

CoachTelesales and CoachCustomerSupport User Guide - Creating and Editing Content

Managers have the ability to create and edit Modules, Coaching Activities, Coaching Methods and Agent Worksheets. This includes changing or editing activity and worksheet names, worksheet content and activity coaching instructions. Current activities and worksheets can be changed to be inactive or active. Coaching Activity priority rankings can be updated and the timeframe for suggest coaching reset can be lengthened or shortened. Worksheets can be created with text fields that Agents complete as part of independent learning.

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- [Create New Modules or Edit Existing Modules](#)
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Create Coaching Activities

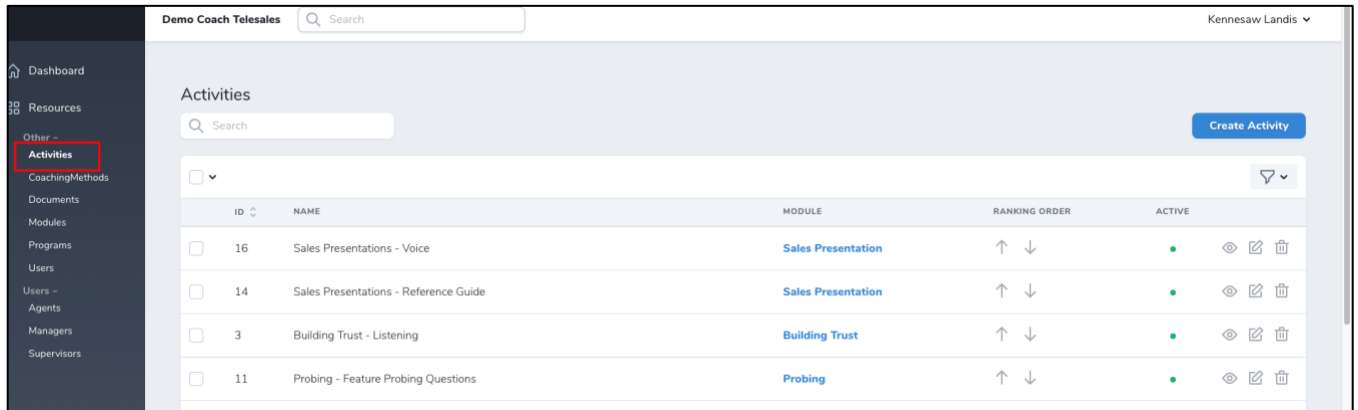
1. Select Content Control from the Username drop down menu

The screenshot displays the ValorCM Manager Dashboard. On the left is a navigation sidebar with sections for Dashboard, Supervisors, Reports, COACHING, COACHING PLAN, and QUICK ACTIONS. The main content area is titled 'Manager Dashboard' and features a table of 'ASSIGNED SUPERVISORS'. A user profile dropdown menu is open in the top right corner, with 'Content Control' highlighted in red. The table below contains the following data:

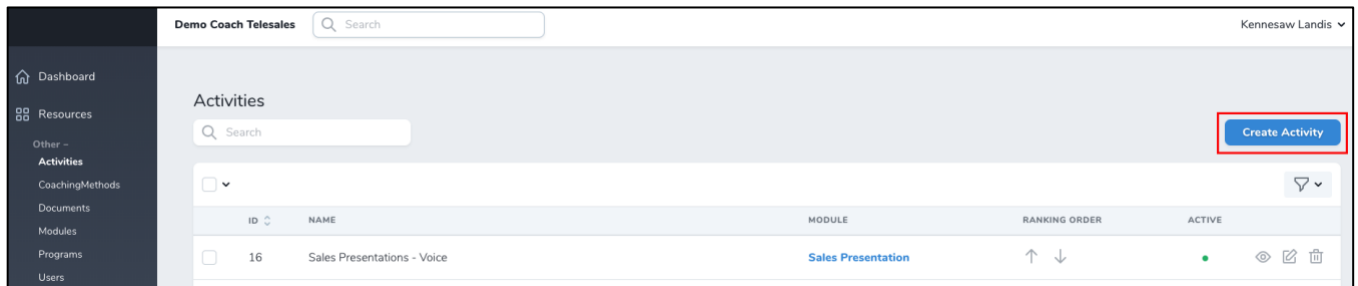
SUPERVISOR NAME	INCOMPLETE ASSIGNED COACHINGS	GO COACHING	ASSIGN WORKSHEETS	PENDING TRIAD ACKNOWLEDGEMENTS	COACHING FORMS PREVIOUS MONTH	COACHING FORMS MONTH TO DATE
Walter Johnson	4 - Item(s)	Go Coaching	Assign Worksheet	1 - Item(s)	0 - Items	14 - Item(s)
Cy Young	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Mickey Mantle	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Babe Ruth	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	2 - Item(s)
Nolan Ryan	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items

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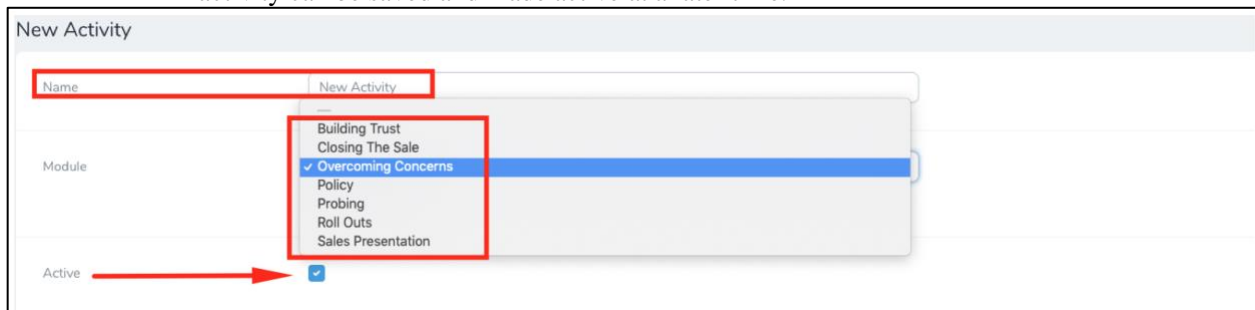
2. Select Activities from the left drop-down menu



3. Click Create Activity



- a. Enter the Name
- b. Select the Module from the drop-down menu
- c. Click Active (if you would like to have the Activity immediately available for coaching. The activity can be saved and made active at a later time.



- d. Create or write the skill content that you would like the agent to be trained on utilizing in the Activity Information box.
 - i. **Content created in the Activity Information box will be visible on the Coaching Form when it is delivered to the agent for Acknowledgement after the coaching is completed.**

Activity Information

File Edit View Insert Format Tools


← → Bold B I U A ↕ ↕


Persuasion

Business and marketing strategy includes influencing your clients on the decisions they will have to make. Your persuasion skills has a lot to do to influence your prospect's behaviors.

6 Principles of Persuasion

1. Reciprocity - People are obliged to give back to others the form of a behavior, gift, or service that they have received first.
2. Scarcity - People want more of those things they can have less of.
3. Authority - People follow the lead of credible, knowledgeable experts
4. Consistency - People like to be consistent with the things they have previously said or done. Consistency is activated by looking for, and asking for, small initial commitments that can be made.
5. Liking - People prefer to say yes to those that they like. We like people who are similar to us, we like people who pay us compliments, and we like people who cooperate with us towards mutual goals. Look for areas of similarity that you share with others and genuine compliments you can give before you get down to business.
6. Consensus - Especially when they are uncertain, people will look to the actions and behaviors of others to determine their own.



Watch on 

C.E.O.

- Customer - Properly using persuasion builds trust and rapport and provides customer confidence .

- e. Create or write the coaching instructions in the Coaching Instructions box (Description).
- i. **Content created in the Coaching Instructions box is only visible to the Supervisor.**

Coaching Instructions

File Edit View Insert Format Tools

← → Bold B I U A ↕ ↕

1. **Discover.** Watch the video with the agent. Find out what the agent knows and confirm the agent's understanding of the principles of persuasion. Ask the agent:
 1. What are the 6 principles of persuasion and what does each principle mean?
 2. How can utilizing gentle principles of persuasion help you close more sales?
2. **Practice.** Ask the agent to provide an excellent examples statements of reciprocity, liking, consensus, consistency, scarcity and authority. (How should they say it).
3. **Assist.** Provide tips, assistance and examples of the skill throughout the coaching while still allowing the agent to do most of the talking and helping the agent to "coach themselves".
4. **Role Play.** Role play the overcoming a concern and have the agent use his or her demonstrated examples exhibiting and re-enforcing the skill. Role play different probable customer scenarios allowing the agent to practice common calls.
5. **Commit.** Re-emphasize what the agent is doing well and verbally commit the agent to use the skill on future calls.
6. **Follow-up.** Tell the agent you will follow up. Create a Follow-Up coaching on your coaching dashboard to review progress and practice again with the agent. Add commitments and goals to the Supervisor comments section of the Follow-Up coaching form you have created.

Note: You can cut and paste text into the Activity Information or Coaching Instructions box for Activities or for Worksheets. You can also utilize the edit tools



to or insert images, slides, videos or text boxes into worksheets and coaching instructions.

- f. Click Create Activity



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Create Agent Worksheets

1. Select Content Control from the Username drop down menu

The screenshot shows the 'Manager Dashboard' in ValorCM. A user profile dropdown for 'Kennesaw Landis' is open, with 'Content Control' highlighted. The main content area displays a table of 'ASSIGNED SUPERVISORS' with the following data:

SUPERVISOR NAME	INCOMPLETE ASSIGNED COACHINGS	GO COACHING	ASSIGN WORKSHEETS	PENDING TRIAD ACKNOWLEDGEMENTS	COACHING FORMS PREVIOUS MONTH	COACHING FORMS MONTH TO DATE
Walter Johnson	4 - Item(s)	Go Coaching	Assign Worksheet	1 - Item(s)	0 - Items	14 - Item(s)
Cy Young	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Mickey Mantle	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Babe Ruth	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	2 - Item(s)
Nolan Ryan	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items

Below the table is a section for 'UNASSIGNED SUPERVISORS'.

2. Select Worksheets from the left drop-down menu

The screenshot shows the 'Worksheets' page in ValorCM. The 'Worksheets' menu item in the left sidebar is highlighted. A 'Create Worksheet' button is visible in the top right corner. The main content area shows a table of existing worksheets:

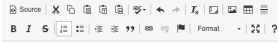
NAME	MODULE	DESCRIPTION	ACTIVE
Discovery Questions	Discovery	Probing questions do...	Active
Call Control	Building Trust	Worksheet to help th...	Active

3. Click Create Worksheet

- a. Enter the Name
- b. Select the Module from the drop-down menu
- c. Enter the Worksheet Description
- d. Click Active (if you would like to have the Worksheet immediately available for coaching. The Worksheet can be saved and made active at a later time.
- e. Create the content of the Worksheet in the Data box area.
- f. Attach a Form to the Worksheet

The 'New Worksheet' form contains the following elements:

- Name:** A text input field.
- Module:** A dropdown menu with a 'With Trashed' checkbox below it.
- Description:** A text input field.
- Active:** A toggle switch.
- Video:** A section with an 'Add New Media' button.
- Coaching Instruction:** A large text area with a rich text editor toolbar (File, Edit, View, Insert, Format, Tools).
- Form:** A dropdown menu with 'Building Trust Reference Guide' selected and a 'With Trashed' checkbox below it.

