

UPCOMING PRODUCT WEBINAR



April 23 at 1 p.m. ET

Smarter Scheduling in Marketscape CRM:

Preview your new CRM calendar before it's live!

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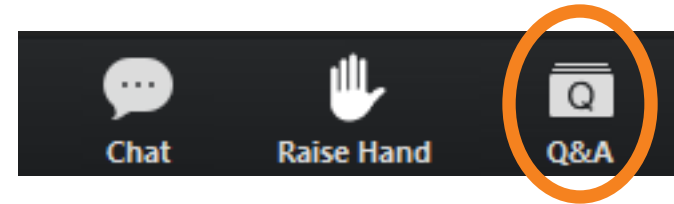
Sam Gold

Solution
Engineer



Housekeeping

Use the “Q&A” feature at the bottom of your screen to submit a question



We will reserve time for our Q&A session at the end

We are recording the session for those unable to attend today

The recording will be sent out after the webinar is completed

SPECIAL PREVIEW!



Marketscape CRM Calendar Enhancements!

Features that support smarter scheduling &
intuitive workflows

A CRM That Promotes Smarter Scheduling with Intuitive Workflows

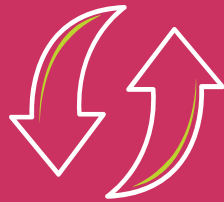
Smart Calendar Features



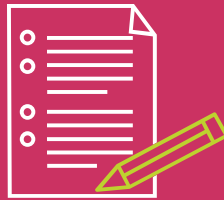
**Book of
Business
List**



**Drag 'n
Drop**



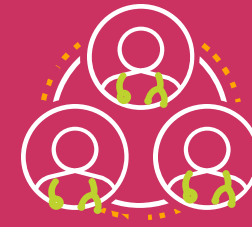
**Intuitive
Event Form**



**Event Note
Templates**



**Event Creation
Requirements**



**Event
Searching &
Filtering**



Key Feature: Book of Business List

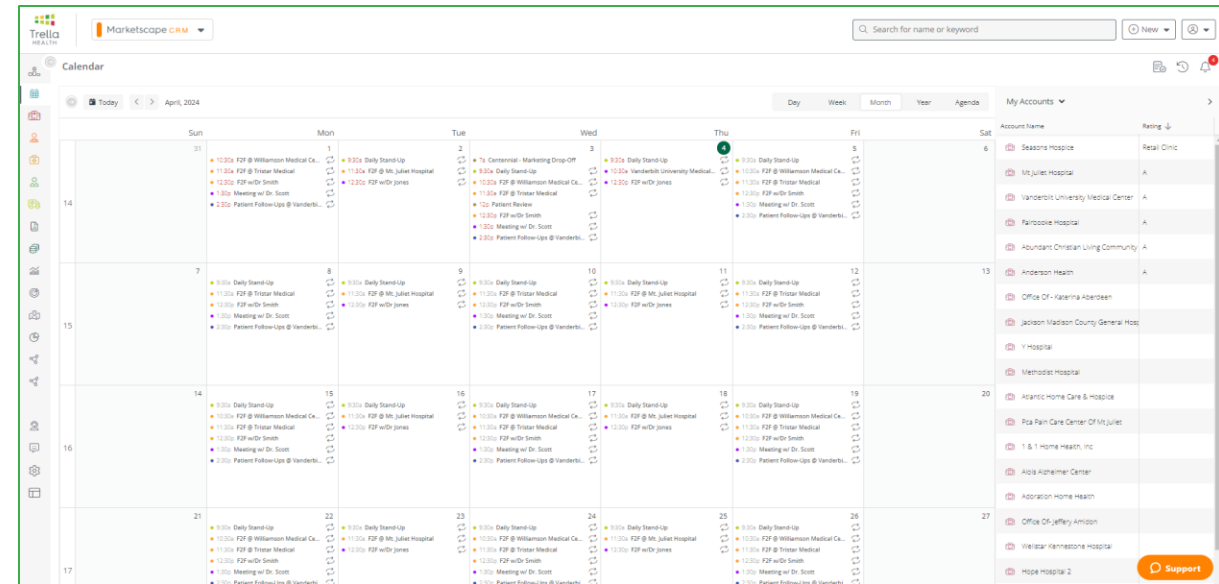


Value: With a side-by-side view of your calendar and account/contact list paired with their rating, you can quickly and strategically plan & prioritize your calendar. Simply drag & drop on your calendar to schedule events without searching and sorting. Using this tool reps will spend less time building out their calendar.

