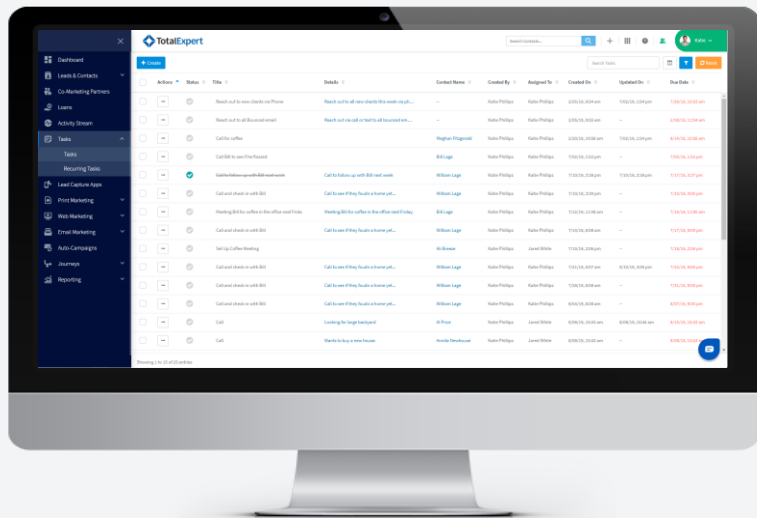


# Workflow Management

# Agenda

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

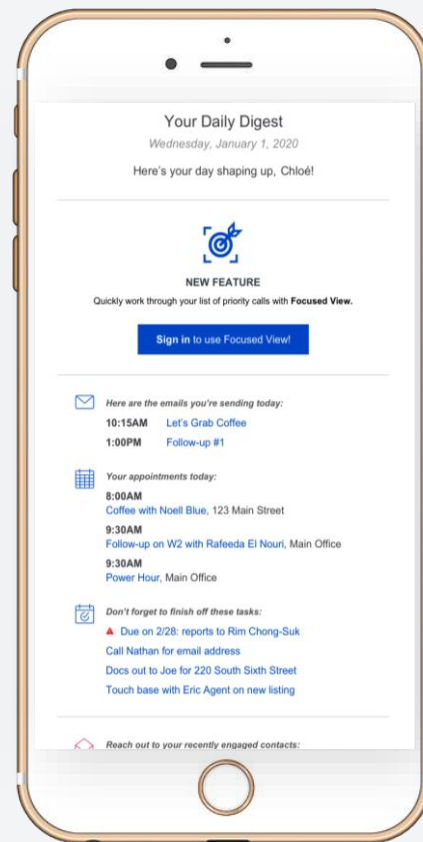


# Workflow management

- Sharing contacts
- Integrations
- Assigning daily tasks
- Reporting

# Daily Digest

Daily email message summarizing the days activities and highlights upcoming tasks and appointments.



# How this helps you win

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System of record



Reporting capabilities



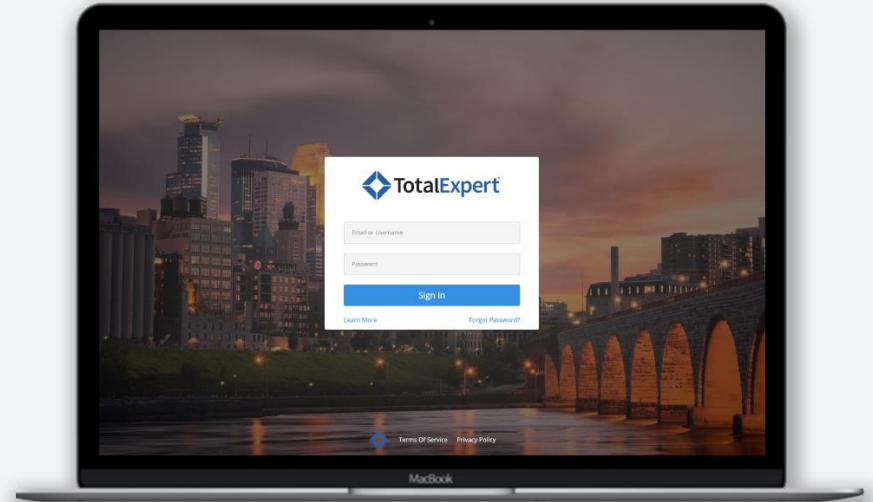
Work collaboratively

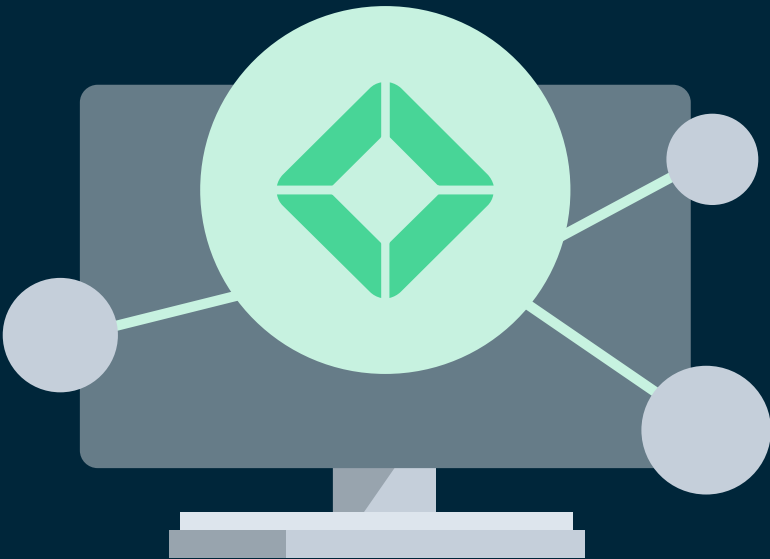
# Logging in and platform training

**Step 1:** [www.totalexpert.net](http://www.totalexpert.net)

**Step 2:** Work email address

**Step 3:** Password





## Best Practices

- Log in daily.
- Review the Daily Digest as you plan your day.
- Integrate Total Expert with Outlook.
- Stay on top of your tasks to fully leverage the automation.
- Review reporting weekly to evaluate the effectiveness of your emails, journeys, and marketing assets.

# Going forward from here



Next steps



Documents



Videos



Support



Thank you