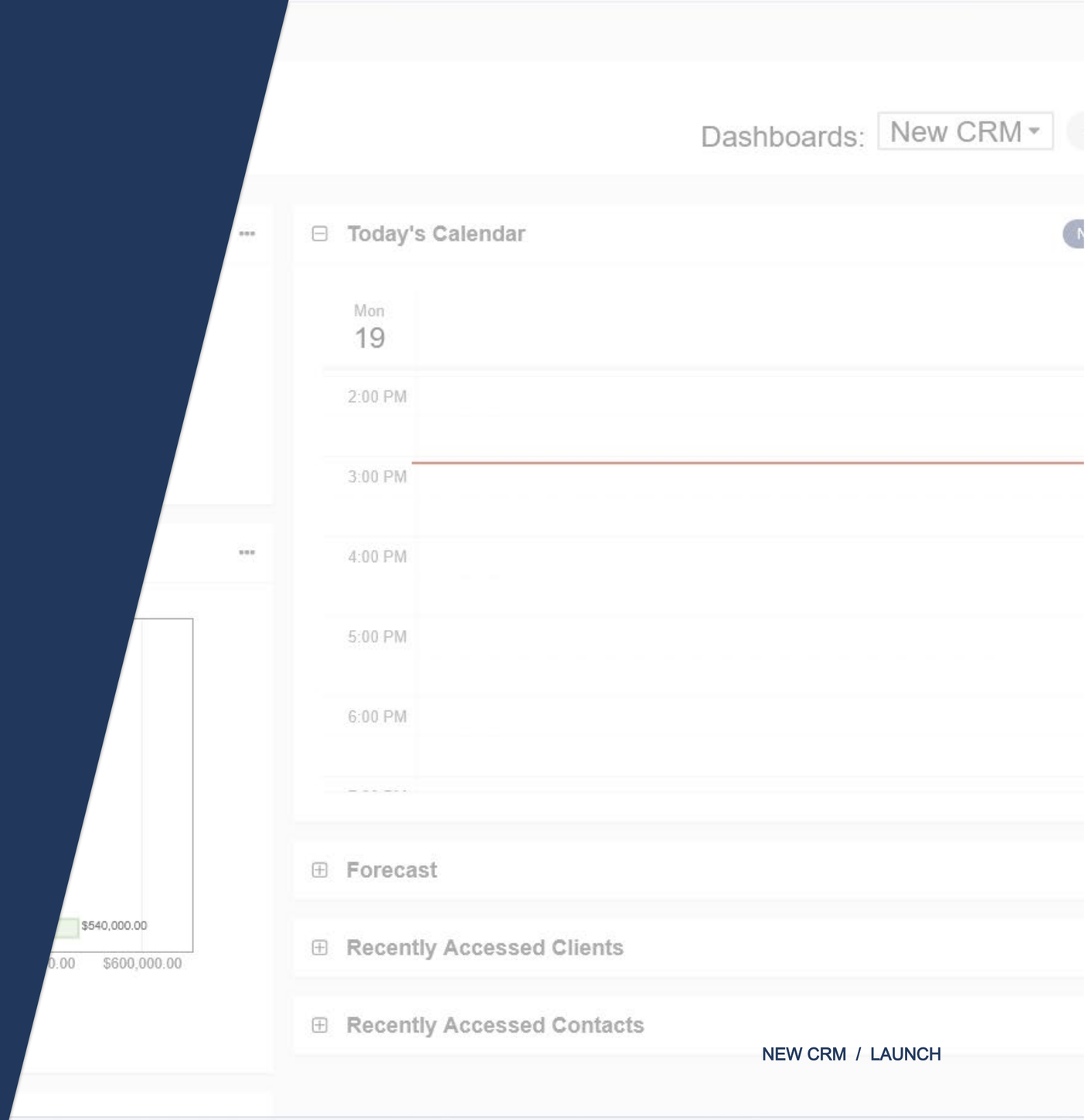
A DAY IN THE LIFE

Welcome to our New CRM Launch

Familiar tools.
Streamlined experience.

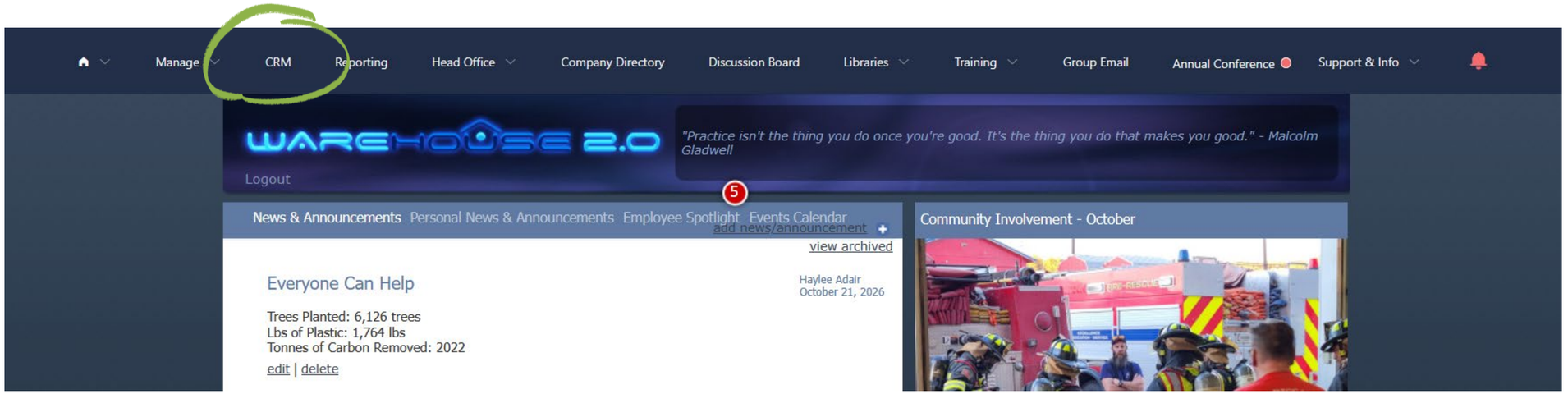
AVAILABLE THROUGH THE WAREHOUSE



Welcome to our official new CRM launch

- Familiar features you already know, paired with exciting new tools to support and improve your day to day.

- The new CRM is available through The Warehouse using your existing login.



This was a labour of love:



Brian Tran



Lucy Kim



Andrew Wang



Alan Cortes



Beth McMillan



Greg Kelly



Isabelle Withers



Erin Wagler



Ashley MacLeod



Maddie Jantzi

Training Resources

01 Updated Training Site Articles

- We’ve updated all our How -To articles on the Training Site to include instructions on navigating, managing, and customizing the new CRM.
- This is the first stop for all your CRM questions including:
  - Customizing the dashboard,
  - Searching and adding to the Client Registry,
  - Generating the Service Agreement and other documents, and
  - Adding and managing new Leads and Opportunities.
- More CRM unique articles are coming down the pipeline, so keep your eyes open!
- You can access the Training Site through the *Warehouse > Training > Training Home* .

Training Resources

02 New CRM Manual

- We've built out a new step -by-step technical guide for navigating the new CRM, available in the Manuals Library alongside the Operations Manual, Sales and Marketing Manual, and Sales Strategies Manual.
- This comprehensive guide will continue to be updated with new section, notes, screenshots, and tips and tricks over the next couple of months.
- The manual already includes the navigation information for:
  - Dashboards,
  - Client, and
  - Sales.
- You can access the CRM Manual through the *Warehouse > Libraries > Manual Libraries.*

Training Resources

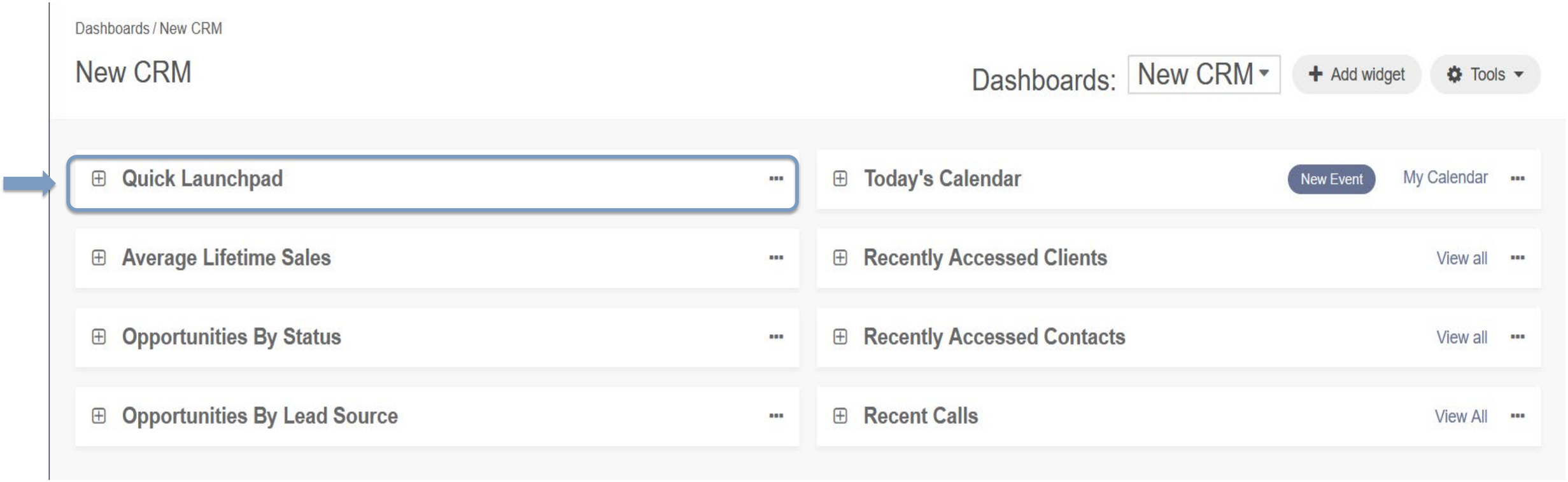
03 New CRM 101 and CRM 102 Sessions

- Beginning the week of **November 16, 2026**, we'll be hosting our **CRM 101** and **CRM 102** training sessions designed to introduce you to the CRM and build up your knowledge of its familiar features and new functionalities!
- These group sessions will be led by a member of our Training and Education Department who will train you on using the new CRM in a more structured fashion.
- Two sessions will be available for registration:
  - **Morning**: 11 AM – 12 PM
  - **Afternoon**: 1 PM – 2 PM
- The full schedule will be made available on the Training Site prior to Annual Conference.
- The links to register will be made available on the Training Site after Annual Conference.
- You can access the Training Site through the *Warehouse > Training > Training Home*.

