2. Importing contacts and building starter groups

Greg Smith - 2026-11-17 - Comments (0) - Coaches

TUTORIAL 2

Importing contacts and building starter groups

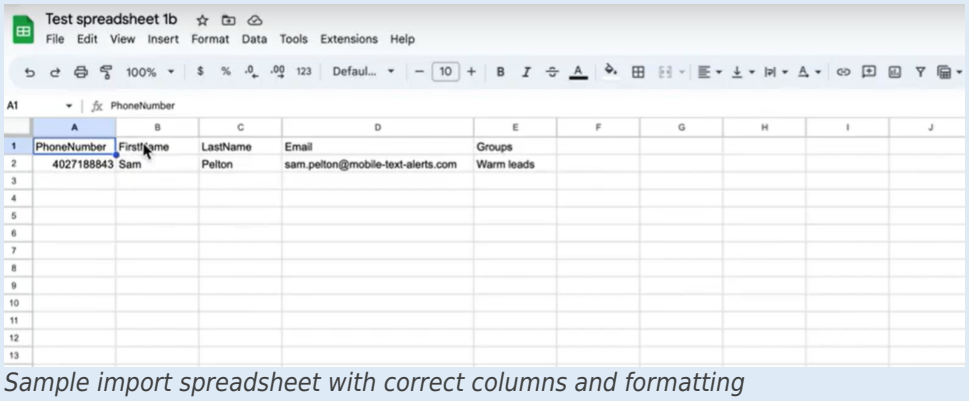
Clean your file and plan your groups before you import, then spot-check a few contacts before your first send. One large, unstructured list is the most common setup mistake.

Recommended starter groups for coaches

Group	Typical use
Leads	Follow-up and promotions
Active clients	Session reminders and program updates
Event registrants	Webinar and masterclass reminders
Program or cohort members	Weekly calls and accountability prompts
Alumni	Re-engagement and new offers

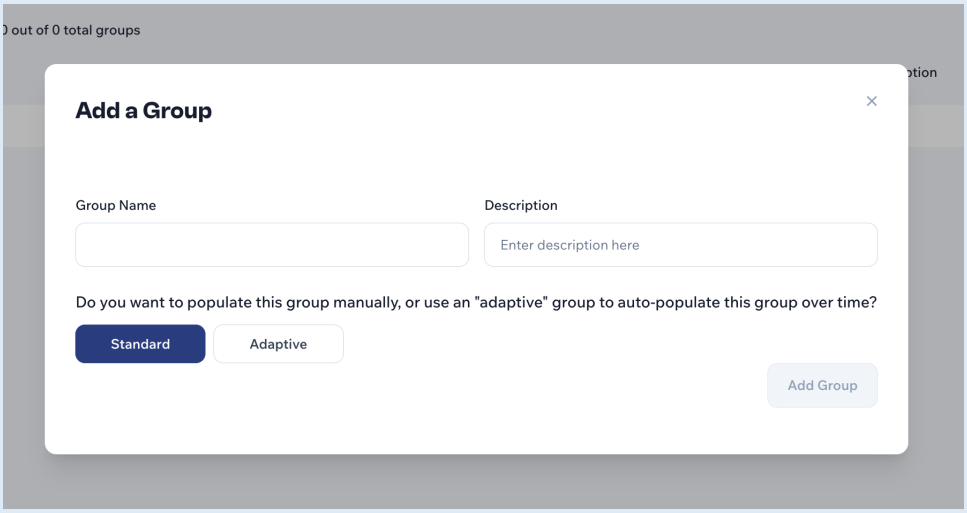
Steps

1. **Clean the file: remove duplicates, check that every phone number is complete, and fill in the required columns.**



