

Let The Fun Begin!

When we start this process it is important to understand what you WANT to get out of it, what you NEED to get out of it, and what your BIG PICTURE GOALS are.

What you will need:

- A LastPass account so that we may securely access your social networks. (This will come in handy in the future)
- iPhone (or iOS system) or Android
- Grammarly (highly recommended, it's a free extension)
- Chrome Browser (We use chrome extensions & share Google Docs with you)
- LinkedIn Chrome Extension
- Pro version of LinkedIn (Business Solution or Sales Navigator)
- 500+ connections before you setup Pivotal Connect

Additional needed resources:

- Crystal Knows Account (Chrome extension)
- Premium Zoom Account. This will be used for virtual meetings and your webinars.
- Calendar Scheduling System (easy access to booking calls without a bunch of back and forth messaging)
- Zapier Account (if you want to use our advanced features like syncing to an outside CRM)
- Lead Pages (some sort of digital assets to build sales funnels on. This could be your website, Clickfunnels, lead pages, etc.)
- Clubhouse Account (It's new, it's trendy, it's a great place to meet people)
- SociaTap (Social Linking Tool)
- Sales CRM? (Not needed but can be useful) example; HubSpot
- Resume worded (Free instant feedback on your resume and LinkedIn profile)

You will now need to set up a free LastPass account using a personal email address and a personal master password. If you are not familiar with LastPass it is a free password protection vault that will allow you to share passwords securely with your team so that they are able to access your accounts without having your actual password. You will get 30-days free of the premium edition when it expires you do not need to pay for a subscription. The free version does everything you will need it to do.

To Add Last Pass Extension:

- Go to the Chrome Web Store
- Search for the Last Pass extension
- Click add to Chrome
- Pin it to the toolbar by clicking on the puzzle piece in the top right corner of your browser next to your brand icon, (picture, initials, or logo)

- Click on the Last Pass icon to create a new account.
- Enter your new email address, then click on create an account.
- Enter your master password. Click Next.

To Add LinkedIn Extension:

- Go to the Chrome Web Store
- Search for the LinkedIn extension
- Click add to Chrome
- Pin it to the toolbar by clicking on the puzzle piece in the top right corner of your browser next to your brand icon, (picture, initials, or logo)
- Log into LinkedIn so that you can add it to your LastPass vault.

Please Upgrade To The Professional Version Of LinkedIn:

- Pro version of LinkedIn (Business Solution or Sales Navigator)
- You are required to have a paid version of LinkedIn or you will be penalized for using its services at such a high volume on a free account.

Setup a Clubhouse Account If You Do Not Have One:

- It's invite-only and we can let you in if you need an invite (we will show you how to use Clubhouse to create an endless supply of current and relevant content)

Connecting Your LinkedIn Account To Pivotal Connect: You will want to finish going through this 1st course before you set up your Pivotal Connect account.

NOTE: This onboarding process should take about 15 to 30 minutes depending on your completion of the above steps and your technical ability to quickly navigate new software and LinkedIn.

- Please make sure you have turned off the two-step verification process on your LinkedIn account if you have it set up. This will prevent our software from staying connected to your account.
- Also, make sure your privacy settings are turned to 'public' so that you can be found and everyone can see your entire profile.