



## **Toastmasters Lead Management (TLM) Training Links**

### **Toastmasters International and Insightly – Role Training Videos**

*These videos have been produced by Insightly.com in collaboration with Toastmasters International and pertain to specific TLM roles and responsibilities.*

- [Club Extension Chairs](#)
- [District Directors and Club Growth Directors](#)

### **Toastmasters International - “How to” Training Videos**

*These videos have been produced by Toastmasters International and pertain to specific TLM procedures that directly relate to utilizing the system for club building/lead management.*

- [How to access the TLM](#)
- [How to add a lead to the TLM](#)
- [How to assign the “User Responsible”](#)
- [How to change a lead or opportunity status](#)
- [How to convert a lead into an opportunity](#)
- [How to move through the pipeline](#) (*pipeline stages are out of date; process remains the same*)

### **Insightly University - “How to” Training Videos**

*These videos have been produced by Insightly.com and generalized to accommodate their diversified clientele (may not directly relate to how Toastmasters International and how districts conduct business).*

- [101: Introduction to Insightly](#)
- [102: Linking Items Together](#)
- [103: Working with Contacts](#)
- [104: Managing Tasks](#)
- [105: Capturing and Winning Opportunities](#)
- [107: Working with Email](#)
- [108: Events and Calendars](#)
- [109: Using the Gmail Gadget](#)
- [110: Working with Tags](#)
- [111: Notifications and Following Items](#)
- [118: Creating and Using Filters](#)
- [119: Bulk Editing](#)

Additional questions may be directed to your Club Growth Director or to Trenton Berry, Marketing Program Coordinator at Toastmasters International, at [CorporateRelations@Toastmasters.org](mailto:CorporateRelations@Toastmasters.org).