



Presentation Guide: Workflow Management

In this session, marketing administrators will train their end users on how to leverage Total Expert to prioritize their day-to-day activities.

POWERPOINT

Agenda

- Leveraging Total Expert in your daily workflow
- How this helps you win
- In-platform training
- Best practices when using lead capture apps
- Your next steps!

Workflow Management

- Sharing contacts – leverage contact sharing with teammates and co-marketing partners to provide visibility for all stakeholders involved.
- Integrations – integrate external accounts with Total Expert to consolidate your marketing into one platform.
- Assigning daily tasks – use the task functionality to stay organized with your communication.
- Reporting – monitor the effectiveness of your marketing through various forms of data reporting in-platform.

Daily Digest

- Daily email message summarizing the day's activities and highlights upcoming tasks and appointments.
 - Great way to start and manage your day.
 - Helps keep users organized with upcoming touchpoints and milestones.
 - Provides visibility into automation going on behind the scenes.

How This Helps You Win

- System of record – Total Expert serves a system of record for your business communication and marketing.
- 360-degree view of contacts – Gives you a complete view of how you interact and connect with your contacts.
- Reporting capabilities – gain valuable insight into the effectiveness of your marketing by accessing reporting in-platform.



- Work collaboratively – leverage tasks, contact sharing, and co-marketing to make Total Expert a collaborative platform for all stakeholders involved in expanding your business.

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.

How to Integrate External Accounts

- To access integrations, click on your name at the top right, then select Integration Settings.
- Review each integration offered dependent on your organization's setup.
- Emphasize the integrations most relevant and pertinent to your audience.

Contact Sharing and Tasks

- Within the navigation menu, click on Leads and Contacts > Contacts.
- Click on any contact listed.
- On the left-hand side of the page, point out the Quick Edit tile.
 - Review the ability to Assign and Share contacts with team members and co-marketing partners.
- Click the Actions button at the top left.
 - Note the following actions:
 - Add Task
 - Add Recurring Task
 - Change Owner
- Click the + sign at the very top right of your screen, then click Create Contact.
 - Note that when users create and add a contact to their account, they can share and assign the contact on the right-hand side.
- Within the navigation menu, click on Tasks > Tasks
 - This is where users can manage, edit, and complete their tasks.

Reporting In-Platform

- Review the following areas of the platform that provides users data regarding their marketing:
 - Lead Capture Apps: registrations, viewers, and conversion rate.



- Single Property Sites: registrations, viewers, and conversion rate.
- Email Marketing > Email Stats: review the various stats listed.
- Journeys > Active Journeys: review the various stats listed.
- Co-Marketing Partners: click on any connected co-marketing partner and review the reporting provided per each partnership.

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Best Practices

- Log into Total Expert daily.
- Review the Daily Digest email as you plan your day.
- Integrate your Total Expert account with your Outlook email.
- Stay on top of your tasks to ensure automation continues.
- Review reporting weekly to evaluate the effectiveness of your emails, campaigns, and marketing assets.

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.