

Office Influence

Admin Module

Managing Your Clients



Coach's Guide

Login Process

The login process contains three components, a Company Code, Login ID, and Password. Your Company Code and Login ID will be created for you. Your Company Code cannot be changed, and your Login ID can only be changed via a request to the system administrator. This is done for security purposes. Your Password can be changed via the "Account" menu option.

Once Logged in, the following screen will be displayed.

Please Note: The picture in the below image will be replaced by the logo of your sponsoring company.



Office influence is the ability to move a person’s thinking, actions and/or decisions in a way that forwards your business objectives

Menu Option: Account

The “Account” menu option allows you to update your contact information and password. Please keep your information up to date to assure you can be reached when needed.

Also please take note of the “*Your Custom Partner Link*”. This is the link to be given to your coaching clients to access the influence assessment and 360. It brings them to the website www.OfficeInfluencePartner.com, which shows your company name or logo and connects the client to your account so you can access their reports.

The screenshot shows the 'Office Influence Administration Center' interface. On the left is a navigation menu with categories: Account Info (Home, Account, Upload Logo, Logout), Client Management (Coaching - Open, Coaching - Closed, Coaching - All), and Accounting (Purchase New Licenses). The main content area is titled 'Account Maintenance: Mary Smith' and contains a form with the following fields:

- Login ID: demo1 (Note: To change you Login ID you must ask your system administrator)
- Password: [masked]
- First Name: Mary
- Last Name: Smith
- Your Custom Partner Link: https://www.officeinfluencepartners.com?Partner=3871NXF43GZ
- Company Name: Chameleon Company
- Job Title: [empty]
- Email: mary@chameleon.com
- Phone Number: 5088810355
- Street Address 1: 72 Lake Street
- Street Address 2: [empty]
- City: Nowhere
- State: MA
- Zipcode: 12345
- Country: United States
- LinkedIn: [empty]
- Twitter: [empty]
- Personal Desc: [text area]
- Notes: [text area]

An 'Update User' button is located at the bottom of the form. A copyright notice '(c) Eric P. Bloom, All Rights Reserved' is visible at the bottom of the page.

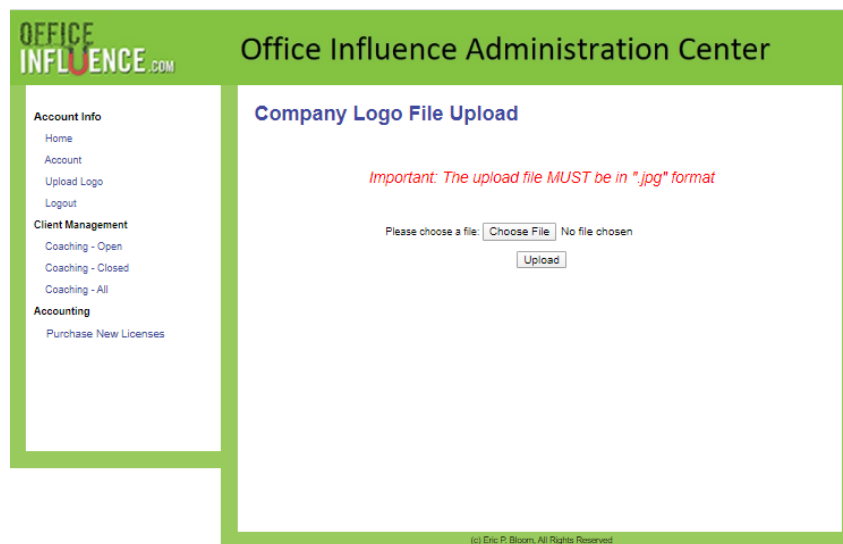
Menu Option: Upload Logo

As the name alludes, this is the menu option that allows you to upload your logo. This logo MUST be a .JPG file or it will not display. Your logo is shown in the header of www.OfficeInfluencePartner.com when people access the website using the link previously described in the “Account” section of this document.

