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

Office Influence
Admin Module
Managing Your Clients

Coach’s Guide
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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.
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.
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 “cashed 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.
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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.

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.
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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.
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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.
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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.
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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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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
**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.
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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.
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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.
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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.
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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”.

![Checkout screenshot]