Easily find contacts with CSA

Stay organized and speed prospecting

What you know and who you know are essential to your success. CSA provides you with instant access to key contacts and valuable contact insights.



Convert your client list to a contact list in just seconds!



Quickly find contacts

or sales action.

Use a rich set of CSA contact filters - name, job role, job level, phone, email, and more – to identify the right contacts. Then, click for direct access to Client360 and Contact360 details.



Get deeper insights into your contacts

View your contact's online profiles and gain insights that can help you develop your valuedriven outreach plan using the Social link in Contact360.

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Contacts worldwide			
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Job title	Favorit	es Call backs Renewals	
Job level			
Job role			Canon Usa Inc

See how CSA contact lists can work for you! Organize your contacts into color-coded contact lists based on client, LoB, project, offering, job role, behavior,

Select the push pin icon to set any contact list as your default displayed contact list on your next CSA login.

+	- Favorites		
+	- Call back: 5- 9 February 2018		
+	- January 2018 contacts		
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Coronel, Jay		360 (+	Office: +10516
Dire	ector, Manager (business Manag		jcoronel@1800
Ad	ld to a list +		

Get more done

Create an opportunity in CRM right from the Contact list screen or from *Contact360*. Easily update contact data, too.

Build a contact list to guide your prospecting activities in just seconds!

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1. Create a targeted, actionable, contact list when you **Refine** your contacts based on job title, location, communication preferences and more.

*Standard contact lists are limited to 15,000 contacts. To send to ProspectReach, you must be a ProspectReach user. Emailing within CSA is limited to contacts lists of 1000 or fewer.

- 2. The **drop-down arrow** displays your existing contact lists and the option to create a new contact list.
- 3. The Actions button enables contact list management tasks such as adding contacts to list, moving contacts to another list, or removing contacts from a list. ProspectReach users see additional contact list use and management options.
- 4. The dark pink circle with a white W icon near the right column identifies white space contacts.
- 5. View the **CRM column** status to determine if you need to add this contact to Atlas.

Click here for more information about CSA Contacts capabilities. Work smarter. Log in to CSA today. ibm.biz/cognitivesalesadvisor

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