



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](#) >

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.](#)



Yesterday at 10:52am

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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

[View](#)

2.9k

[Quick Send](#)

Notifications.