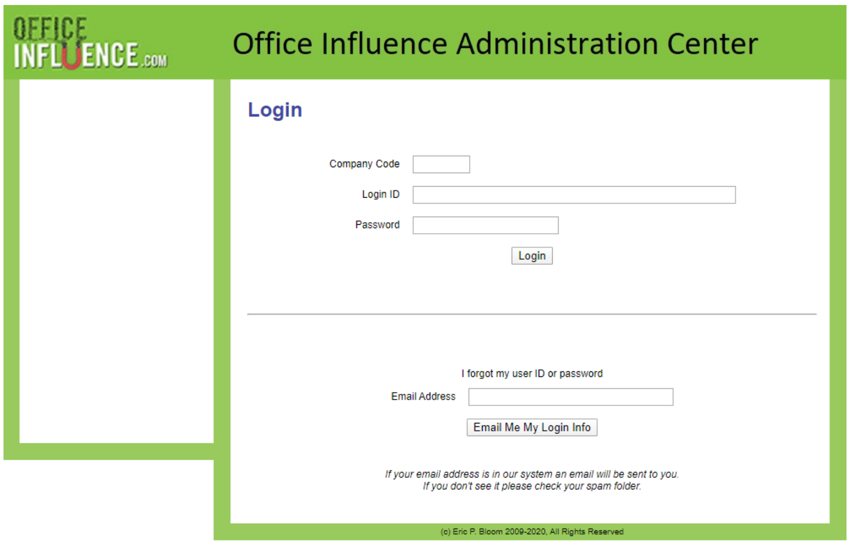
Office influence is the ability to move a person's thinking, actions and/or decisions in a way that forwards your business objectives

Office Influence
Admin Module
New Client Setup Process

Coach's Guide

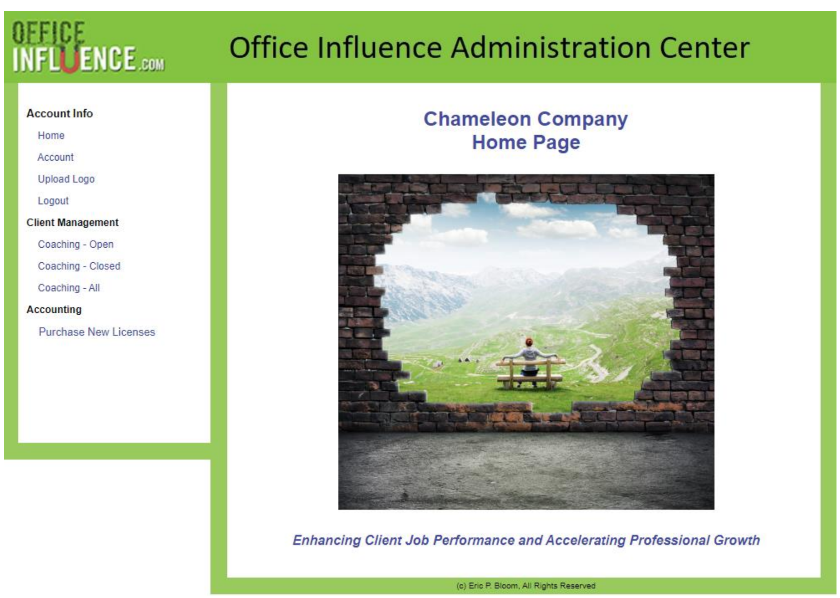
Step 1: Login Process

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.