“My Accounts” & “My Contacts” View

- Accounts and Contacts need to be assigned to users for them to appear in this list view.
- Lists are sorted based on the **Rating** field on each object.
- Users can toggle between “My Accounts” and “My Contacts” for easy scheduling.
- Users will be able to exclude accounts and contacts that already have events scheduled

Location: Web > Calendar > My Accounts



Marketscope CRM Web Application



Key Feature: Drag and Drop

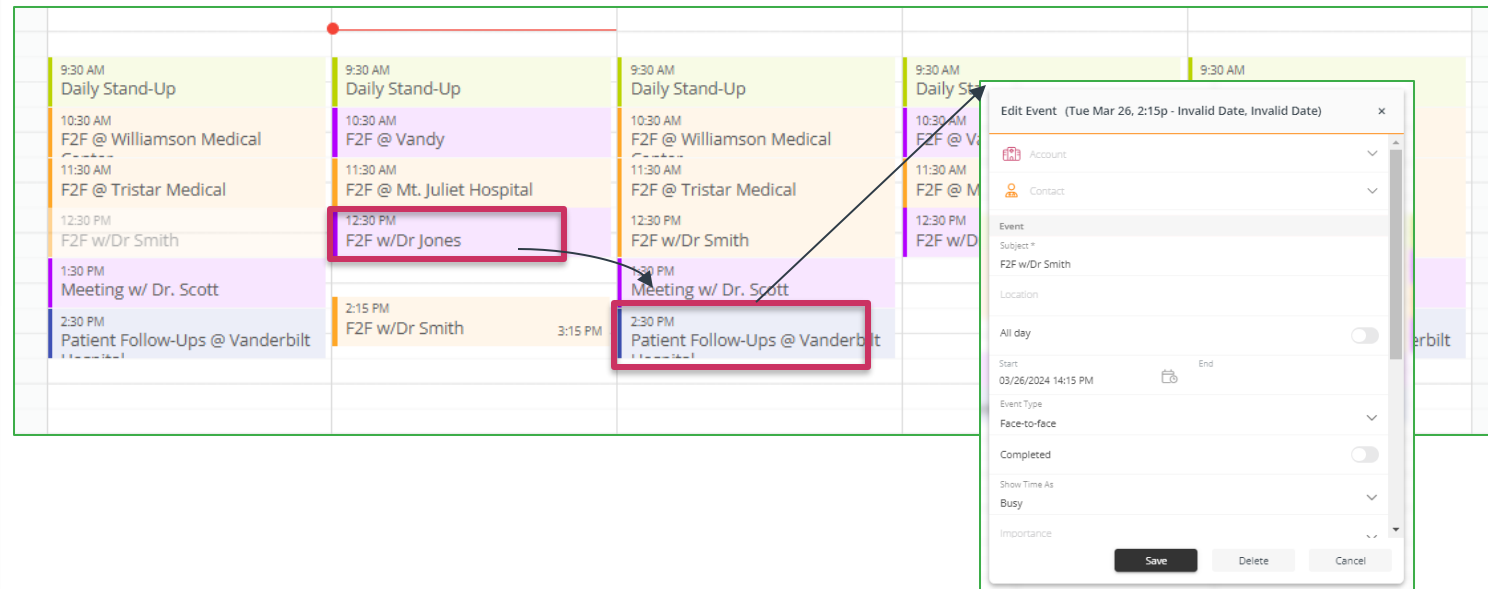


Value: Cut your steps in half with our drag and drop functionality! Easily move events from one day to another directly from the calendar or drag and drop directly from your book of business list to create a new event - saving time and simplifying your workflow.

