
Own Your Network in 7 Days

*Spend each day for one week to launch
your network to success*



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If your goal is to grow and maintain your business, then you probably know that the best way to achieve it is by staying top-of-mind with the people in your network that matter the most. In turn, our goal is for you to utilize Contactually to do exactly that, by maintaining your relationships and keeping in touch with those important folks in your network in a personal way that works to expand your network and grow your business. .

However, we know that getting up and running with a new system and learning your way around the ropes can be challenging at the start. Just remember that your hard work and efforts will pay in the long run.

If you put in a little bit of effort into properly setting up your Contactually account now, you'll be able to turn the act of staying in touch into a reliable habit and integral part of your workflow. This will lead to a LOT of professional success (and money) down the road.

We curated some of our favorite tips from our power users that helped them out when they first signed up for Contactually to help you get started. We'll walk you through your first 7 days of Contactually and what milestone you should conquer with each day. If you follow these tips and start using Contactually on the regular, and your business will start growing before your eyes and you'll be well on your way to owning your network and everything it can offer you.



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Your 7 Contactually Habits Checklist:



Day 1:

Connect your email and import contacts



Day 2:

Define your primary objective for using Contactually



Day 3:

Create your buckets and bucket 200 contacts



Day 4:

Understand how to set your follow-up reminders



Day 5:

Act on at least one follow-up reminder every day



Day 6:

Set up at least 1 template for each of your important processes



Day 7:

Set contactually.com as your default homepage

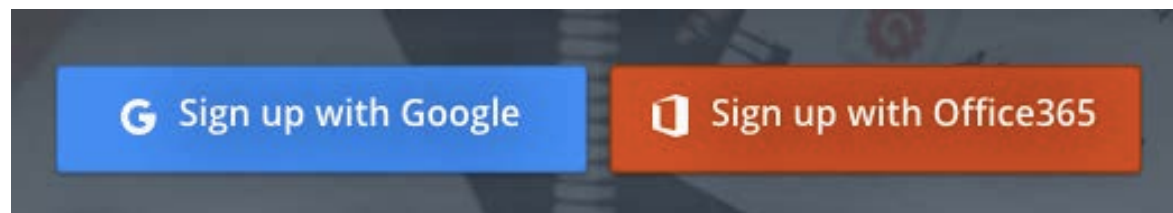


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Day 1: Connect your email accounts and import your contacts

If you're one of the few people that isn't interested in increasing your business's success and profitability, skip this step. In fact, skip the rest of this eBook. Chances are you're smarter than that, though.

The first thing that you'll need to do when you start using Contactually is connecting your email accounts and importing any contacts and information that you may have outside of your email accounts. While it used to be possible to connect your social accounts, with Facebook and LinkedIn closing their APIs, it's all but impossible to get that information into Contactually. You can export a list of all your connections and friends from each platform and utilize those lists to come up with a comprehensive list of all your contacts.



By connecting your email and importing your contacts, we'll be able to automatically create your centralized online address book for you, and will flag any duplicate listings that you may have so that you can review them before they're merged, keeping your database is neat and tidy.

We'll also create new contact records for you every time you establish a new connection or email someone for the first time. All of this automation allows you to focus your precious time on other more pressing endeavors. You can thank us later.



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After your accounts are connected, we'll also automatically track all of your communications with your important contacts as you email (and on mobile) call or text them, too.

By doing this, we know exactly when you last spoke to your prospects, and can remind you to follow-up with them when we detect that you've gone too long without doing so. Again, no heavy lifting on your part! This will help you better engage your contacts, retain valuable mindshare and generate referrals and business from the people in your network. Our follow-up messaging also gives you the option to drop in some quick email templates, leaving you with less writing to worry about.