Your logo must fit within the size of 80 pixels high by 1000 pixels wide, if not, it will not display correctly.

Please note: If you upload a modified version of your logo and the old version is still displayed, clear the “cached images and files” in your browser and the new image will appear.

If you choose not to upload a logo, the company name you entered in the Account Maintenance page will be displayed instead.



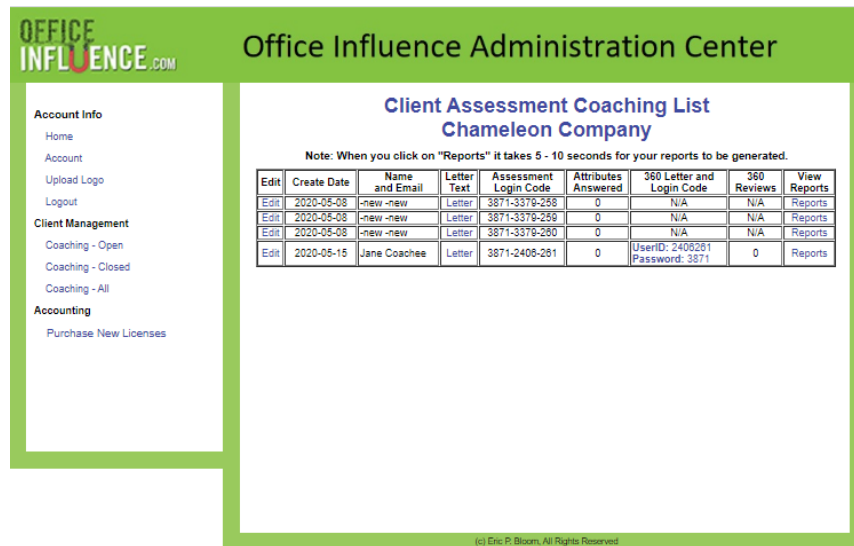
Menu Option: Coaching – Open/Closed/All

This is your main client dashboard; it provides information to all your clients’ data.

A client is considered open or closed based on the “Close Date” field on their Client Info page using the following logic:

- Close Date field is empty: Client is open
- Close Date is today or in the future: Client is open
- Close Date is in the past: Client is closed

A closed client can be reopened simply by changing or removing the date in the Close Date field. This field is reached by clicking on the “Edit” column as described below.



Office Influence Administration Center

Client Assessment Coaching List
Chameleon Company

Note: When you click on "Reports" it takes 5 - 10 seconds for your reports to be generated.

Edit	Create Date	Name and Email	Letter Text	Assessment Login Code	Attributes Answered	360 Letter and Login Code	360 Reviews	View Reports
Edit	2020-05-08	-new -new	Letter	3871-3379-258	0	N/A	N/A	Reports
Edit	2020-05-08	-new -new	Letter	3871-3379-259	0	N/A	N/A	Reports
Edit	2020-05-08	-new -new	Letter	3871-3379-260	0	N/A	N/A	Reports
Edit	2020-06-15	Jane Coachee	Letter	3871-2408-281	0	UserID: 2408261 Password: 3871	0	Reports

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This table has the following columns and functions:

- Edit:** This column allows you to view and edit the client’s contact data and update their “Close Date” field. It also allows you to enter client notes as desired.
- Create Date:** This column contains the date you purchased the assessment.
- Name/Email:** This column is the client’s name and email. Please note that when you first purchase an assessment the first and last name are set to “-New”.
- Letter Text:** This column displays example text for a client containing their login and assessment instructions. This text can be cut, pasted, and modified to meet your client’s needs.



