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# Website Form Signal Tracking Template

Clay Template Link: [https://app.clay.com/shared-table/share\\_0tbhn9phWoUxMNzDmfz](https://app.clay.com/shared-table/share_0tbhn9phWoUxMNzDmfz)

## How it works?

### Step 1: Capture demo requests

Connect the website demo form to Clay.

- Add a **webhook** to the website “**Book Demo**” form.
- Route form submissions to **Clay**.
- Ensure the webhook receives:
  - Full name
  - Work email
  - Company name
  - Domain
  - How they found us

Verify the webhook:

- Submit a test form
- Confirm a **new row appears in Clay**

### Step 2: Enrich missing data

Complete the contact and company profile.

Use Clay enrichment to populate:

- Company domain
- Company LinkedIn page
- Contact LinkedIn URL
- Job title
- Headcount

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- Industry

### Step 3: Normalize records

Create standardized fields for CRM lookup.

Create columns such as:

- Final Contact Name
- Final Company Name
- Company Domain
- LinkedIn Profile URL
- Company LinkedIn URL

### Step 4: Lookup company in CRM

Prevent duplicate company records.

Lookup company using:

- Company domain
- Company name

### Step 5: Route existing companies

If the company exists in CRM:

- Identify the **record owner**
- Retrieve company data
- Retrieve contact data

Send a **Slack notification** to the owner containing:

- Contact name
- Company name
- Demo request details

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### Step 6: Validate new companies

If the company does not exist:

Verify the company is legitimate.

Check signals such as:

- Valid domain
- Active website
- LinkedIn company page

### Step 7: Create CRM record

If validation passes:

- Create **new company record**
- Associate the contact with the company
- Populate CRM properties

### Step 8: Update CRM with enrichment

Push enriched data back to CRM.

Update fields such as:

- **Company**
  - Domain
  - Industry
  - Headcount
  - LinkedIn
- **Contact**
  - Name
  - Title
  - Email
  - LinkedIn