Dashboard walkthrough

01 Jump straight to core records

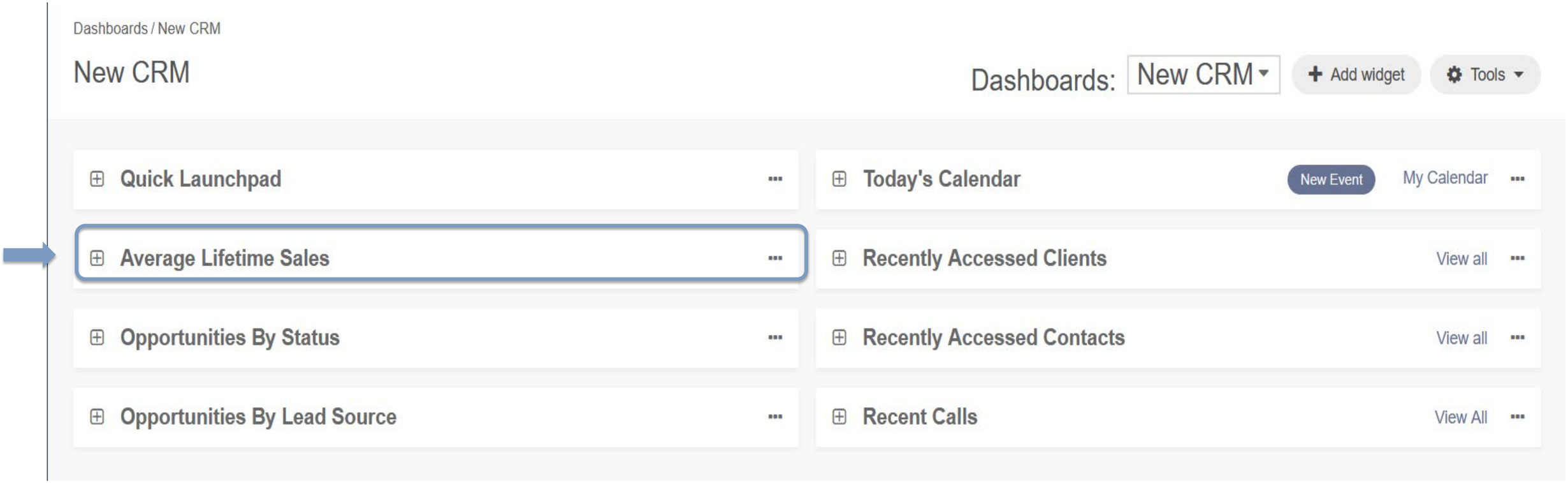
Use Quick Launchpad to open Clients, Leads, Contacts, and Opportunities in one click.



Dashboard walkthrough

02 Track average client value

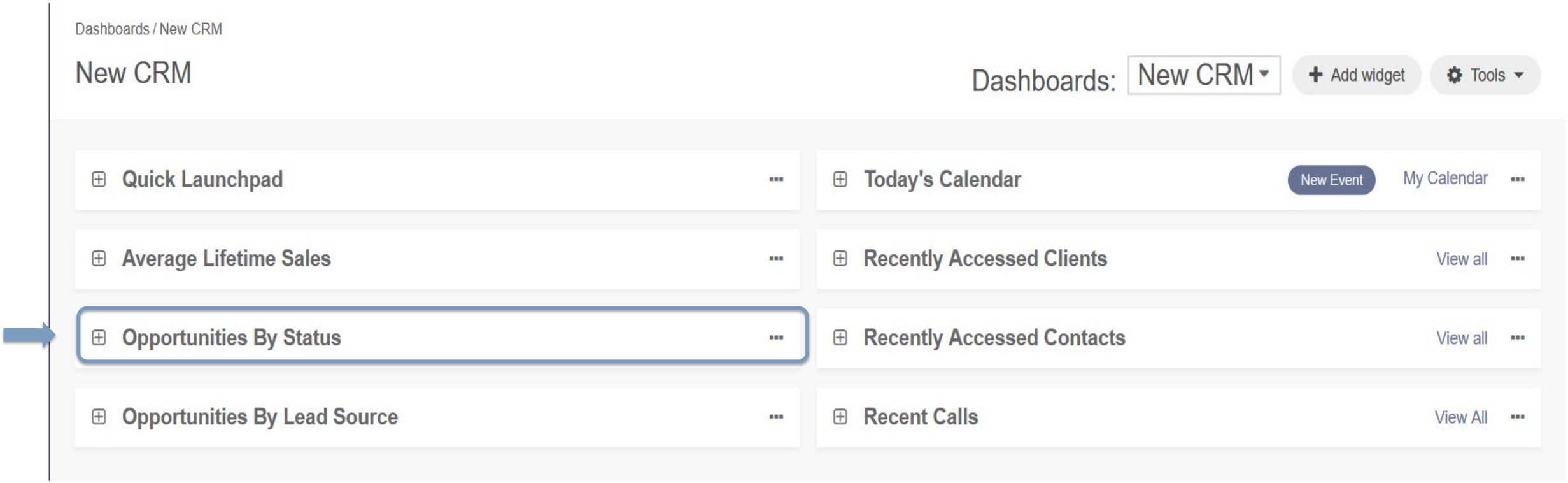
Average Lifetime Sales uses completed Post Audit data to keep the number current.



Dashboard walkthrough

03 See spend by pipeline status

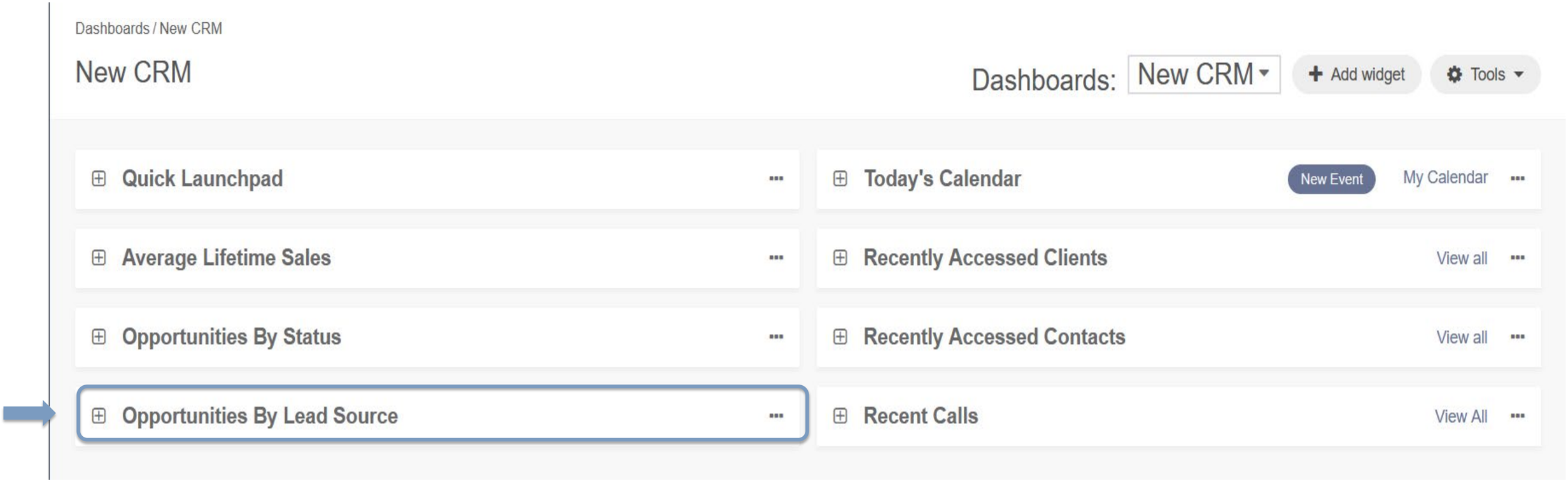
Opportunities by Status summarizes total opportunity spend across each stage.



Dashboard walkthrough

04 Understand where opportunities begin

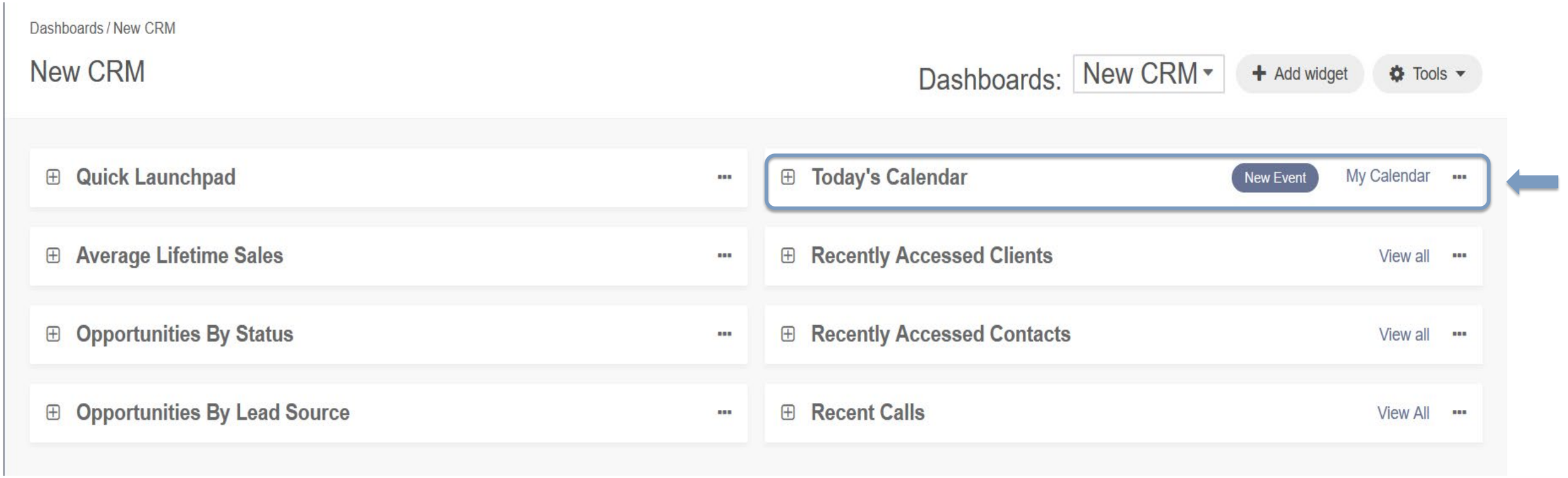
Opportunities by Lead Source shows how many opportunities were generated by each source.