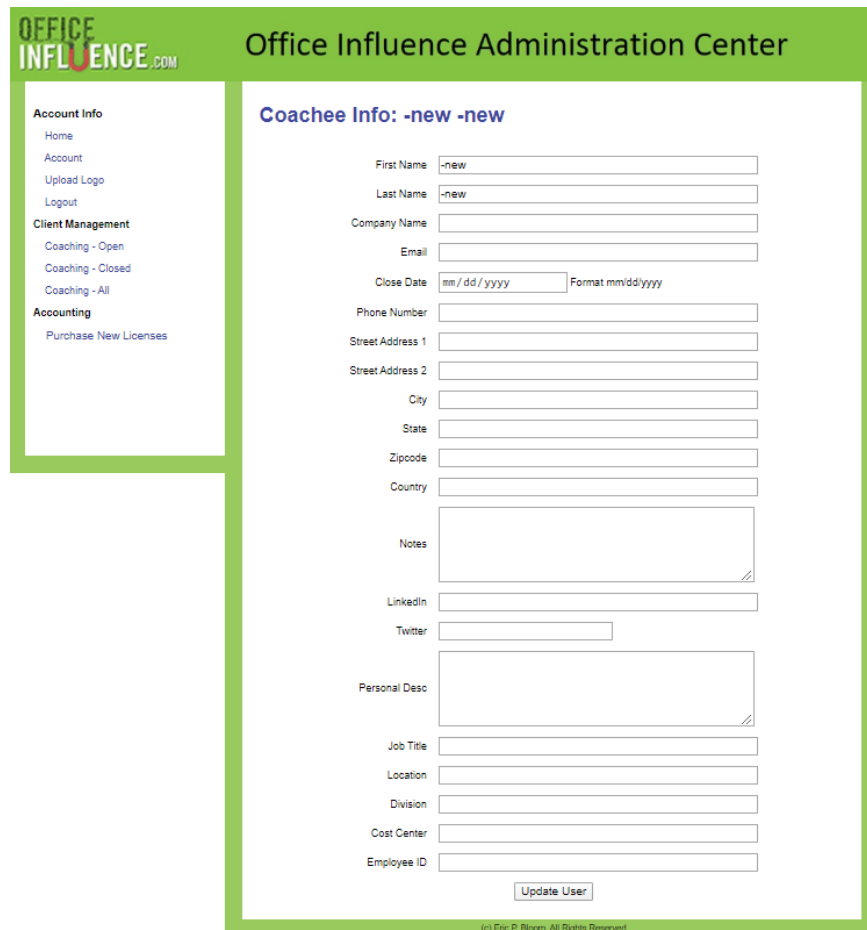
Office influence is the ability to move a person's thinking, actions and/or decisions in a way that forwards your business objectives

- Assessment Login Code: This is the login code to be given to your client to login to the system. **Please note** that this code will only work on the www.InfluencePartners.com website using the link listed in your account info via the "Account" menu option.
- Attributes Answered: This number represents the attributes for which they entered values. The number 53 shows they have completed the assessment.
- 360 Letter/ Login Code: This column contains "N/A" if you only purchased the assessment. IT will contain a 360 login and password if you purchased the "Self and 360 Assessment" combination. Clicking on the UserID/Password will display example text to be given to those included in the client's 360 assessment process.
- 360 Reviews: This lists the number of 360 reviews that have been completed. If you click on the number, you will see a list of people who have completed the 360 assessment.
- View Reports: When clicked, this field displays the list of client reports.
NOTE: When clicked, it takes approximately 5 – 10 seconds to display the report.

Coaching List Column: Edit

The “Edit” column link of the “Coaching List” table allows you to update your client’s contact information and Close Date. Please keep this information up to date to assure you can easily reach your client when needed.

Please note that when the Close Date is changed, the client will immediately be moved to the appropriate “Coaching open/close” list.



