TEAM TRAINING OUTLINE

Team Name: _____

This document is to help prepare your Customer Success Manager for the Team Training Call. Take a moment to think about the process you want your team to follow in inMotion. The idea is to show Staff users only what they need to see to get their jobs done. Be prepared to talk about your specific process as it relates to each section of the training. Please return this form to your Customer Success representative as soon as possible prior to your Team Training Call.

Proof Workspace
☐Post Proof for Review
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          ☐Workflows
          ☐Review Teams
     ☐Post Proof on Hold
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☐Reviewing Edits
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☐**Deadline Calendar**

Contacts
☐Adding Contacts
☐Adding/Editing Review Teams/Workflows

☐**Reporting**

Account
☐Proof Archive
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