Dashboard walkthrough

05 Keep your day in view

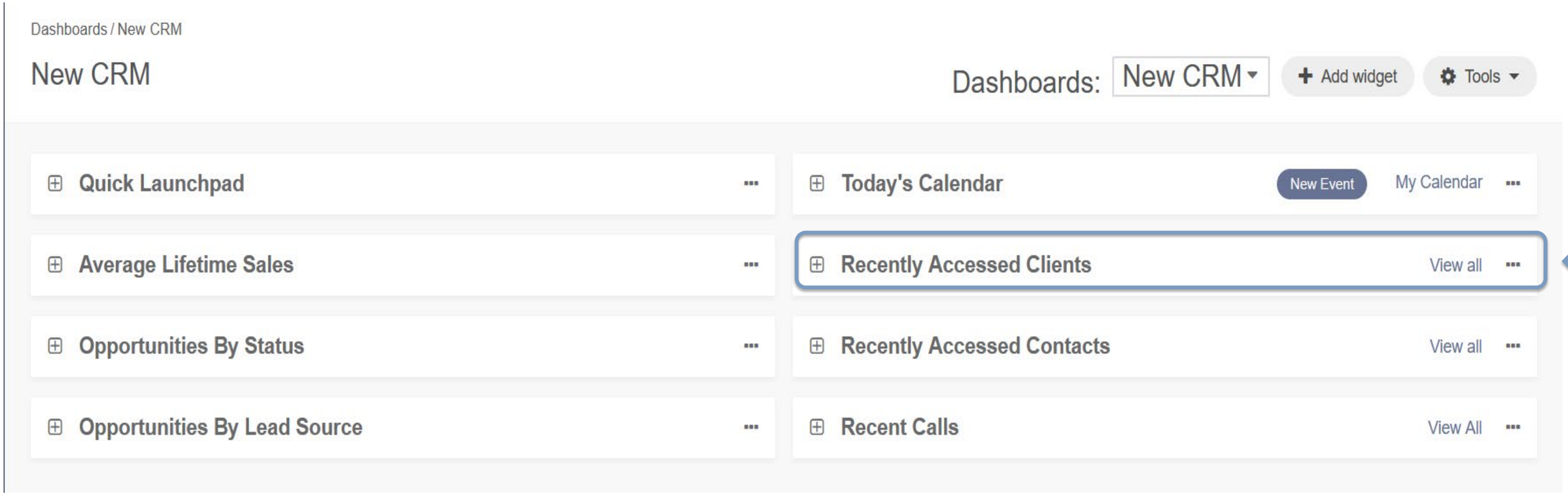
Today's Calendar brings Outlook meetings and events into the dashboard.



Dashboard walkthrough

06 Return to recent clients

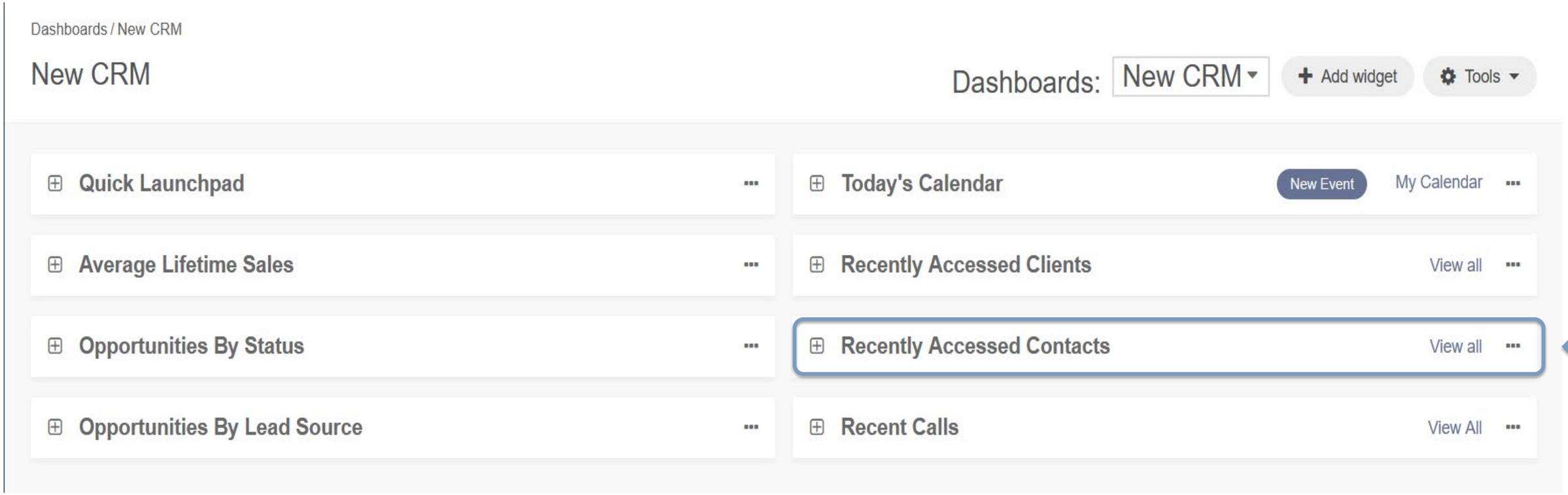
Recently Accessed Clients keeps frequently used client records one click away.



Dashboard walkthrough

07 Return to recent contacts

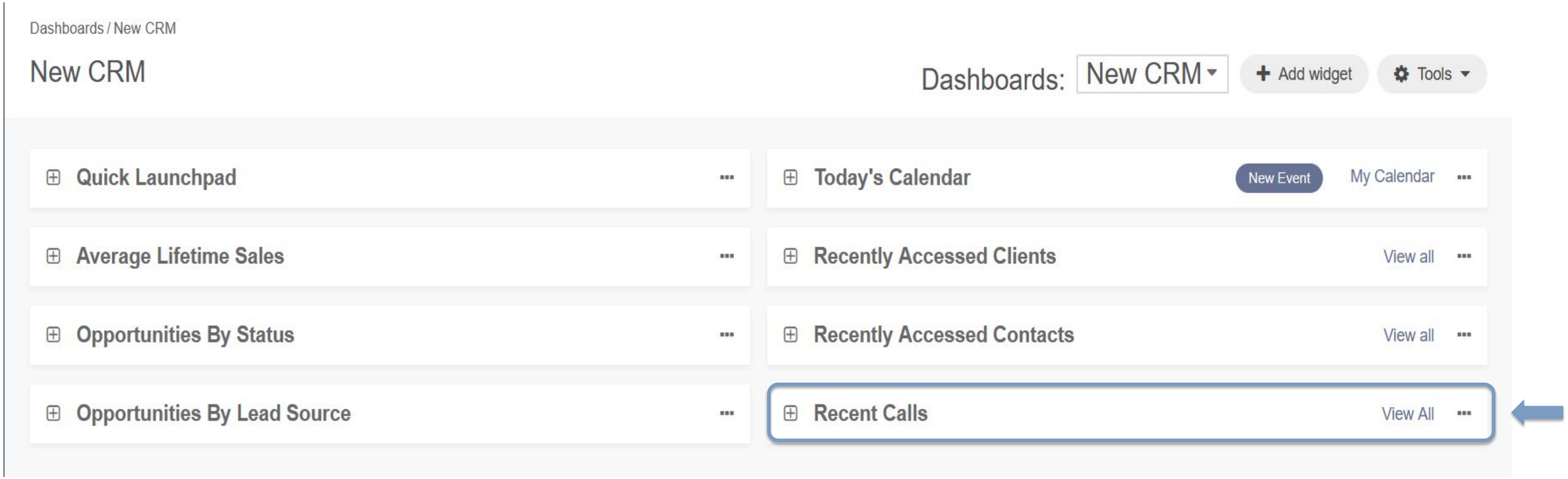
Recently Accessed Contacts surfaces the people you worked with most recently.



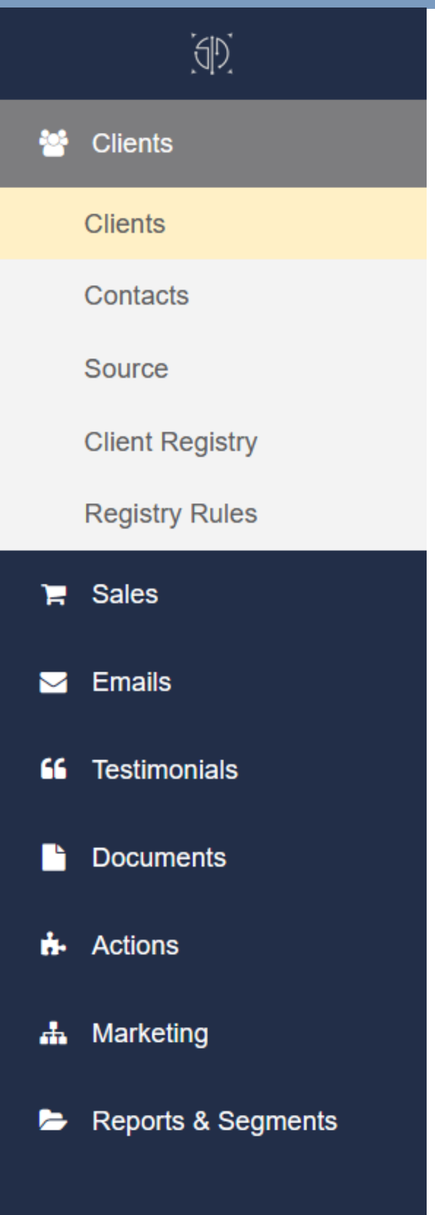
Dashboard walkthrough

08 Review the latest calls

Recent Calls gives you a running list of the calls added most recently.



