



Presentation Guide: Focused View

In this session, marketing administrators will train their end users on how to leverage Focused View to help identify contacts with the highest-value actions and to keep users organized with their business priorities.

POWERPOINT

Agenda

- About Focused View
- How this helps you win
- In-platform training
- Best practices when using Focused View
- Your next steps

About Focused View

- Organizes contacts into easy to use contact lists based off those meeting high-value and potential actions.
- Provides valuable data and insight into contacts that should be prioritized based off activity.
- Single view that summarizes pertinent information that can be easily interpreted to take swift action.
- Ability to leverage “standard” Focused Views created by your organization and ability to create their own “custom” views as well.

How This Helps You Win

- Drive Efficiency: Stay efficient by leveraging Focused View to help stay in front of contacts with the highest priority.
- Comprehensive View: Focused View provides a comprehensive overview to ensure you have all pertinent data.
- Peace of Mind: Provides reassurance so that no contacts that are in need of communication or marketing, don't slip through the cracks.

In-Platform Training

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

How to Leverage a Standard Focused View

- Show users where to find the Focused View tool. Leads and Contacts > Focused View.
- Begin by going over “Standard” Focused Views.



- “Standard” Focused Views are views created by your organizations marketing department to provide users quick and easy access to contacts who meet business priorities.
- Identify any Focused View that you prefer and go over the following:
 - The name of the Focused View
 - The description
 - Click the arrow on the far-right side to show contacts that are in the view.
 - Focused View initially shows up to 5 contacts at a time.
 - If more contacts meet the criteria beyond 5, they can click “Show More” at the bottom.
 - Next, click the down arrow on the far-right side next to a contact.
 - Give brief overview of pertinent information that is brought in about each contact:
 - Interaction history
 - Personal and contact information – phone number, email, etc.
 - Loan information if applicable.
 - Next, click the 3 dots (...) on the far-right side. This is the Actions menu. Allows user to quickly communicate and take action with the contact. Provide overview of the various actions they can take. Send email, SMS, bomb video, etc.
 - Next, click on the blue “Log Outcome” icon directly adjacent to the Actions menu (...). This provides users ability to quick log outcomes, add notes, and create tasks after they communicate with the contact. Helps users stay organized.

How to Create a Custom Focused View

- Click the “Custom” tab at the top left.
- “Custom” Focused View allows users the ability to mine their database and create their own, original custom views to efficiently identify contacts that need prioritization or contacts that meet market trends.
- Click Add View at the top right.
 - Note that users can start by adding a blank view – creating one from scratch.
 - Or users may add a marketer view – users start with a “standard” view and can make edits and iterations to org-wide standard views.
- Start by clicking on Add Blank View and go over the following:
 - Name of the Focused View
 - Description
 - Column Selection
 - Sort Order
 - Inclusion Rules – allows the user to tell the platform which contacts to include in the Focused View only if they meet the rule(s) selected. Provide a brief overview of the available filter and rule options.
 - Exclusion Rules – allows the user to tell the platform which contacts to exclude from the Focused view if they meet the rule(s) selected.



- Note: There will always be a default exclusion rule of “Silenced communication is on.”
- Outcomes
- Once a user is done creating their Focused View, click Back to Contacts at the top right to load the newly created view.
- Next, provide user a brief demonstration on adding from a Marketer View.
 - Click Edit View at the top right
 - Click Add View > Add Marketer View
 - Select any Marketer View from the available options
 - Brief overview of the same custom options:
 - Column selection, sort order, inclusion rules, exclusion rules, etc.
 - This allows users to make edits and adjustments to standard focused views.

POWERPOINT

Best Practices

- Use Focused View every day to identify highest value opportunities and easily log activities.
- Select an outcome for each contact made or attempted to help keep the Focused View automation running.
- Keep detailed notes and tasks for each lead to ensure contact records are as updated as possible.
- For custom views, start by creating views with broader impact and fine-tune as needed.

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.