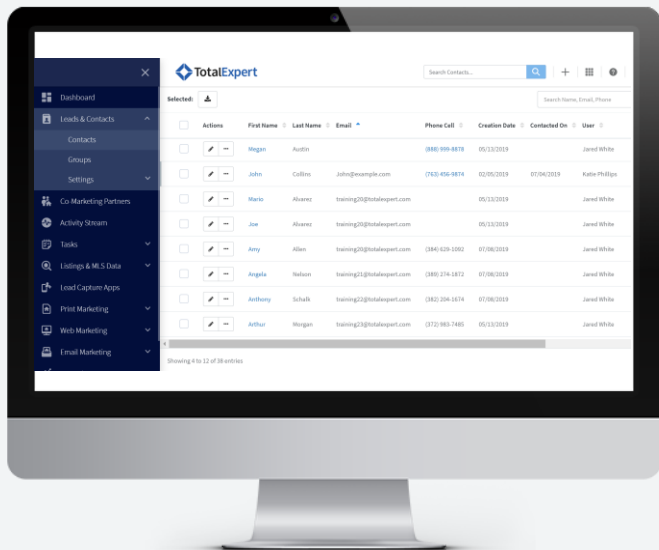


Contacts and Groups

Agenda

- Leveraging contacts and groups
- How this helps you win
- In-platform training
- Best practices
- Your next steps!



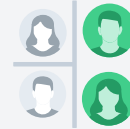
Leveraging contacts and groups

- Manage all contacts in one place.
- Filter and sort contacts.
- Use groups to segment your audience based on things they have in common.

How this helps you win



Leverage automation



Target groups



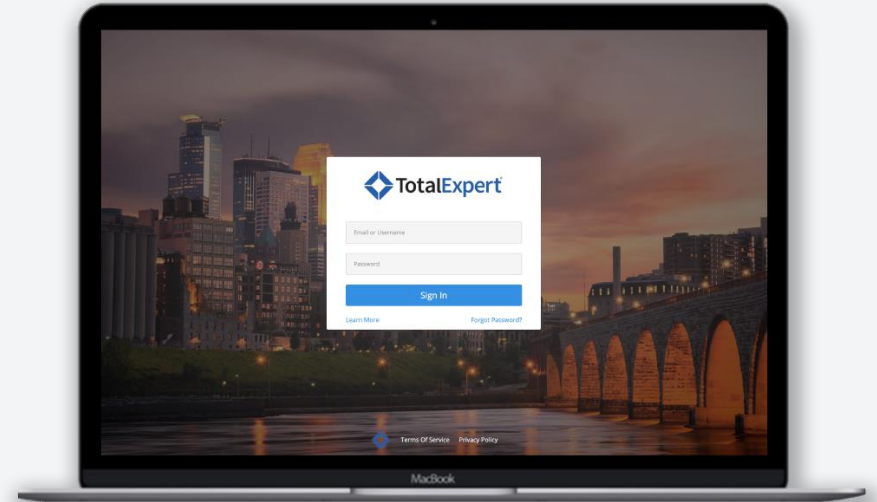
Quick reporting

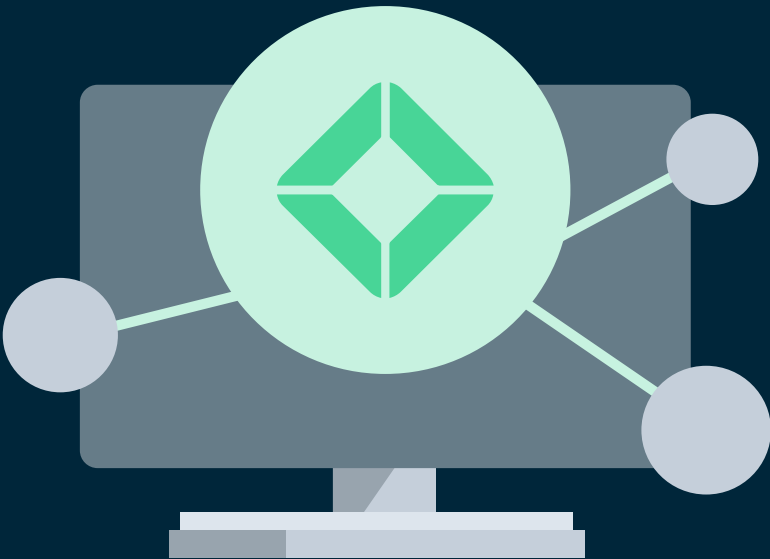
Logging in and platform training

Step 1: www.totalexpert.net

Step 2: Work email address

Step 3: Password





Best Practices

- Add yourself as a contact to test communications.
- Keep detailed notes in the contact record.
- Use tasks to remind yourself to follow up.
- Use groups to identify commonalities and communicate at the right time, with the right message.
- Leverage the new contacts tile on the dashboard to start developing a relationship.

Going forward from here



Next steps



Documents



Videos



Support

Thank you