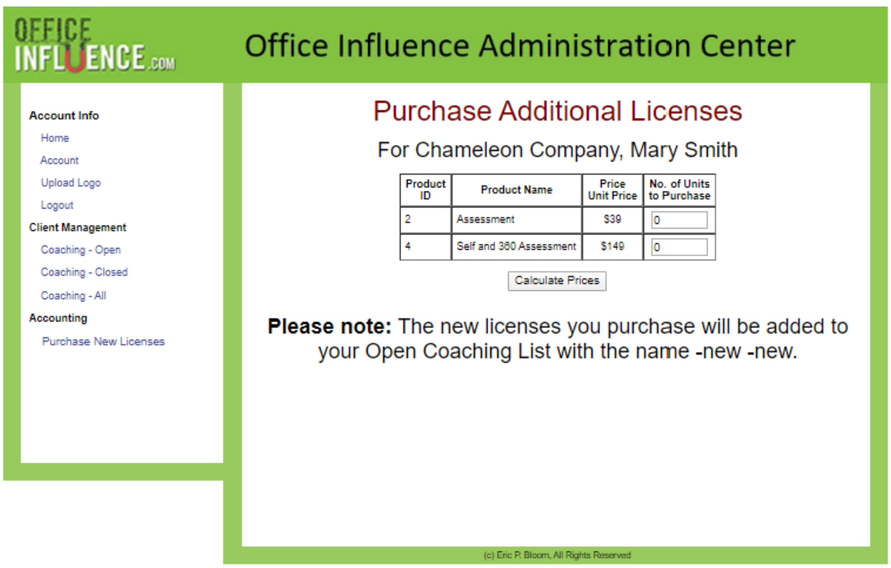
Please Note: The picture in the below image will be replaced by the logo of your sponsoring company.



Step 2: Purchase a New License (unless you have already done so)

This four-step process is described in detail in the "Administration Module Coach User Guide".

Important: For your credit card to process, you must first add your address and phone to your account via the 'Account' menu option.

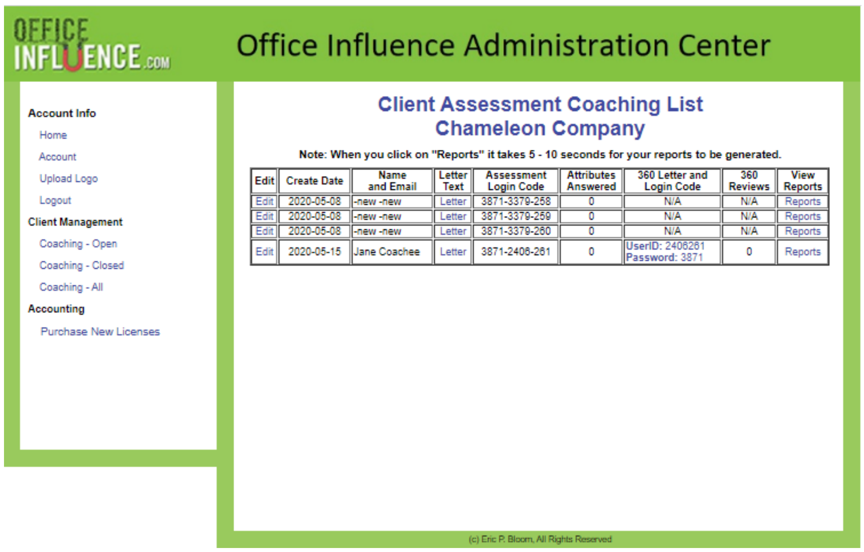


Step 3: Click on the "Coaching – Open menu option

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

All assessment licenses when first purchased are given a first name and last name of "-new".

Click on the word "Edit" in the leftmost column next the row you would like to use.

