- CP Updates Owner of Lead to Meeting Assignee (optional)

Sales and prospect meet and have wonderful journey down funnel

Prospect doesn't book meeting

Prospect books meeting

(Optional) Custom Salesforce workflow triggered (i.e. sales alert - no meeting booked)

Eloqua campaign flow triggered (i.e. sales alert)

- CP sends calendar invite to prospect
- CP alerts rep via Email / Slack
- CP creates event in SFDC

Sales and prospect meet and have wonderful journey down funnel.

Sales outreach

Prospect books meeting

Never connects

- CP sends calendar invite to prospect
- CP alerts rep via Email / Slack
- CP creates event in SFDC

Sales and prospect meet and have wonderful journey down funnel.