Recent Activity

- ✓ Follow-up with Calvin Rose completed
- ✓ Follow-up with Audrey Carpenter completed
- ✓ Follow-up with Alberto Franklin completed
- ✓ Follow-up with Tracy Gregory completed
- ✓ Follow-up with Tyler Burke completed

Follow Up with Kristen Allen

Open in: [Gmail](#) | [Desktop Outlook/Mac Mail](#)

From: Ankur Patel <ap@contactually.com>

To: Kristen Allen <kristen.allen15@example.com>

Subject: Just following up

[Add Cc](#) [Add Bcc](#)

[Email templates](#) [Add Content](#) [Introduce](#) [Attach File](#)

Track: Open Click Reply

Now

Not sure what to say to Kristen?

Kristen Allen
Customer Service at Bark Shop

Your Recent Conversations

- I could use your help Jun 2
- Just following up Apr 29
- How are you doing Kristen? Mar 31
- Bumped into Kristen at Pete's coffee. She wants to get together to chat. Jan 27

Personal Notes

Loves the Jets. Jan 27

Programs



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Day 2: What is your main business goal with Contactually?

Before you really get going with Contactually, you'll need to define what your primary objective is for using our platform. Are you trying to generate business opportunities? Keep up with friends and family members? Get more referrals? Whatever it is, you'll need to understand how your network can help you the most before you get into the weeds with Contactually and start reaching out. .

We firmly believe that in order to reach those business goals, you need to build some strong and healthy habits. We also understand that building those habits doesn't happen overnight. [While we've covered how to form the best habits for your life on our blog](#), we [also have a worksheet](#) to help walk you through it. As you form your Contactually habits and define your business goals, keep this worksheet nearby, it'll only serve to help you in the longterm.



The image shows a worksheet titled "Creating Good Habits Worksheet". It has three main sections for writing:

- Section 1: "My Top Professional Goal This Year" (with a large gear icon in the background)
- Section 2: "What's my routine?"
- Section 3: "What are some potential rewards?"

At the bottom of the worksheet, it says "Creating Good Habits Worksheet" again.

One of the best parts of making Contactually a part of your daily life is that's what makes it really work for you and your goals. But unless you know your goals from the starting line, you'll have a hard time setting it up in the best way to achieve those goals in the first place.

Know your goals, form some good habits, and integrate Contactually into your life, and you're conquering day 2!



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Day 3: Create your buckets and bucket 200 contacts

Now that your contacts are in your Contactually address book and our platform has taken the steps to begin cleaning it up, it's time to segment your contacts into buckets. Bucketing your

contacts allows you to effectively segment your database. You can start by playing the 'Bucket Game,' which allows you to quickly move through the process of placing your contacts in their relevant buckets and making the segmenting a lot easier... and fun!



Referral Leads 🐾
Develop relationship, and convert to client



Current Clients 🐾
Nurture and grow the relationship.

Then, set follow-up reminder intervals for your buckets so that Contactually can remind you to follow-up with your prospects when the system detect that you've gone too long without reaching out.

If you're looking to start small, check out one of our blog posts that covers the best segments











for your relationships. This is a great way to break out your contacts into different categories that match up with your goals and business objectives in a more tangible way. Try creating a "Legends" bucket with 20 to 30 people in it and set the follow-up reminder frequency to 30 days. Once you're comfortable with this, you can continue creating buckets and bucketing your important contacts appropriately. [Check out the post here.](#)



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PRO TIP: Consider implementing this Contactually tip from our Customer Success team... They recommend creating a “Non-important” bucket for the people for whom you don’t want to receive follow-up reminders, and setting the follow-up reminder interval to “never” for that bucket.

This is a great way to ensure that your contact database stays nice and clean, you focus on the contacts that will have a positive impact on your business and you aren’t reminded to follow up with the people that aren’t important to you. Plus, you'll still have that list of contacts you aren't quite ready to delete from your life.