Note: When editing, you can cut and paste text into the Coaching Instructions box for Activities or the Data box for Worksheets. You can also utilize the edit tools  to or insert images and videos into worksheets and coaching instructions. You can [create Forms or Quizzes](#) to attach to Worksheets.

g. Click Create Document  

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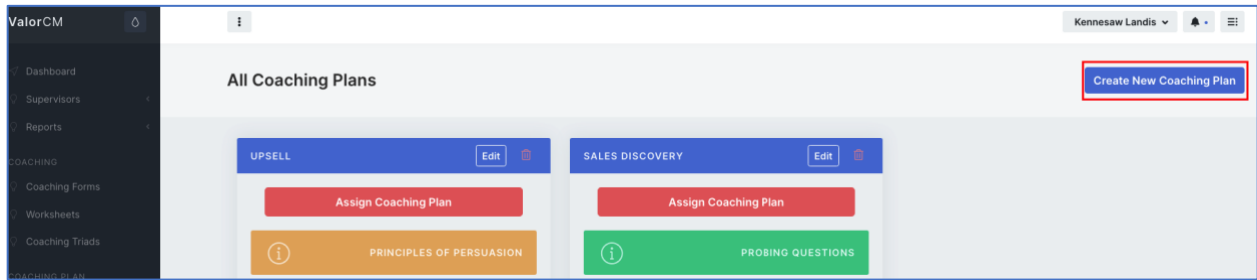
Creating Coaching Plans

1. Select Manage Coaching Plans from the side bar menu on the Manager Dashboard.

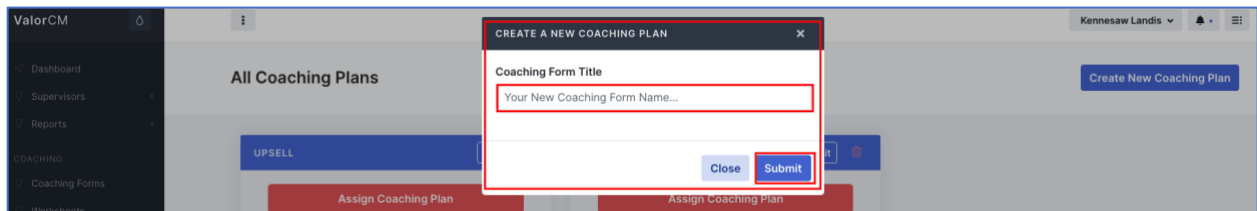
The Manager Dashboard displays the following data for assigned supervisors:

SUPERVISOR NAME	INCOMPLETE ASSIGNED COACHINGS	GO COACHING	ASSIGN WORKSHEETS	PENDING TRIAD ACKNOWLEDGEMENTS	COACHING FORMS PREVIOUS MONTH	COACHING FORMS MONTH TO DATE
Walter Johnson	4 - Item(s)	Go Coaching	Assign Worksheet	1 - Item(s)	0 - Items	14 - Item(s)
Cy Young	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Mickey Mantle	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Babe Ruth	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	2 - Item(s)
Nolan Ryan	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items

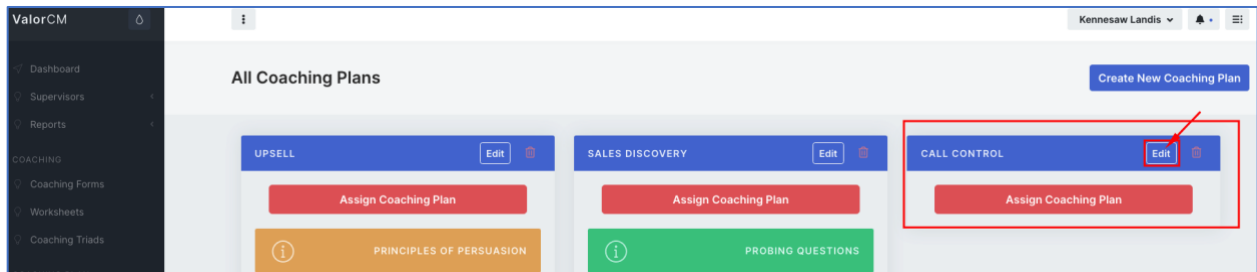
2. Click Create New Coaching Plan



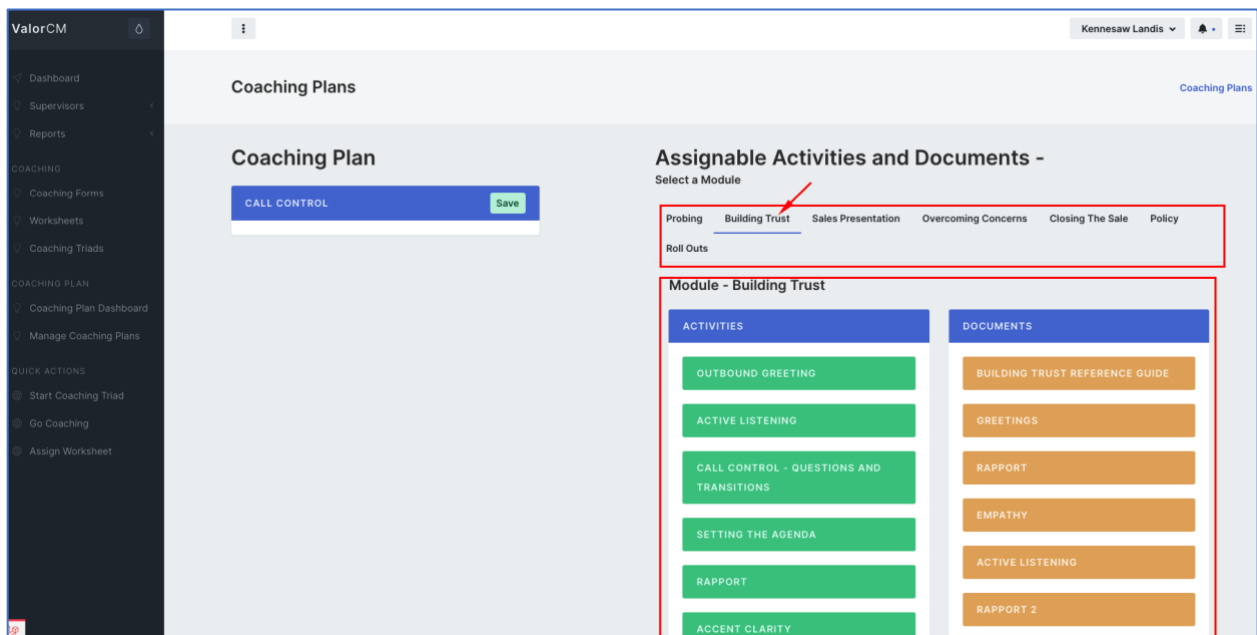
3. Name the Coaching Plan and click Submit.



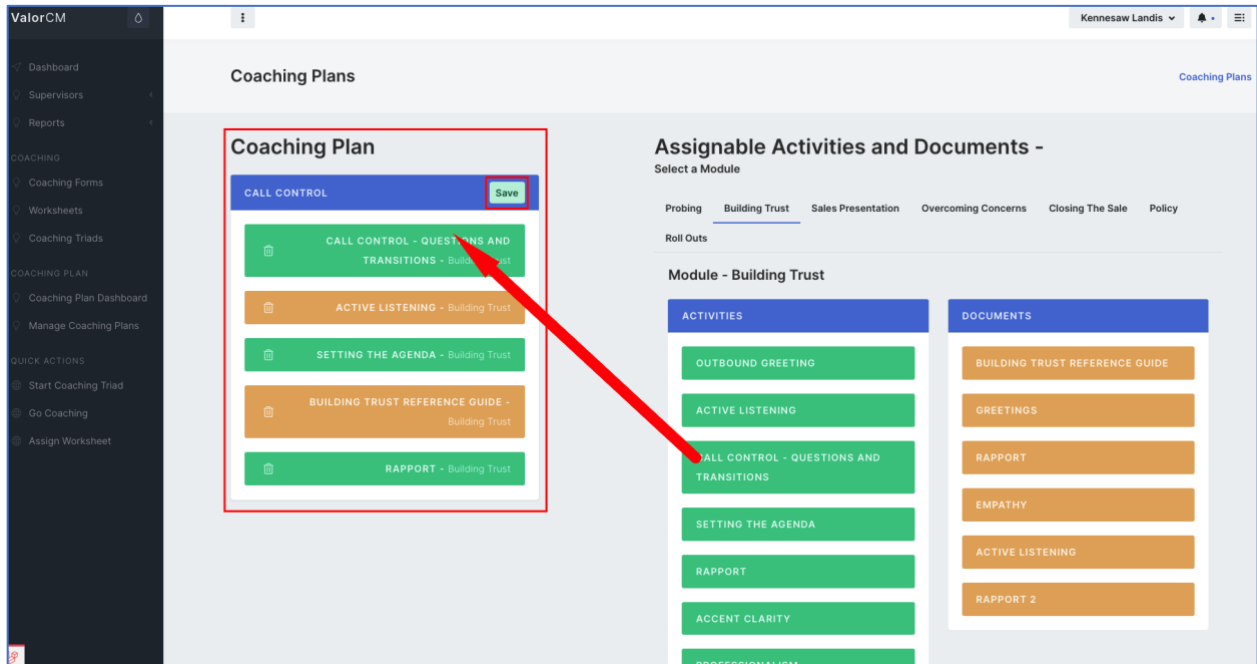
4. Click Edit on your new Coaching Plan.