OFFICE INFLUENCE .COM Office Influence Administration Center

Coachee Info: -new -new

Account Info
 Home
 Account
 Upload Logo
 Logout
 Client Management
 Coaching - Open
 Coaching - Closed
 Coaching - All
 Accounting
 Purchase New Licenses

First Name
 Last Name
 Company Name
 Email
 Close Date Format mm/dd/yyyy
 Phone Number
 Street Address 1
 Street Address 2
 City
 State
 Zipcode
 Country
 Notes
 LinkedIn
 Twitter
 Personal Desc
 Job Title
 Location
 Division
 Cost Center
 Employee ID

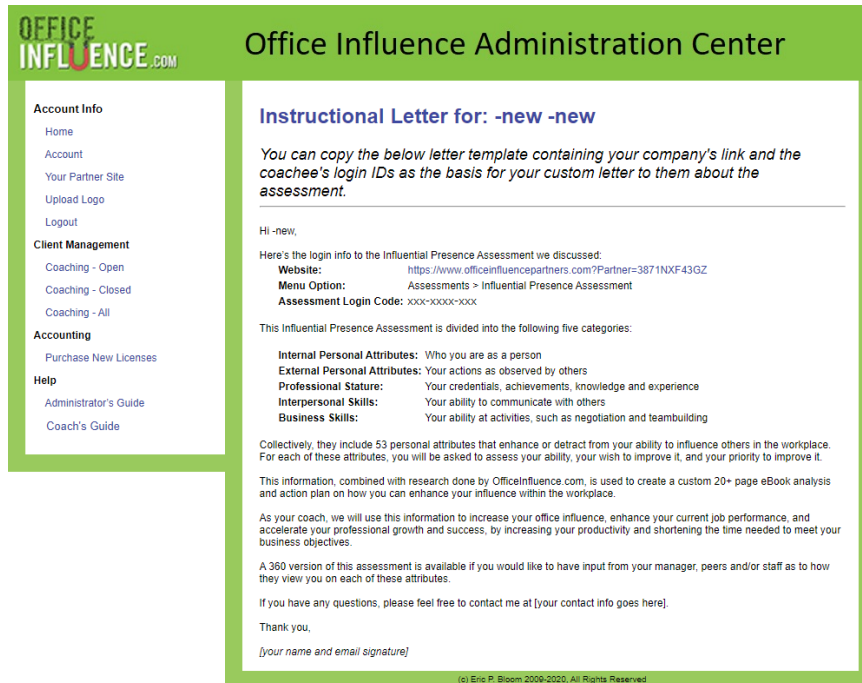
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Coaching List Column: Letter

This is the boilerplate letter that is displayed when the “Letter” column is clicked.

This text can be cut, pasted, and modified to meet your client's needs.

As you will see, each time this letter is displayed, the client's name and Login ID is changed based on the row within the “Coaching – Open/Closed/All” table that is selected.



OFFICE INFLUENCE.COM Office Influence Administration Center

Account Info
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Account
Your Partner Site
Upload Logo
Logout

Client Management
Coaching - Open
Coaching - Closed
Coaching - All

Accounting
Purchase New Licenses

Help
Administrator's Guide
Coach's Guide

Instructional Letter for: -new -new

You can copy the below letter template containing your company's link and the coachee's login IDs as the basis for your custom letter to them about the assessment.

Hi -new,

Here's the login info to the Influential Presence Assessment we discussed:
Website: <https://www.officeinfluencepartners.com?Partner=3871NXF43GZ>
Menu Option: Assessments > Influential Presence Assessment
Assessment Login Code: xxx-xxxx-xxx

This Influential Presence Assessment is divided into the following five categories:

- Internal Personal Attributes:** Who you are as a person
- External Personal Attributes:** Your actions as observed by others
- Professional Stature:** Your credentials, achievements, knowledge and experience
- Interpersonal Skills:** Your ability to communicate with others
- Business Skills:** Your ability at activities, such as negotiation and teambuilding

Collectively, they include 53 personal attributes that enhance or detract from your ability to influence others in the workplace. For each of these attributes, you will be asked to assess your ability, your wish to improve it, and your priority to improve it.