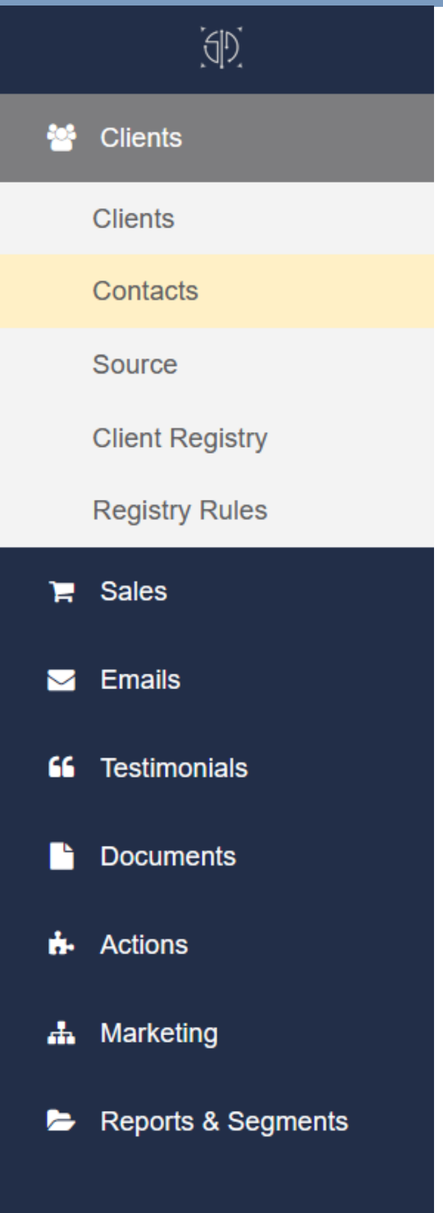
Clients walkthrough



01 Work in a streamlined client view

- While this section looks different, the functionality is the same as the My Clients section – just improved and more streamlined!
- The new layout minimizes the clicks needed to access client information.
- You can still add new and update existing clients, search your clients, import lists of clients, and generate client documents.

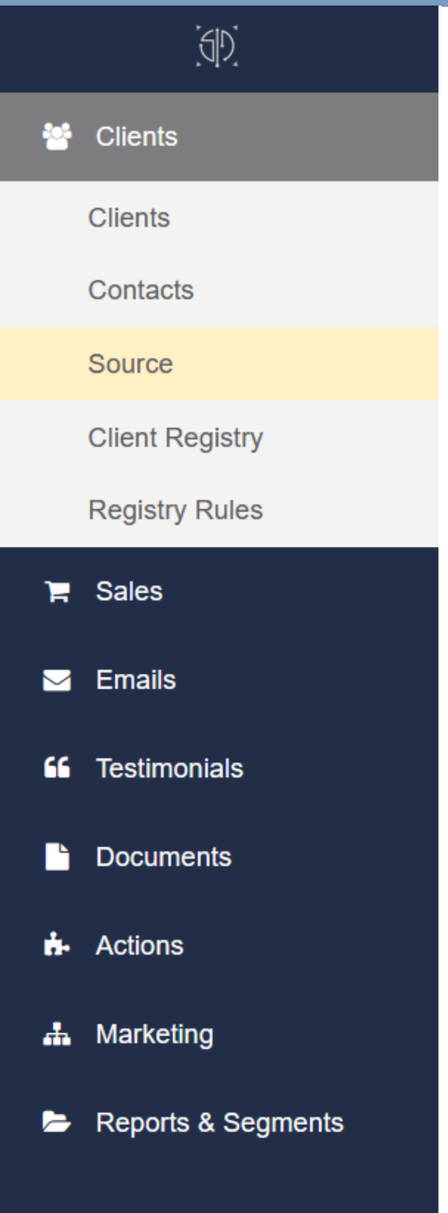
Clients walkthrough



02 Keep every contact in one place

- A dedicated space for your contacts list.
- You can still add and import contacts, as well as add your contacts to the Pulse and Drip.
- Updated DV tags have been added to improve companywide statistics and reporting.
- Your Outlook contacts will sync to your outlook address book!

Clients walkthrough

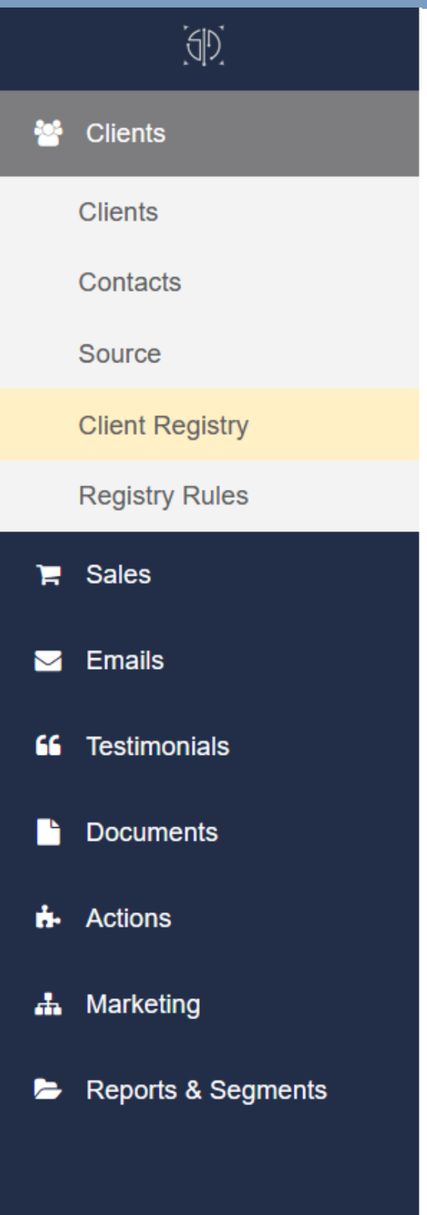


03 Turn referrals into a trackable source

- Celebration time! This function is completely new to the CRM.
- A referrals specific section that tracks and manages referral sources and partners.
- Track leads groups and networking referrals to help keep on top of follow -ups, see major referral sources, track continuous and one -off referrals, and provide updated to referral partners.
- Nurture relationships and get the most out of your referral sources.
- Comes with its own reporting section of clients by source.

CLIENTS / SOURCE

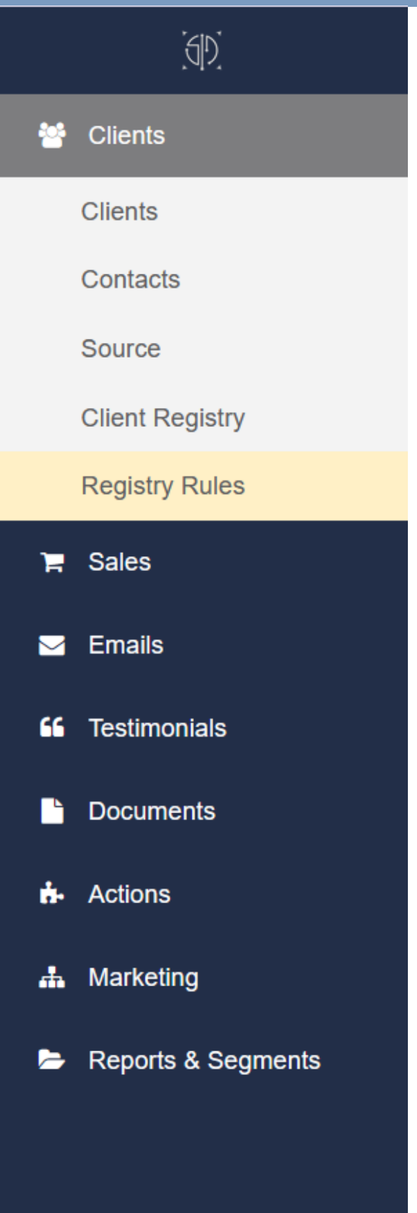
Clients walkthrough



04 Search the Client Registry with precision

- While this section looks different, the functionality is the same as the Client Registry that you're familiar with.
- Allows you to search for existing clients when looking to add new clients to the registry.
  - It's important to follow the same registry searching rules when looking for active clients protected by other franchisees.
- Comes with a variety of new, more specific search criteria!

Clients walkthrough



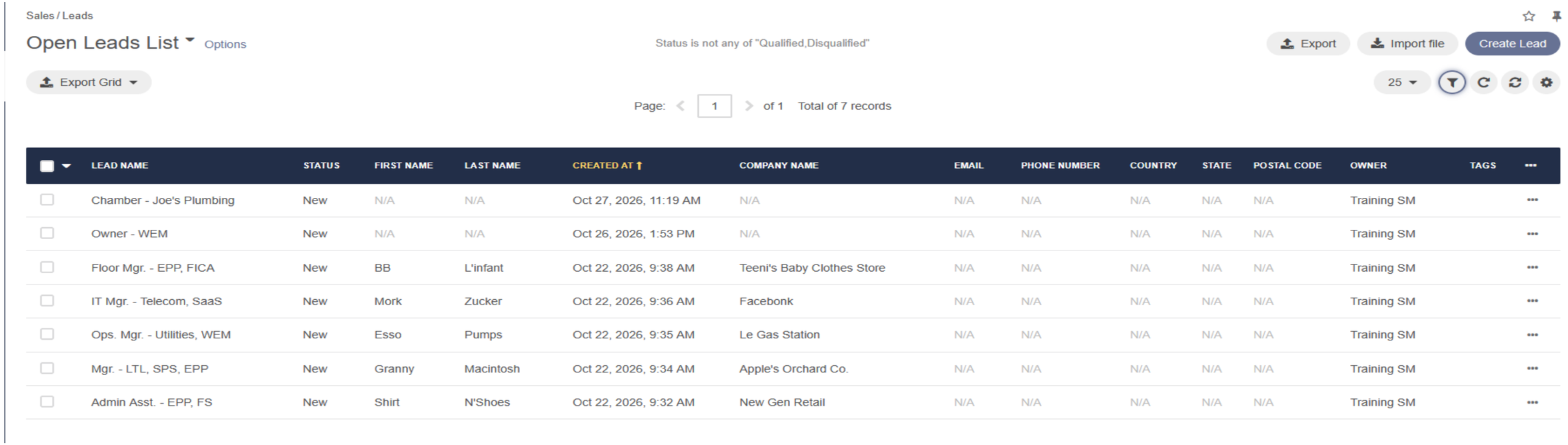
05 Keep the registry rules close at hand

- A new, easily accessible list of the primary Client Registry rules.
- The registry rules have been updated for clarity, but the core meaning and functionality remain the same.
- More information on the registry rules can be found in the Operations Manual (G1).