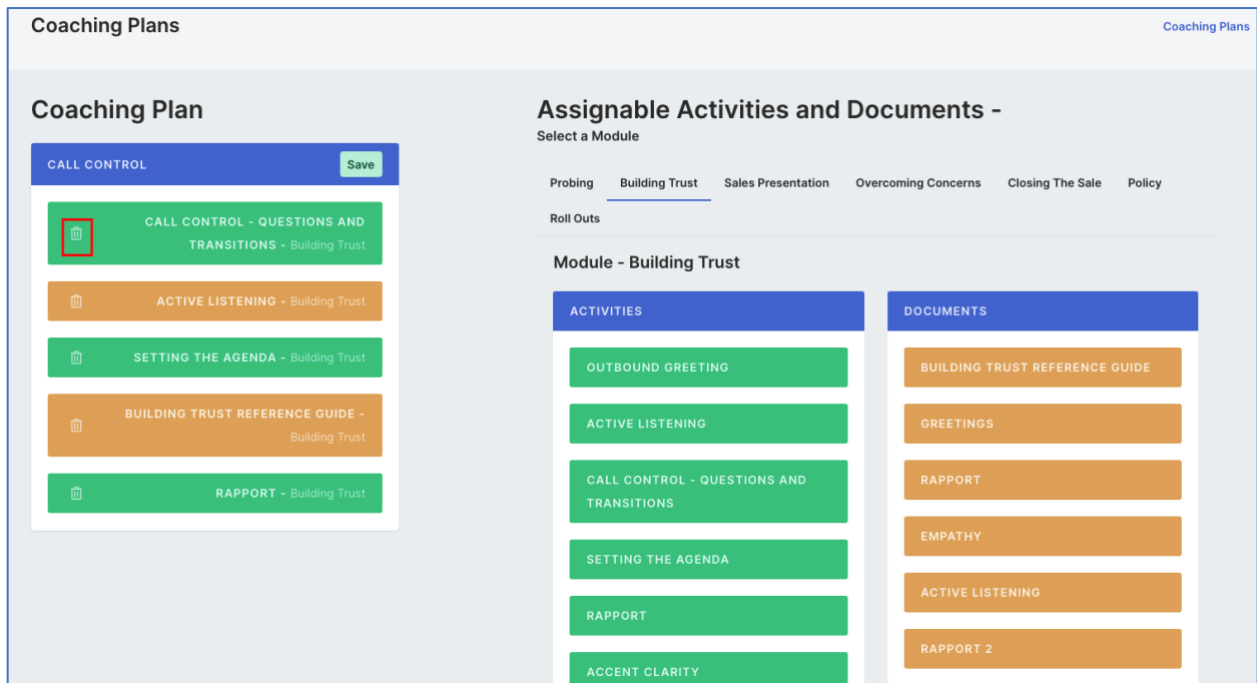
5. Click on each Module to display the available Coaching Activities and Worksheets within that Module that can be added to the Coaching Plan.



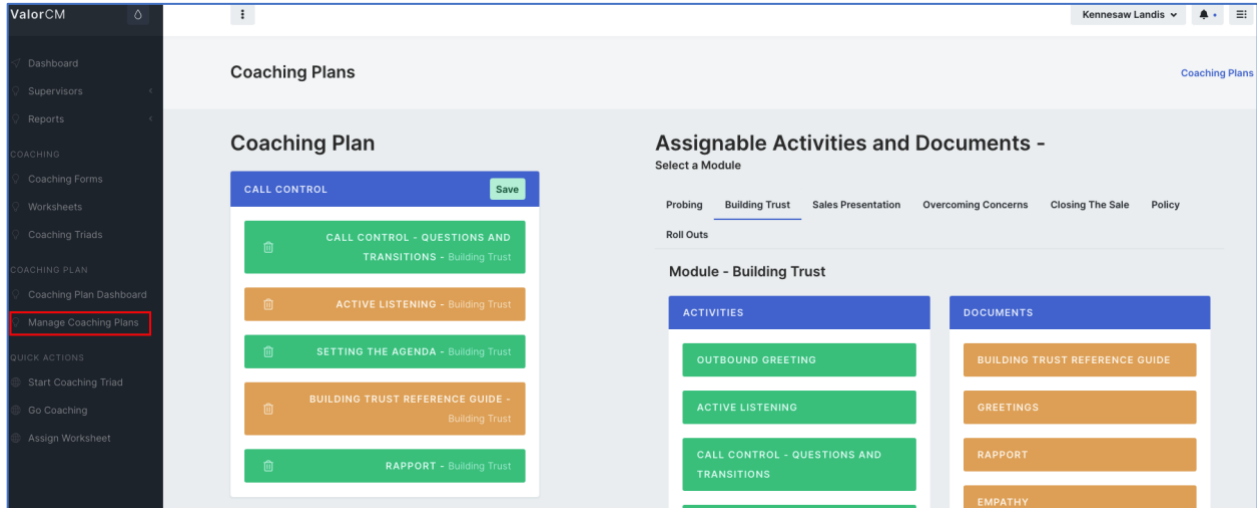
6. Drag and Drop Activities and Worksheets from the Module columns to the Coaching Plan Column.



7. To remove Activities or Worksheets from the Coaching Plan, click the Trash Can icon next to the Activity or Worksheet you would like to remove.



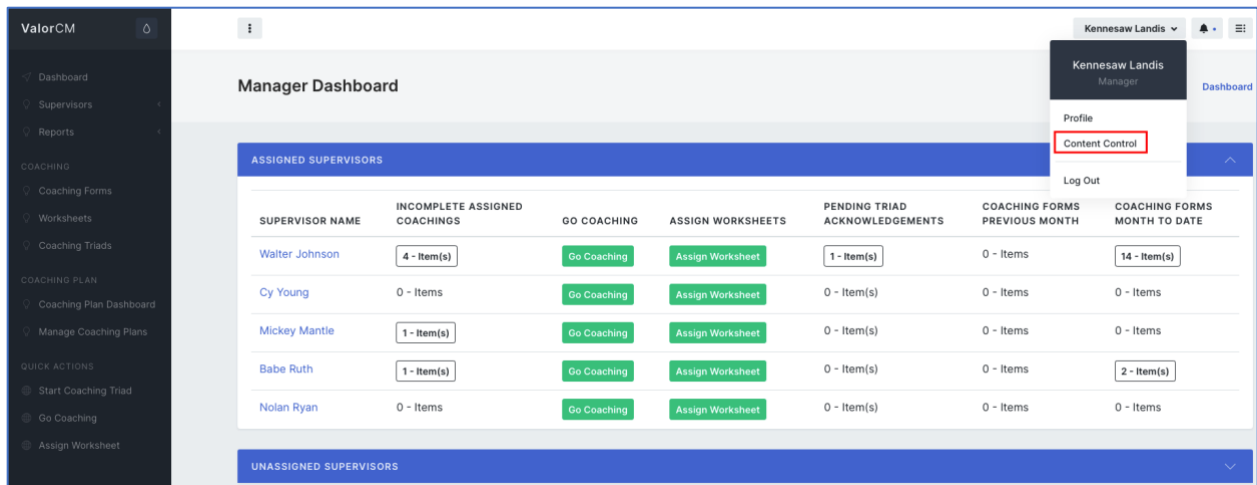
8. After adding or removing the desired Activities and Worksheets, Click Save.
9. Click Manage Coaching Plans to return to the Coaching Plans page and to Assign the new Coaching Plan.



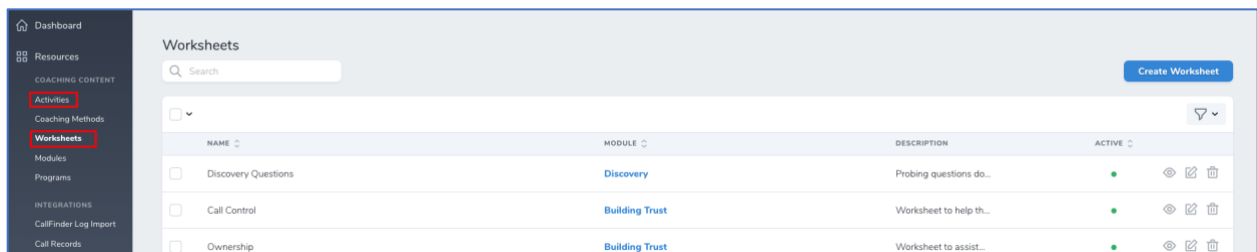
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Editing Coaching Activities or Worksheets

1. Select Content Control from the Username drop down menu



2. Select Activities from the left drop-down menu to edit Coaching Activities or Select Worksheet from the left drop-down menu to edit Worksheets.



3. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.

Activities

Q sales presentations

Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature, Bridge, Benefit.	Sales Presentation	↑ ↓	●
18	Sales Presentations - Descriptive and Power Words	Sales Presentation	↑ ↓	●

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4. Click the Edit icon 

Activities

Q Sales Presentations

Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature, Bridge, Benefit.	Sales Presentation	↑ ↓	●

5. Edit the Activity
- Activity or Worksheet Name
 - Module that contains the Activity or Worksheet
 - Activity Information, Coaching Instructions or Worksheet Data
 - Save your changes

Update & Continue Editing Update Activity or Cancel Update & Continue Editing Update Worksheet

Update Activity: Trial Closing Questions

Name: Trial Closing Questions

Module: Closing The Sale

Active:

Audio: Add WAV File

Video: Add New Media

Activity Information

File Edit View Insert Format Tools

Trial Closing Questions


A trial close is a test question that you utilize during the sales call to measure prospect interest and gain acceptance of a feature or benefit. Trial closing questions help you to be sure that you are moving forward towards meeting the customer needs and towards the final close. By gaining confirmation and acceptance of the features and benefits of your product, you make it more difficult for the customer to say "no" when they have already confirmed acceptance to your trial closing questions. Trial closing questions are particularly important on a tele-sales call as you do not have the visual clues from the prospect that are available when meeting in person. Utilize trial closing questions throughout the sales presentation, to confirm that you have overcome a concern and to finally transition to an assumptive closing question. Examples of trial closing questions are:


"How does that sound?"

"Would you like to save 60% on your phone service?"

"Will the Virtual Assistant make your business more efficient?"

Create a list of trial closing questions for popular features that will confirm to the customer your product will meet their needs and build consensus towards closing the final sale and that you can share with the agent.

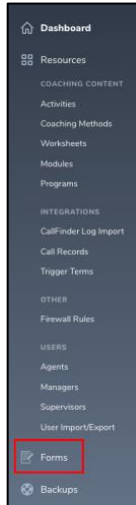


Note: When editing, you can cut and paste text into the Coaching Instructions box for Activities for Worksheets. You can also utilize the edit tools  to insert images and videos into worksheets and coaching instructions. You can create Forms or Quizzes to attach to Worksheets.

