

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.



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.

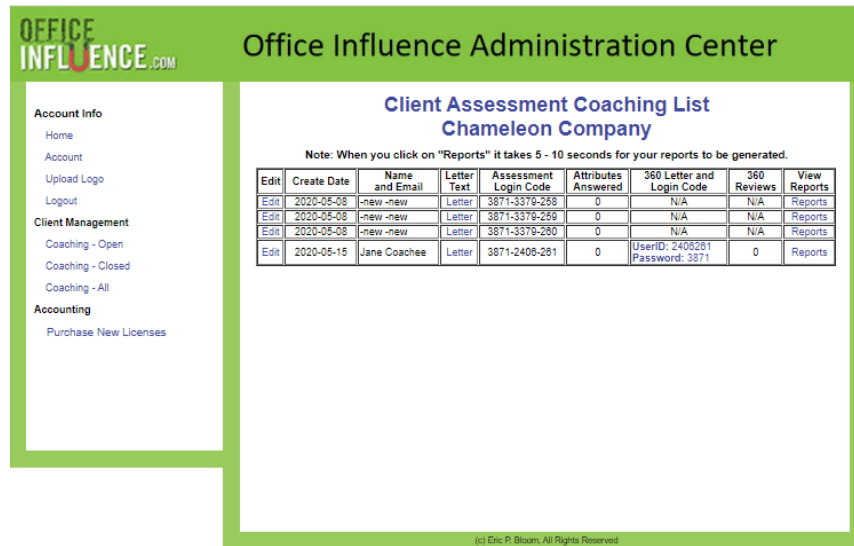
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Step 3: Click on the “Coaching – Open menu option

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.



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	3871-3376-258	0	N/A	N/A	Reports
Edit	2020-05-08	-new -new	Letter	3871-3376-259	0	N/A	N/A	Reports
Edit	2020-05-08	-new -new	Letter	3871-3376-260	0	N/A	N/A	Reports
Edit	2020-05-15	Jane Coachee	Letter	3871-2406-281	0	UserID: 2406281 Password: 3871	0	Reports

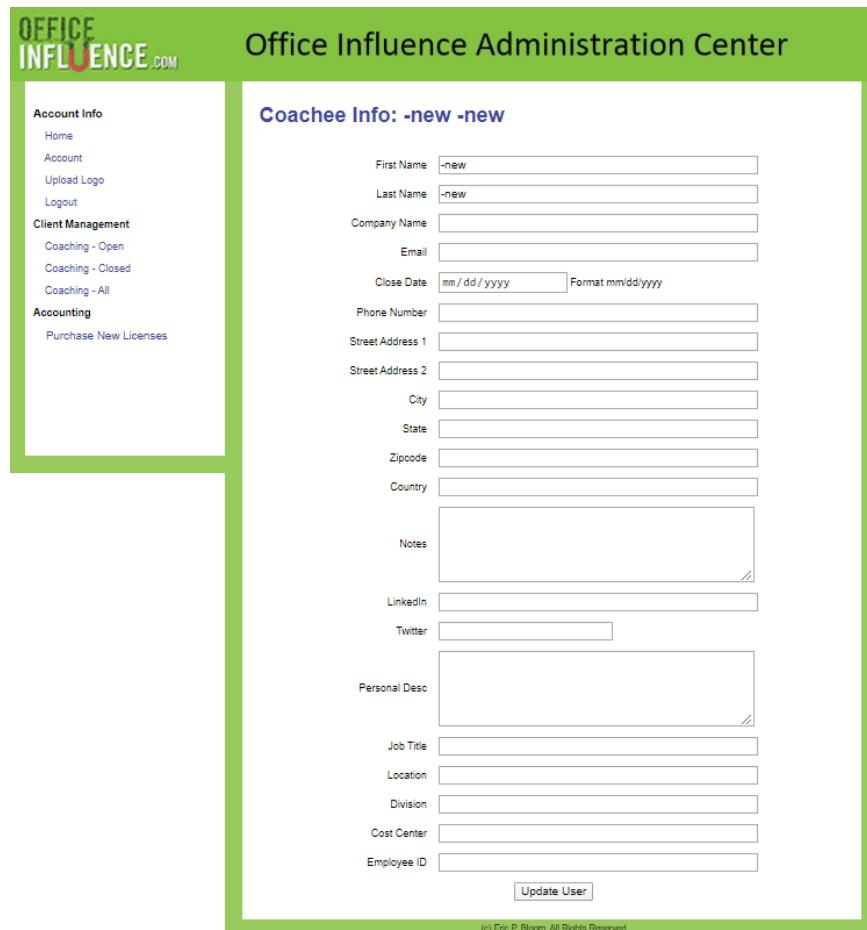
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Information on the other columns in the table can be found in the “Administration Module Coach User Guide”.

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 .COM Office Influence Administration Center

Coachee Info: -new -new

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

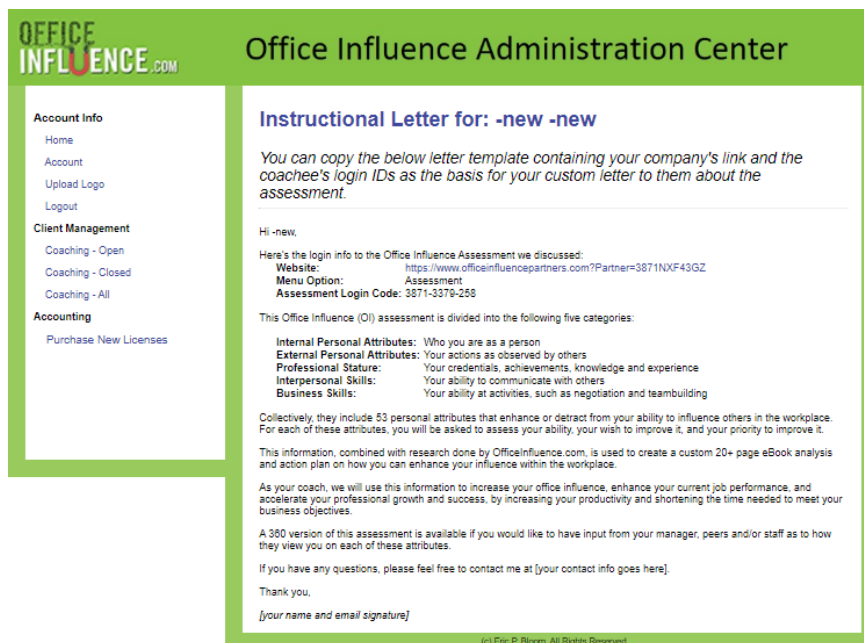
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Step 5: Send the client their Instruction Letter

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.



OFFICE INFLUENCE .COM Office Influence Administration Center

Account Info
 Home
 Account
 Upload Logo
 Logout

Client Management
 Coaching - Open
 Coaching - Closed
 Coaching - All

Accounting
 Purchase New Licenses

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 Office Influence Assessment we discussed:
Website: <https://www.officeinfluencepartners.com?Partner=3871NXF43GZ>
Menu Option: Assessment
Assessment Login Code: 3871-3370-258

This Office Influence (OI) 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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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.