Location: Web > Calendar > My Accounts

Scheduling Made Easier

- Drag and drop directly from your account/contact list to the calendar.
- Drag and drop can be used to reorganize existing event on the calendar making it easier to adjust events.
- Event length can also be manipulated on the calendar like resizing a picture.



Marketscape CRM Web Application



Key Feature: Intuitive Event Form



Value: Benefit from auto-populated fields to minimize errors and maintain precise event details, fostering a more professional and reliable calendar.

Location: Web > Calendar > My Accounts

Auto-Populate Fields Upon Dragging & Dropping!

- Subject is populated with the account or contact name brought over from your book of business list
- Event start & end time are populated based on settings in My Profile
- Your default event type will automatically populate and can be adjusted as needed

Integrated with Quick Notes (Event Templates)!

- Use quick notes to create events by adding to the Event Purpose and Expected Outcome field!

Account Name	HHC Score
1 & 1 Home Health, Inc Phone:	100.00
1 Glen Hill Road Operations Llc 1 Glen Hill Rd, Danbury, CT	100.00
Abundant Christian Living Community Llc 2012 Sherwood Dr, Johnson City, TN	100.00
Adoration Home Health 1210 Briarville Rd Bldg D, Nashville, TN	89.20
Alois Alzheimer Center 70 Damon Rd, Cincinnati, OH	78.40
Amedisys Home Health 1170 Celebration Blvd Ste 103, Nashville, FL	50.20
Amedisys Home Health Of Montgomery 300 Interstate Park Dr, Montgomery, AL	44.60
Anderson Health 791 Old Gray Station Rd, Johnson City, TN	41.60
Associated Dental Group 1900 Patterson St, Nashville, TN	39.00

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Key Feature: Event Note Templates



Value: Create standardized templates for your most routine events, help increase onboarding ramp time and adoption, and minimize manual documentation in the field.

Who can change these settings for a user? Admins only

For Managers & Admins:

- Event Templates must be created in Web Settings.
 - Field Names:
 - Event Purpose & Expected Outcome Options / Business Purpose Options
 - Call/Visit Notes Options
- Easily add new templates or remove templates that no longer fit your sales strategy.
 - Your event details and quick notes stay safe! Even if you remove templates or edit quick notes, your past and future events keep the information intact, saving you time and maintaining consistency.

For Sales Reps:

- With our intuitive event form, choose an Event Purpose & Expected Outcome template for your most routine visits
- Easily complete an event with pre-populated Call/Visit Notes

Location: Web > Settings > Objects > Events

List Options

OPTION	
☰ Identify providers pain points with existing Home Health provider and discuss any patients who would be a good fit for our agency.	✖
☰ Heart Health Month - Discuss how our agency excels in post coronary artery bypass surgery care.	✖
☰ New Template Here!	✖