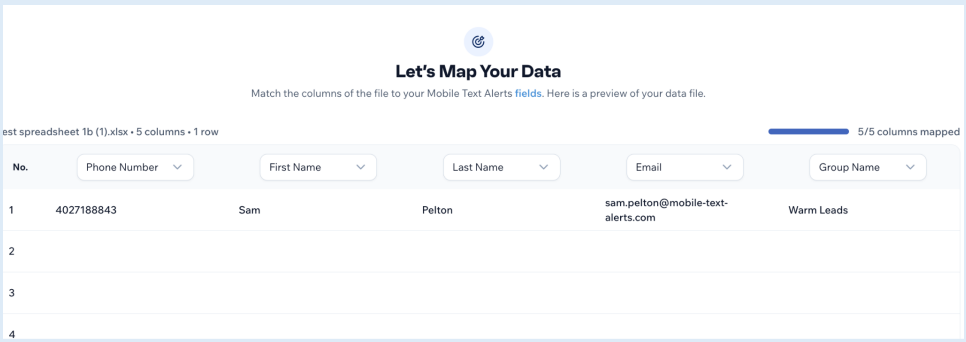
Sample import spreadsheet with correct columns and formatting

1. **Create your groups in the platform before importing.**



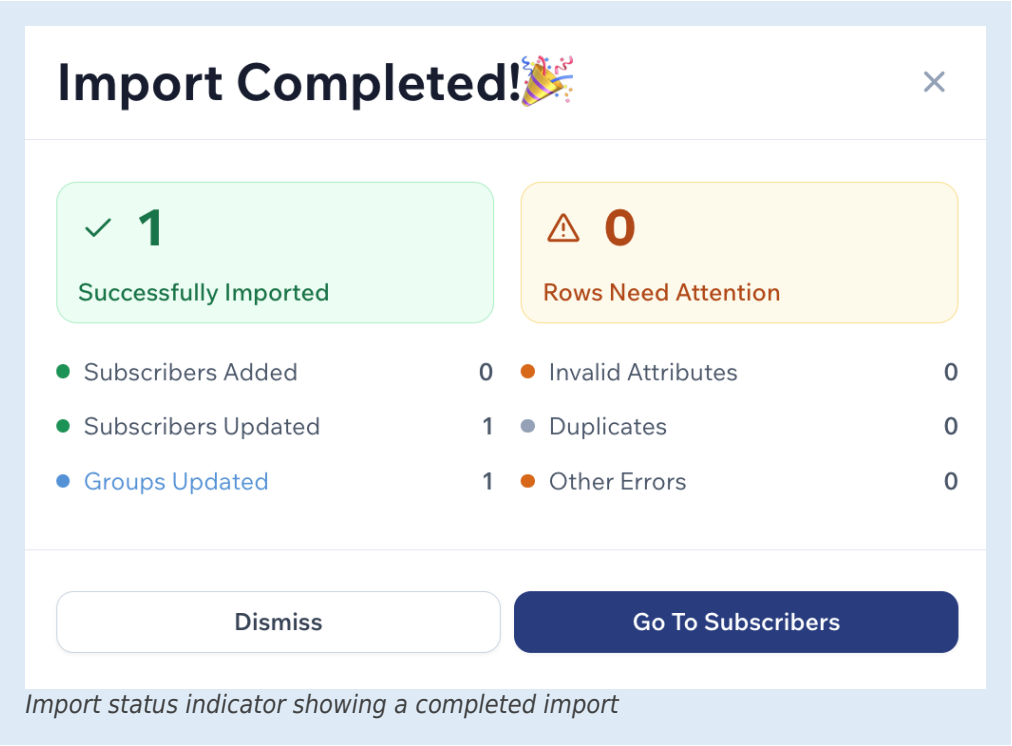
Create group screen

1. **Upload the file and assign contacts to the right group.**



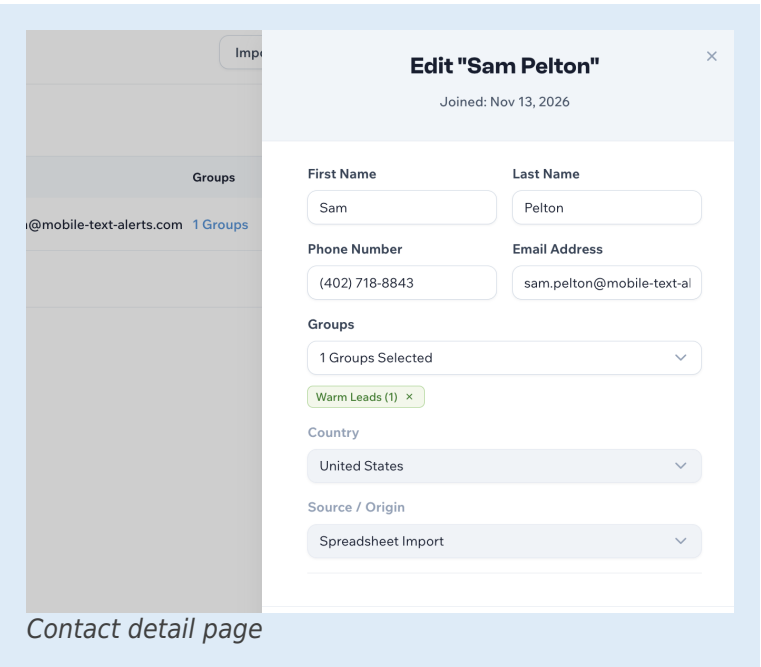
Import screen with file selected and group assignment visible

1. **Check the import status.**



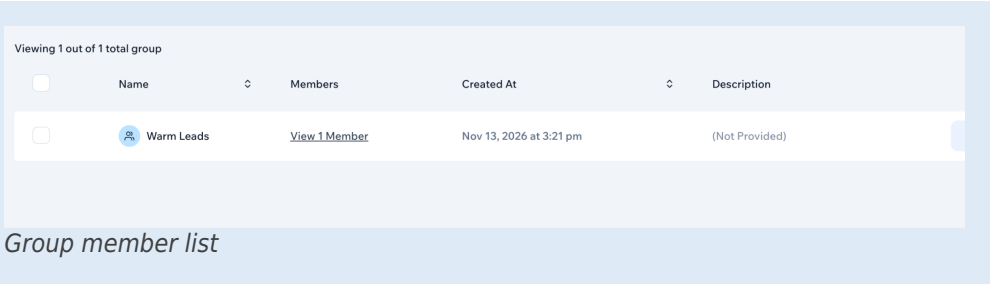
