

## **SAM Suite® FAQ's** (Frequently Asked Questions)

- **What is the SAM Suite®?**
  - It is a customizable Performance Measurement & Coaching Platform for Producers & Sales Teams that is scalable with roll-up capability. All 3 module options are Goal-oriented, Activity-based, Metrics-driven and synchronized across the Web and App versions.
- **Why is the SAM Suite® considered a Coaching Platform?**
  - There are many elements within the SAM Suite® where coaching and training opportunities exist. Some examples are: Setting Goals & Keeping Score within the SAM Suite®, the SAM Coaching Session and Coaching to the Numbers from the Reports comparing Activity vs. Goals. The **SAM Suite®** is a *customizable* coaching platform that enables individual producers or study groups and advisor teams to set goals, keep score, manage business and assess performance.
- **What is the Pipeline/Calendar Module, i.e., SAMBOOK?**
  - It is an electronic calendar that allows you to keep track of sales activities, manage you pipeline and see the names behind the numbers.
- **What is the Scoreboard Module, i.e., SAMBOARD?**
  - Formerly called eScoreBoard™, this metrics-driven tool makes it easy for Producers and Managers to set goals, keep score...and manage the Activity and Metrics that drive business.
- **What is the SAM Suite BUNDLE?**
  - It syncs the best attributes of SAMBOARD™ and SAMBOOK™ in one location, including daily motivational quotes, quick stats, the ability to customize categories & ratios around your culture
- **What if I want to change my account to another SAM Suite Version?**
  - If you are interested in just tracking numbers, you can change your account over to a SAMBOARD account\*
  - If you are interested in tracking both Names and Numbers, you can change your account over to a SAMBUNDLE account\*
- **Am I locked into a long-term Contract?**
  - If you sign up for an Annual account, you have pre-paid for the year and at the end of that timeframe you can let us know you would like to cancel, and you will not be charged for an additional year. If you do not let us know we will send you a reminder prior to the end of the year and if no action was taken you will be renewed.
  - If you sign up for a Monthly account, you have pre-paid for the month only. and at the end of that timeframe you can let us know you would like to cancel, and you will not be charged for an additional month. At the end of

\*when changing to a different account an additional cost may occur. You will be pro-rated if on an annual account. If you are on a monthly account, the change will go into effect the next month.

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the month you will be notified you will be charged on the renewal dates. If you do not take any action your account will be renewed.

- **What devices are the App available on?**
  - The **SAM Suite®** App is available on the IOS (Apple) platform and the Android is slated for late 2022.
- **Can I use the SAM Suite® App on a tablet?**
  - Of course, you can! The **SAM Suite®** was built on a responsive design platform which means anything you would like to have access to that can be found on your computer would be accessible on a tablet screen. Currently there is not an App for tablets.
- **Can I share my SAM Suite® account with someone else?**
  - **SAM Suite®** is accessible by your username and password. If you would like to share that information with someone else, you can. That would allow them to log into your account.
  - If you are using the **SAM Suite®** App, any changes made to the account from the Web would be visible right away within the App.

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