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.

Contents:

- <u>Creating New Coaching Activities</u>
- <u>Create New Worksheets</u>
- <u>Creating Coaching Plans</u>
- <u>Editing Coaching Activities or Worksheets</u>
- <u>Creating Forms and Quizzes for Worksheets</u>
- Insert Images into Coaching Activity Instructions and Worksheets
- Insert Videos into Coaching Activity Instructions and Worksheets
- Add Audio (.wav) Files to Coaching Activities and Worksheets
- Add PDF files to Coaching Activities
- Activating or Deactivating Existing Activities and Worksheets
- <u>Create New Modules or Edit Existing Modules</u>
- View, Create or Edit Activities and Worksheets within each Module
- Edit and Create Coaching Methods

Create Coaching Activities

1. Select Content Control from the Username drop down menu

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| ✓ Dashboard ◊ Supervisors < | Manager Dashboa | rd | | | | _ | Manager Dashboard |
| © Reports ← | ASSIGNED SUPERVISORS | | | | | | t Control |
| Coaching Forms Worksheets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | Log Ou COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| ♀ Coaching Triads | Walter Johnson | 4 - Item(s) | Go Coaching | Assign Worksheet | 1 - Item(s) | 0 - Items | 14 - Item(s) |
| COACHING PLAN | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| ♀ Manage Coaching Plans | Mickey Mantle | 1 - item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| QUICK ACTIONS | Babe Ruth | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 2 - Item(s) |
| Start Coaching Go Coaching | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| Assign Worksheet | UNASSIGNED SUPERVISO | RS | | | | | ~ |

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2. Select Activities from the left drop-down menu

| | Demo Coach Telesales | Q Search |) | | | | Kennesaw Landis |
|--|------------------------|-------------------------------------|---|--------------------|--|--------|--|
| Dashboard Resources)ther – | Activities Q Search | | | | | | Create Activity |
| ctivities pachingMethods ocuments lodules | | NAME | | MODULE | RANKING ORDER | ACTIVE | ∀* |
| ograms ers rs – | | Sales Presentations - Voice | | Sales Presentation | $\uparrow \downarrow$ $\uparrow \downarrow$ | • | ○ Ľ ů ○ Ľ ů |
| ents inagers pervisors | | Building Trust - Listening | | Building Trust | $\uparrow \downarrow$ | • | ○ Ľ [±] |
| | 11 | Probing - Feature Probing Questions | | Probing | $\uparrow \downarrow$ | • | ⊘ Ľ [±] |

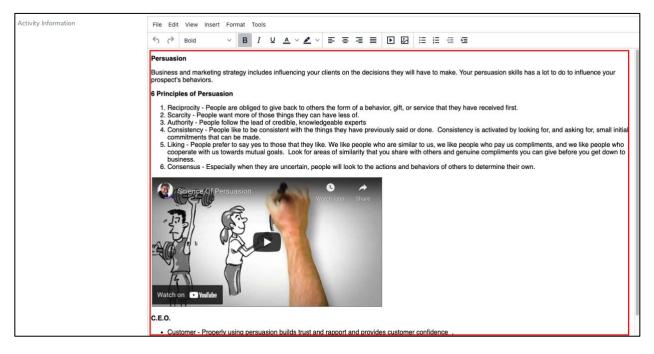
3. Click Create Activity

| | Demo Coach Telesales Q Search | | Kennesaw Landis 🗸 |
|---|------------------------------------|--------------------|-------------------|
| Dashboard B Resources Other − Activities | Activities Q. Search | | Create Activity |
| CoachingMethods | □ • | | ∇ ~ |
| Documents Modules | ID 🗘 NAME | MODULE RANKIN | G ORDER ACTIVE |
| Programs Users | 16 Sales Presentations - Voice | Sales Presentation | · ◎ Ľ ὑ |

- 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.

| / Activity | | |
|------------|-----------------------|---|
| ame | New Activity | |
| | Building Trust | |
| | Closing The Sale | |
| lodule | ✓ Overcoming Concerns | |
| | Policy | 2 |
| | Probing | |
| | Roll Outs | |
| | Sales Presentation | |

- 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.



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

| | Super visor. |
|-----------------------|---|
| Coaching Instructions | File Edit View Insert Format Tools |
| | |
| | Discover. Watch the video with the agent. Find out what the agent knows and confirm the agent's understanding of the principles of persuasion and what does each principle mean? How can utilizing gentie principles of persuasion help you close more sales? Practice. Ask the agent to provide an excellent examples statements of reciprocity, liking, consensus, consistency, scarcity and authority. (How should they say it). 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". 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. Commit. Re-emphasize what the agent is doing well and verbally commit the agent to use the skill on future calls. Follow-up. Tell the agent you will follow up. Create a 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

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to or insert images, slides, videos or text boxes into

worksheets and coaching instructions.