Import status indicator showing a completed import

1. **Open a few imported contacts and confirm names, numbers, and groups came through correctly.**



Contact detail page

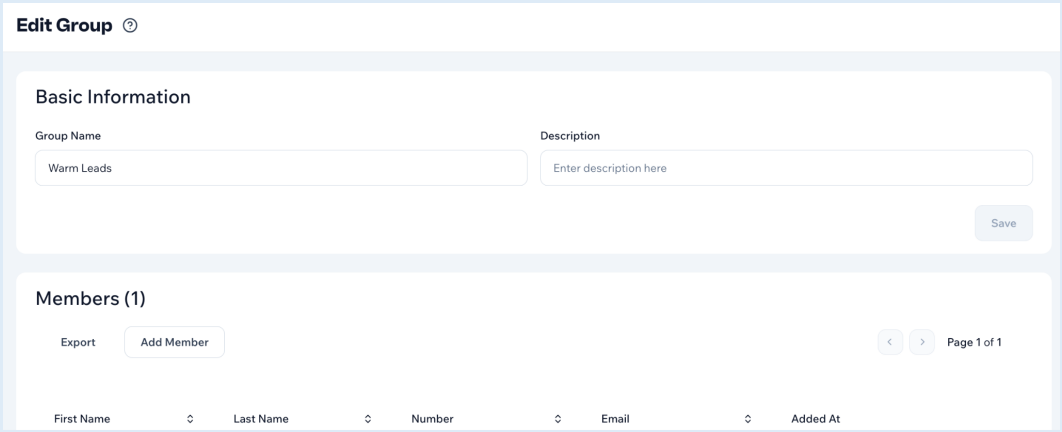
1. **Open a group or category to see everyone assigned to it.**



Group member list

Troubleshooting

If you get an error when editing a group, open the group's details page directly and make the change there. If it still fails, contact support with a screenshot.



Group details page, showing where to edit