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Creating and Editing Forms (Quizzes) for Worksheets

1. In the Admin Dashboard, select Forms from the sidebar menu



2. Select Create a New Form or select the Form you would like to edit.

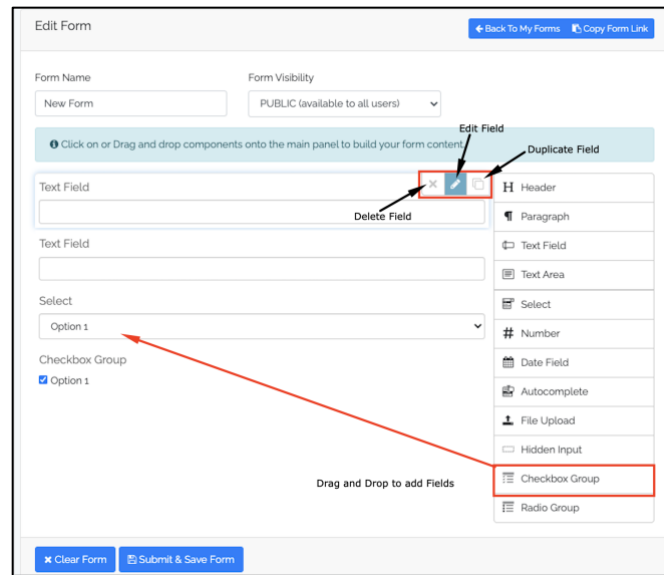
#	Name	Visibility	Allows Edit?	Submissions	Actions
1	DC Access App	PUBLIC	NO	0	Data + ✎ ✖
2	Weekly Survey	PUBLIC	NO	0	Data + ✎ ✖
3	Closing the Call Reference Guide	PUBLIC	NO	0	Data + ✎ ✖
4	Managing Concerns Reference Guide	PUBLIC	NO	0	Data + ✎ ✖
5	Resolutions Reference Guide	PUBLIC	NO	0	Data + ✎ ✖
6	Probing Reference Guide	PUBLIC	NO	0	Data + ✎ ✖
7	Building Trust Reference Guide	PUBLIC	NO	0	Data + ✎ ✖
8	Managing Concerns	PUBLIC	NO	0	Data + ✎ ✖
9	Decision Tree	PUBLIC	NO	0	Data + ✎ ✖
10	Ownership Statement	PUBLIC	NO	0	Data + ✎ ✖
11	Call Control	PUBLIC	NO	0	Data + ✎ ✖
12	Probing Questions	PUBLIC	NO	1	Data + ✎ ✖

3. For new Forms, enter the Form Name and select Public for the Form Visibility

The image shows the 'Create New Form' interface. At the top, there are two input fields: 'Form Name' (containing 'New Form') and 'Form Visibility' (set to 'PUBLIC available to all users!'). Below these is a large dashed box for the form content with the instruction 'Click on or drag and drop components onto the main panel to build your form content.' To the right is a menu of form components including Header, Paragraph, Text Field, Text Area, Select, Number, Date Field, Autocomplete, File Upload, Hidden Input, Checkbox Group, and Radio Group. At the bottom are 'Clear Form' and 'Submit & Save Form' buttons.

4. Add the fields from the menu that you would like in the Form.
 a. Drag and Drop the field type you would like to add to the Form.

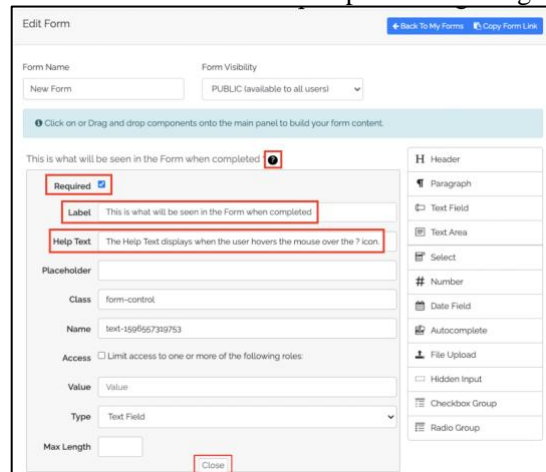
- i. Click Edit to add content to the Field.
- ii. Click the X to delete an unwanted Field
- iii. Click Duplicate Field to create an exact copy of the Field you have created.



b. Edit the Fields you have added.

i. Text Fields

1. Select if you would like the Field Required or Not.
2. The Label is the text that will be displayed on the Form for the end user. This would be where you would type your quiz question.
3. Enter any Help text or “hint” you would like to display for the end user.
4. Click Close to complete the Editing for JUST that specific Field.



ii. Select Fields

1. Select if you would like the Field Required or Not.
2. The Label is the text that will be displayed on the Form for the end user. This would be where you would type your quiz question.
3. Enter any Help text or “hint” you would like to display for the end user.
4. Enter the Options for the end user to select.
 - a. Create the number of Options you would like the end user to choose from.
 - b. Select Allow Multiple Selections if desired
 - i. If Allow Multiple Selections is checked, ALL selections will be visible in the menu at one time to the end user and

they will need to use the control key on the keyboard to select multiple options.

- c. Type the text you want for each Option into BOTH columns for each Option.
- d. Click Close to complete the Editing for JUST that specific Field.

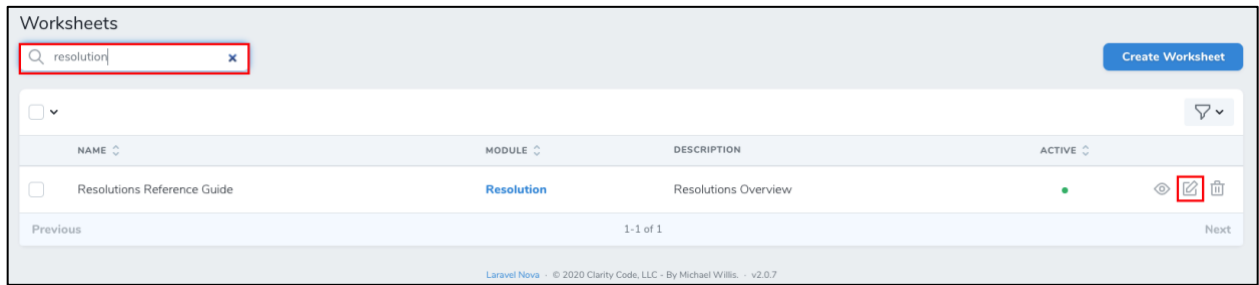
iii. Checkbox Group and Radio Group Fields

1. Select if you would like the Field Required or Not.
2. The Label is the text that will be displayed on the Form for the end user. This would be where you would type your quiz question.
3. Enter any Help text or “hint” you would like to display for the end user.
4. Enter the Options for the end user to select.
 - a. Create the number of Options you would like the end user to choose from.
 - i. Checkbox Group Fields default to allow for the end user to choose multiple selections.
 - ii. Radio Group Fields allow for you to select whether you would like the end user to choose “Other” as the answer and enter text.
 - b. Type the text you want for each Option into BOTH columns for each Option.
 - c. Click Close to complete the Editing for JUST that specific Field.

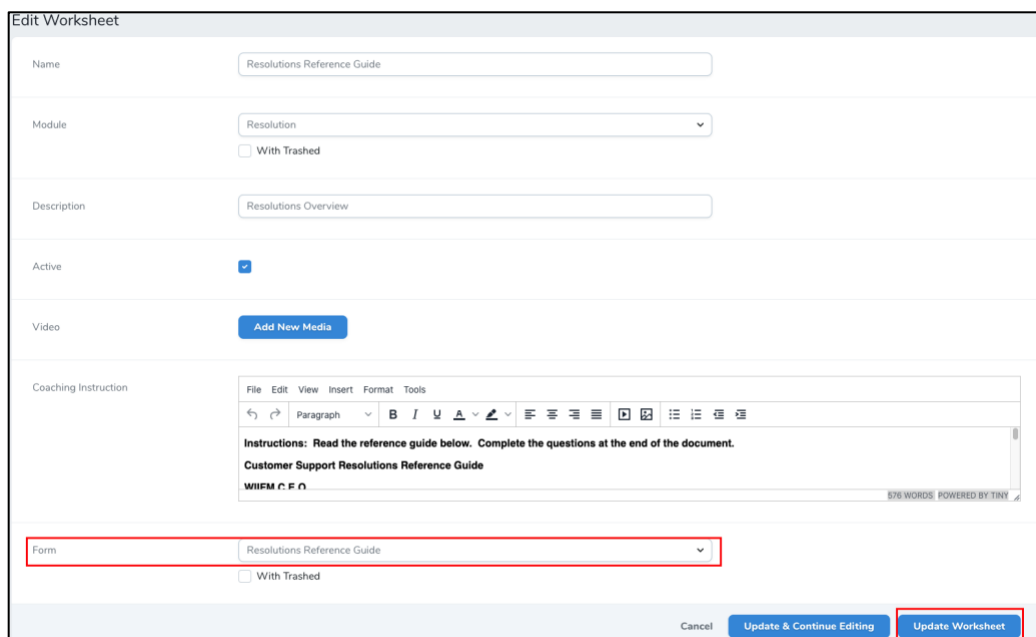
Note: When using Copy and Paste into Form Fields, you must right click on the mouse and select “*Paste and Match Style*” to see the correct text in the fields when viewing form data that has been entered by end users.

5. Attach the Form to a Worksheet

- Locate the Worksheet you would like to edit or attach a Form. Use the Search bar to filter the list of Worksheets.
- Click the Edit icon



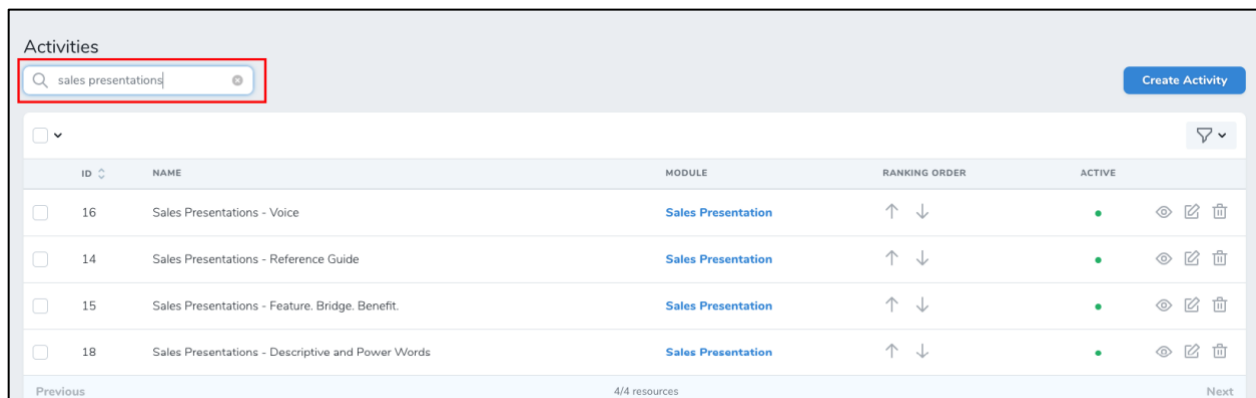
- At the bottom of the Worksheet, select the Form you would like to attach from the Form drop down menu.
- Click Update Worksheet



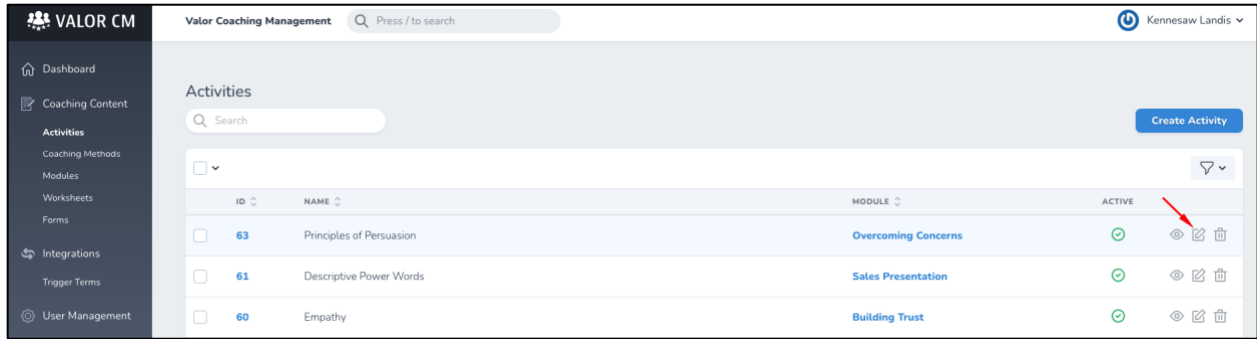
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Insert Images into Coaching Activity Instructions and Worksheets

