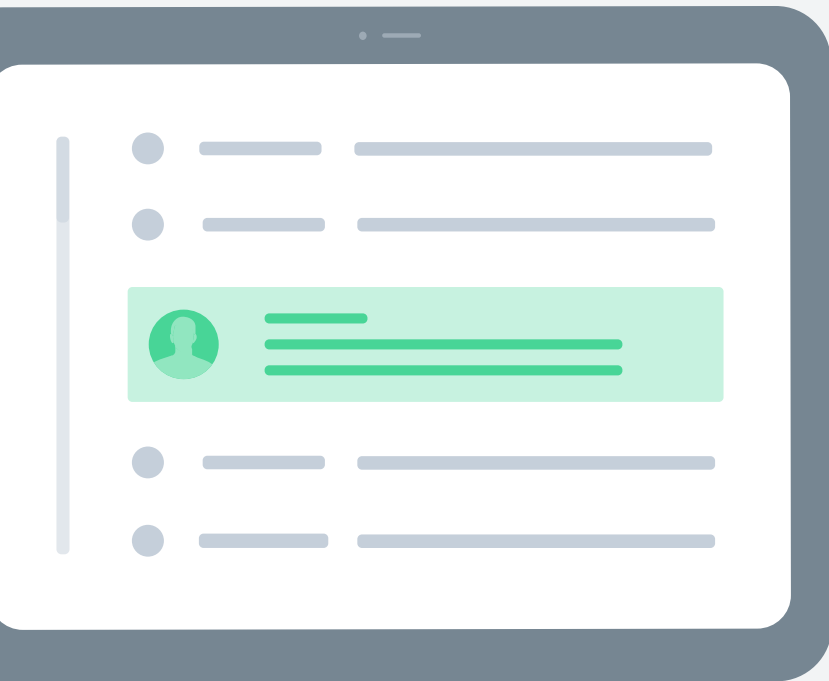


Focused View

Agenda

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



Focused View

- Mines your database and organizes contacts to identify your highest-value actions.
- A single view that summarizes everything you need to know.
- Standard views (created by your organization) and custom views (that you can create on your own).

How this helps you win



Drive efficiency



Comprehensive view



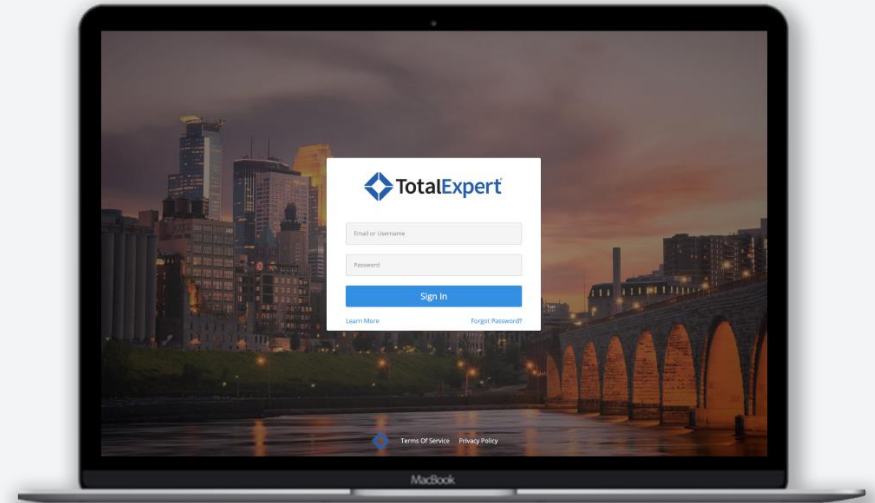
Peace of mind

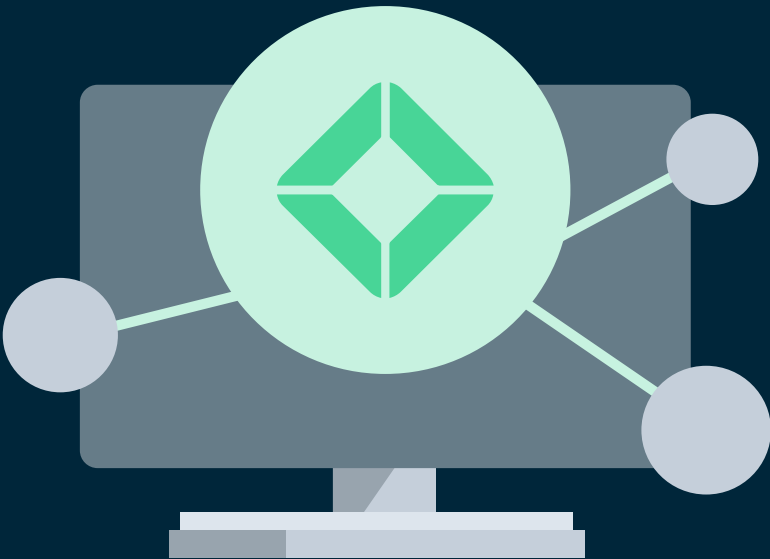
Logging in and platform training

Step 1: www.totalexpert.net

Step 2: Work email address

Step 3: Password





Best Practices

- Log in to Focused View daily to identify your highest value opportunity and log activities.
- Select an outcome for each contact made or attempted to keep the automation running.
- Keep detailed notes in the contact record and use tasks to remind yourself to follow up.
- For custom views, start by creating views with a broad impact and fine-tune as needed.

Going forward from here



Next steps



Documents



Videos



Support

Thank you