<u>Top</u>

Create Agent Worksheets

1. Select Content Control from the Username drop down menu

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| visors < | Ū. | | | | | Profile | |
| ts < | | | | | | Conter | t Control |
| | ASSIGNED SUPERVISORS | | | | | | |
| ing Forms | | | | | | Log Out | |
| heets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| ng Triads | Walter Johnson | 4 - Item(s) | Go Coaching | Assign Worksheet | 1 - Item(s) | 0 - Items | 14 - Item(s) |
| PLAN | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| ing Plan Dashboard e Coaching Plans | Mickey Mantle | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| IIONS | Babe Ruth | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 2 - Item(s) |
| oaching Triad | | | ou coaching | Assign Worksheet | | | |
| paching | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| n Worksheet | | | | | | | |
| | UNASSIGNED SUPERVIS | DRS | | | | | |

2. Select Worksheets from the left drop-down menu

| ☆ Dashboard | | | | |
|--------------------------------|---------------------|----------------|----------------------|------------------|
| 88 Resources | Worksheets | | | |
| COACHING CONTENT | Q Search | | | Create Worksheet |
| Activities | | | | ▽~ |
| Coaching Methods Worksheets | | | | |
| Modules | NAME 🗘 | MODULE 🗇 | DESCRIPTION | ACTIVE 0 |
| Programs | Discovery Questions | Discovery | Probing questions do | • © 🗹 🔟 |
| INTEGRATIONS | Call Control | Building Trust | Worksheet to help th | • © Ľ ů |
| CallFinder Log Import | | | | |

- 3. Click Create Worksheet
 - a. Enter the Name
 - b. Select the Module from the drop-down menu

 - c. Enter the Worksheet Descriptiond. 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

| New Worksheet | |
|----------------------|---|
| Name | Name |
| | |
| Module | - v |
| | With Trashed |
| Description | Description |
| Active | 8 |
| Video | Add New Media |
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| Form | Building Trust Reference Guide |
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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 and videos into worksheets and coaching instructions. You can <u>create Forms or Quizzes</u> to attach to Worksheets.

g. Click Create Document Create & Add Another Create Docume

Top

Creating Coaching Plans

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

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| Reports < | ASSIGNED SUPERVISORS | 3 | | | | | ^ |
| Coaching Forms Worksheets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| Coaching Triads | Walter Johnson | 4 - Item(s) | Go Coaching | Assign Worksheet | 1 - item(s) | 0 - Items | 14 - Item(s) |
| ACHING PLAN Coaching Plan Dashboard | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| Manage Coaching Plans | Mickey Mantle | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| CK ACTIONS Start Coaching Triad | Babe Ruth | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 2 - Item(s) |
| Go Coaching | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| Assign Worksheet | UNASSIGNED SUPERVIS | DRS | | | | | ~ |

2. Click Create New Coaching Plan

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| ✓ Dashboard ♀ Supervisors | c | All Coaching Plans | | | | Create New Coaching Plan |
| © Reports COACHING | ¢ | UPSELL | Edit | SALES DISCOVERY | Edit | |
| Coaching Forms Worksheets | | Assign Coa | ching Plan | Assign Coachir | ng Plan | |
| Coaching Triads | | (i) PRING | CIPLES OF PERSUASION | (i) P | ROBING QUESTIONS | |

3. Name the Coaching Plan and click Submit.

| ValorCM 0 | 1 | CREATE A NEW COACHING PLAN X | | K | Cennesaw Lan | Cennesaw Landis 🐱 | čennesaw Landis 👻 🌲 | čennesaw Landis 🗸 🌲 | čennesaw Landis 👻 🌲 | čennesaw Landis 👻 🌲 • | Cennesaw Landis 👻 🌲 🔹 |
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| | All Coaching Plans | Coaching Form Title | | | Create Nev | Create New Coac | Create New Coaching | Create New Coaching | Create New Coaching | Create New Coaching F | Create New Coaching P | Create New Coaching P | Create New Coaching P | Create New Coaching PI | Create New Coaching Pla |
| | | Your New Coaching Form Name | | | | | | | | | | | | | |
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| | UPSELL | Close Submit | it 🗎 | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| O Warkeheate | Assign Coaching Plan | Assign Coaching Plan | | | | | | | | | | | | | |

4. Click Edit on your new Coaching Plan.

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| © Reports COACHING | ¢ | UPSELL | Edit | SALES DISCOVERY | Edit | CALL CONTROL |
| Coaching Forms Worksheets | | Assign Coac | hing Plan | Assign Coac | hing Plan | Assign Coaching Plan |
| ♀ Coaching Triads | | (i) PRINCI | IPLES OF PERSUASION | í | PROBING QUESTIONS | |

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

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| ✓ Dashboard ♀ Supervisors < | Coaching Plans | | Coaching Plans |
| Reports Reports CoAcHING Coaching Forms Worksheets Coaching Triads CoacHING PLAN | Coaching Plan | Assignable Activities and I Select a Module Probing Building Trust Sales Presentation Roll Outs Module - Building Trust | Overcoming Concerns Closing The Sale Policy |
| Coaching Plan Dashboard Manage Coaching Plans | | ACTIVITIES | DOCUMENTS |
| QUICK ACTIONS Start Coaching Triad Go Coaching | | OUTBOUND GREETING | BUILDING TRUST REFERENCE GUIDE |
| Assign Worksheet | | CALL CONTROL - QUESTIONS AND TRANSITIONS | RAPPORT |
| | | SETTING THE AGENDA | EMPATHY ACTIVE LISTENING |
| 8 | | RAPPORT ACCENT CLARITY | RAPPORT 2 |

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

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| COACHING | Coaching Plan | Assignable Activities and Documents - Select a Module |
| ♀ Coaching Forms | CALL CONTROL Save | |
| ♀ Worksheets | | Probing Building Trust Sales Presentation Overcoming Concerns Closing The Sale Policy |
| ♀ Coaching Triads | CALL CONTROL - QUESTIONS AND | Roll Outs |
| COACHING PLAN | TRANSITIONS - Build, 1985 | Module - Building Trust |
| © Coaching Plan Dashboard | ACTIVE LISTENING - Building Trust | |
| Manage Coaching Plans | | ACTIVITIES DOCUMENTS |
| QUICK ACTIONS | SETTING THE AGENDA - Building Trust | OUTBOUND GREETING BUILDING TRUST REFERENCE GUIDE |
| Start Coaching Triad | BUILDING TRUST REFERENCE GUIDE - | |
| Go Coaching | Building Trust | ACTIVE LISTENING GREETINGS |
| Assign Worksheet | RAPPORT - Building Trust | CALL CONTROL - QUESTIONS AND RAPPORT |
| | | ЕМРАТНУ |
| | | SETTING THE AGENDA |
| | | ACTIVE LISTENING |
| | | RAPPORT |
| | | RAPPORT 2 |
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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.

