Distro Setup

What to expect when setting up Chili Piper Distro with Salesforce

Who to involve from your team:

Demand Generation:
To determine which records should be routed.

Revenue Operations:
To structure the CRM routers, build assignment rulesets and set-up teams.

CRM Admin:
To connect Salesforce and 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.

KICKOFF

Introduction to Chili Piper & Distro.

1. Assign user licenses.
2. Create a team.
3. Set up a CRM Router.
4. Test a record.

BUILD

Create all CRM Routers, Test Distro, Turn on CRM Routers.

1. Create remaining necessary teams.
2. Build remaining flows.
3. Create all CRM Routers.
4. Activate CRM Routers and Teams.

LAUNCH

Launch Chili Piper and let the good times roll

1. Replace your current process with Distro and see the magic work.

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.