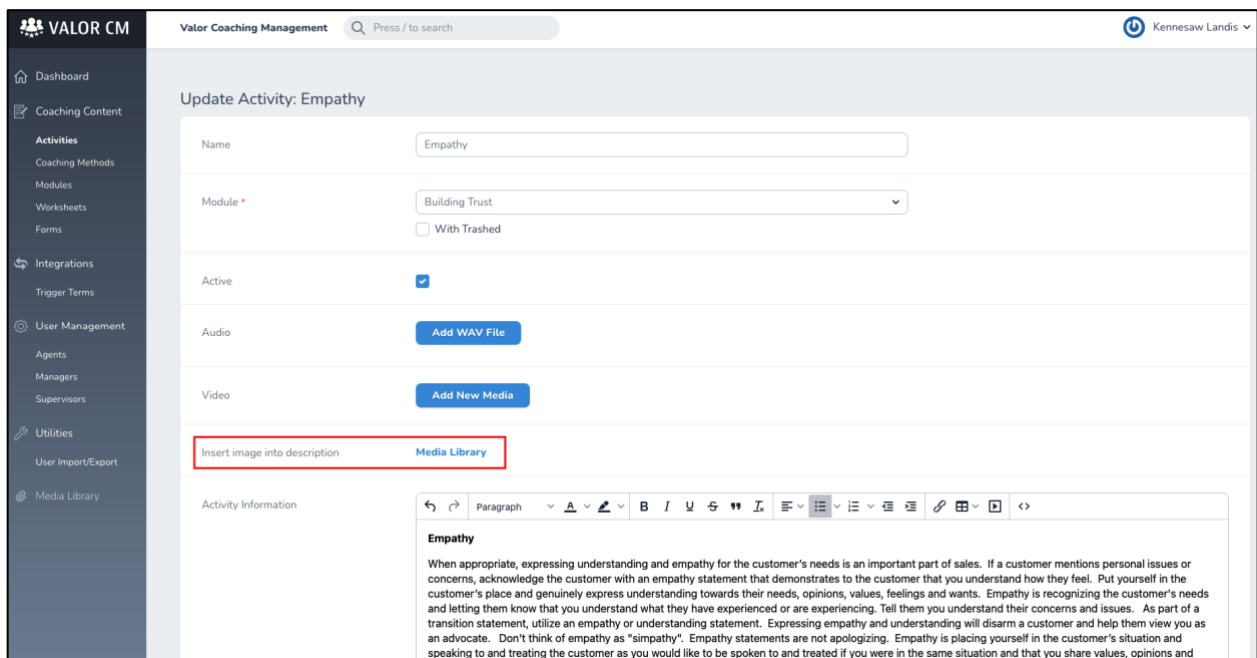
- Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



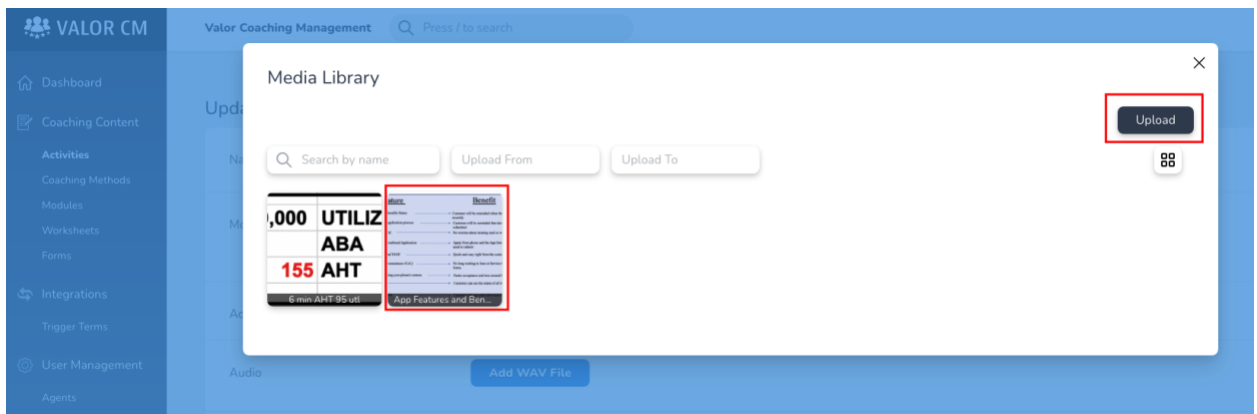
2. Click the Edit icon 



3. Place your mouse cursor in the location you would like the image to appear and then click Media Library.



4. Click Upload to choose a new image from your saved images on your computer or click on an image that has already been added to your Media Library.



5. Double click on the image to bring up the image editing tool bar. Rotate, Crop, Brighten or resize your image.

C.E.O.

- Customer - Helps the customer see the agent as their advocate and helpful
- Employee - De-escalates an upset or frustrated customer
- Organization - Improves CSAT and reduces escalations

<u>App Feature</u>	<u>Benefit</u>
• Push Notifications – Benefits Status	Customer will be reminded when they need to recertify
• Push Notifications – Application process	Customer will be reminded that documentation needs to be submitted
• View notices sent by DC	No worries about missing mail or waiting for mail
• Apply for SNAP or Combined Application	Apply from phone and the App lists the documents you need to submit
• Recertify for SNAP and TANF	Quick and easy right from the customer's phone
• Submit changes in circumstances (CoC)	No long waiting in lines at Service Centers or filling out paper forms
• Upload Documents using your phone's camera	Faster acceptance and turn around for benefits
• Check Benefits	Customer can see the status of all benefits right on their phone
• See Upcoming Payments	Customer can see when their next benefit payment is expected

6. Save your changes



OR

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Insert Videos into Coaching Activity Instructions and Worksheets

YouTube or Vimeo videos can be viewed in Coaching Activity Instructions and Worksheets, without size restrictions. Videos that are uploaded are restricted to 100 megabytes and MUST be saved in .MP4 format.

YouTube and Vimeo Videos

1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.

Activities

sales presentations

Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature, Bridge, Benefit.	Sales Presentation	↑ ↓	●
18	Sales Presentations - Descriptive and Power Words	Sales Presentation	↑ ↓	●

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2. Click the Edit icon



Activities

Search: Sales Presentations

Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature. Bridge. Benefit.	Sales Presentation	↑ ↓	●

3. Click the Insert Video icon

Coaching Instruction

File Edit View Insert Format Tools

Instructions:

- Watch the video below with your agent.
- Ask the agent what they can do better to learn and discover the customer's needs and wants.
- Commit the agent to listen and probe effectively.

4. Paste the YouTube or Vimeo URL address in the Source Field and click Save

Insert/Edit Media

General

Source:

Embed

Advanced

Width: Height:

Cancel Save

5. Save your changes or

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Upload and insert .MP4 Videos (100 MPEG size limit) into Activity Instructions and Worksheets

1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.

Activities

Search: sales presentations

Create Activity







ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature. Bridge. Benefit.	Sales Presentation	↑ ↓	●
18	Sales Presentations - Descriptive and Power Words	Sales Presentation	↑ ↓	●

Previous 4/4 resources Next

2. Click the Edit icon 

Activities

Search: Sales Presentations Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE	
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●	 
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●	 
15	Sales Presentations - Feature, Bridge, Benefit.	Sales Presentation	↑ ↓	●	 

3. Click the Add New Media button

VALOR CM | Valor Coaching Management | Search: Press / to search


Update Activity: Empathy

Name:

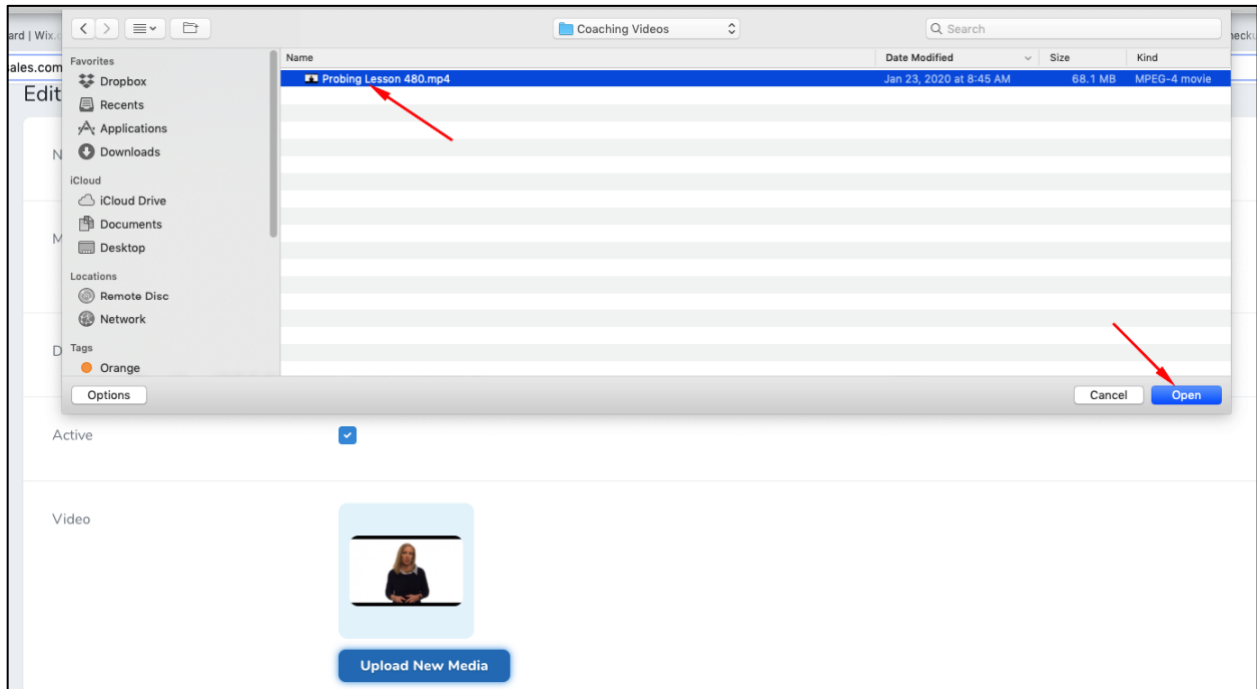
Module: With Trashed

Active:

Audio:

Video: 

4. Locate the Saved .mp4 video in your File Folder and click Open



5. Save your changes

[Update & Continue Editing](#)

