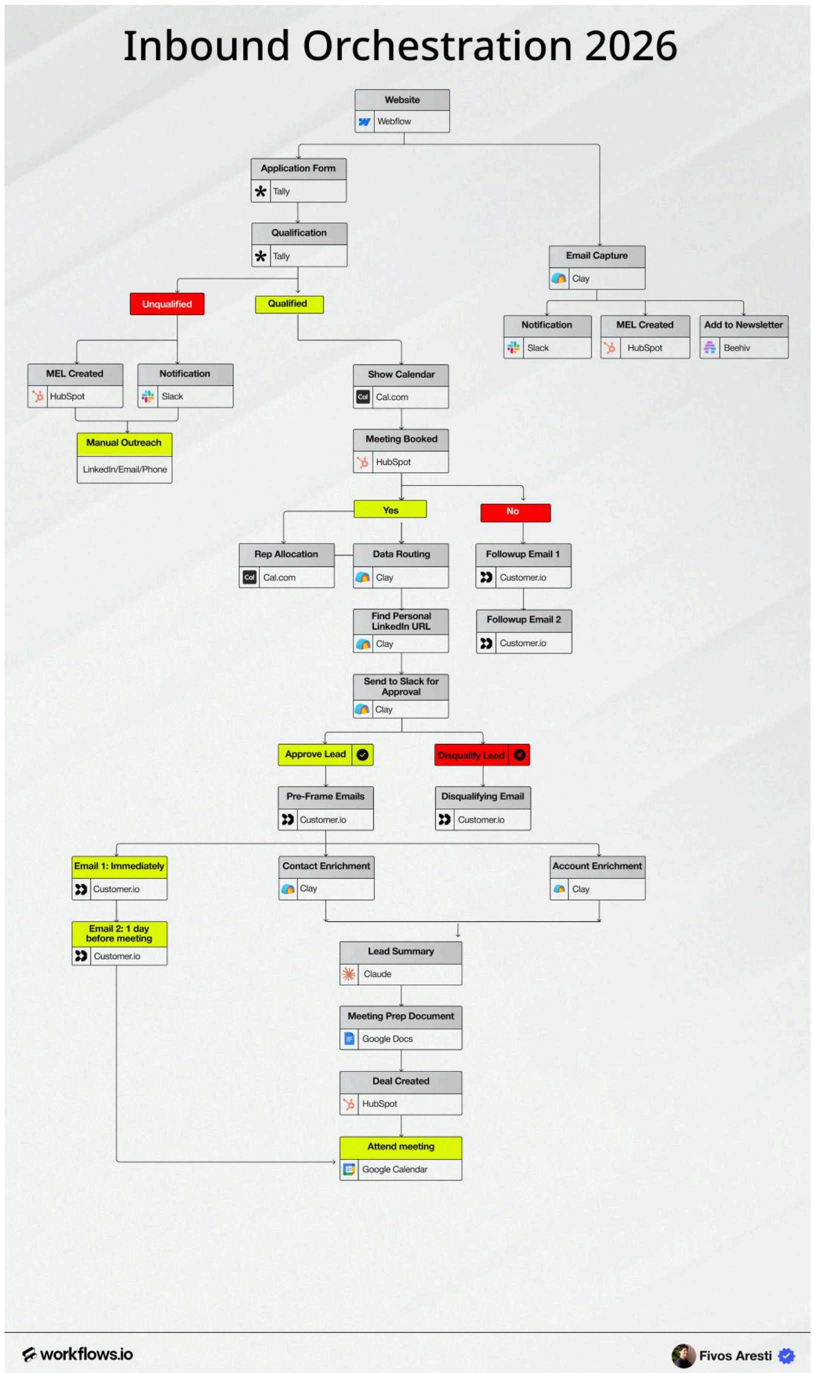
Inbound Orchestration 2026



How it works?

Step 1: Capture & Initial Qualification

- Webflow form captures emails (2 fields only for minimal friction).
- Tally application form auto-qualifies leads based on rules.
- Qualified leads instantly see a cal.com booking page.
- Email-only submissions → sent to Slack for manual review + outreach.

Step 2: Lead Routing

- Form completers who don't book → receive automated email reminders via Customer.io.
- Booked meetings → routed by Cal using weighted distribution rules.
- All captured contacts → sent to Clay for enrichment & LinkedIn URL discovery.
- HeyReach auto-sends LinkedIn connection requests to warm the prospect pre-call.

Step 3: Approving Leads

- Lead submitted → Slack lead card is generated.
- Team reviews directly inside Slack (no CRM required).
- If approved → triggered into Customer.io pre-frame emails.
- If rejected → tagged in HubSpot and removed from automations.

Step 4: Deep Enrichment

- BetterContact finds and verifies direct phone numbers.
- Findymail enriches emails + pulls company info via API.
- Claygent extracts recent news, funding, hiring, or product updates.
- Claude generates a structured lead summary → auto-populated into a Google Doc prep file.

Step 5: CRM Sync & Preparation

- Prep GDoc is saved directly into a HubSpot property.
- Slack notification posts full prep details to the assigned rep.
- A deal is created automatically in the correct pipeline + stage.
- Contact + company are fully associated with the deal (no manual work).

Step 6: Meeting Execution & Intelligence Layer

- All inbound meetings are recorded using Sybill.
- Transcriptions, summaries, and insights flow into the sales process.
- Reps run standard follow-up, nurturing, and qualification workflows.