| Coaching Plans | Coaching Plans |
|--|--|
| Coaching Plan | Assignable Activities and Documents – Select a Module Probing Building Trust Sales Presentation Overcoming Concerns Closing The Sale Policy |
| CALL CONTROL - QUESTIONS AND TRANSITIONS - Building Trust | Roll Outs Module - Building Trust |
| ACTIVE LISTENING - Building Trust | ACTIVITIES DOCUMENTS |
| SETTING THE AGENDA - Building Trust | OUTBOUND GREETING BUILDING TRUST REFERENCE GUIDE |
| BUILDING TRUST REFERENCE GUIDE - Building Trust | ACTIVE LISTENING GREETINGS |
| RAPPORT - Building Trust | CALL CONTROL - QUESTIONS AND RAPPORT TRANSITIONS |
| | EMPATHY SETTING THE AGENDA |
| | ACTIVE LISTENING |
| | ACCENT CLARITY |

- 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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| ✓ Dashboard ♀ Supervisors | Coaching Plans | Coaching Plu | ans |
| Reports COACHING Coaching Forms | Coaching Plan | Assignable Activities and Documents - Select a Module | |
| Worksheets Coaching Triads COACHING PLAN | CALL CONTROL - QUESTIONS AND TRANSITIONS - Building Trust | Probing Building Trust Sales Presentation Overcoming Concerns Closing The Sale Policy Roll Outs Module - Building Trust | |
| Coaching Plan Dashboard Manage Coaching Plans | ACTIVE LISTENING - Building Trust | ACTIVITIES DOCUMENTS | |
| QUICK ACTIONS | B SETTING THE AGENDA - Building Trust | OUTBOUND GREETING BUILDING TRUST REFERENCE GUIDE | |
| Go Coaching Assign Worksheet | BUILDING TRUST REFERENCE GUIDE - Building Trust | ACTIVE LISTENING OREETINGS | |
| - Asaign Horkshoet | RAPPORT - Building Trust | CALL CONTROL - QUESTIONS AND RAPPORT TRANSITIONS EMPATHY | |

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Editing Coaching Activities or Worksheets

1. Select Content Control from the Username drop down menu

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| aching Forms rksheets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| ching Triads | Walter Johnson | 4 - item(s) | Go Coaching | Assign Worksheet | 1 - Item(s) | 0 - Items | 14 - Item(s) |
| NG PLAN ching Plan Dashboard | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| age Coaching Plans | 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) |
| t Coaching Triad Coaching | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| sign Worksheet | | | | | | | |
| | UNASSIGNED SUPERVIS | | | | | | |

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.

| Dashboard Besources COACHING CONTENT | Worksheets Q. Search | | | Create Worksheet |
|--|-------------------------|----------------|----------------------|------------------|
| Activities Coaching Methods Worksheets | □ ✓ NAME © | MODULE 🗇 | DESCRIPTION | active 🗘 |
| Modules Programs | Discovery Questions | Discovery | Probing questions do | • • • • |
| INTEGRATIONS CallFinder Log Import | Call Control | Building Trust | Worksheet to help th | • © 12 11 |
| Call Records | Ownership | Building Trust | Worksheet to assist | • • 2 11 |

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

| - | vities sales presenta | tions | | | Creat | e Activity |
|-----|---------------------------------|---|--------------------|-----------------------|--------|----------------|
| | ~ | | | | | $\nabla \cdot$ |
| | ID 🗘 | NAME | MODULE | RANKING ORDER | ACTIVE | |
| | 16 | Sales Presentations - Voice | Sales Presentation | $\uparrow \downarrow$ | • © | ☑ ΰ |
| | 14 | Sales Presentations - Reference Guide | Sales Presentation | $\uparrow \downarrow$ | • © | 2 1 |
| | 15 | Sales Presentations - Feature, Bridge, Benefit, | Sales Presentation | $\uparrow \downarrow$ | • © | 12 11 |
| | 18 | Sales Presentations - Descriptive and Power Words | Sales Presentation | $\uparrow \downarrow$ | • @ | r i |
| Pre | vious | 4/4 | resources | | | Next |

4. Click the Edit icon \square

| Activi | ities | | | | | |
|--------|---------------|---|--------------------|-----------------------|--------|-------------------------------|
| Q Si | ales Presenta | tions | | | | Create Activity |
| • | | | | | | ∇ ~ |
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| | 16 | Sales Presentations - Voice | Sales Presentation | $\uparrow \downarrow$ | • | ◎ ৫ ₪ |
| | 14 | Sales Presentations - Reference Guide | Sales Presentation | $\uparrow \downarrow$ | • | ◎ I ¹ ¹ |
| | 15 | Sales Presentations - Feature. Bridge. Benefit. | Sales Presentation | $\uparrow \downarrow$ | • | ◎ 12 11 |

- 5. Edit the Activity
 - a. Activity or Worksheet Name
 - b. Module that contains the Activity or Worksheet
 - c. Activity Information, Coaching Instructions or Worksheet Data
 d. 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 |
| | With Trashed |
| Active | 8 |
| Audio | Add WAV FEr |
| Video | Add New Modia |
| Activity Information | File Left: View inset Format View Inset Inse Inse Inset |

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 $\begin{bmatrix} 1 & 1 & 1 & 1 & 1 \\ 0 & 1 & 0 & 0 & 0 & 1 \end{bmatrix}$ to or insert images and videos into worksheets and coaching instructions. You can create Forms or Quizzes to attach to Worksheets.

