

# Identifying Catalyst Opportunities for Existing Clients

## EPIC Users Segment Their Customer Data In a Variety of Ways



Regardless of your segmentation strategy, you can still use EPIC to determine the Everything DiSC® on Catalyst™ upgrade opportunities for your existing clients. The key is to identify access codes that can be used as existing data for free Catalyst upgrades. You can then contact your client with a clear picture of the opportunity to try Everything DiSC on Catalyst risk-free.

The directions below offer some tips on identifying those qualifying reports.

## FOLDERS

1. Click **Manage Your Account** on the EPIC navigation menu.
2. Click **Profile Completion - Detail** under the *Account Activity Reports* option.
3. Select the date range.
4. Select **Everything DiSC** from the **Product Family** dropdown list.
5. If you want to see all the potential reports that can be used for a Catalyst upgrade, you do not need to select a product. However, if this client has used more than one product, you can target a single product by selecting it from the **Product** dropdown list.
6. Select the appropriate folder from the **Folder** dropdown list.
7. Select the appropriate sub folder from the **Sub Folder** dropdown list, if applicable.
8. Select the file format. Note, the Excel format allows for sorting the data.
9. Click **View Report**. The resulting file lists the individual reports and each respondent's name that could migrate to Catalyst for free. Since an individual may have multiple reports, sorting the file by the Name column will help identify duplicates.



## SUB ACCOUNTS

1. Click **Manage Your Account** on the EPIC navigation menu.
2. Click **Profile Completion - Detail** under the *Sub Accounts* option.
3. Select the date range.
4. Select the sub account(s).
5. Select the file format.
6. Click **View Report**. The resulting file lists the total number of reports sorted by product that can migrate to Catalyst for free.



## NO SEGMENTATION

1. Click **Manage Reports** on the EPIC navigation menu.
2. Click **View/Print/Email Completed Reports**.
3. Select **Everything DiSC** from the **Product Family** dropdown list.
4. If you want to see all the potential reports that can be used for a Catalyst upgrade, you do not need to select a product. However, if this client has used more than one product, you can target a single product by selecting it from the **Product** dropdown list.
5. Enter the customer's email domain in the **Email** field. The domain is everything that appears after the @ in an email address. For example, *company\_name.com*.
6. Click **Search**. The total number of reports that can migrate to Catalyst for free appears at the top of the search results.

**Once you've identified which learners are eligible for an Everything DiSC on Catalyst upgrade, use our job aid Catalyst Upgrades for step-by-step instructions on administering upgrades in EPIC.**

