Chat Setup

What to expect when setting up Chili Piper Chat.

Marketing Ops:

Build routing rules, set up teams, build Journeys

CRM Admin:

To connect Salesforce and create custom CRM fields

Pre-Kick Off

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

1. Create your Chili Piper instance
2. Get familiar with Chat

Kickoff

Meet your onboarding team and set up the fundamentals.

1. Assign User Licenses
2. Set up Data Fields
3. Set up your Branding
4. Set up Distributions

Build

Build out your teams, routing logic, and Journeys.

1. Create your Teams
2. Create your Meeting Types
3. Build your Journeys

Launch

Launch Chili Piper and let the good times roll

1. Get your end users set up for success

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.