Top Creating and Editing Forms (Quizzes) for Worksheets

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

| | Dashboard |
|----|-----------|
| | |
| 88 | Resources |
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2. Select Create a New Form or select the Form you would like to edit.

| For | ms | | • Create | a New Form III My Submissions | |
|-----|-----------------------------------|------------|--------------|-------------------------------|-------------------|
| # | Name | Visibility | Allows Edit? | Submissions | Actions |
| 1 | DC Access App | PUBLIC | NO | 0 | iii Data 🔹 🖍 🚯 |
| 2 | Weekly Survey | PUBLIC | NO | 0 | i E Data 👁 🖌 🚯 🔒 |
| 3 | Closing the Call Reference Guide | PUBLIC | NO | 0 | i E Data 👁 🖌 🚯 😫 |
| 4 | Managing Concerns Reference Guide | PUBLIC | NO | 0 | III Data 👁 🖌 🚯 😫 |
| 5 | Resolutions Reference Guide | PUBLIC | NO | 0 | III Data 👁 🖌 🗈 😢 |
| 6 | Probing Reference Guide | PUBLIC | NO | 0 | 🖽 Data 🗶 🖌 🚯 |
| 7 | Building Trust Reference Guide | PUBLIC | NO | 0 | i E Data 🔹 🖌 🗈 🔒 |
| 8 | Managing Concerns | PUBLIC | NO | 0 | i E Data 🔹 🖌 🚯 🔒 |
| 9 | Decision Tree | PUBLIC | NO | 0 | ilii Data 👁 🖌 🚯 😫 |
| 10 | Ownership Statement | PUBLIC | NO | 0 | ilii Data 👁 🖌 🚯 🔒 |
| 11 | Call Control | PUBLIC | NO | 0 | i 🗄 Data 🔹 🖌 🚯 🔒 |
| 12 | Probing Questions | PUBLIC | NO | 1 | III Data 🔹 🖌 🔥 😫 |

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

| m Name | Form Visibility | 7 |
|----------------------------|--|------------------|
| lew Form | PUBLIC (available to all users) | |
| O Click on or drag and dro | op components onto the main panel to build your form cor | ntent. |
| | | H Header |
| | | ¶ Paragraph |
| | | D Text Field |
| | | I Text Area |
| | | E Select |
| | Drag a field from the right to this area | # Number |
| | brag a lieu nom ble right to bils area | 🛱 Date Field |
| | | 🖆 Autocomplete |
| | | 1 File Upload |
| | | Hidden Input |
| | | 🗐 Checkbox Group |
| | | |

- 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.

| Form Name | Form Visibility | |
|-----------------------------|---|-----------------------|
| New Form | PUBLIC (available to all users) | |
| Click on or Drag and drop o | Edit components onto the main panel to build your form content | Field Duplicate Field |
| Text Field | × / C | H Header |
| | Delete Field | ¶ Paragraph |
| Text Field | | D Text Field |
| | | 🗐 Text Area |
| Select | | E Select |
| Option 1 | ~ | # Number |
| Checkbox Group | | 🛗 Date Field |
| Option 1 | | 🖆 Autocomplete |
| | | 1 File Upload |
| | | 🖂 Hidden Input |
| | Drag and Drop to add Fields | E Checkbox Group |
| | | 🔲 Radio Group |

- 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.

| Edit Form | | ⊕ Back To My Forms € Copy Form |
|-------------------|---|------------------------------------|
| Form Name | Form Visibility | |
| New Form | PUBLIC (available to all users) | |
| O Click on or Dr | ag and drop components onto the main panel to build your form conten | to: |
| This is what will | be seen in the Form when completed | H Header |
| Required | 8 | ¶ Paragraph |
| Label | This is what will be seen in the Form when completed | C Text Field |
| Help Text | The Help Text displays when the user hovers the mouse over the ? icon | Text Area |
| | • | F Select |
| Placeholder | | # Number |
| Class | form-control | 📋 Date Field |
| Name | text-1596557319753 | Autocomplete |
| Access | Limit access to one or more of the following roles: | 1 File Upload |
| Value | Value | - Hidden Input |
| | | Checkbox Group |
| Туре | Text Field | Radio Group |
| Max Length | | |

- 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.

| Label | Who is the president? | | | |
|-------------|---|---------------------------|------------|--|
| Help Text | Select the correct answer | | _ | |
| Placeholder | | | | |
| Class | form-control | | | |
| | | | | |
| Name | select-1596628277709 | | | |
| | | e following roles: | | |
| Name | Limit access to one or more of the | | | ption should be left blank or ct the Correct Answer |
| Access | | | | |
| | Limit access to one or more of the | | | |
| Access | Limit access to one or more of the Allow Multiple Selections | / | | Delete Options by clicking the |
| Access | Limit access to one or more of th Allow Multiple Selections Select the Correct Answer | Select the Correct Answer | read Selec | Delete Options by clicking the |

- 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.

