Getting Started with Focused View

- ☐ Marketers attend *Focused View for Marketers* training.
- ☐ Total Expert turns on permission for marketers.
- ☐ Marketers review Total Expert best practice Views.
- ☐ Marketers determine any updates or personalizations to be made to best practice Views.

  Options for personalization may include:

  - ☐ Adjusting date ranges for the pre-approval expiration View.
  - ☐ Editing groups from which contacts are pulled from for the New Lead View.
  - ☐ Adjust the interest rate for the refi View.
  - ☐ Determine what Outcomes your org will use.
  - ☐ Review your preferred sort order for each View.
- ☐ Marketers create new Views, as needed.
- ☐ Marketers publish Standard Views.
- ☐ Marketers contact Total Expert for information on training end users.
- ☐ Marketers announce Focused View rollout plan to end users.
- ☐ End users view *Focused View for End Users* training.
- ☐ Total Expert turns on permission for end users.
- ☐ Marketers solicit feedback from end users on Standard Views.

Notes

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