Cancel Save

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Key Feature: Event Search

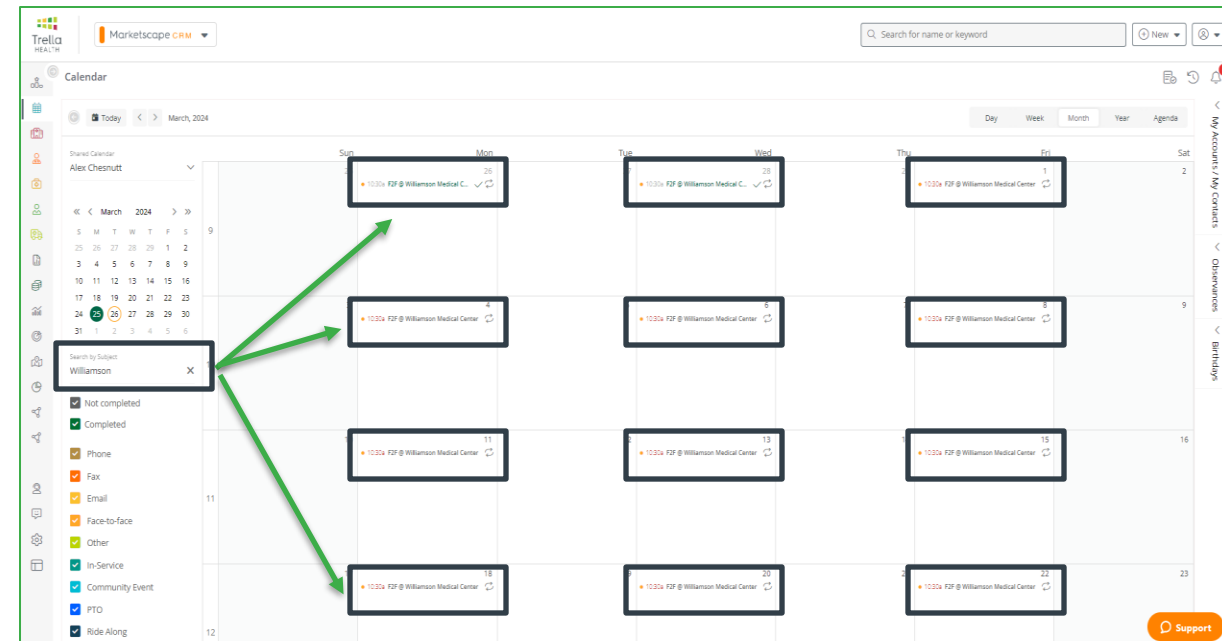


Value: Quickly locate upcoming or past events with our event search! This will help you save time, plan, and stay organized.

Location: Web > Calendar

Searching for Events:

- Users can now search for **event subjects** to quickly see upcoming or past events on the day, week, month, year, or list views.
- Search coupled with the newly added auto-populating subject makes finding event occurrences easy.
 - Using either an **Account** or a **Contact** will auto-populate the event **Subject!**



Marketscope CRM Web Application



Key Feature: Event Creation Requirements



Value: To improve flexibility and reduce user friction during event creation, allowing a choice on the required objects allows teams to align their sales strategy with their CRM utilization.

What should I know?

- Changing the required object will apply to:
 - **ALL** users in an account
 - Web event creation and completion
 - Mobile event creation and completion
- If the requirement is changed, any events that are edited **AFTER** the change will be held to the update.
 - Example: If an event was created when contacts were required and then the agency updated the required object to accounts, when the event is completed, edited, or saved it will require an account. *It will not require both objects in this scenario.*

Location: Web > Settings > System Setup > Required Event Objects

REQUIRED EVENT OBJECTS

Specify whether accounts or contacts should be the mandatory associated object. For all event types, except Cold Call and Other, entering the selected object is required to save an event.

Accounts ▼

Save Required Association Object

Marketscape CRM Web Application



Key Feature: Color Coded Events by Type



Value: Color-coded events by type and filtering capabilities to help you stay organized and customize your view.

Filtering Options

- In addition to the event type filters, users will still be able to filter on complete vs incomplete events.
- Only the event types that have been created for an organization will be shown on the left side of the page.

Limitations

- Users can not choose which colors are assigned to which event type

Location: Web > Calendar

The screenshot displays a filtering menu on the left and two calendar views on the right. The filtering menu includes the following options:

- Phone
- Fax
- Email
- Face-to-face
- Other
- In-Service
- Community Event
- PTO
- Ride Along
- Cold Call- prospect meeting
- Patient/Referral Update
- Meeting
- Cold Call

The calendar view is titled "Before Filtering" and shows a grid of events. The "After Filtering" view shows the same grid but with only the "Face-to-face" events remaining. A red arrow points from the "Face-to-face" checkbox in the filter menu to the "After Filtering" calendar view.