| | | | ×I | | a Autocomptete |
|-------------|--|------------------------|---------|--------|----------------------|
| Required | | | | 1 | File Upload |
| Label | | | | | Hidden Input |
| | Emoji & Symbols | | | | Checkbox Group |
| Help Text | Undo Redo | | | П | Radio Group |
| Placeholder | Cut | | | | |
| Class | Copy Paste | Right Click in the fie | eld and | select | Paste and Match Styl |
| - | Paste and Match Style | | | | |
| Name | Select All | | | | |
| Access | Language Settings Writing Direction | he following roles: | | | |
| Value | Inspect | | | | |
| | | | | | |

5. Attach the Form to a Worksheet

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

| Worksheets | | | | Create Worksheet |
|-----------------------------|--|------------------------------|----------|-------------------|
| | | | | ▽~ |
| NAME 🗘 | MODULE 🗘 | DESCRIPTION | ACTIVE 🗘 | |
| Resolutions Reference Guide | Resolution | Resolutions Overview | • | ⊘ [] ¹ |
| Previous | 1-1 of | 1 | | Next |
| | Laravel Nova · © 2020 Clarity Code, LL | C - By Michael Willis v2.0.7 | | |

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

| Edit Worksheet | |
|----------------------|--|
| Name | Resolutions Reference Guide |
| Module | Resolution v With Trashed |
| Description | Resolutions Overview |
| Active | |
| Video | Add New Media |
| Coaching Instruction | File Edit View Instructions: File Edit E <t< td=""></t<> |
| Form | Resolutions Reference Guide v With Trashed |
| | Cancel Update & Continue Editing Update Worksheet |

<u>Top</u>

Insert Images into Coaching 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.

| | tiviti (sale | ies es presentati | onsj | | | | Create A | Activit | X |
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| C | | 15 | Sales Presentations - Feature. Bridge. Benefit. | Sales Presentation | $\uparrow \downarrow$ | • | ⊚ [| 2 t | ð |
| C | | 18 | Sales Presentations - Descriptive and Power Words | Sales Presentation | $\uparrow \downarrow$ | • | 0 [| Z t | Ì |
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2. Click the Edit icon \square

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| Coaching Methods Modules Worksheets | □ ♥ ID ○ NAME ○ | MODULE 🗘 | active |
| Forms | 63 Principles of Persuasion | Overcoming Concerns | 0 © C ü |
| Trigger Terms | 61 Descriptive Power Words 60 Empathy | Sales Presentation Building Trust | |

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

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| ᢙ Dashboard ♂ Coaching Content | Update Activity: Empathy | |
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| Modules Worksheets Forms | | vilding Trust |
| Integrations | Active 💌 | |
| User Management Agents Managers | Audio | Add WAV File |
| Managers Supervisors // Utilities | Video | Add New Media |
| User Import/Export | Insert image into description Med | lia Library |
| 🥔 Media Library | | $\begin{array}{c c c c c c c c c c c c c c c c c c c $ |
| | cc ci ar tra ar | Then appropriate, expressing understanding and empathy for the customer's needs is an important part of sales. If a customer mentions personal issues or oncerns, acknowledge the customer with an empathy statement that demonstrates to the customer that you understand how they feel. Put yourself in the ustomer's place and genuinely express understanding towards their needs, opinions, values, feelings and wants. Empathy is recognizing the customer's needs and letting them know that you understand what they have experienced or are experiencing. Tell them you understand their concerns and issues. As part of a ansition statement, utilize an empathy or understanding statement. Expressing empathy and understanding will disarm a customer and help them view you as andvocate. Don't think of empathy as "simpathy". Empathy statements are not apologizing. Empathy is placing yourself in the customer's isluation and peaking to and treating the customer's ayou would like to be spoken to and treated if you were in the same situation and that you share values, opinions and |

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.

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| Forms | | |
| 🤹 Integrations | 6 min AHT 95 ut App Features and Ben | |
| Trigger Terms | | |
| 💮 User Management | Audio Add WAV Fite | |
| Agents | | |

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

| | App Feature | Benefit |
|---|--|--|
| • | 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 Update & Continue Editing Update Activity Or Update & Continue Editing Update Document

<u>Top</u>

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.

| Activi Q sa | ties les presenta | tions | | | Create | Activity |
|----------------|-----------------------------|---|--------------------|-----------------------|--------|----------------|
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| | 14 | Sales Presentations - Reference Guide | Sales Presentation | $\uparrow \downarrow$ | • © | 2 1 |
| | 15 | Sales Presentations - Feature. Bridge. Benefit. | Sales Presentation | $\uparrow \downarrow$ | • © | r i |
| | 18 | Sales Presentations - Descriptive and Power Words | Sales Presentation | $\uparrow \downarrow$ | • © | 0 |
| Previo | ous | | 4/4 resources | | | Next |

2. Click the Edit icon \square

| | Activities Q. Sales Presentations Image: Create Activity | | | | | | | | | |
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3. Click the Insert Video icon

| File Edi | t View Insert | Format Too | bls | | |
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| • Wa • Ast | tch the video be the agent what | t they can do | better to learn and | discover the customer's | needs and wants. |
| | לה אי Instruc • Wa • Asi | Sold Instructions: • Watch the video be • Ask the agent what | Sold Bold B I Instructions: • Watch the video below with you • Ask the agent what they can do | S C Bold ∨ B I U A ✓ ✓ Instructions: • Watch the video below with your agent. | Sold ✓ B I U A ✓ E E E E E E E Image: Solar state Image |

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

| Insert/Ed | Edit Media | | | | | | |
|-----------|--------------|-----------------------|----------------|-----------------|-------------|------------------|---------------|
| General | Source | | | | | | |
| Embed | https://www. | youtube.com/watch?v=N | /IPV2 | | | | |
| Advanced | Width | Height | | | | | |
| | 560 | 314 | | | | | |
| | | Cancel | Save | | | | |
| Sav | e your ch | anges Update & Co | ntinue Editing | Update Activity | Or Update & | Continue Editing | Update Docume |

