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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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

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SPECIAL PREVIEW!

Marketscape CRM Calendar Enhancements!

Features that support smarter scheduling & intuitive workflows

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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

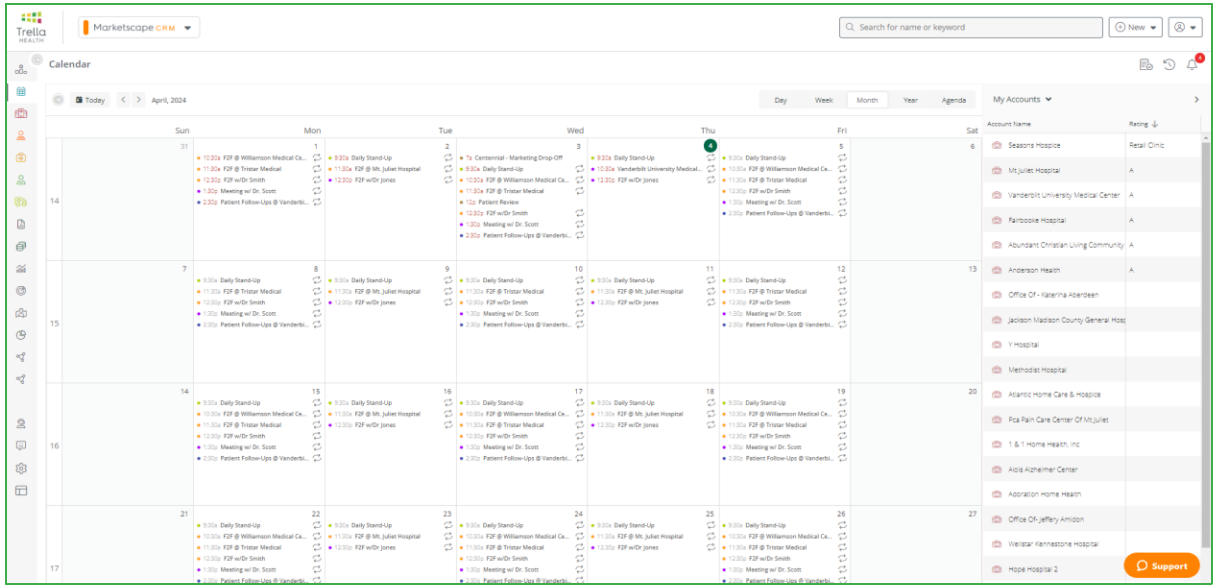
Key Feature: Book of Business List

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



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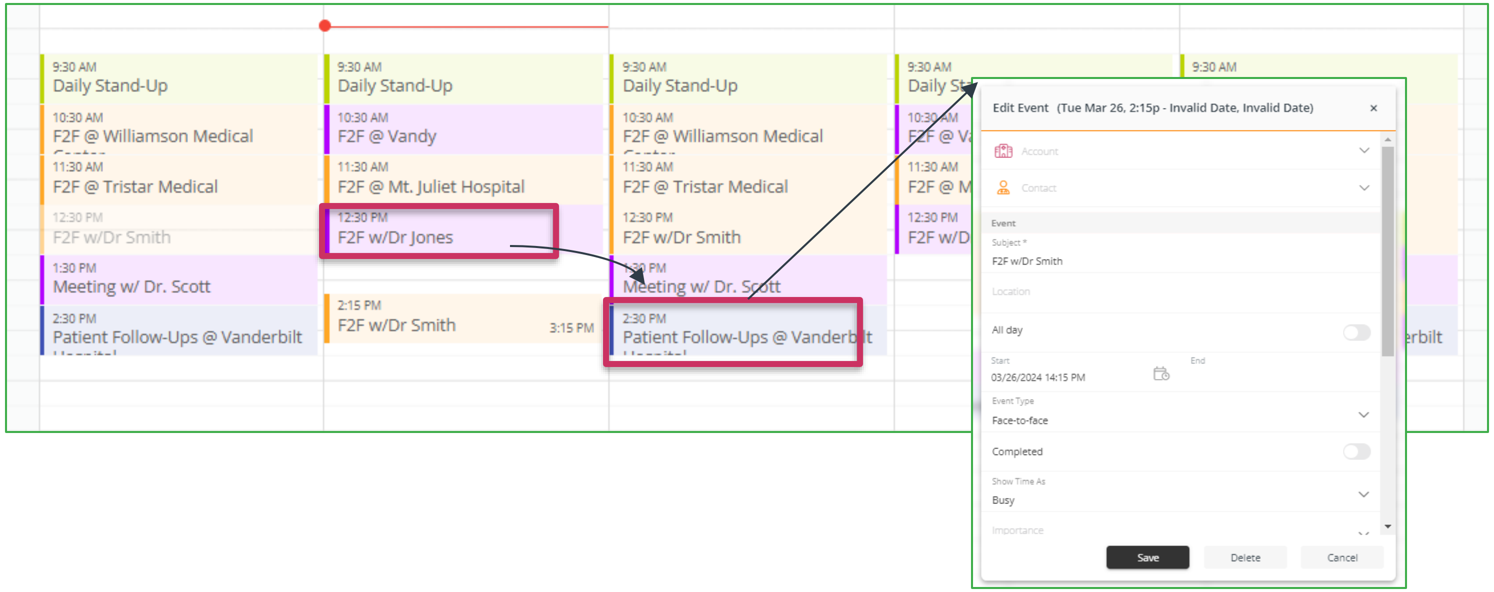
Key Feature: Drag and Drop

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.



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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.