Time	Event 1	Event 2	Event 3	Event 4	Event 5
9:30 AM	Daily Stand-Up	Daily Stand-Up	Daily Stand-Up	Daily Stand-Up	Daily Stand-Up
11:30 AM	F2F @ Tristar Medical	F2F @ Mt. Juliet Hospital	F2F @ Tristar Medical	F2F @ Mt. Juliet Hospital	F2F @ Tristar Medical
12:30 PM	F2F w/Dr Smith	F2F w/Dr Jones	F2F w/Dr Smith	F2F w/Dr Jones	F2F w/Dr Smith
1:30 PM	Meeting w/ Dr. Scott		Meeting w/ Dr. Scott		Meeting w/ Dr. Scott
2:30 PM	Patient Follow-Ups @ Vanderbilt Hospital		Patient Follow-Ups @ Vanderbilt Hospital		Patient Follow-Ups @ Vanderbilt Hospital

Time	Event 1	Event 2	Event 3	Event 4
11 AM	F2F @ Mt. Juliet Hospital		F2F @ Mt. Juliet Hospital	
11:30 AM	F2F @ Tristar Medical		F2F @ Tristar Medical	
12:30 PM	F2F w/Dr Smith		F2F w/Dr Smith	

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PREVIEW!

LIVE DEMONSTRATION

Let's schedule an event in our upgraded calendar!



Trella
HEALTH



Settings

Set yourself up for success

User Settings: My Profile

Value: Personalize time zone and calendar settings to reduce additional work when creating events and display the calendar preferences.

Who can change these settings for a user? ONLY THE USER

What do the settings do?

- **Time zone (not show)** - Impacts the default time that events are created.
- **Default view** – determines how we present the calendar to a user when navigating to the page.
- **Week/Day View Time Range** – Determines view start and end of your day that appears on the calendar.
- **Calendar Subscription** – Allows user to add the MAR CRM calendar to an external calendar.

Location: Web > My Profile

CALENDAR SETTINGS

Default View

Week/Day View Time Range to

Default Appointment Length

Show Weekends?

Send me a copy of events I create

Sidebar Widgets Observances Contact Birthdays

Calendar Subscription [Generate Link](#)

Marketscope CRM Web Application

Calendar Default View – Cheat Sheet!

Default View is a settings that will assist in ensuring that users are set up for success with the new, smarter Marketscape CRM calendar!

The settings below can only be updated by the user but regardless of their default, users will be able to use all view types!

Day View

Location: Web > My Profile > Default View

Best Suited For: Managing Events

Impactful Features:

- Drag and drop – especially for existing events
- Event menu
- Color Coded Events

Week View

Location: Web > My Profile > Default View

Best Suited For: Reorganizing Events

Impactful Features:

- Drag and drop – especially for existing events
- Event duration manipulation
- Color Coded Events

Month View

Location: Web > My Profile > Default View

Best Suited For: Planning Events

Impactful Features:

- Drag and drop – especially for new events
- My Accounts & My Contacts List
- Search



So, when can you get
your hands on this new
calendar?

RELEASE
PLANNED FOR

**Tuesday
April 30,
2024**

Customer FAQs

- **Do I have to do anything to upgrade my calendar?**
 - Nope! Marketscape CRM customers will have an automatic calendar upgrade upon release
- **Do you have any resources I can reference?**
 - Yes! Be on the lookout for emails, in-app announcements, and Help Center articles which include helpful checklists by role, key settings for admins & managers, & guided demonstrations for learning.





POLL: What feature are you most excited for?

A: Side-by-side Calendar & Account/Contacts List

B: Drag n' Drop

C: Intuitive Event Form & Note Templates

D: Event Search & Color Coded

E: All of the above!



Q&A

April 23, 2024

A large graphic on the left side of the slide, composed of overlapping, semi-transparent diamond shapes in various colors including red, orange, yellow, pink, green, and dark green. The Trella Health logo is centered within a dark red diamond.

Trella
HEALTH

Thank You for Joining!

Webinar recording will be shared within
24 hours.

Questions?

Connect with your Customer Success
Manager.