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 Q sales presentations Create Activity | | | | | | | | | |
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<u>Top</u>

2. Click the Edit icon \square

| Create Activity Create Activity | | | | | | | | | |
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3. Click the Add New Media button

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| | Dashboard | Update Activity: Empathy | |
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| | Utilities | | SOFT SKILS? |
| | User Import/Export | | |
| | Media Library | | Upload New Media |

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

| ard Wix.c | | | Coaching Videos | • | Q. Search | | 16 | ecku |
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| V | ideo | Upload New Media | | | | | | |
| 4 | 5. Save your changes | Update & Continue Editing U | pdate Activity | Update & Continue Editing | Update Document | | | |

<u>Top</u>

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.

| <u></u> | Activities Q sales presentations Create Activity | | | | | | | | |
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2. Click the Edit icon \checkmark

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3. Click Add WAV File

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| Modules Worksheets Coaching Forms | Module * | Resolution V | |
| Integrations | Active | | |
| User Management Agents | Audio | Add WAV File | |
| Managers Supervisors | Video | Add New Media | |
| 19 Utilities User Import/Export | Activity Information | File Edit View Insert Format Tools ♦ c) c> Bold ∨ B I U A< ∨ ✓ E | |
| | | Prepare: Personalize the Resolutions and Focus on the most important benefit to the customer. When presenting the resolution to the cus personalize the resolution by leading with the strongest benefit (what is most important to the customer) that meets the customer's needs proceed with additional benefits and information so that the customer to accepts the resolution. Earn the customer's attention and respec- that you were listening to their needs and what is most important to them. This is done by focusing on the resolution benefits and best so those needs. Build consensus throughout the call by confirming the customer's understanding and acceptance as you continue to preser resolution. Outline the process and steps to complete Resolution. Don't assume that customer understands the process for resolution. Outline (the process for resolution). | s and then st by displaying Jution to meet at the |
| y. | | Summe the process and steps to complete resolution. Unit assume that customer understands the process for resolution. Uniting explicitly to the customer what has been done as part of the resolution and explain clearly any and all resolution at sets that will follow. Co customer's understanding policy and resolution. This includes what has been done already and what further will take place to resolve the | nfirm the |

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

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5. Save your changes Update & Continue Editing Update Activity Or Update & Continue Editing Update Document

<u>Top</u>

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.

| Q sales presentations Create Activity | | | | | | | | | |
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2. Click the Edit icon

| | Activities | | | | | | | | |
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3. Click Add New File

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| S Integrations | Active | |
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| Managers Supervisors // Utilities | PDF File | Add New File |
| User Import/Export | Video | Add New Media |
| 🥔 Media Library | Insert image into Activity Information | Media Library |
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4. Locate the saved .pdf file in your File Folder and click Open

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| Integrations | Documents Nor-merit call center_bruary 2020 FINAL.pdf Apr 5, 2021 at 8:59 AM 441 KB PDF Do March Desktop |
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5. Save your changes Update & Continue Editing Update Activity or Update & Continue Editing Update Document Top

Activate or Deactivate Existing Activities or Worksheets

1. Select Content Control from the Username drop down menu

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| Coaching Forms Worksheets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| ♀ Coaching Triads | Walter Johnson | 4 - Item(s) | Go Coaching | Assign Worksheet | 1 - Item(s) | 0 - Items | 14 - Item(s) |
| COACHING PLAN | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| S Manage Coaching Plans | Mickey Mantle | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| QUICK ACTIONS | Babe Ruth | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 2 - Item(s) |
| Start Coaching Triad Go Coaching | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| Assign Worksheet | UNASSIGNED SUPERVISO | DRS | | | | | ~ |

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

| | Demo Coach Telesale | s Q Search | | | Kennesaw Landis |
|-------------------------|---------------------|---------------------------------------|--------------------|-----------------------|-----------------|
| Dashboard Resources | Activities | | | | |
| Other – Activities | Q Search | | | | Create Activity |
| CoachingMethods | □ • | | | | $\nabla \cdot$ |
| Documents Modules | ID 0 | NAME | MODULE | RANKING ORDER | ACTIVE |
| Programs Users | 16 | Sales Presentations - Voice | Sales Presentation | $\uparrow \downarrow$ | • © 12 11 |
| Users – Agents | 14 | Sales Presentations - Reference Guide | Sales Presentation | $\uparrow \downarrow$ | • © 12 11 |
| Managers Supervisors | 3 | Building Trust - Listening | Building Trust | $\uparrow \downarrow$ | • © 🗹 🔟 |
| | 11 | Probing - Feature Probing Questions | Probing | $\uparrow \downarrow$ | • © 🗹 🗓 |

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.

| Activities Q sales presentations Create Activity | | | | | | | | |
|--|------|---|--------------------|-----------------------|--------|------|--|--|
| □ • | | | | | | ▽• | | |
| | ID 🗘 | NAME | MODULE | RANKING ORDER | ACTIVE | | | |
| | 16 | Sales Presentations - Voice | Sales Presentation | $\uparrow \downarrow$ | • | 2 1 | | |
| | 14 | Sales Presentations - Reference Guide | Sales Presentation | $\uparrow \downarrow$ | • | 2 1 | | |
| | 15 | Sales Presentations - Feature. Bridge. Benefit. | Sales Presentation | $\uparrow \downarrow$ | • © | c i | | |
| | 18 | Sales Presentations - Descriptive and Power Words | Sales Presentation | $\uparrow \downarrow$ | • | 区山 | | |
| Previo | ous | | 4/4 resources | | | Next | | |

