TLM Frequently Asked Questions

Question	Answer
Is there a program manual or webinar recording to help with learning the program?	The TLM Best Practices and Guidelines document and a TLM Webinar recording can be found on www.toastmasters.org by searching *Club Growth Director Resources.*
Who do we contact with questions or to report program error messages?	Please contact the Corporate Relations Team by emailing corporaterelations@toastmasters.org.
How do I access the Toastmasters Lead Management (TLM) program?	The TLM may be accessed by logging into www.toastmasters.org using your Toastmasters International (TI) credentials. Once logged in, click on Leadership Central in the toolbar and then click on District Central from the drop-down menu.
What are my Toastmasters credentials (i.e. the username and password for the TLM)?	Your credentials are your email address registered with TI WHQ and your password is what you created at the time you joined. To reset your password, click on Reset Password on the login screen.
Who will have access to the TLM: DD, CGD, PQD, etc.?	Access to the system is granted to those with District Central access. This includes all district officers reported to the TI WHQ Districts Team. The Club Extension Chair is also granted access upon request. Please contact the Districts Team at districts@toastmasters.org by July 15 to report your officer list and request access.
How do you assign the team member who will be responsible for the lead?	A lead is assigned to an owner by entering their First and Last Name in the Assigned Owner field at the top of the Lead/Opportunity Record.
Who can view and/or edit leads in the TLM? (i.e. aid with collaboration)	Changes to lead records can be made by any district officer or member of your District Marketing Team that has access to District Central. Please establish a process for editing leads that works best for your team.
Will all members of my District Marketing Team see all leads even if they are assigned to only a few lead records?	All district officers with access to District Central can see all leads assigned to your district. If a member of your District Marketing Team is not a district officer or a Club Extension Chair, you may export the TLM List View to Excel to share lead information.
Are we able to change the team members during the TM year if needed (e.g. mid-term)?	If situations arise where team members need to step down, please notify Districts at districts@toastmasters.org to report the officer role change. The new officer will be granted access to District Central at that time.
Will the TLM send an email notification when a lead is added?	An email notification will be sent to the Club Growth Director upon the first time the lead is assigned to the CGD. If the lead is reassigned, a notification email will not be sent. Please use diligence in communicating when a lead is reassigned.
Can the lead information in the TLM be exported to excel?	Data from the TLM can be exported to Excel using Export. Click on Export in the TLM List View. An Excel spreadsheet will automatically download and can be found in the Downloads folder on your computer.
Will the leads from TI WHQ go directly into the TLM?	Leads received through the Start a Club online form or by email to TI WHQ will be added to TLM and assigned to the respective district's CGD. Once received, the CGD can then reassign the lead to the appropriate contact on their team.
Will TI WHQ ever go into the TLM to edit a lead record?	TI WHQ will conduct annual clean up of records where there has been no activity after six months (e.g. pipeline stage change, email, notes, etc). Otherwise, TI WHQ does not alter records within the TLM.
How will data be transferred to incoming leaders for the new program year or districts going through reformation?	Lead owners should be reassigned as necessary by the CGD or DD. Please reference the TLM Best Practices and Guidelines for instruction.