This information, combined with research done by OfficeInfluence.com, is used to create a custom 20+ page eBook analysis and action plan on how you can enhance your influence within the workplace.

As your coach, we will use this information to increase your office influence, enhance your current job performance, and accelerate your professional growth and success, by increasing your productivity and shortening the time needed to meet your business objectives.

A 360 version of this assessment is available if you would like to have input from your manager, peers and/or staff as to how they view you on each of these attributes.

If you have any questions, please feel free to contact me at [your contact info goes here].

Thank you,
[your name and email signature]

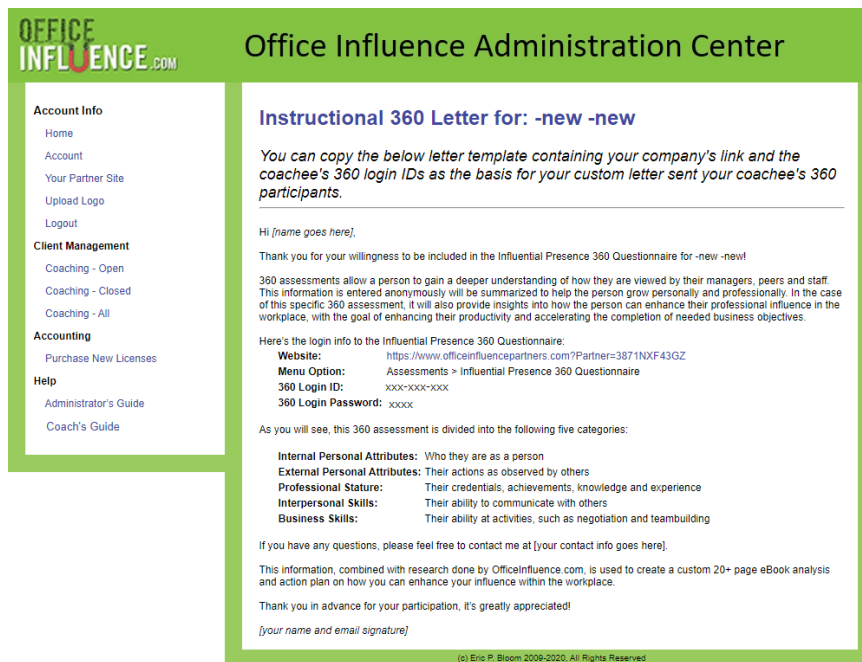
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Coaching List Column: 360 Letter and Login Code

This is the example letter text that is displayed when the “UserID/Password” link is clicked.

This letter can only be reached if you purchased the “Self and 360 Assessment” combination for client.

As you will see, each time this letter is displayed, the client’s name and Login ID is changed based on the row within the “Coaching – Open/Closed/All” table that is selected. You will, however, be required to enter the name of the person receiving the letter.



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Instructional 360 Letter for: -new -new

You can copy the below letter template containing your company's link and the coachee's 360 login IDs as the basis for your custom letter sent your coachee's 360 participants.

Hi *[name goes here]*,

Thank you for your willingness to be included in the Influential Presence 360 Questionnaire for -new -new!

360 assessments allow a person to gain a deeper understanding of how they are viewed by their managers, peers and staff. This information is entered anonymously will be summarized to help the person grow personally and professionally. In the case of this specific 360 assessment, it will also provide insights into how the person can enhance their professional influence in the workplace, with the goal of enhancing their productivity and accelerating the completion of needed business objectives.

Here's the login info to the Influential Presence 360 Questionnaire:
Website: <https://www.officeinfluencepartners.com?Partner=3871NXF43GZ>
Menu Option: Assessments > Influential Presence 360 Questionnaire
360 Login ID: xxx-xxx-xxx
360 Login Password: xxxxx

As you will see, this 360 assessment is divided into the following five categories:

- Internal Personal Attributes:** Who they are as a person
- External Personal Attributes:** Their actions as observed by others
- Professional Stature:** Their credentials, achievements, knowledge and experience
- Interpersonal Skills:** Their ability to communicate with others
- Business Skills:** Their ability at activities, such as negotiation and teambuilding

If you have any questions, please feel free to contact me at *[your contact info goes here]*.