Sales walkthrough

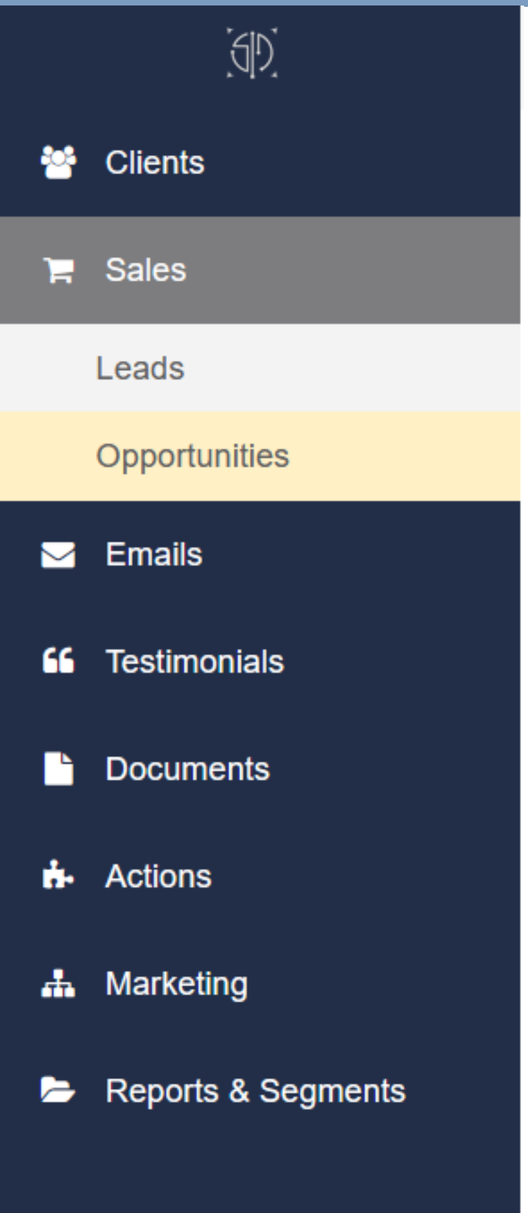
01 Start the pipeline with a Lead

- The first step in our new sales pipeline management tool!
- A Lead is any potential prospect or entity that might be a fit for our product. Think of it as a name on a sticky note!



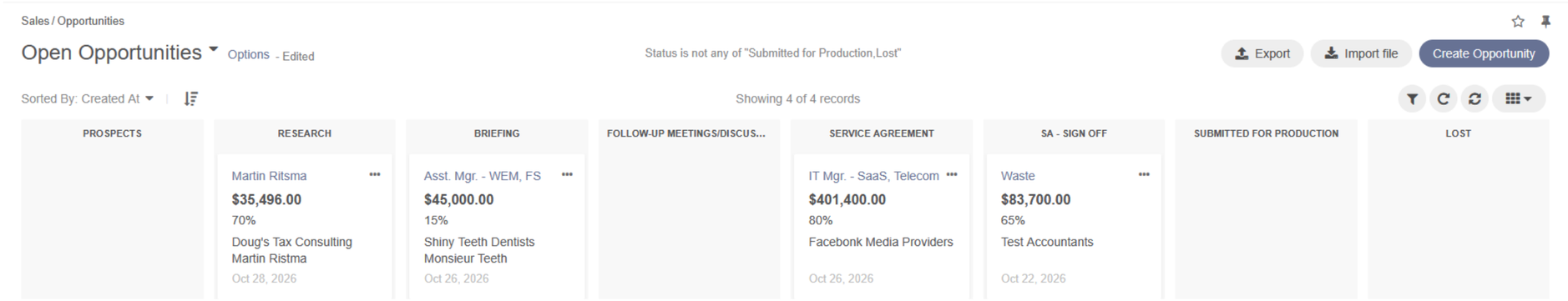
LEAD NAME	STATUS	FIRST NAME	LAST NAME	CREATED AT	COMPANY NAME	EMAIL	PHONE NUMBER	COUNTRY	STATE	POSTAL CODE	OWNER	TAGS
Chamber - Joe's Plumbing	New	N/A	N/A	Oct 27, 2026, 11:19 AM	N/A	N/A	N/A	N/A	N/A	N/A	Training SM	
Owner - WEM	New	N/A	N/A	Oct 26, 2026, 1:53 PM	N/A	N/A	N/A	N/A	N/A	N/A	Training SM	
Floor Mgr. - EPP, FICA	New	BB	L'infant	Oct 22, 2026, 9:38 AM	Teeni's Baby Clothes Store	N/A	N/A	N/A	N/A	N/A	Training SM	
IT Mgr. - Telecom, SaaS	New	Mork	Zucker	Oct 22, 2026, 9:36 AM	Facebonk	N/A	N/A	N/A	N/A	N/A	Training SM	
Ops. Mgr. - Utilities, WEM	New	Esso	Pumps	Oct 22, 2026, 9:35 AM	Le Gas Station	N/A	N/A	N/A	N/A	N/A	Training SM	
Mgr. - LTL, SPS, EPP	New	Granny	Macintosh	Oct 22, 2026, 9:34 AM	Apple's Orchard Co.	N/A	N/A	N/A	N/A	N/A	Training SM	
Admin Asst. - EPP, FS	New	Shirt	N'Shoes	Oct 22, 2026, 9:32 AM	New Gen Retail	N/A	N/A	N/A	N/A	N/A	Training SM	

Sales walkthrough



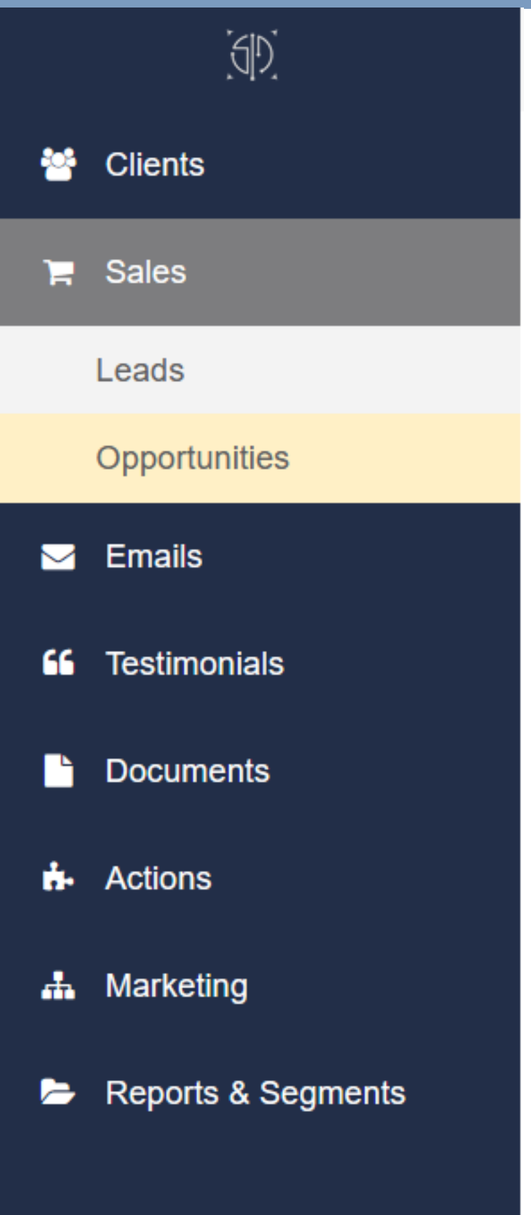
02 Move qualified interest into Opportunities

- The next phase of the new sales pipeline management tool once a Lead becomes business prospect!
- An Opportunity is any client or entity you would like to do or continue business with that has expressed interest in our services and has the services we consult to.



SALES / OPPORTUNITIES

Sales walkthrough

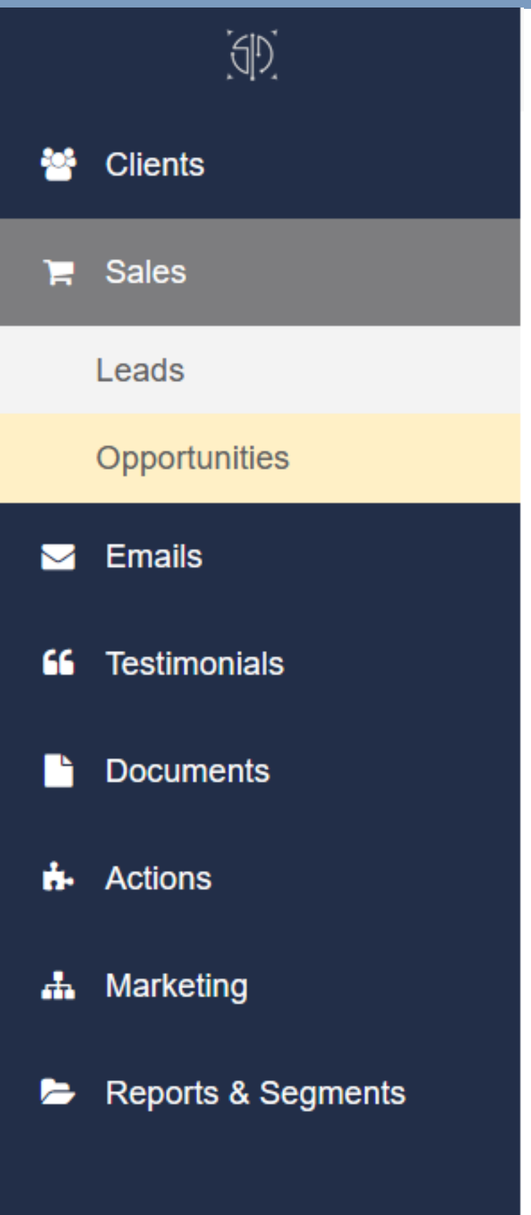


03 Use Opportunities for new and existing business

- Opportunities oversees the sales pipeline for your added clients, but it ultimately has **two functions** :

1. A new prospective business with which you want to do Schooley Mitchell business.
2. An existing client for which you want to do another Schooley Mitchell service.

