

## **InterAction Essentials - Frequently Asked Questions**

### **Which track is best for me?**

The InterAction Essentials course is a role-based course with 3 specific tracks.

The Administrators track has 4 sessions. It is best suited for those who are responsible for administering and configuring InterAction.

The Marketing track, with 3 sessions, is ideal for a professional who uses InterAction to support the firm's Marketing and Business Development strategy and vision.

The Data Steward track, with 3 sessions, is the right course for those who are responsible for maintaining the firm's InterAction data. This role handles the day-to-day contact accuracy and maintenance.

### **Am I required to take each session in my track?**

No, it is not mandatory for a student to take each session in any track. Our recommendation is that you take the Fundamentals Concepts session, however, if you have little familiarity with InterAction, CRM or Relationship Intelligence. The subsequent sessions assume you have a working knowledge of these concepts as there is no repeat of this information.

### **I have more than one person who needs to take a class. Does each person need to register for a seat?**

Yes, our policy is that each attendee registers for a seat in our class. This is a live, interactive session with a certified InterAction trainer. We limit the number of seats to 12 to ensure that each student gets a full experience and ample opportunity to ask questions. In addition, each student receives a private and individual connection to our virtual training environment to enable hands-on practice.

### **When I register for all classes for my track, why are some classes missing?**

If you wish to take the entire course in a certain track, click "Register for all classes."

Immediately, you will notice that one or more classes may be missing from your schedule.

This is simply due to the way we organize the online meeting process. Once your method of payment is processed, usually between 24-48 hours, all classes in your track will appear on your "My Courses" page.

### **Where do I get all the materials I need for the class?**

When the dates of the session approach, you will receive an email communication from your trainer. He/She will provide you with all the necessary materials and connection information for each session in your track.