

Upcoming



Dec 7, 2018 – in 7 Days

2019 Medicare Health Insurance Open Enrollment Ends.
Applies only to people over age 65.

Activity

Unread (14) Read



Yesterday at 10:52am

Patricia Hasalonglastname completed the Estate Planning survey.
Take a minute to review and write a summary. [Review survey.](#)



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Mark as Read



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Clients

All Clients

View

5



New Clients

View

3

Prospects

View

0

Add Client

Responses

Need Review

View

4

In-Progress

View

12

Completed

2.9k

View

Quick Send



1. Add clients

Add a client, import many, or engage prospects.

[Add Client](#) ➤



2. Send surveys

E-mail custom or pre-built surveys to one or more clients.

[Browse Surveys](#) ➤

[Quick Send](#) ➤



3. Review responses

Review survey responses to gain a deeper understanding of a client's goals and ideas.

[View Responses](#) ➤



4. Get the big picture

Review client profiles to prep for meetings in mere minutes.

[View Clients](#) ➤





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