[Update Activity](#)

or

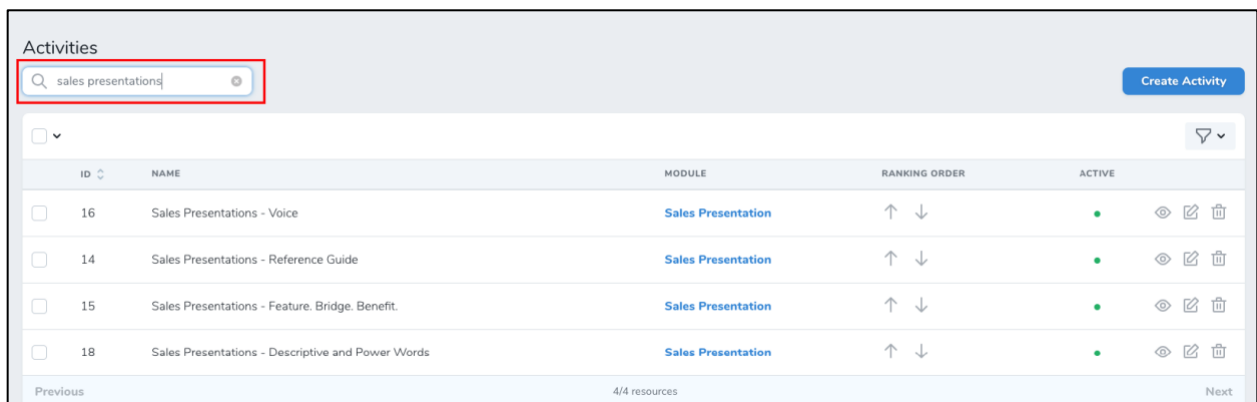
[Update & Continue Editing](#)

[Update Document](#)

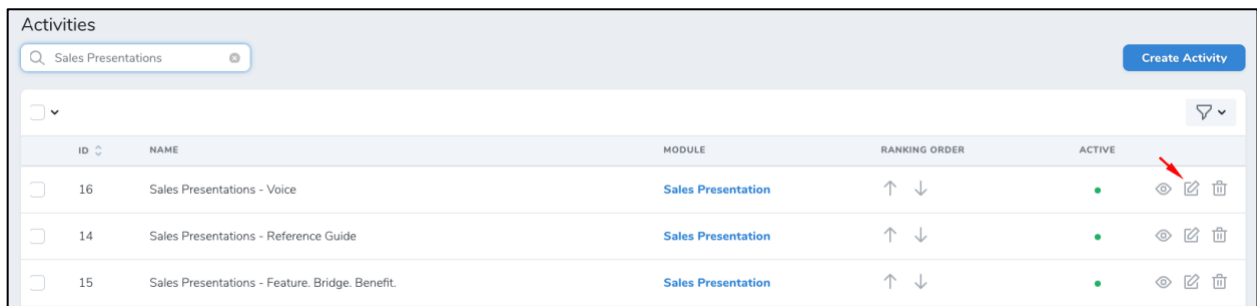
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Add Audio Files (.wav) to Coaching Activities and Worksheets

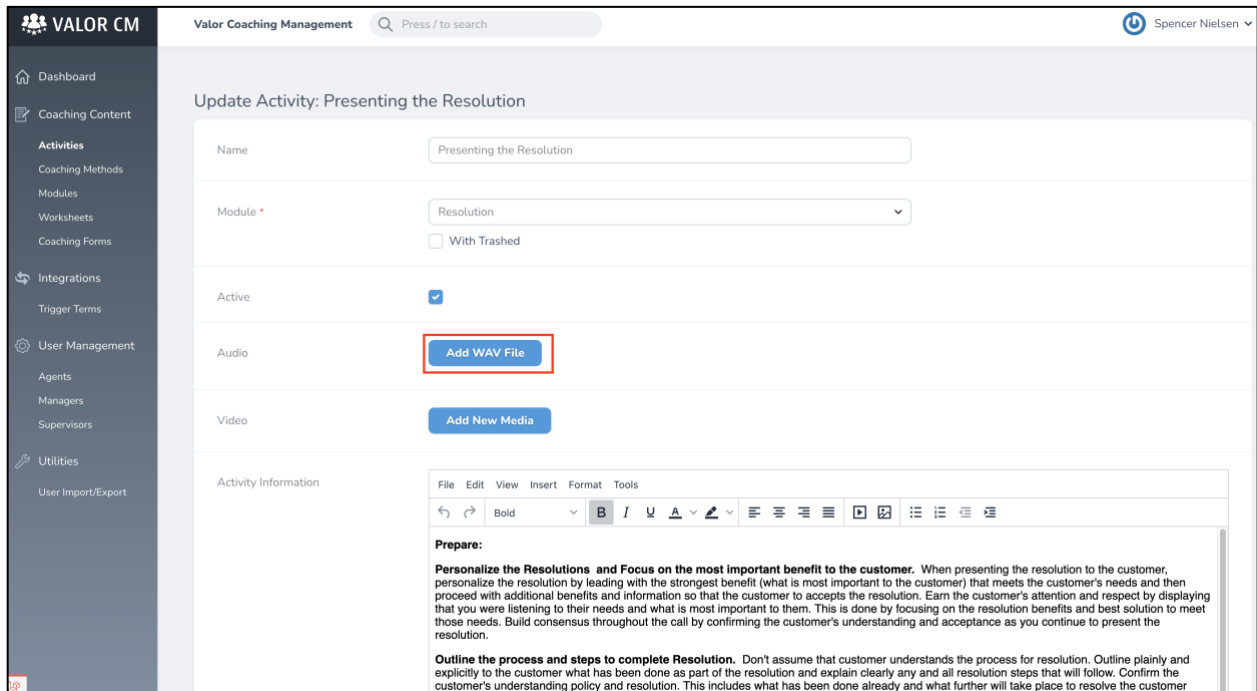
1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



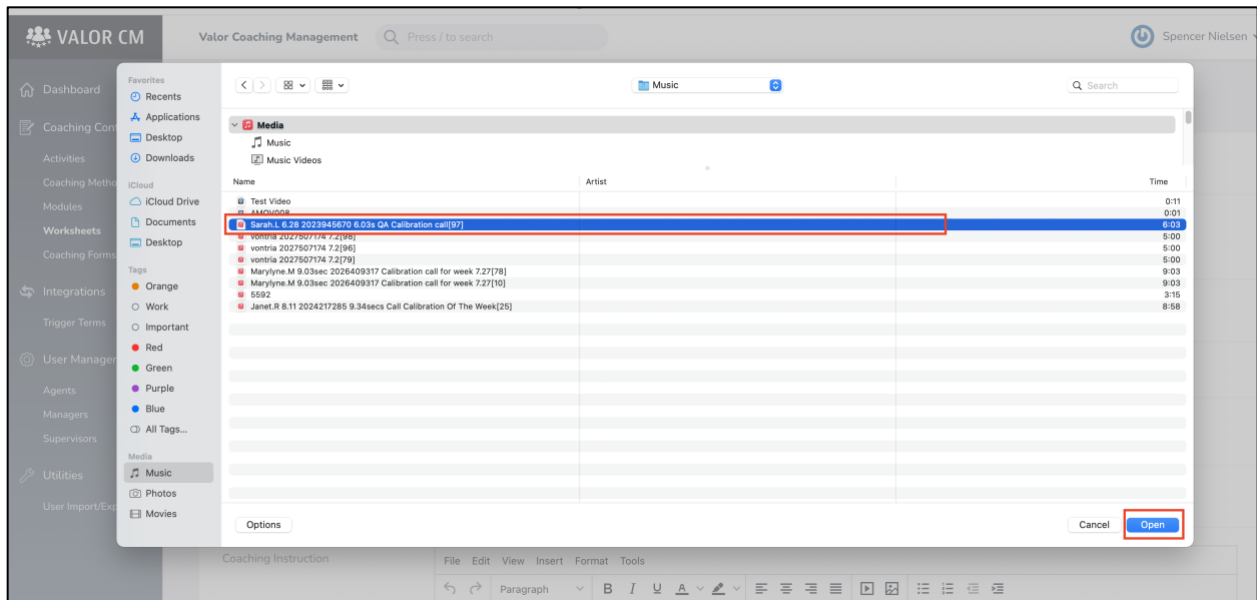
2. Click the Edit icon



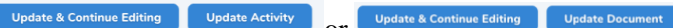
3. Click Add WAV File



4. Locate the saved .wav audio file in your File Folder and click Open



5. Save your changes



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Add PDF (.pdf) files to Coaching Activities and Worksheets

1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.

Activities

Q sales presentations

Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature, Bridge, Benefit.	Sales Presentation	↑ ↓	●
18	Sales Presentations - Descriptive and Power Words	Sales Presentation	↑ ↓	●

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2. Click the Edit icon 

Activities

Q Sales Presentations

Create Activity

ID	NAME	MODULE	RANKING ORDER	ACTIVE
16	Sales Presentations - Voice	Sales Presentation	↑ ↓	●
14	Sales Presentations - Reference Guide	Sales Presentation	↑ ↓	●
15	Sales Presentations - Feature, Bridge, Benefit.	Sales Presentation	↑ ↓	●

3. Click Add New File

VALOR CM Valor Coaching Management

Update Activity: Positive Feedback

Name: Positive Feedback

Module: Management

Active:

Audio WAV File: Add New File

PDF File: Add New File

Video: Add New Media

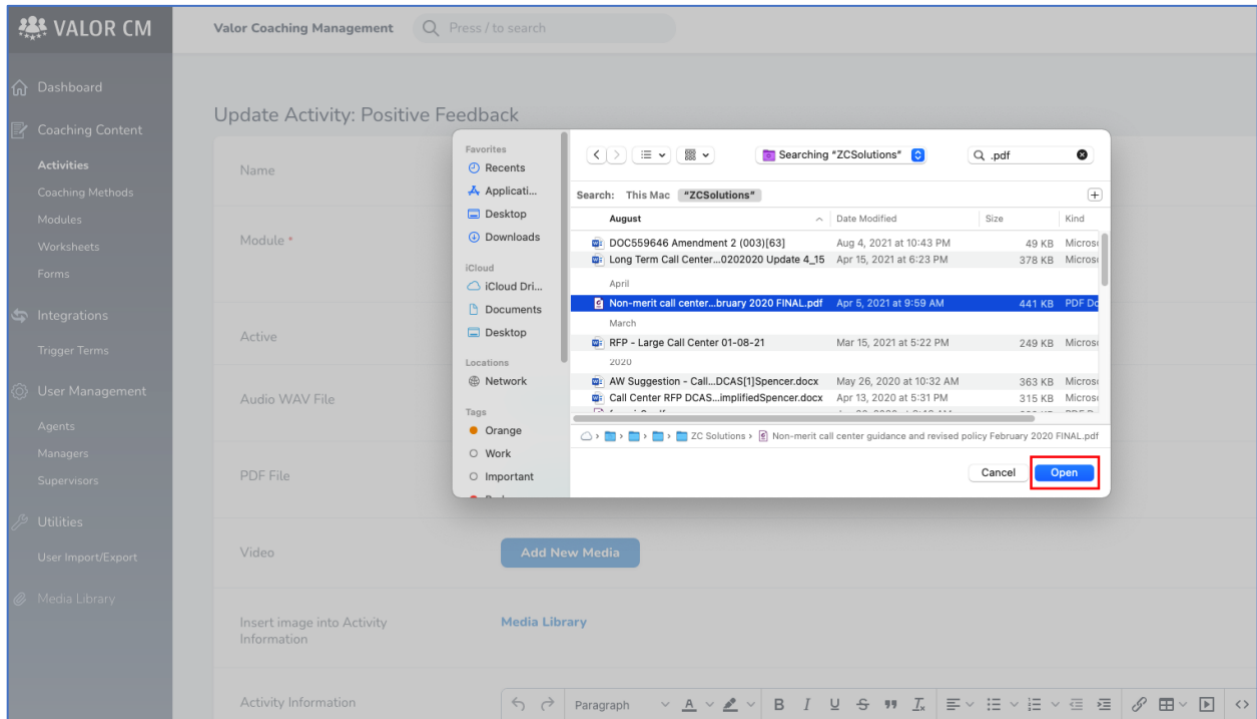
Media Library

Activity Information

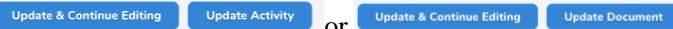
Paragraph

Enter content here

4. Locate the saved .pdf file in your File Folder and click Open



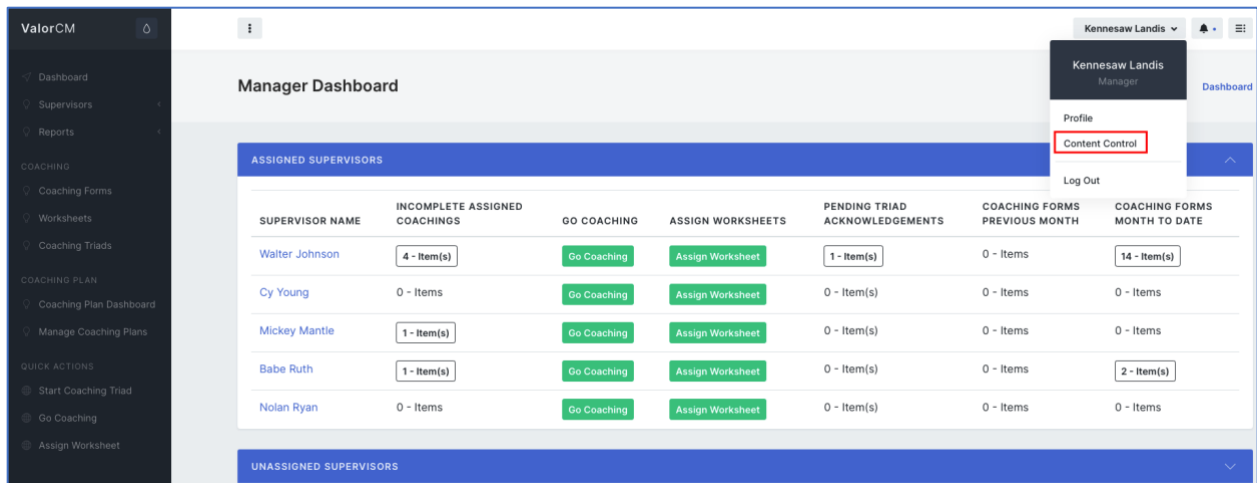
5. Save your changes



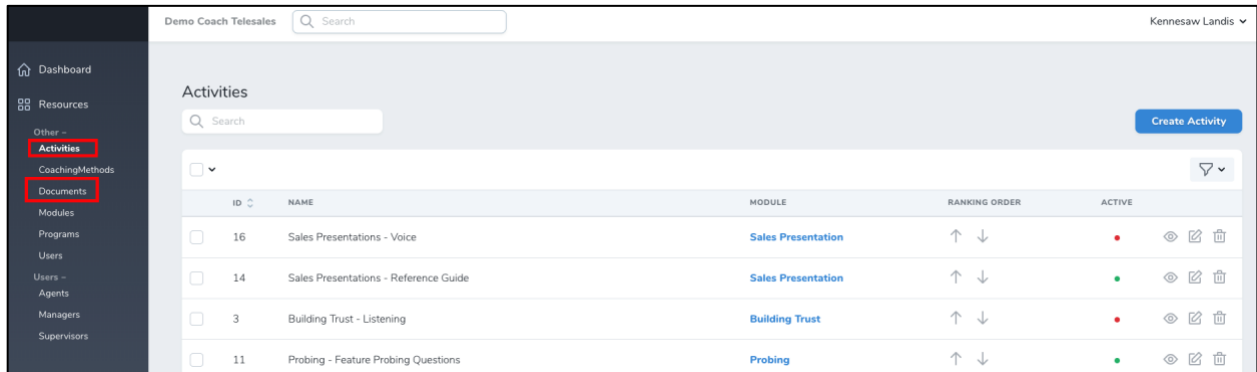
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Activate or Deactivate Existing Activities or Worksheets

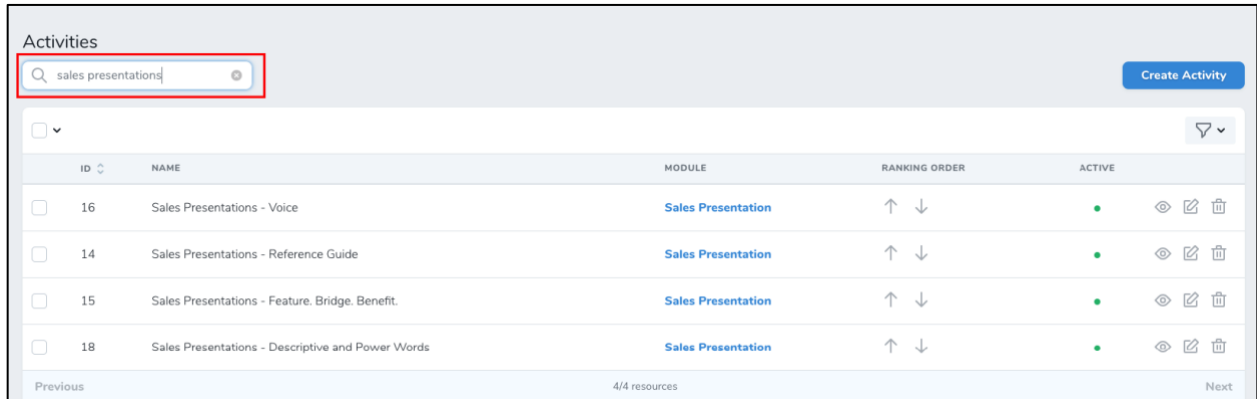
1. Select Content Control from the Username drop down menu




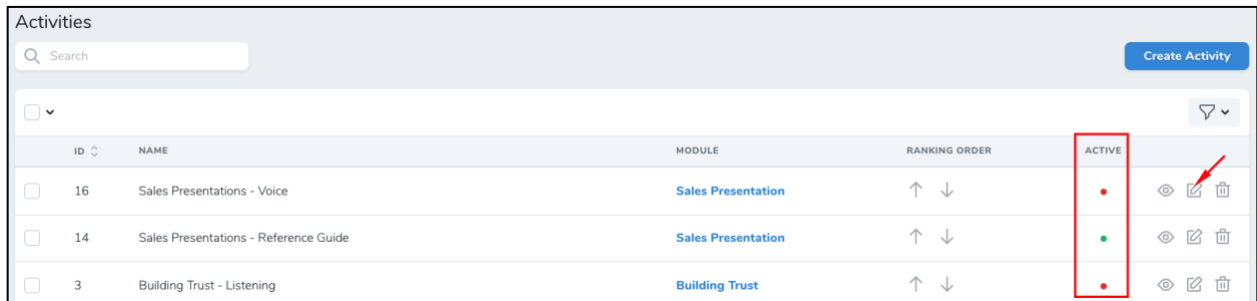
2. Select Activities or Documents from the left drop-down menu



3. Locate the Activity or Worksheet you would like to activate or de-activate. Use the Search bar to filter the list of Activities or Worksheets.



4. Click the Edit icon  for the Activity or Worksheet you would like to Activate or Deactivate
 a. Active Activities and Worksheets have a Green dot in the Active column and inactive Activities have a Red dot.



5. Select or De-select the Active button

Edit Activity

Name:

Module: ▼

With Trashed

Active:

Description:

1. **Discover.** Find out what the agent knows and confirm the agent's understanding of the use of their voice (how they sound) by agent: 1) *Why* is how you sound important? 2) *What* are the important keys of how you sound (Enthusiasm, Tone, Pace, Volume, Clarity, Pauses and Repetition)

2. **Practice.** Print the Sales Presentations - Voice document. Ask the agent to tell you about his or her favorite restaurant, interest or hobby using *Enthusiasm, Tone, Pace, Volume, Clarity, Pauses and Repetition*

6. Save your changes

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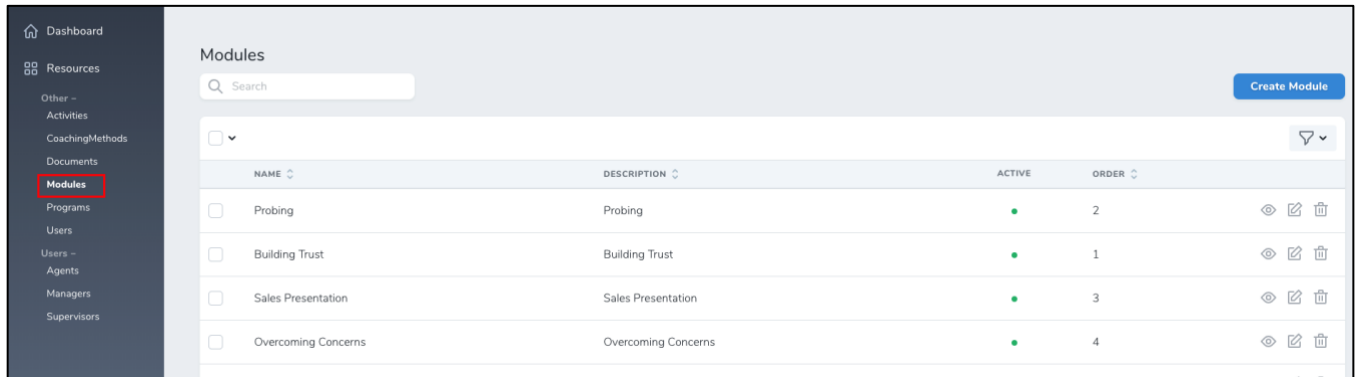
Create New Modules or Edit Existing Modules