This information, combined with research done by OfficeInfluence.com, is used to create a custom 20+ page eBook analysis and action plan on how you can enhance your influence within the workplace.

Thank you in advance for your participation, it's greatly appreciated!

[your name and email signature]

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Coaching List Column: Report

This is your main report generation page.

NOTE: When clicked, this page takes approximately 5 - 10 seconds to display. The delay is because all your reports are being generated. These reports are all in PDF format and are not given directly to the client. They are only presented here allowing you, their coach, to present them their findings/analysis.



These reports are:

Self-Assessment Results and Recommendations

This report is a 20+ page personalized eBook containing the following sections:

1. Introduction
2. Influence Profiles Description
3. Your Influence Profile (Your results start here)
4. Your Influence Enhancement Roadmap
5. Enhancing Your Personal Internal Attributes
6. Enhancing Your Personal External Attributes
7. Enhancing Your Professional Stature
8. Enhancing Your Interpersonal Communication Skills
9. Enhancing Your Business Skills
10. Your Action Plan
11. Cross-Attribute Analysis

Appendix A: Your Strongest Influence Attributes

Appendix B: Your Self-Rating on the Top 20 Most Important Attributes



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Attribute Definitions and Importance

This is a static report that does not change from client to client. It contains definitions of all 53 attributes.

Our Research

This is a static report that does not change from client to client. It contains information describing our influence research.

Your 360 Results

This report can always be displayed, but only contains data for the clients for whom you have purchased the "Self and 360 Assessment" and data was entered by those participating in the client's 360 review.

Instructional Suggestions

This report is for you, the coaching suggestions are individualized for each client. Its goal is to provide you with ideas, insights and resources to help you coach your client based on the combination of our research and the values they entered within the assessment.

Entered Values

This report is for your reference. It contains all of the assessment values entered by your client.

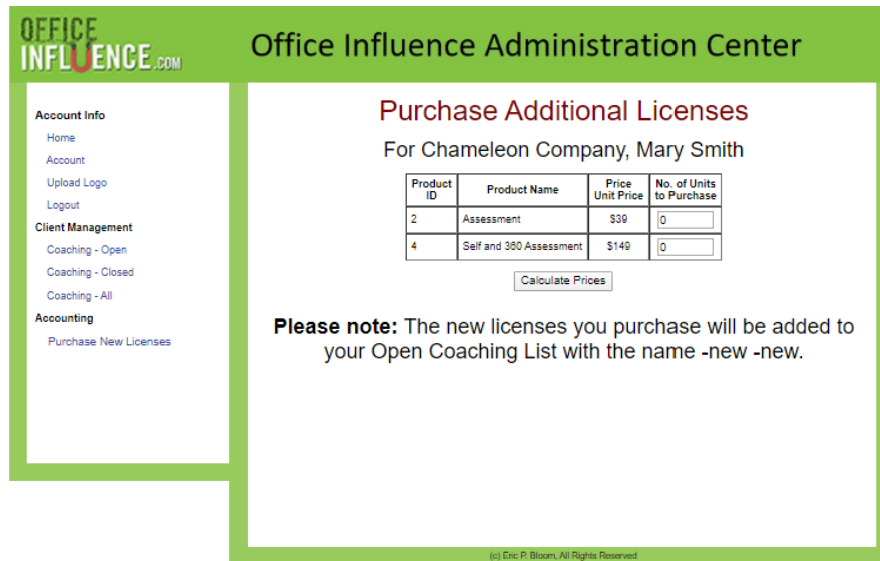
Menu Option: Purchase New Licenses

The four windows that follow walk you through the license purchasing process.

