

Handoff Setup

What to expect when setting up Chili Piper Handoff.

Who to involve from your team:

Marketing Ops:

To clone an existing form for testing.

Web Dev:

To install the Handoff javascript snippet.

CRM Admin:

To 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 the Admin Center](#)

Kickoff

Meet your onboarding team and dive into Chili Piper.

1. [Assign User Licenses](#)
2. [Set up Data Fields](#)
3. [Set up your Branding](#)
4. [Set up Distributions](#)

Build

Together with your onboarding team review your Routers and Meeting Types. Test your Handoff Router and get ready to go live

1. [Create your Routers](#)
2. [Customize your Meeting Types and Reminders](#)
3. [Assign User Licenses](#)

Launch

Launch Chili Piper and let the good times roll.

1. [Train end users on ChiliCal](#)

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.