1. Select Content Control from the Username drop down menu

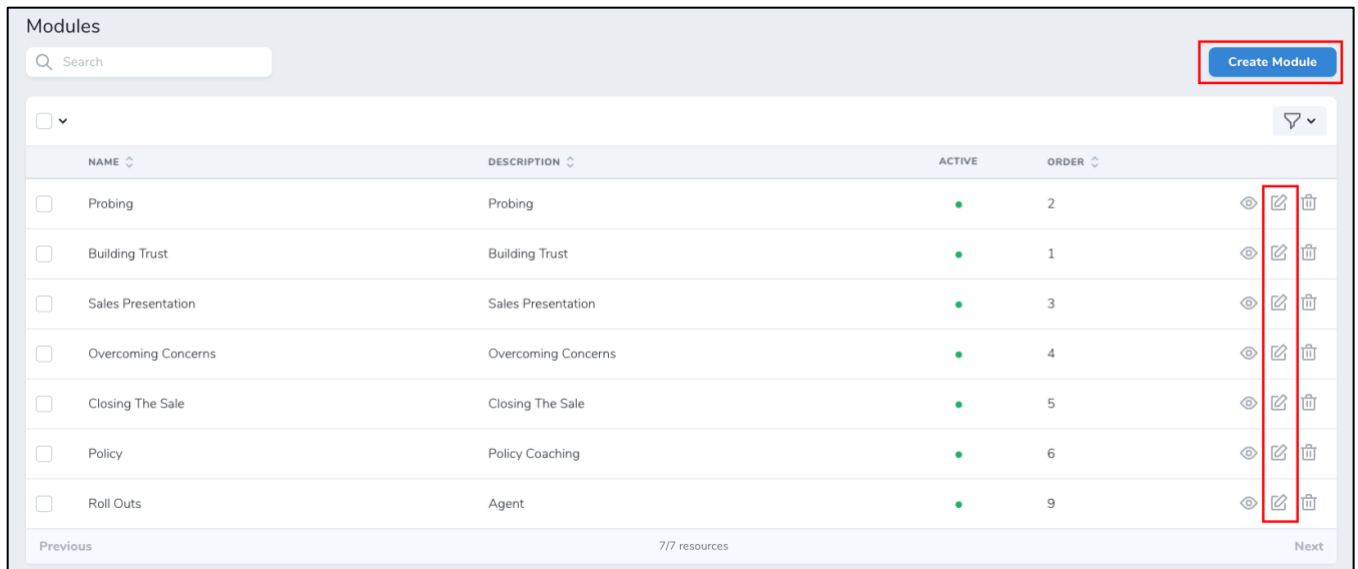
The screenshot shows the ValorCM Manager Dashboard. A user profile dropdown menu is open for 'Kennesaw Landis', with 'Content Control' highlighted in red. The dashboard includes a table of assigned supervisors and a sidebar with navigation options.

SUPERVISOR NAME	INCOMPLETE ASSIGNED COACHINGS	GO COACHING	ASSIGN WORKSHEETS	PENDING TRIAD ACKNOWLEDGEMENTS	COACHING FORMS PREVIOUS MONTH	COACHING FORMS MONTH TO DATE
Walter Johnson	4 - Item(s)	<input type="button" value="Go Coaching"/>	<input type="button" value="Assign Worksheet"/>	1 - Item(s)	0 - Items	14 - Item(s)
Cy Young	0 - Items	<input type="button" value="Go Coaching"/>	<input type="button" value="Assign Worksheet"/>	0 - Item(s)	0 - Items	0 - Items
Mickey Mantle	1 - Item(s)	<input type="button" value="Go Coaching"/>	<input type="button" value="Assign Worksheet"/>	0 - Item(s)	0 - Items	0 - Items
Babe Ruth	1 - Item(s)	<input type="button" value="Go Coaching"/>	<input type="button" value="Assign Worksheet"/>	0 - Item(s)	0 - Items	2 - Item(s)
Nolan Ryan	0 - Items	<input type="button" value="Go Coaching"/>	<input type="button" value="Assign Worksheet"/>	0 - Item(s)	0 - Items	0 - Items

2. Select Modules from the left drop-down menu



3. Click Create Module to create a new module or click the Edit icon for a selected module to update an existing module.



4. Update or enter the Module information
 - a. Module Name
 - b. Description
 - c. Select Active or Deactivate
 - d. Click Update or Create Module

The screenshot shows the 'Update Module: Building Trust' form. It contains three input fields: 'Name' (with 'Building Trust' entered), 'Description' (with 'Building Trust' entered), and 'Active' (with a checked checkbox). At the bottom right, there are three buttons: 'Cancel', 'Update & Continue Editing', and 'Update Module'. The 'Name', 'Description', and 'Active' fields are highlighted with red boxes.

5. Place the Modules in the order that you want them to appear on the coaching dashboard menu by clicking the 3 lines icon and dragging and dropping the Modules into the proper order.

Modules


Search Create Module

☐ ▾ 🔍 ▾

	NAME	DESCRIPTION	ACTIVE	
<input type="checkbox"/>	Building Trust	Building Trust	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Probing	Probing	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Sales Presentation	Sales Presentation	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Overcoming Concerns	Overcoming Concerns	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Closing The Sale	Closing The Sale	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Policy	Policy Coaching	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Roll Outs	Agent	●	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>

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Tip: You can view and edit the specific Activities and Worksheets that are in a specific Module by clicking on the view icon  for a Module.

Search Create Module

☐ ▾ 🔍 ▾

	NAME	DESCRIPTION	ACTIVE	ORDER	
<input type="checkbox"/>	Probing	Probing	●	2	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Building Trust	Building Trust	●	1	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Sales Presentation	Sales Presentation	●	3	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Overcoming Concerns	Overcoming Concerns	●	4	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>
<input type="checkbox"/>	Closing The Sale	Closing The Sale	●	5	<input type="checkbox"/> <input type="edit"/> <input type="trash"/>

Here you can edit the Module or select any of the Activities or Worksheets to edit. You can also create new Activities and Worksheets.

Module Details

Name	Probing
Description	Probing
Active	Yes
Order	2

Activities

Search Create Activity

ID	NAME	RANKING ORDER	ACTIVE	
11	Probing - Feature Probing Questions	↑ ↓	●	👁️ 📄 🗑️
12	Probing - Benefits Discovery	↑ ↓	●	👁️ 📄 🗑️
13	Probing - Nurse Story	↑ ↓	●	👁️ 📄 🗑️
10	Probing - Probing Reference Guide	↑ ↓	●	👁️ 📄 🗑️

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Documents

Search Create Document

NAME	DESCRIPTION	ACTIVE	
Probing Reference Guide	Probing Skills Outline	●	👁️ 📄 🗑️
Acme Probing Questions	Critical thinking and scripting activity to write and practice probing questions for each feature.	●	👁️ 📄 🗑️

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Edit and Create Coaching Methods

1. Select Content Control from the Username drop down menu

Manager Dashboard

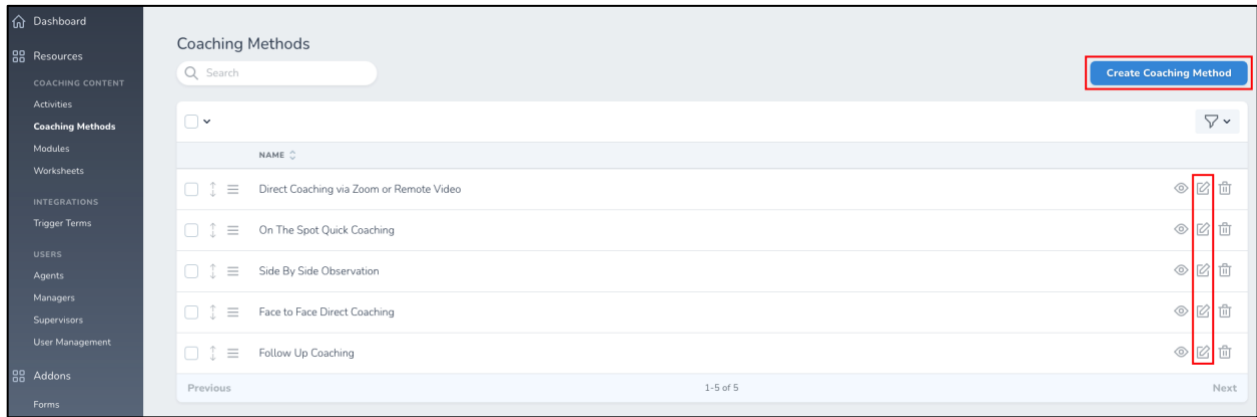
ASSIGNED SUPERVISORS

SUPERVISOR NAME	INCOMPLETE ASSIGNED COACHINGS	GO COACHING	ASSIGN WORKSHEETS	PENDING TRIAD ACKNOWLEDGEMENTS	COACHING FORMS PREVIOUS MONTH	COACHING FORMS MONTH TO DATE
Walter Johnson	4 - Item(s)	Go Coaching	Assign Worksheet	1 - Item(s)	0 - Items	14 - Item(s)
Cy Young	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Mickey Mantle	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items
Babe Ruth	1 - Item(s)	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	2 - Item(s)
Nolan Ryan	0 - Items	Go Coaching	Assign Worksheet	0 - Item(s)	0 - Items	0 - Items

UNASSIGNED SUPERVISORS


User Profile Dropdown: Kennesaw Landis (Manager) | Profile | **Content Control** | Log Out

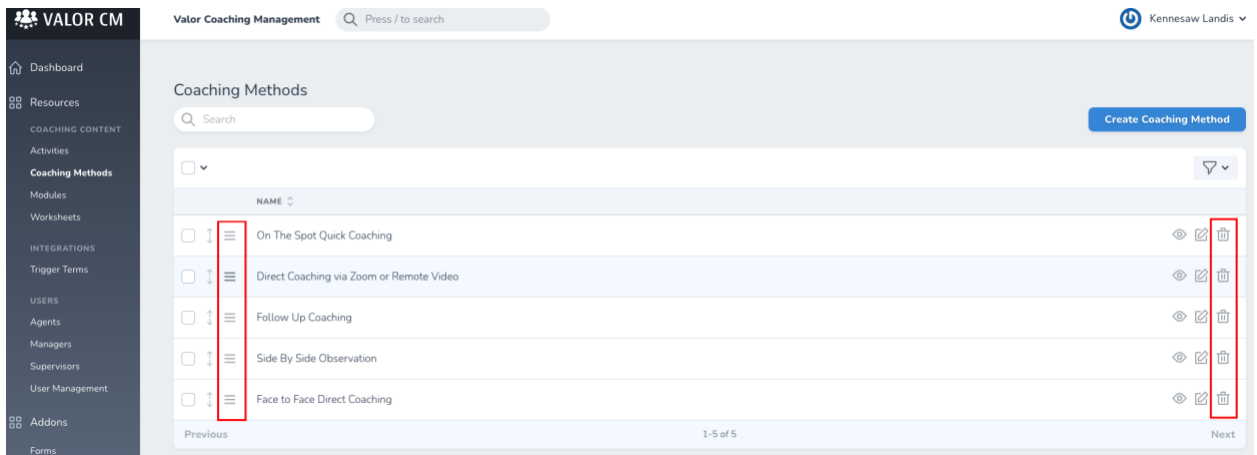
2. Select Coaching Methods from the left drop-down menu



3. Click Create Coaching Method or the Edit icon for the Coaching Method you would like to edit.
4. Enter or update the Name of the Coaching Method
 - a. Click Update or Create Coaching Method



5. Reorder the Coaching Methods drop-down menu on coaching forms by clicking on the 3 lines icon  and Dragging and Dropping Coaching Methods into the order you want them to appear.



6. Delete Coaching Methods by clicking the Trash Can icon.

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