

Becoming a Penny Expert Checklist

This checklist will help you build your confidence in becoming a Penny expert!

Sync your Phone Contacts into Penny

There are 2 different ways you can sync your phone contacts.

TO DO: Sync your phone contacts into Penny.

[How to Import your Mobile Contacts article](#) ›

TO DO: Add in notes to different contacts in Penny.

[How to Update & Edit a Contact article](#) ›

TO DO: Add those additional communication paths to contacts so you can communicate to them through different channels.

[How to Link a Facebook profile article](#) ›

[How to Link an Instagram Handle article](#) ›

Create Content and Save Your Frequently Used Content

TO DO: Add content (don't forget to attach a picture to your content to make it more interesting for your contacts to want to open). Write out a generic script which you can send to any new Prospect. Make it short and genuine and include a question if you'd like to generate a response from them to start building the foundation of this new relationship.

[How to Create Your Own Content article](#) ›

Create Custom Categories for your Contacts with Tags!

TO DO: Create a custom tag on different contact profiles. Try adding your newly created tags to multiple contact profiles.

[What are Filter Tags and How to Use Them article](#) ›

Do the Daily! Take Steps Toward Getting New Customers and Team Mates

There are 2 ways you can complete Prospecting tasks.

TO DO: Complete a Prospecting task and set up the next time you'll speak to that contact. Don't forget your notes, tags, and any other additional information to their profile to keep the momentum going that you've started!

[How to View your Completed Tasks article](#) ›

[How to Place a Task into "Pending" article](#) ›

Do the Daily! Provide Amazing Customer Service

There are 2 areas/ways you can complete your Customer Care tasks.

TO DO: Complete a Customer Care task and set up the next time you'll speak to your customer. Be sure to add in notes, tags, or any other additional information to their profile you gained from the conversation.

[How to Create a new task article](#) ›

[How to Delete a task article](#) ›



Help Resources

Option 1: Self Serve

This way allows you to find the answers yourself to be self-sufficient, and not to mention, gain some tech savvy points in our books by navigating to the Help and Learning articles. There are articles that will walk you through the steps to find the answers to all of these tasks.

You can find the Help and Learning articles by:

On the mobile app go to the “More” section, select “Help & Learning”, selecting the “More Articles” button, then using the search bar at the top to type in keywords, i.e Customer Care Cycle, to help pull up the article that outlines the steps to complete the tasks on this checklist.

On the web app, go to the menu option on the left hand side, select “Articles & Videos”, then select “More Articles”.



Option 2: Ask for Help

This way allows you to speak to one of Penny’s world-renowned Customer Support experts who have the answers to any of your Penny related questions or are there for you if you’d just like to chat and exchange funny memes and emojis.

You can speak to one of Penny’s Customer Support representatives by:

Going to the “More” section, select “Live Chat”, select the “Send us a message” button, then type in your question there and wait for a Customer Support Representative to jump in to help.