Sales walkthrough

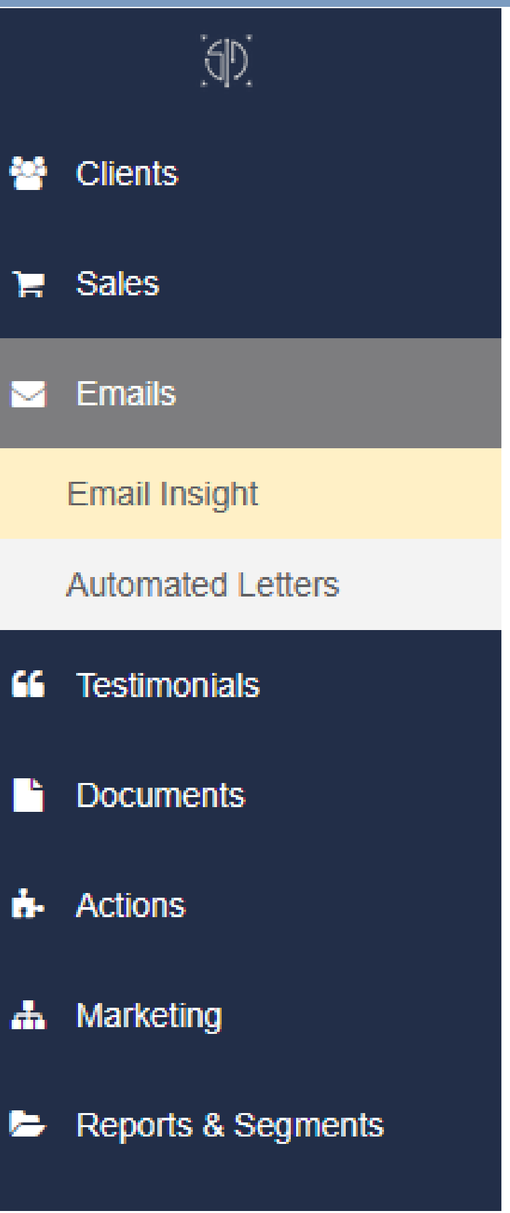


04 Track progress across eight opportunity lanes

There are 8 lanes under Opportunities:

1. **Prospect** : A business that you are targeting for Schooley Mitchell services with the end goal of a Service Agreement.
2. **Research** : Pull everything needed for a briefing: cost categories, pain points, cheat sheets, marketing downloads, testimonials, etc.
3. **Briefing** : Discussion with the prospect to determine if their minimum thresholds and spends amounts qualify for analysis.
4. **Follow-Up Meetings/Discussions** : Where the prospect stays until a Service Agreement is ready to be signed.
5. **Service Agreement** : Once the prospect is ready to sign a Service Agreement.
    1. This will trigger the SA Document Wizard.
6. **SA – Sign Off** : Once the client has signed the Service Agreement and must be added to the permanent registry.
    1. This will trigger the Upload Service Agreement section.
7. **Submitted for Production** : Once the client has been submitted for production.
8. **Lost** : If the prospects expected closed date has expired with no Service Agreement signed.

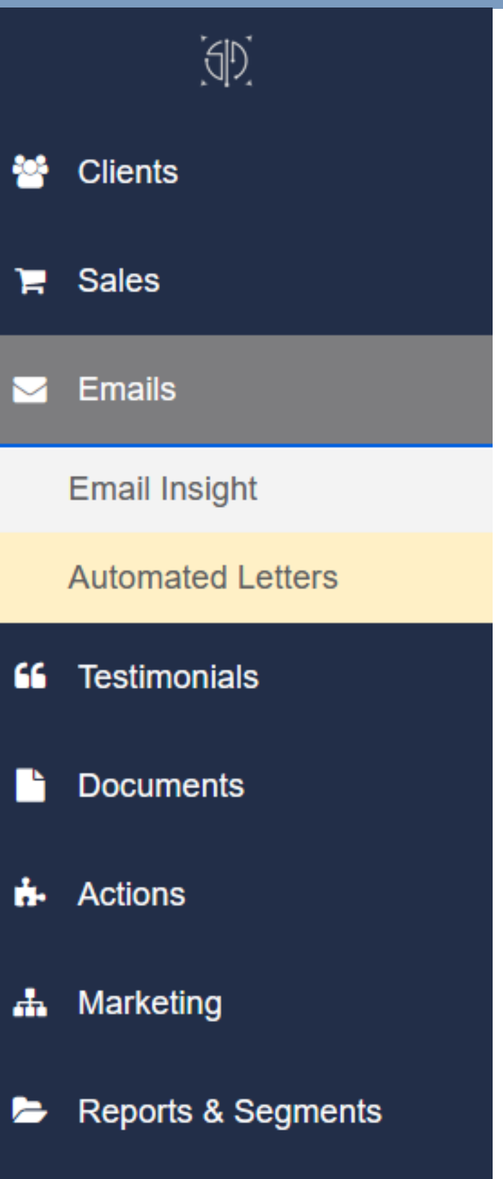
Email walkthrough



01 See sent email activity and open rates

- This is where you can track and manage all your sent emails, as well as view recipient open rates.
- All email templates will be housed here!

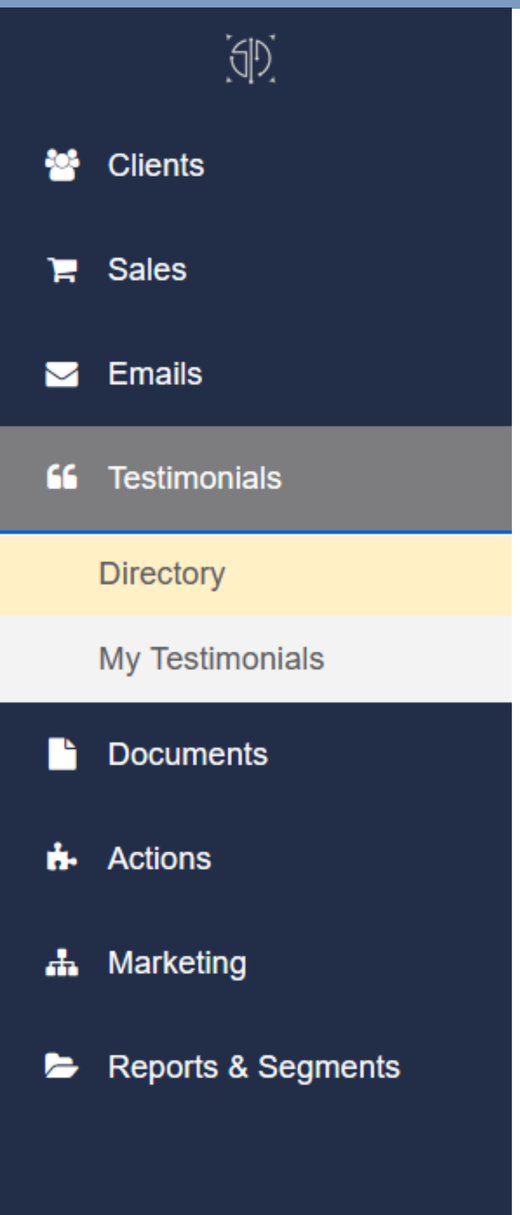
Email walkthrough



02 Track every automated letter

- This is where sent automated letters like the Welcome Letter and the First Rec Letter are tracked.

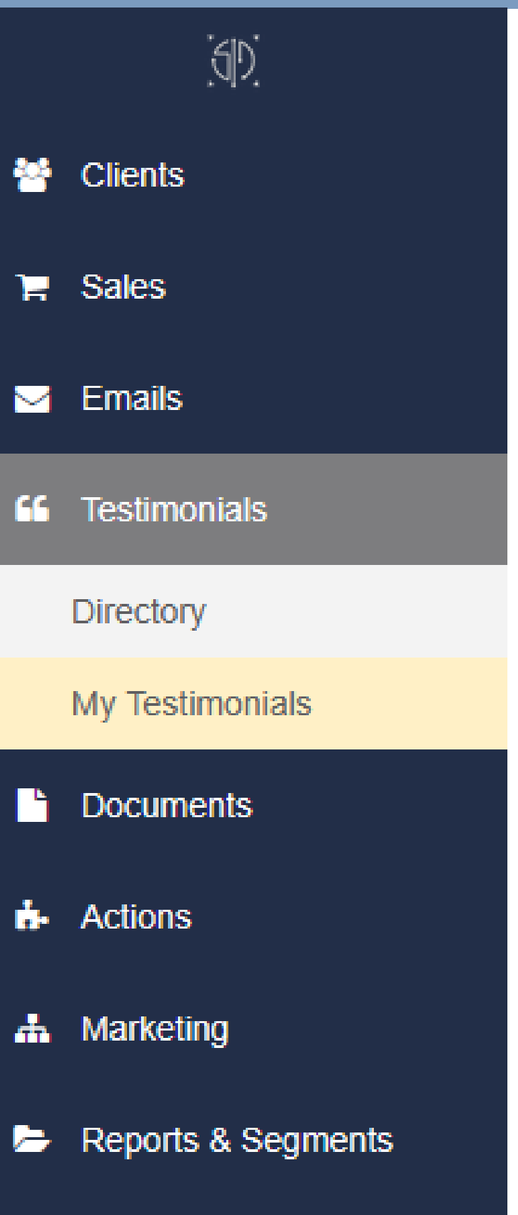
Testimonials walkthrough



01 Find and download existing testimonials

- This is where all existing testimonials are tracked and accessible for download.
- While the search functionality is the same as before, it has been cleaned up.

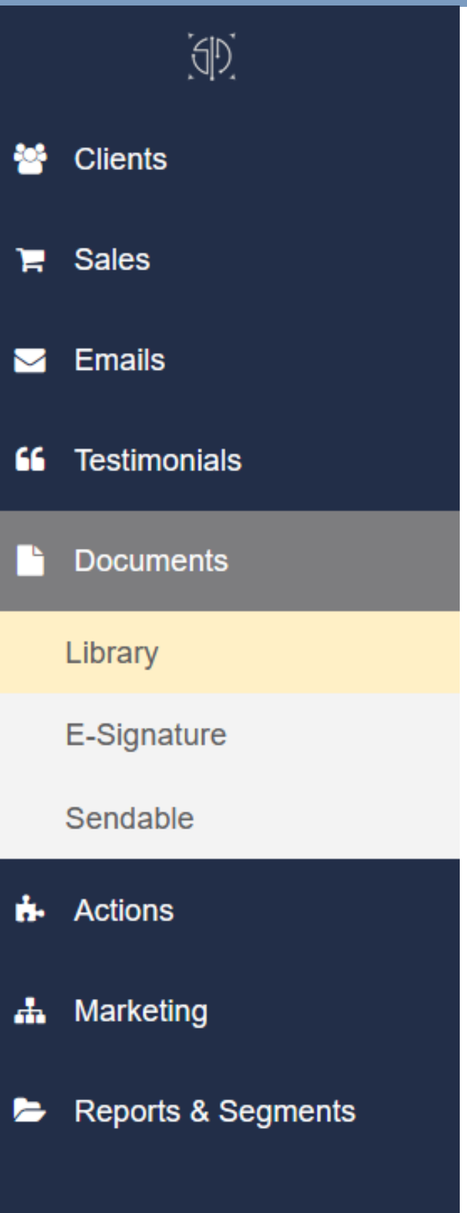
Testimonials walkthrough



02 Manage the testimonials you add

- This is where you can add and see all your added testimonials.