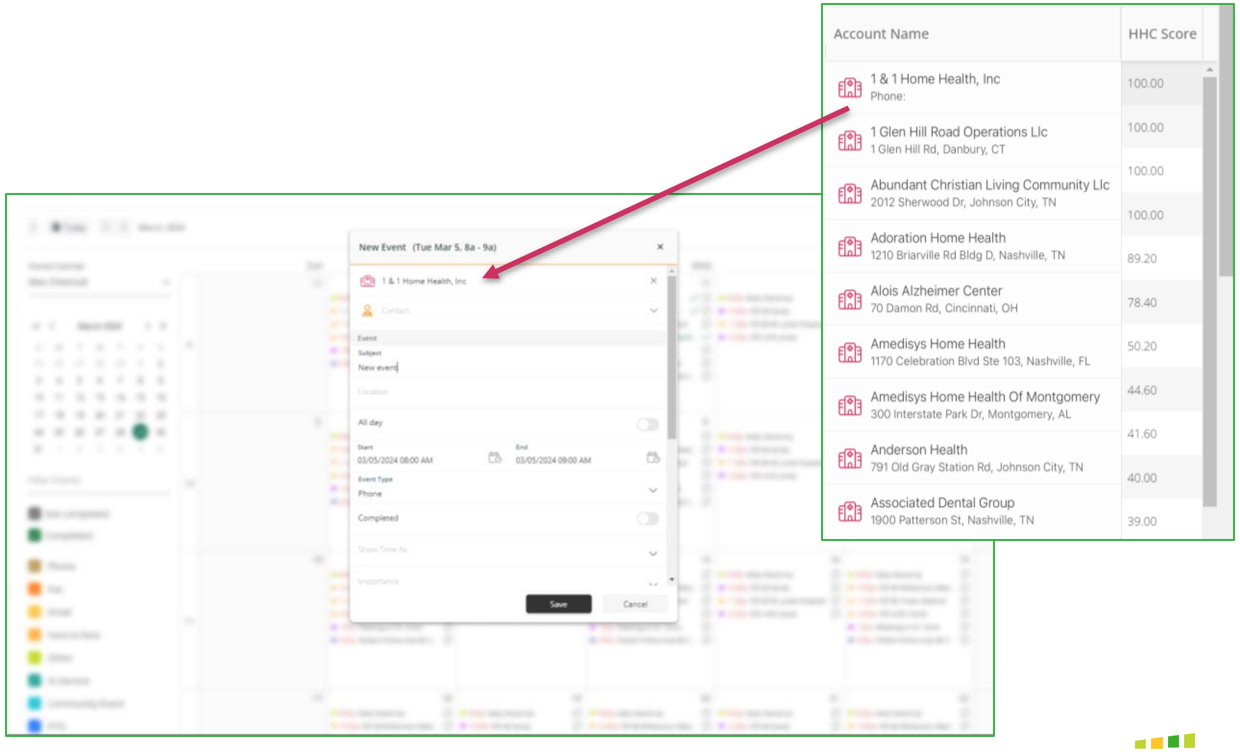
Location: Web > Calendar > My Accounts

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!



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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

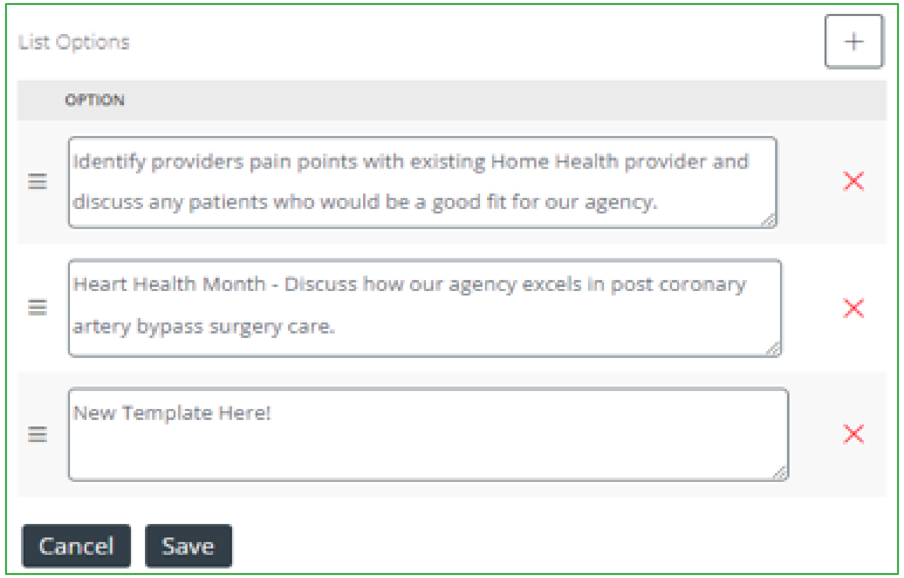
For Managers & Admins:

- 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



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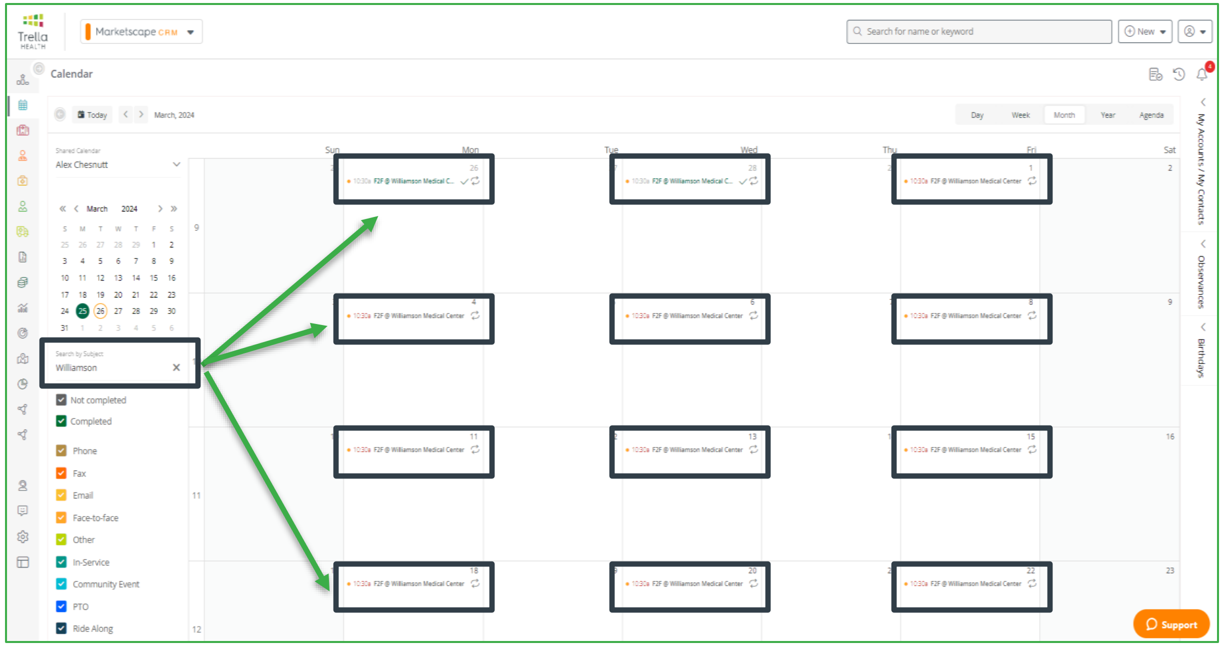
Key Feature: Event Search

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**!



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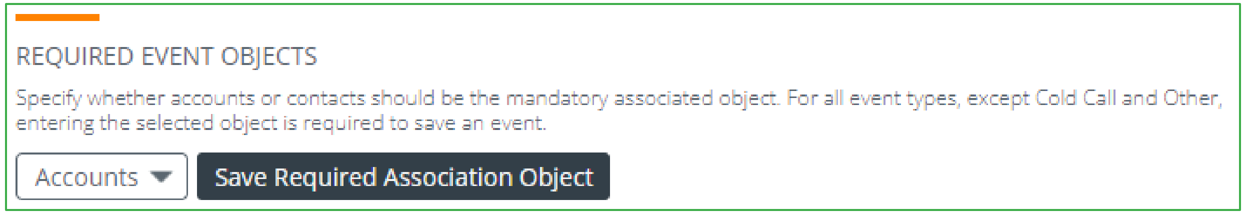
Key Feature: Event Creation Requirements

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



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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.

