



Implementation Agenda

7:00 - 8:00am	Check In / Continental Breakfast
7:20 - 7:45am	Sponsor Education Session: Mobile Assistant
8:00 - 8:15am	Welcome
8:15 - 8:30am	Break / Classrooms Split
8:30 - 8:45am	Intro to Implementation
8:45 - 10:00am	<p>History Part 1 - Maintaining the Captain's Log <i>Every mission requires a comprehensive log! Learn all the ways to track your interactions with the most important history-focused tools in your CRM.</i></p> <p>Key Takeaways:</p> <ul style="list-style-type: none">• Opportunities• Database Lists• Notes• Activities• Reminders• Reporting on History
10:00 - 10:15am	Break
10:15 - 12:00pm	<p>History Part 2 - Houston, We Have a Solution <i>The best way to avoid problems is by having concrete plans in the first place! Help your crew work better together with these process-management solutions!</i></p> <p>Key Takeaways:</p> <ul style="list-style-type: none">• Building Workflows• Automations• Running Workflows
12:00 - 1:15pm	Lunch



1:15 - 2:45pm

Information Part 1 - Customize Your Constellation

*Every client and their relationships are unique!
Fortunately, there are many tools in the CRM to help you
draw your own Contact Constellations in the sky!*

Key Takeaways:

- Database Lists Continued
- The Contact Record
- Accounts
- Relationships

2:45 - 3:00pm

Break

3:00 - 4:30pm

Information Part 2 - Establish Your Orbit

*The information in your CRM helps you maintain your
routines so you can focus on your ever-expanding
galaxy. Continue to bring in new opportunities when you
harness the power of your gravitational pull.*

Key Takeaways:

- Advanced Search
- Contact List Building
- Seminars
- Broadcast Email

4:30 - 5:00pm

Wrap-up / Q&A