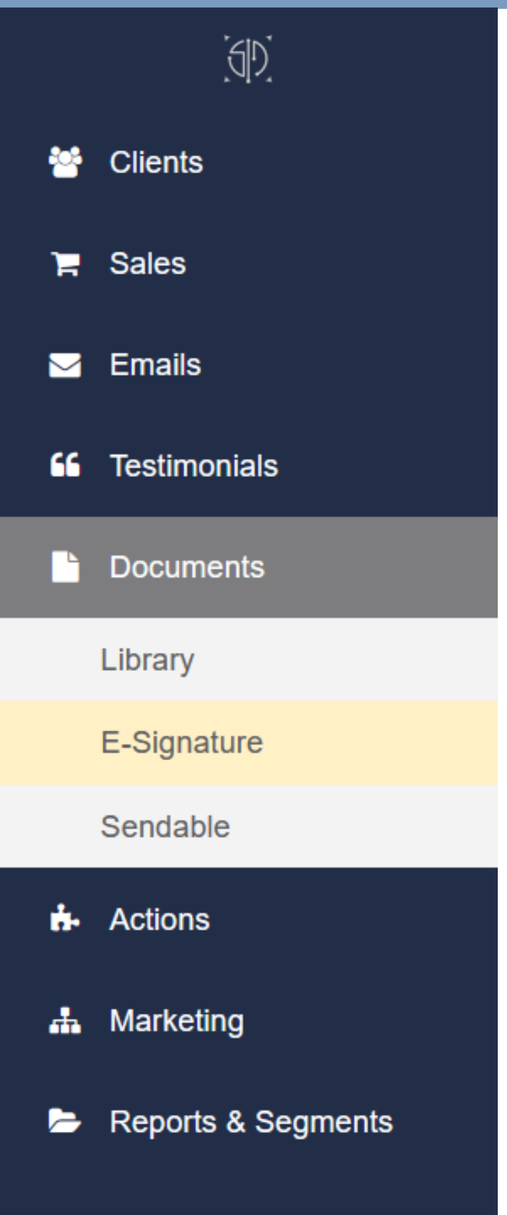
Documents walkthrough



01 Use one library for every client document

- A library of all client documents uploaded by your office that can be filtered, viewed, and downloaded.
- You can also create new documents for production, specific cost categories, Value Reports, recommendations, statements, Post Audits, and more.

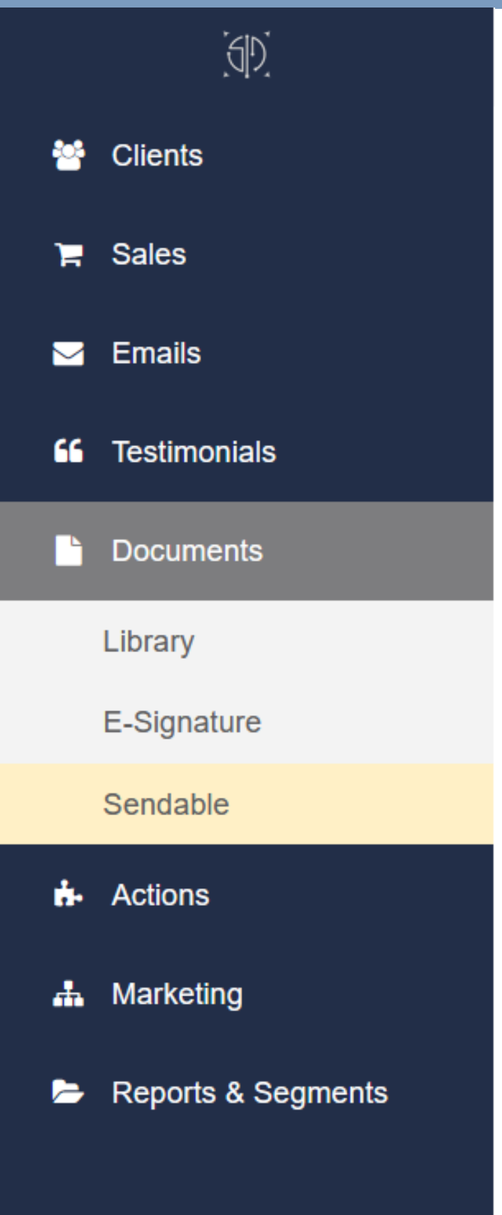
Documents walkthrough



02 Track and manage templated e -signatures

- The new e -signature page used for tracking and managing all templated e -signature documents for your office.
- View all your active e -signature documents, see their history, send reminders to the signer, and cancel the document.
- You can also send new e -signature documents:
  - Service Agreement,
  - Service Agreement Addendum,
  - Letter of Authorization,
  - HO Production Agreement, and
  - Joint Venture Agreement.

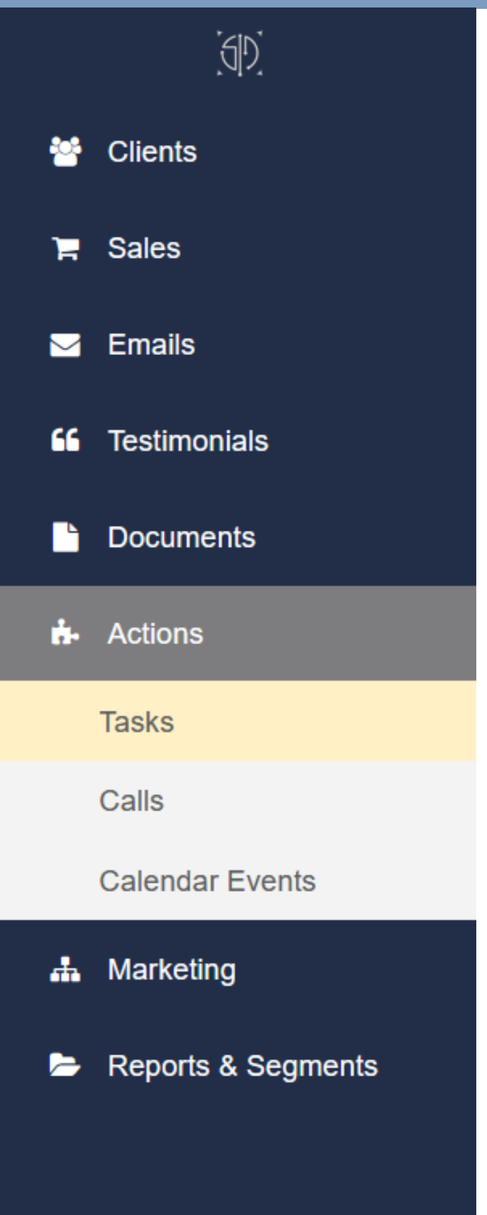
Documents walkthrough



03 Send customized documents for signature

- The new e -signature page used for tracking and managing all customized e -signature documents like the Value Report.
- View all your active analyst -uploaded documents and send them directly to the client for signing.

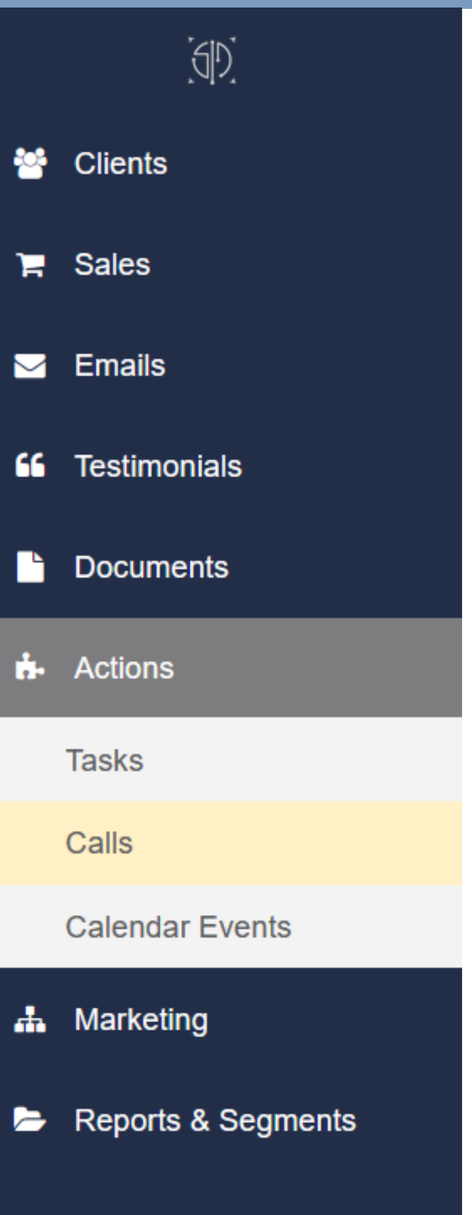
Actions walkthrough



01 Put every task and action item on the record

- You can now add any task or action item related to your office, clients, leads, opportunities, or contacts.
- Tasks will also show on the right -hand side menu for easy access, alongside sticky notes and recent emails.