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.

| Activ | rities | | | | | |
|-------|--------|---------------------------------------|--------------------|-----------------------|--------|-----------------|
| Q s | earch | | | | | Create Activity |
| • | | | | | | ▽• |
| | ID Ç | NAME | MODULE | RANKING ORDER | ACTIVE | 1 |
| | 16 | Sales Presentations - Voice | Sales Presentation | $\uparrow \downarrow$ | • | ⊘ 🗹 🖞 |
| | 14 | Sales Presentations - Reference Guide | Sales Presentation | $\uparrow \downarrow$ | • | ⊘ 12 11 |
| | 3 | Building Trust - Listening | Building Trust | $\uparrow \downarrow$ | • | ◎ ଅ 前 |

5. Select or De-select the Active button

| Edit Activity | |
|----------------------|---|
| Name | Sales Presentations - Voice |
| Module | Sales Presentation With Trashed |
| Active | |
| Description | • Source X □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ |
| | Discover. Find out what the agent knows and confirm the agent's understanding of the use of their voice (how they sound) b agent: 1) Why is how you sound important? 2) What are the important keys of how you sound (Enthusiasm, Tone, Pace, Volu 2. Practice. Print the Sales Presentations - Voice document. Ask the agent to tell you about his or her favorite restaurant, inter agent to "sell" you on their restaurant, interest or hobby using Enthusiasm, Tone, Pace, Volume, Clarity, Pauses and Repetition |
| 6. Save your changes | te & Continue Editing Update Activity |

<u>Top</u>

Create New Modules or Edit Existing Modules

1. Select Content Control from the Username drop down menu

| rCM O | E | | | | | Ke | nnesaw Landis 👻 🌲 • |
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| hboard | Manager Dashboa | ard | | | | | nesaw Landis Manager Dashb |
| pervisors < | | | | | | Profile | _ |
| aports < | | | | | | | at Control |
| IING | ASSIGNED SUPERVISORS | | | | | | |
| paching Forms | | | | | | Log Ou | it |
| orksheets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| aching Triads | Walter Johnson | 4 - Item(s) | Go Coaching | Assign Worksheet | 1 - Item(s) | 0 - Items | 14 - Item(s) |
| HING PLAN baching Plan Dashboard | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| anage Coaching Plans | Mickey Mantle | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| ACTIONS | Babe Ruth | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 2 - Item(s) |
| art Coaching Triad | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| So Coaching | | | | | | | |
| Assign Worksheet | UNASSIGNED SUPERVISO | | | | | | |

2. Select Modules from the left drop-down menu

| | Madulaa | | | |
|-----------------------|---------------------|---------------------|----------------|--------------|
| Resources | Modules | | | |
| Other – Activities | Q Search | | | Create Modul |
| CoachingMethods | □ • | | | ∇ |
| Documents | NAME 🗘 | DESCRIPTION 🗘 | ACTIVE ORDER 🗘 | |
| Modules | | | | |
| Programs | Probing | Probing | • 2 | • C i |
| Users | | | | |
| Users – Agents | Building Trust | Building Trust | • 1 | 0 Ľ í |
| Managers | Sales Presentation | Sales Presentation | • 3 | • C t |
| Supervisors | | | | |
| | Overcoming Concerns | Overcoming Concerns | • 4 | |

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

| Modu | lles | | | | | |
|-------|---------------------|---------------------|--------|---------|--|--|
| Q s | Q Search | | | | | |
| • | | | | | ▽~ | |
| | NAME 🗘 | DESCRIPTION 🗘 | ACTIVE | ORDER 🗘 | | |
| | Probing | Probing | • | 2 | ◎ ☑ ^⑪ | |
| | Building Trust | Building Trust | • | 1 | ⊚ 🗹 🕮 | |
| | Sales Presentation | Sales Presentation | • | 3 | | |
| | Overcoming Concerns | Overcoming Concerns | • | 4 | Image: Second secon | |
| | Closing The Sale | Closing The Sale | • | 5 | ⊚ 🖄 🗇 | |
| | Policy | Policy Coaching | • | 6 | ⊚ 12 🗇 | |
| | Roll Outs | Agent | • | 9 | ⊚ 12 1 | |
| Previ | pus | 7/7 resources | | | Next | |

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

| U | Update Module: Building Trust | | | | | | | | |
|---|-------------------------------|----------------|--------|---------------------------|---------------|--|--|--|--|
| | Name | Building Trust | | | | | | | |
| | Description | Building Trust | | | | | | | |
| | Active | | | | | | | | |
| | | | Cancel | Update & Continue Editing | Update Module | | | | |

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.

| Module | es | | | | |
|----------|-----|---------------------|---------------------|---------|---------------|
| Q Sear | rch | | | | Create Module |
| • | | | | | ▽~ |
| | | NAME | DESCRIPTION | ACTIVE | |
| | ≡ | Building Trust | Building Trust | \odot | ◎ ☑ ⅲ |
| | = | Probing | Probing | \odot | @ ☑ ₪ |
| | = | Sales Presentation | Sales Presentation | \odot | ◎ 岱 曲 |
| | = | Overcoming Concerns | Overcoming Concerns | \odot | ◎ 比 前 |
| | = | Closing The Sale | Closing The Sale | \odot | @ 12 ₪ |
| | ≡ | Policy | Policy Coaching | \odot | @ 12 ₪ |
| | = | Roll Outs | Agent | \odot | @ 12 ₪ |
| Previous | s | | 1-7 of 7 | | Next |

