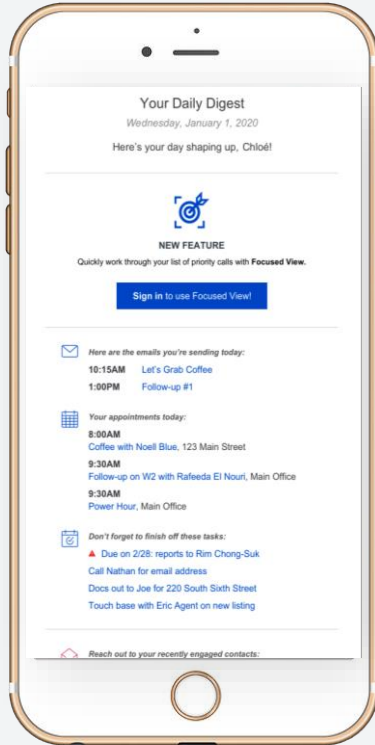


Daily Digest

Agenda

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



Leveraging Daily Digest

- Daily email, straight to your inbox, summarizing your activities for the day.
- Highlights 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



Close more business



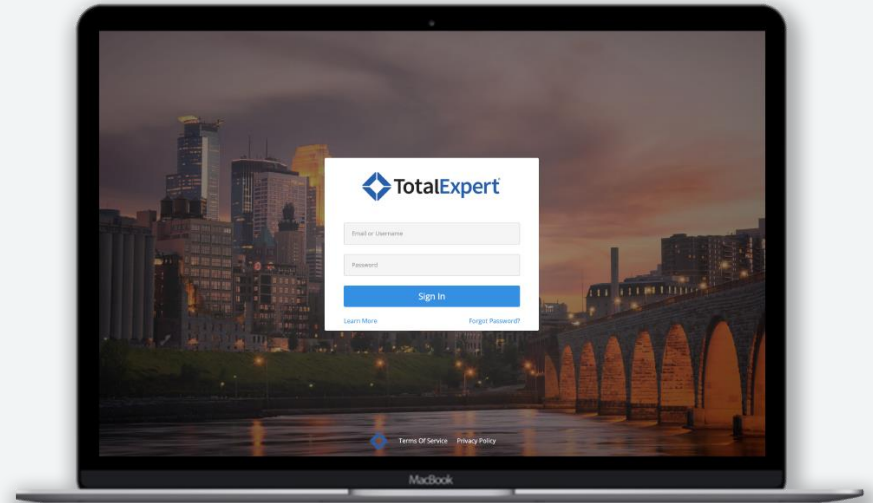
Gain better insight

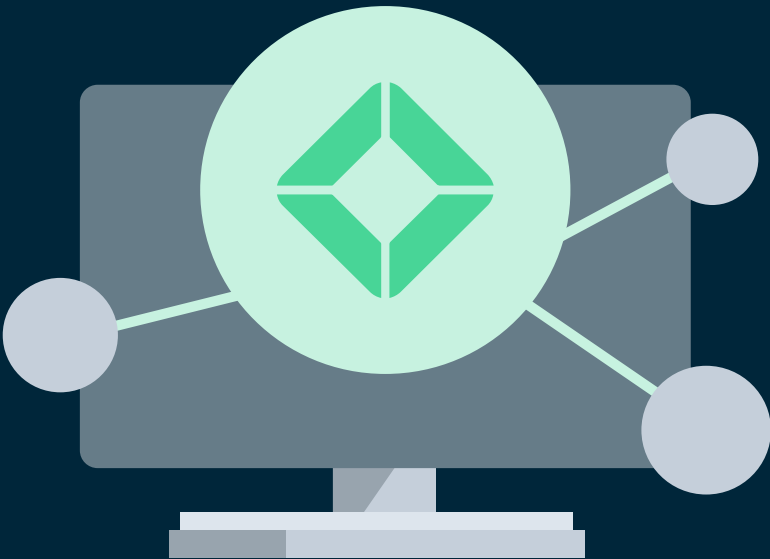
Logging in and platform training

Step 1: www.totalexpert.net

Step 2: Work email address

Step 3: Password





Best Practices

- Read the Daily Digest every day and use it as your source of truth.
- Quickly work through your list and prioritize touchpoints based on highest value actions.
- Reach out to new contacts directly from the Daily Digest on your mobile device with click-to-call phone numbers and emails.
- Follow up with engaged contacts who have clicked on emails in the past 24-hours.

Going forward from here



Next steps



Documents



Videos



Support

Thank you