Note: When your new licenses are purchased, you will find them in the “Coaching – Open” list with a first and last name of “-new”. Simply press the “Edit” link to the left of the name column to enter your client’s name and contact info.

Step 1: Selecting the items to purchase.

Enter the number of licenses you would like to purchase in the “No. of Units to Purchase” column and press “Calculate Prices” button.



Office Influence Administration Center

Purchase Additional Licenses
For Chameleon Company, Mary Smith

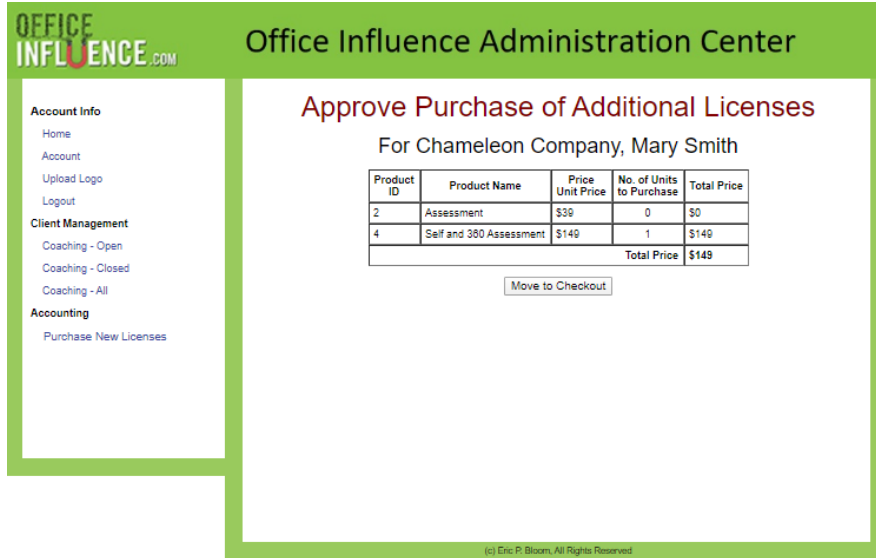
Product ID	Product Name	Price Unit Price	No. of Units to Purchase
2	Assessment	\$39	<input type="text" value="0"/>
4	Self and 360 Assessment	\$149	<input type="text" value="0"/>

Please note: The new licenses you purchase will be added to your Open Coaching List with the name -new -new.

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Step 2: Approve the licenses to be purchased.

Review the number of licenses you have entered to purchase. If you agree, press the “Move to Checkout” button. If you have made an error, please press the “Purchase New Licenses” menu option to restart the purchase process.



Office Influence Administration Center

Approve Purchase of Additional Licenses
For Chameleon Company, Mary Smith

Product ID	Product Name	Price Unit Price	No. of Units to Purchase	Total Price
2	Assessment	\$39	0	\$0
4	Self and 360 Assessment	\$149	1	\$149
Total Price				\$149

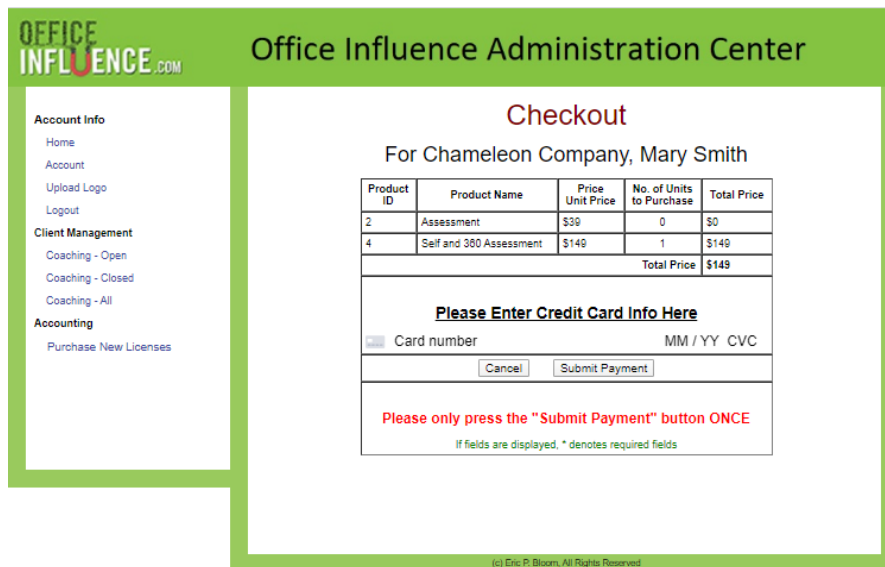
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Step 3: Checkout.

