Presentation Guide: Daily Digest

In this session, marketing administrators will train their end users on how to receive the daily email digest to stay ahead and in front of their upcoming day's tasks and priorities.

POWERPOINT

Agenda

- Leveraging Daily Digest
- How this helps you win
- In-platform training
- Best practices
- Your next steps!

Leveraging Daily Digest

- Daily email message summarizing the day's activities.
- Highlights upcoming tasks, focused view appointments, and new marketing content.
- Reminders about new and engaged contacts.
- Birthday and loan anniversaries.

How This Helps You Win

- Save time – know right away which of your contacts you should prioritize reaching out to.
- Close more business.
- Gain better insight – provides visibility into high value actions their network is taking and gives users insight into what's going on behind the scenes.

In-Platform Training

Before you begin - assist and guide users with the login process based off your organization's login method

How to Turn on and Receive the Daily Digest

- To receive the Daily Digest, users will need to make sure they have notification turned on.
- Click on your name at the top right, then select Account Settings.
- Scroll down, halfway down the page locate the Notification Settings tile.
- Locate the Receive Daily Email Digest notification and turn it on to Yes.
- Click Save Changes at the top left.

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Best Practices

- Open the Daily Digest each morning and review your schedule for the day, tasks, new contacts, emails going out on your behalf, birthdays, and loan anniversaries.
- Quickly walk through your list and prioritize calls and contacts accordingly to focus on highest value actions.
- Reach out to your new contacts directly from the Daily Digest email on your mobile device with click-to-call phone numbers and email addresses.
- Follow up on engaged contacts who have clicked emails in the last 24 hours.

Going Forward From Here

- For adoption and retention purposes – encourage your audience to access supporting documents, videos, and resources and demonstrate where they can access our Help Center within the platform, as well as reaching out to our Product Support team.