Meeting Form Orchestration Playbook

Playbook Visual Link: Meeting Form Orchestration.jpg

How it works?

Step 1: Capture form submissions

Start by routing meeting request submissions into Clay.

- Add a **webhook** to the website form using **Tally**.
- Configure the webhook to send all submissions directly into **Clay**.
- Extract the following fields from the webhook payload:
  - Full name
  - Email
  - Company name
  - Company domain

Step 2: Enrich missing data

Standardize and enrich incomplete records before validation.

- Use **Clay enrichment** to fill missing fields.
- Populate additional company and contact attributes such as:
  - Company domain
  - LinkedIn profile URL
  - Job title
  - Company firmographic data

Step 3: Lookup company and contact in CRM

Verify whether the lead already exists in the CRM.

- Perform a **company lookup in HubSpot** using the company domain.

- Perform a **contact lookup using the email address**.
- Determine whether:
    - The company already exists
    - The contact already exists
    - Both need to be created

Step 4: Route existing companies

If the company already exists in HubSpot, validate the contact persona.

- Run **persona qualification** to confirm the lead matches ICP.
- Evaluate attributes such as:
    - Job title
    - Department
    - Seniority level

Step 5: Handle new companies

If the company does **not exist in the CRM**, validate company fit first.

- Run **ICP qualification** using **Clay AI**.
- Evaluate whether the company fits based on:
    - Industry
    - Company size
    - Technology stack
    - Target market alignment

Only qualified companies move forward.

Step 6: Enrich and create company

Create CRM records for qualified new companies.

- Enrich the company using **Clay enrichment**.
- Populate attributes such as:
    - Company size
    - Industry
    - Website

    - LinkedIn profile
- Create the **company record in HubSpot**.
- Create the **associated contact record**.

Step 7: Assign account ownership

Route the lead to the correct sales rep.

- Check whether the company already has an **assigned account owner**.
- If an owner exists:
    - Notify the rep via **Slack**.
- If no owner exists:
    - Assign a new account owner.
    - Send a Slack notification to the assigned rep.

Step 8: Perform outreach

Trigger follow-up outreach once ownership is assigned.

- Launch **email outreach via Instantly**.
- Launch **LinkedIn outreach via HeyReach**.