Enter your credit card information below the line “Please Enter Credit Card Info Here”

Once you have pressed the “Submit Payment” button, like all check out screens, please do not press the button a second time or press the browser back up button. This could cause you to be charged twice.

In the rare case if the “card Number” line does not display, please clear your computer's cache or try another computer. Your card can also be entered manually by calling Office Influence at 508-881-6355.



Office Influence Administration Center

Checkout
For Chameleon Company, Mary Smith

Product ID	Product Name	Price Unit Price	No. of Units to Purchase	Total Price
2	Assessment	\$39	0	\$0
4	Self and 360 Assessment	\$149	1	\$149
Total Price				\$149

Please Enter Credit Card Info Here

Card number MM / YY CVC

Please only press the "Submit Payment" button ONCE

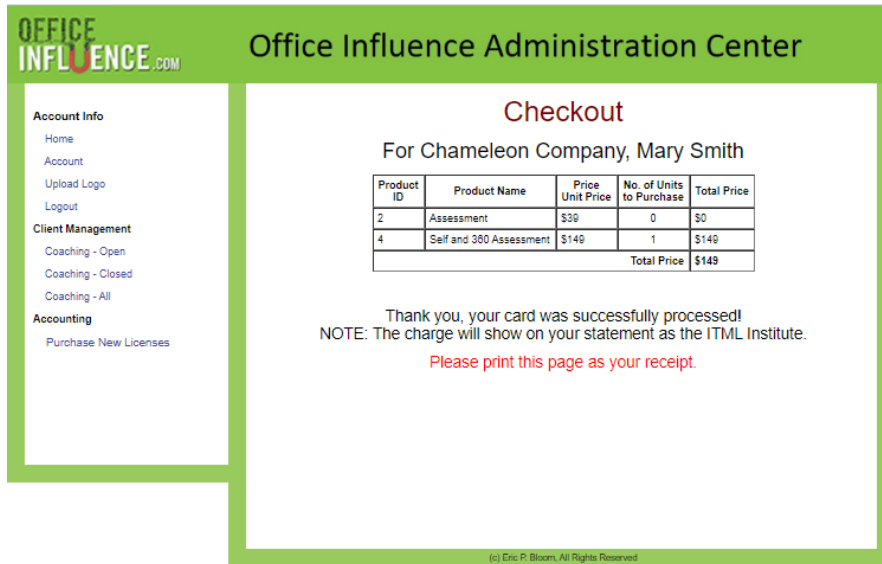
If fields are displayed, * denotes required fields

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Step 4: Print receipt

Please print this page as your receipt.

With your new license(s) now purchased, you will see them by clicking on the “Coaching – Open” menu option. They will have a first and last name of “-new”.



Office Influence Administration Center

Checkout

For Chameleon Company, Mary Smith

Product ID	Product Name	Price Unit Price	No. of Units to Purchase	Total Price
2	Assessment	\$39	0	\$0
4	Self and 360 Assessment	\$149	1	\$149
Total Price				\$149

Thank you, your card was successfully processed!
 NOTE: The charge will show on your statement as the ITML Institute.

Please print this page as your receipt.

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