<input type="checkbox"/>	Name ▾	Bucket	Assigned
<input type="checkbox"/>	 Vicki Spencer vicki.spencer83@example.com Consumer Goods Manager at Fem Fetale	Referral Leads ▾	 Lester Graves ▾
<input type="checkbox"/>	 Nathaniel Bishop nathaniel.bishop21@example.com CFO at Time Change	Referral Leads ▾	 Lester Graves ▾
<input type="checkbox"/>	 Harper Jennings harper.jennings20@example.com Mentor at Mockingbird	Referral Leads ▾	 Lester Graves ▾
<input type="checkbox"/>	 Tommy Hopkins tommy.hopkins18@example.com Manager at Groves Trail	Referral Leads ▾	 Carla Reyes ▾
<input type="checkbox"/>	 Aaron Kim aaron.kim37@example.com Programmer at Map Trap	Referral Leads ▾	 Carla Reyes ▾



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Day 4: Understand how to set your follow-up reminders

If you're not receiving the most accurate follow-up reminders, it's time to examine the follow-up intervals that you've set for your buckets. Perhaps you've set too frequent of an interval for a particular bucket, and you end up with too many reminders that you ignore day after day. Maybe there are contacts that you know you haven't followed up with recently and haven't been reminded to do so. These contacts could be in a bucket with too long of a frequency. Whatever you're struggling with, adjusting your follow-up reminders could be the solution you're looking for! You can adjust your bucket settings by going to www.contactually.com/buckets



I want Contactually to remind me to follow up with important contacts.

Generate up to follow-ups for me at

Email these reminders

Email Settings

- 1
- 3
- 5
- 7

You might also benefit from increasing the number of follow-up reminders that you receive each morning in your General Settings. That way, you're getting a manageable amount when you log in that doesn't leave you feeling overwhelmed and possibly frustrated.



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Day 5: Act on at least one follow-up reminder per day

It's simple. Contactually wants you to reconnect with people who you otherwise would have let slip through the cracks. However, it can be a challenge to do this before you develop your "habit muscle" for this action.



The screenshot displays two rows of follow-up reminders in a list view. Each row includes a date indicator (Jun 23), a profile picture, the text of the reminder, the name of the contact, and two buttons: 'Approve' and 'Deny'.

Date	Contact	Action	Buttons
Jun 23	Marvin Jordan	Approve Step 3 in the New Leads program: Send message using New lead #2 template via Google account - Marvin Jordan	Approve, Deny
Jun 23	Joel Wright	Approve Step 3 in the New Leads program: Send message using New lead #2 template via Google account - Joel Wright via join.me	Approve, Deny

First things first: make sure that you're receiving your follow-up reminder digest email at a time during the day that's convenient to you each morning. You can set the time at which you receive this important email by accessing your General Settings. We recommend scheduling the email to be sent at the time at which you normally wake up and check your email, so that this important piece of communication is at the top of your inbox when you log in.

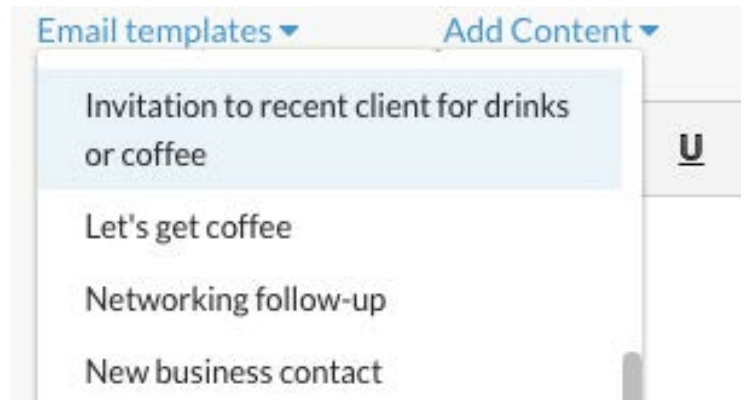
Now that you've started cementing follow-up related habits into your morning routine, let's take it a step further. Make it a goal to send at least one follow-up email to a person who may have recently popped up in your Contactually account who's relationship with you is at risk of going cold. So before you do anything else, build the habit of reaching out to them, whether it's work-related, email-related, or related to your personal life.