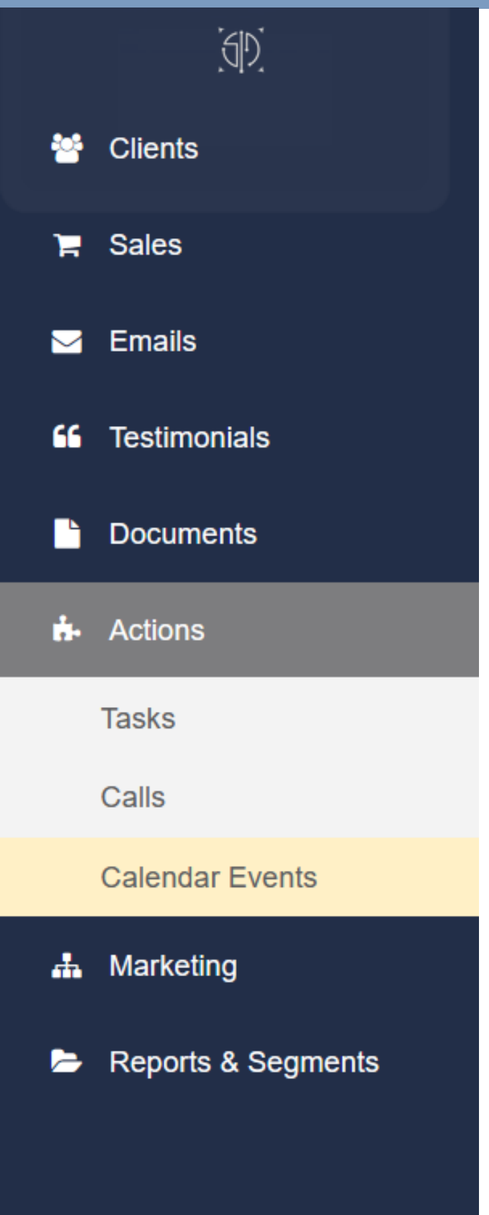
Actions walkthrough



02 Log incoming and outgoing calls

- You can manually log all calls – ingoing and outgoing - related to your office, clients, leads, opportunities, or contacts.
- Logged calls will show in the Dashboard on the Recent Calls widget.

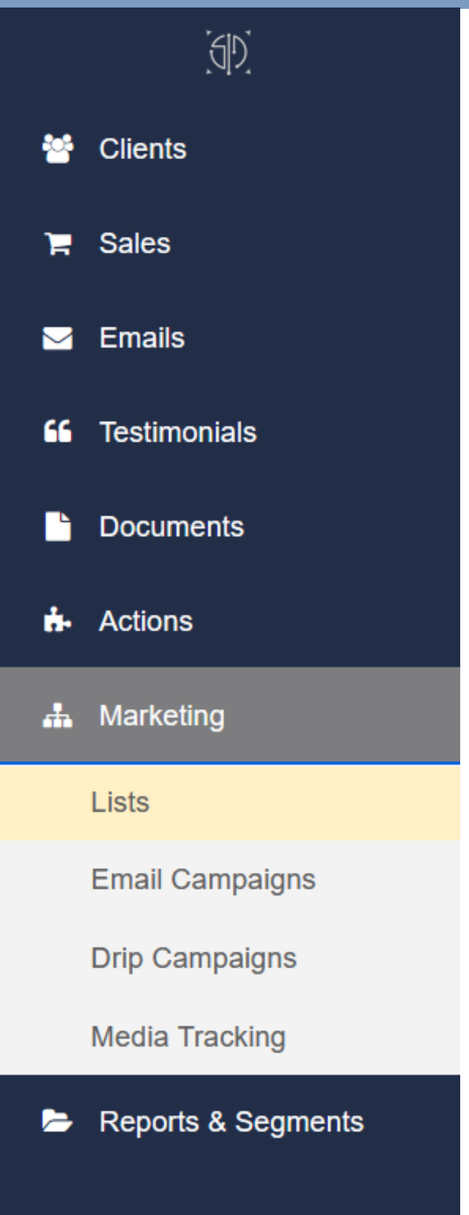
Actions walkthrough



03 Keep CRM and Outlook calendars in sync

- You can add any event, meeting, or time blocked task to your calendar.
- Calendar events will show in the Dashboard on the Today's Calendar widget.
- All added calendar events will sync with your Outlook calendar!

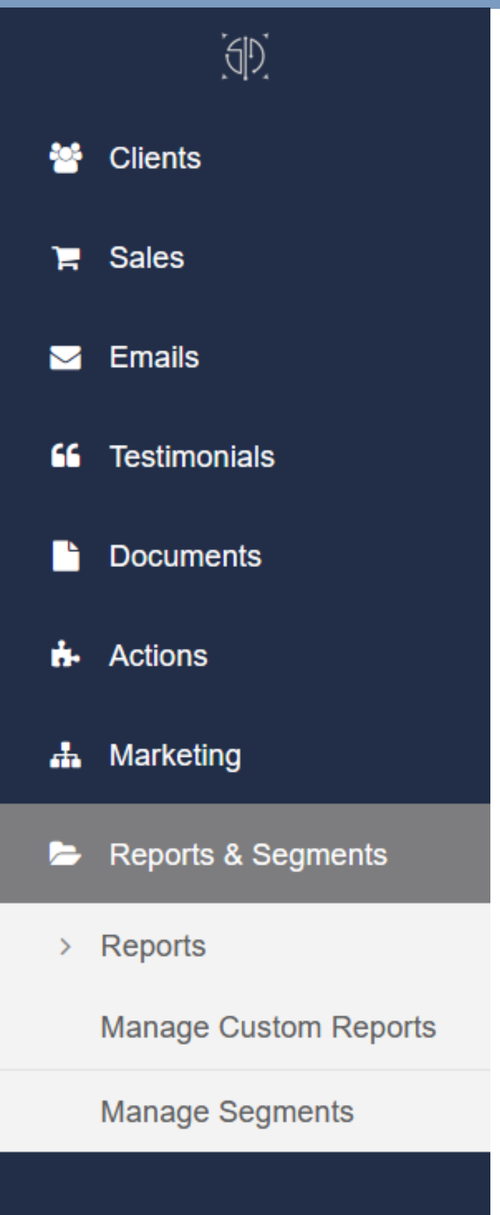
Marketing walkthrough



01 Bring campaigns and media tracking together

- This is where all our Drip Campaigns and Media Tracking information will be housed.

Reports walkthrough



01 Turn CRM activity into actionable reporting

- We'll have a webinar on this section in the new year – keep an eye out for more information!
- All current report options available:
  - Clients
    - Client Lifetime Sales Value
    - Clients By Opportunities
    - Clients Anniversary Report
    - Clients Upcoming Service Agreement Report
  - Leads
    - Number of Leads By Date
  - Opportunities
    - Opportunities by Status
    - Won opportunities by date period
    - Forecast
  - Can also create custom reports with unique parameters!

STRATFORD-ON-004 Learn how to use this space

Dashboards / New CRM

New CRM

Dashboards: New CRM

Quick Launchpad

Clients Leads Contacts Opportunities

Today's Calendar

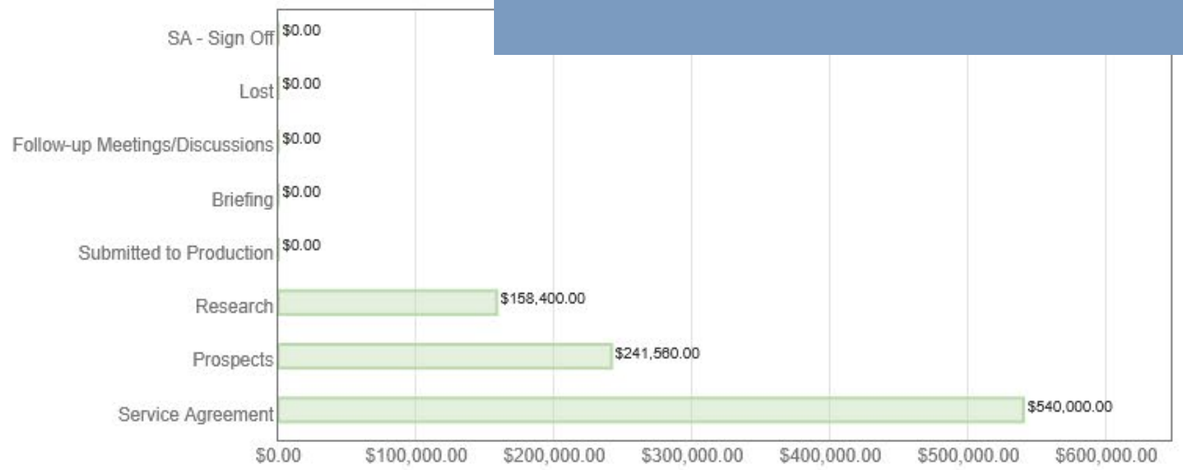
Mon
19

2:00 PM

6:00 PM

DEMO TIME!

Opportunities By Status



Owners: All owners
Date range: October 2026

Forecast

Recently Accessed Clients

Recently Accessed Contacts

Dashboards Clients Sales Emails Testimonials Documents Actions Marketing Reports & Segments

More Support

01 Submit a Question or Bug Report

- To submit any CRM questions, or notify us of any bugs or issues, please submit a Support Request through the Warehouse.
- When completing your Support Request, please include the following information:
  - **Topic** : Select Programming for bugs and Other for general inquiries or questions.
  - **Attachment** : Any screenshots of the issue, missing or incorrect information, error message, etc.
  - **Title** : Identify if the request is a Question, Bug, or Error and what feature it is for.
  - **Content** : Any relevant information about the steps taken, error messages or incorrect or missing information, and additional context. The more detail the better!
- You can submit a Support request through the *Warehouse > Support & Info > Support Request* .
- You can also submit any questions to the Training.support@schooleymitchell.com inbox; however, we encourage everyone to utilize the Training Site articles, CRM manual, and Support Request process first.

Definitions

Term	Definition
Lead	Any potential prospect or entity that might be a fit for our product. Think of it as a name on a sticky note!
Opportunity	Any client or entity you would like to do or continue business with that has expressed interest in our services and has the s ervices we consult to.
Prospect	A business that you are targeting for Schooley Mitchell services with the end goal of a Service Agreement.
Research	Pulls everything needed for a briefing: cost categories likely applicable, points of contact, pain points, cheat sheets, mark eti ng downloads, testimonials.
Briefing	Discussion with the prospect to determine if their minimum thresholds and spends amounts qualify for analysis.
Follow Up Meetings / Discussions	Where the prospect stays until a Service Agreement is ready to be signed.
Service Agreement	Once the prospect is ready to sign a Service Agreement.
SA Sign-Off	Once the client has signed the Service Agreement and must be added to the permanent registry.
Submitted for Production	Once the client has been submitted for production.
Lost	When the prospect closed date has expired with no Service Agreement signed.
Source	A referral source, partnership, or leads group.
Owner	The account an item, action, or task is assigned to.