Concierge Setup

What to expect when setting up Chili Piper Concierge with HubSpot CRM

Who to involve from your team:

Marketing Ops:
To clone an existing form for testing

Web Dev:
To install the Concierge javascript snippet

CRM Admin:
To create custom CRM fields (if applicable)

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.
3. Copy your webform for testing.

KICKOFF

Meet your onboarding team and dive into Chili Piper.

1. Create Queues based on your desired routing logic.
2. Customize your Meeting Template and Reminders.
3. Assign User Licenses.

BUILD

Together with your onboarding team review Queue Rules, Templates, Test Concierge, Go Live Prep

1. Brand your Concierge pop-up with Custom-CSS.
2. Add HubSpot Fields for tracking and reporting (if applicable)

LAUNCH

Launch Chili Piper and let the good times roll

1. Chili Piper Concierge 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.