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Day 6: Set up at least 1 template for each of your important processes

Contactually is in the business of making sure that you get more business by staying in touch. We also realize that time is money, which is why we created a really robust email template feature -- to save you time and earn you mindshare and money.



We find that many of our users like to use our email templates to send highly personalized and relevant messages to their contacts in mass. Thanks to our dynamic fields, your templates will be automatically populated with key personal details that our system pulls directly from your contact profiles and inserts into the message after you've selected the recipient. In mere seconds, it'll seem like you spent several minutes crafting a very personal and thoughtful message, yet your contacts will have no idea that you used a template -- and they'll surely pay attention to your message.

To start, try creating one template that you can use with a particular bucket. You could also create a template along the lines of "hey, how's it going?" for your more general follow-up efforts. You'll find that the time that you saved writing individual follow-up emails will allow you to tackle more robust challenges at hand.



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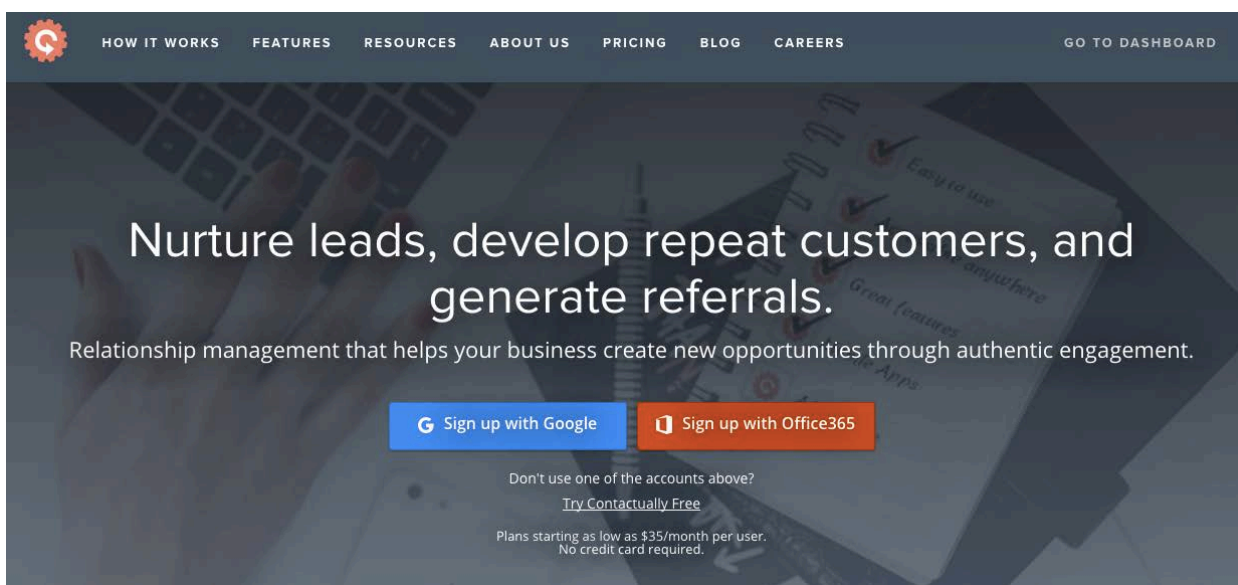
PRO TIP: You can add or edit your templated message after you select the recipient in the follow-up window. Your edits will only apply to the message directly in front of you, meaning that the original body of your template will stay the same for any time that you may use it in the future.