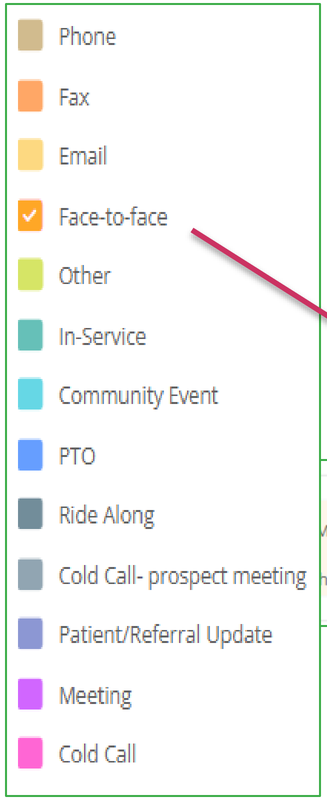
Filtering Options

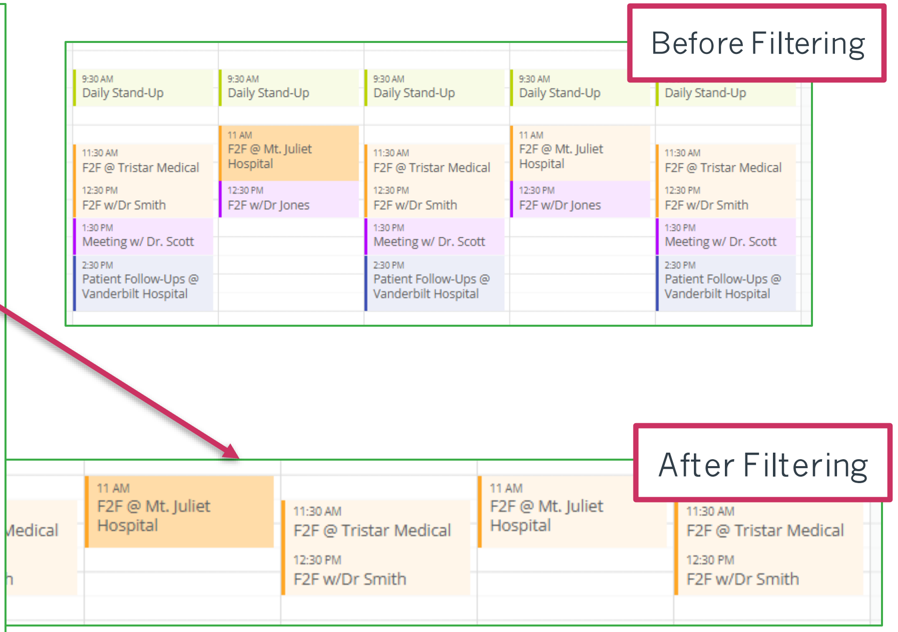
- In addition to the event type filters, users will still be able to filter on complete vs incomplete events.
- Only the event types that have been created for an organization will be shown on the left side of the page.

Limitations

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

Location: Web > Calendar





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PREVIEW!

LIVE DEMONSTRATION

Let’s schedule an event in our upgraded calendar!

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Settings

Set yourself up for success

User Settings: My Profile

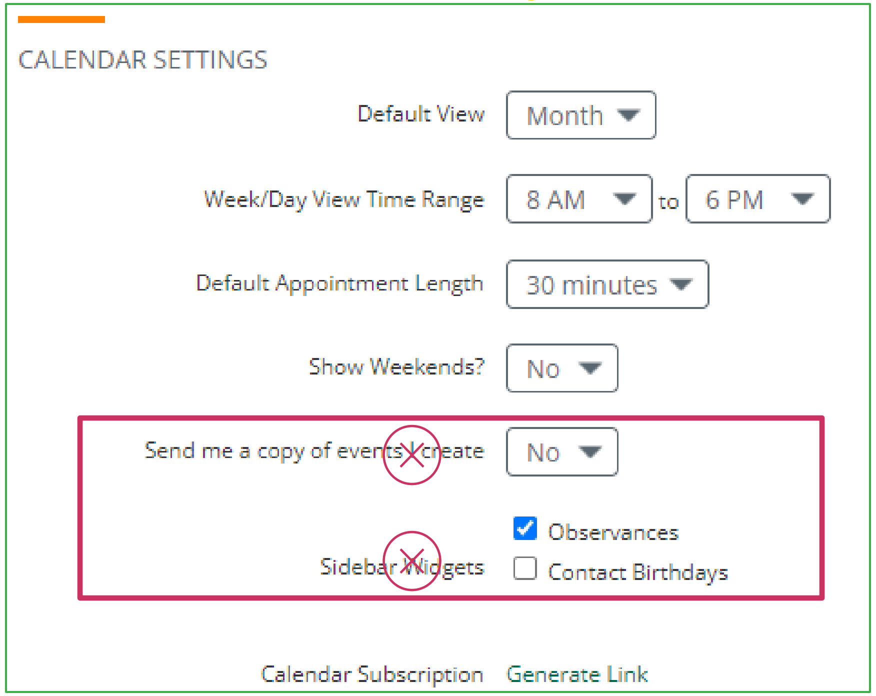
Value: Personalize time zone and calendar settings to reduce additional work when creating events and display the calendar preferences.

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



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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?

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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.

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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

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Thank You for Joining!

Webinar recording will be shared within 24 hours.

Questions?

Connect with your Customer Success Manager.