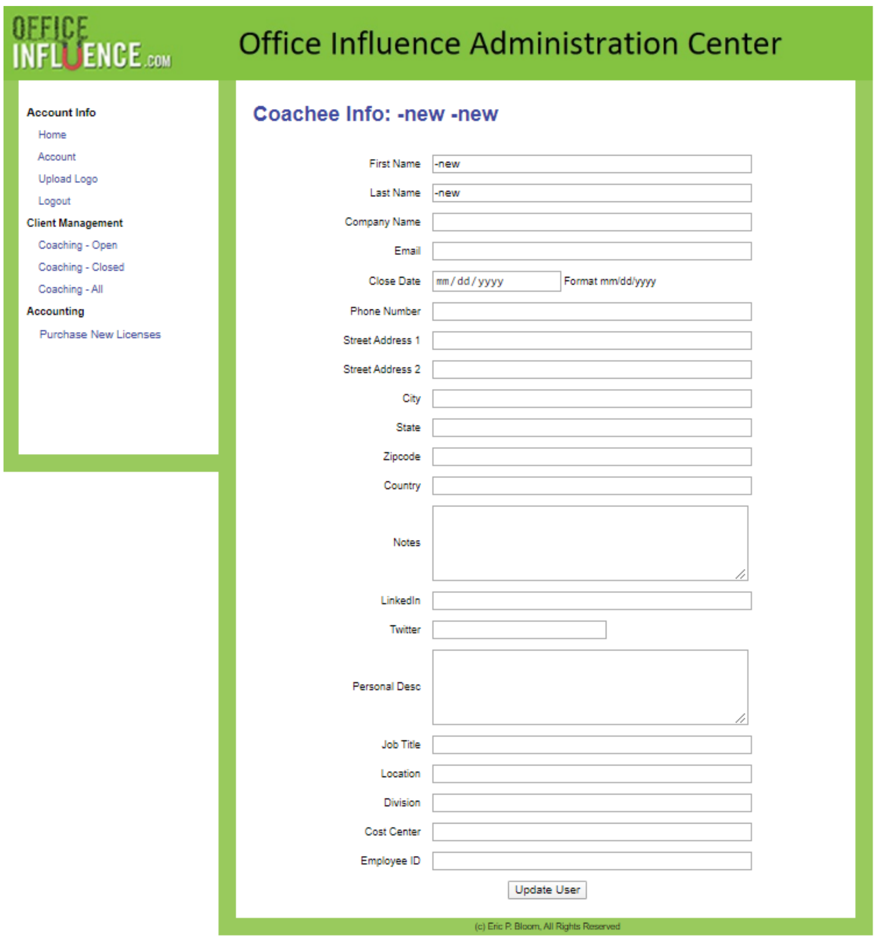


Information on the other columns in the table can be found in the "Administration Module Coach User Guide".

Step 4: Enter the new client's information

Enter the client's contact info.

The Close Date can initially be left blank. When a date is entered and reached, the client will no longer be able to login and the client will automatically be move from your "open" list to your "closed" list. Should you choose, you can reopen it simply by changing or removing the close date.


Office Influence Administration Center

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

Coachee Info: -new -new

First Name: -new
Last Name: -new
Company Name
Email
Close Date: mm/dd/yyyy 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
Update User

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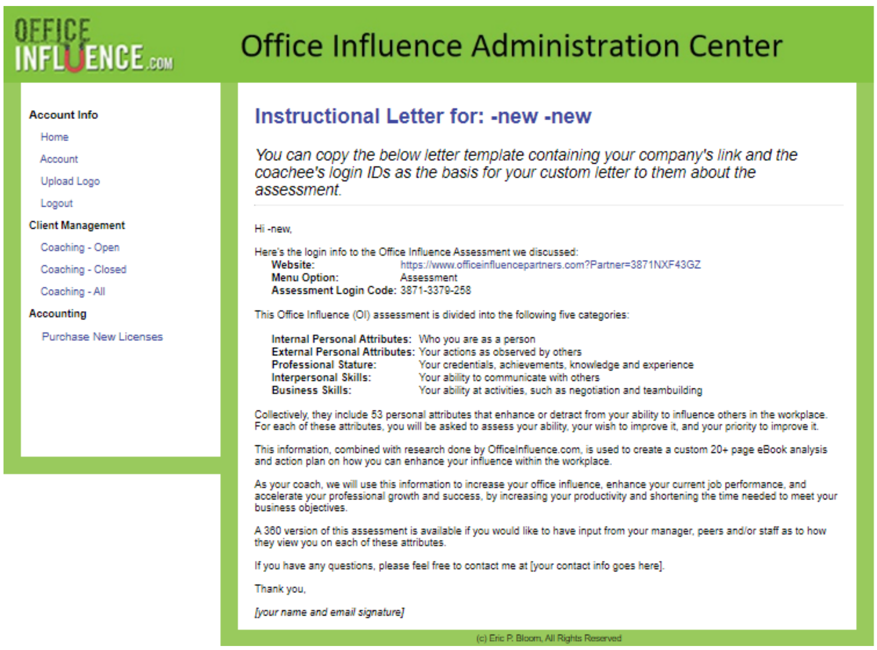
Step 5: Send the client their Instruction Letter

This is the boilerplate letter that is displayed when the "Letter" column in your dashboard 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.



After the client has completed the assessment

This is your main report generation page. It’s reached by clicking on the rightmost column on your dashboard.

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.