<u>Top</u>

Tip: You can view and edit the specific Activities and Worksheets that are in a specific Module by clicking on the view icon ⁽¹⁾ for a Module.

| Q Se | arch | | | | Create Mod | dule |
|------|---------------------|---------------------|--------|---------|------------|------|
| • | | | | | ∇ | 7 • |
| | NAME 🗘 | DESCRIPTION 🗘 | ACTIVE | ORDER 💲 | | |
| | Probing | Probing | • | 2 | ◎ 12 | Ш |
| | Building Trust | Building Trust | • | 1 | ◎ 12 | ⑪ |
| | Sales Presentation | Sales Presentation | • | 3 | ◎ 12 | Ш |
| | Overcoming Concerns | Overcoming Concerns | • | 4 | ◎ 12 | ⊞ |
| | Closing The Sale | Closing The Sale | • | 5 | © 12 | 団 |

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 | | | | | <u></u> |
|----------------|-------------------------------------|---|-----------------------|----------|----------------------------|
| Name | | Probing | | | |
| Description | | Probing | | | |
| Active | | • Yes | | | |
| Order | | 2 | | | |
| Activities | | | | | |
| Q Search | | | | (| Create Activity |
| ~ | | | | | ▽~ |
| ID | NAME | | RANKING ORDER | ACTIVE | |
| 11 | Probing - Feature Probing Questions | | $\uparrow \downarrow$ | • | ◎ 12 11 |
| 12 | Probing - Benefits Discovery | | $\uparrow \downarrow$ | • | ∅ L II |
| 13 | Probing - Nurse Story | | $\uparrow \downarrow$ | • | ◎ 12 11 |
| 10 | Probing - Probing Reference Guide | | $\uparrow \downarrow$ | | ⊘ Ľ [±] |
| Previous | | 4/4 resources | | | Next |
| Documents | | | | | |
| Q Search | | | | | Create Document |
| . • | | | | | ▽~ |
| NAME 🗘 | | DESCRIPTION | | ACTIVE 🗘 | |
| Probing Refe | rence Guide | Probing Skills Outline | | • | ⊘ Ľ [±] |
| Acme Probin | Questions | Critical thinking and scripting activity to write and practice probing questions for each featu | ire | | ◎ 🗹 🖞 |

Top

Edit and Create Coaching Methods

1. Select Content Control from the Username drop down menu

| ValorCM 👌 | I | | | | | Ke | nnesaw Landis 👻 🌲 • 🗮 |
|---|----------------------|----------------------------------|-------------|-------------------|-----------------------------------|----------------------------------|-----------------------------------|
| ✓ Dashboard Q: Supervisors < | Manager Dashboa | rd | | | | | nesaw Landis Manager Dashboard |
| © Reports ← | | | | | | Profile | t Control |
| COACHING | ASSIGNED SUPERVISORS | i | | | | Log Ou | ^ |
| Coaching Forms Worksheets | SUPERVISOR NAME | INCOMPLETE ASSIGNED COACHINGS | GO COACHING | ASSIGN WORKSHEETS | PENDING TRIAD ACKNOWLEDGEMENTS | COACHING FORMS PREVIOUS MONTH | COACHING FORMS MONTH TO DATE |
| ♀ Coaching Triads | Walter Johnson | 4 - Item(s) | Go Coaching | Assign Worksheet | 1 - Item(s) | 0 - Items | 14 - Item(s) |
| COACHING PLAN | Cy Young | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| Manage Coaching Plans | Mickey Mantle | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| QUICK ACTIONS | Babe Ruth | 1 - Item(s) | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 2 - Item(s) |
| Start Coaching Triad Go Coaching | Nolan Ryan | 0 - Items | Go Coaching | Assign Worksheet | 0 - Item(s) | 0 - Items | 0 - Items |
| Assign Worksheet | | | | | | | |
| | UNASSIGNED SUPERVISO | DRS | | | | | \sim |

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

| டு Dashboard | | |
|-----------------------------|--|-------------------------|
| BB Resources | Coaching Methods | |
| COACHING CONTENT | Q Search | Create Coaching Method |
| Activities | • | ▽~ |
| Coaching Methods Modules | NAME © | v |
| Worksheets | | - 🗔 - |
| INTEGRATIONS | □ ↓ | ◎ ☑ ⑪ |
| Trigger Terms | \bigcirc 1 \equiv On The Spot Quick Coaching | |
| USERS Agents | □ ↓ | |
| Managers Supervisors | □ 1 | ◎ ピ |
| User Management | □ 1 | |
| 88 Addons | Previous 1-5 of 5 | Next |
| Forms | | |

- 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

| Update & Continue Editing | Update CoachingMethod |
|---------------------------|---------------------------|
| | Update & Continue Editing |

5. Reorder the Coaching Methods drop-down menu on coaching forms by clicking on the 3 lines icon

 \equiv and Dragging and Dropping Coaching Methods into the order you want them to appear.

| 🐥 VALOR CM | Valor Coaching Management Q Press / to search | 🕑 Kennesaw Landis 🗸 |
|--|---|------------------------|
| | Coaching Methods Q. Search | Create Coaching Method |
| Activities Coaching Methods Modules | | ▽~ |
| Worksheets | □ 1 | ۵ 🛛 |
| Trigger Terms USERS | I Direct Coaching via Zoom or Remote Video | ◎ 12 前 |
| Agents Managers Supervisors | Image: Side By Side Observation | |
| User Management | □ 1 | © لا ش |
| B Addons | Previous 1-5 of 5 | Next |

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

<u>Top</u>