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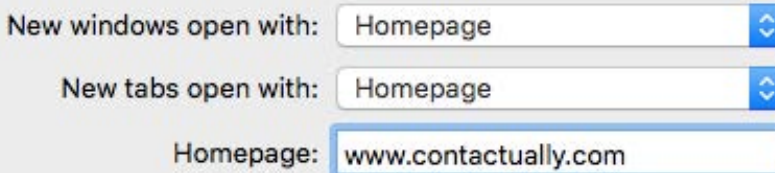
Day 7: Set Contactually as your default homepage for a week

You've been working really hard this week to best engage your network, and we're really proud of you. That's why we're giving you an easy task for the last day, but it's one of the things that will probably make the biggest impact on how often you login to Contactually...

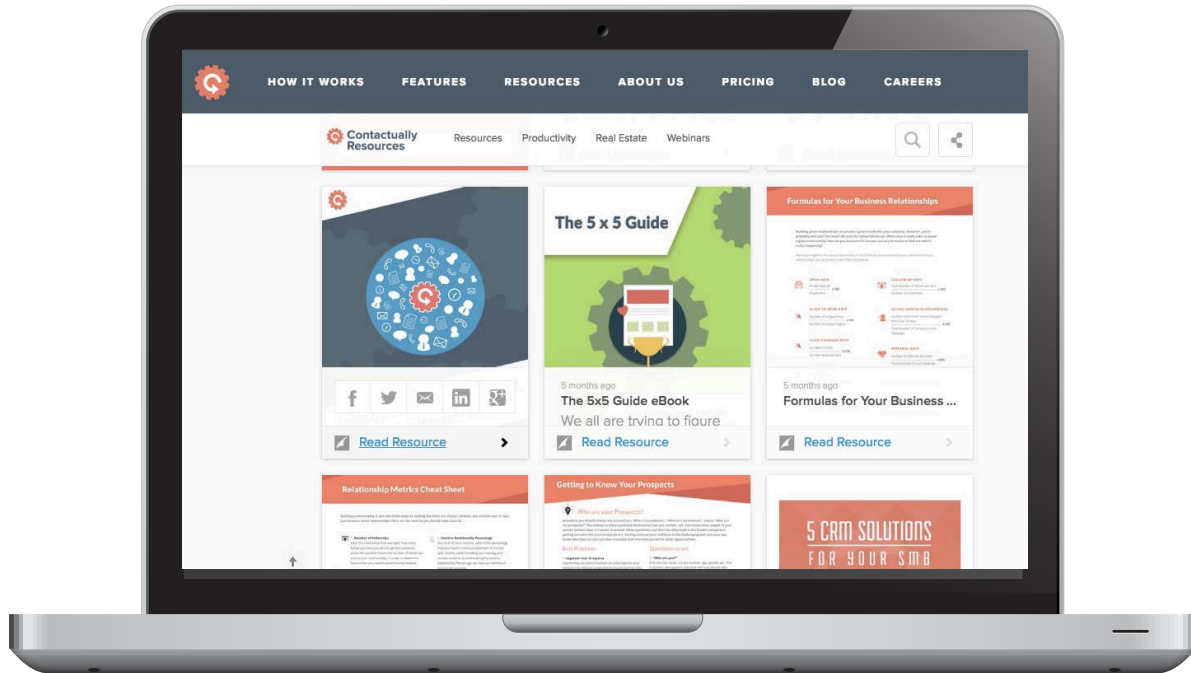


If you're looking for a surefire way to engage with Contactually, try setting your default homepage on your browser to contactually.com. That way, you'll see your recommended

actions each time you open a new browser window or tab. This should help you better engage with our platform. The only downside? You won't be able to make excuses anymore as to why you aren't actively using Contactually! You really have nothing left to lose, besides valuable business and money on the table!



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Now that you've fully integrated Contactually into your daily habits and you've got a week under your belt, it's time to really dig into it and find more ways that Contactually can help you fully own your network. Go ahead, [check out our resources page](#), get cozy with some of our eBooks and take your business relationships to the next level.

