Coaching Configuration Guide

Updated 07-2019

Getting Started

Step 1

Add people and coaching relationships

- Add job roles
- Add org structure
- Add people
- Add coaching relationship

Step 2

Assign Assessments

- Assign assessments to job role
- Setup coaching frequencies

Step 3

Assign Performance Metrics

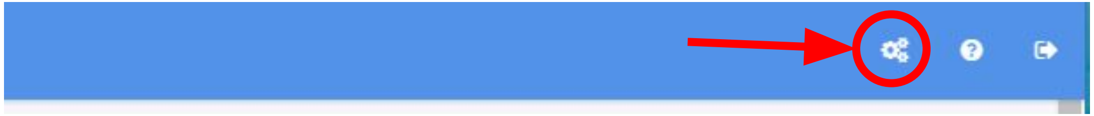
- Define performance metrics
- Collect metric data
- Upload into system

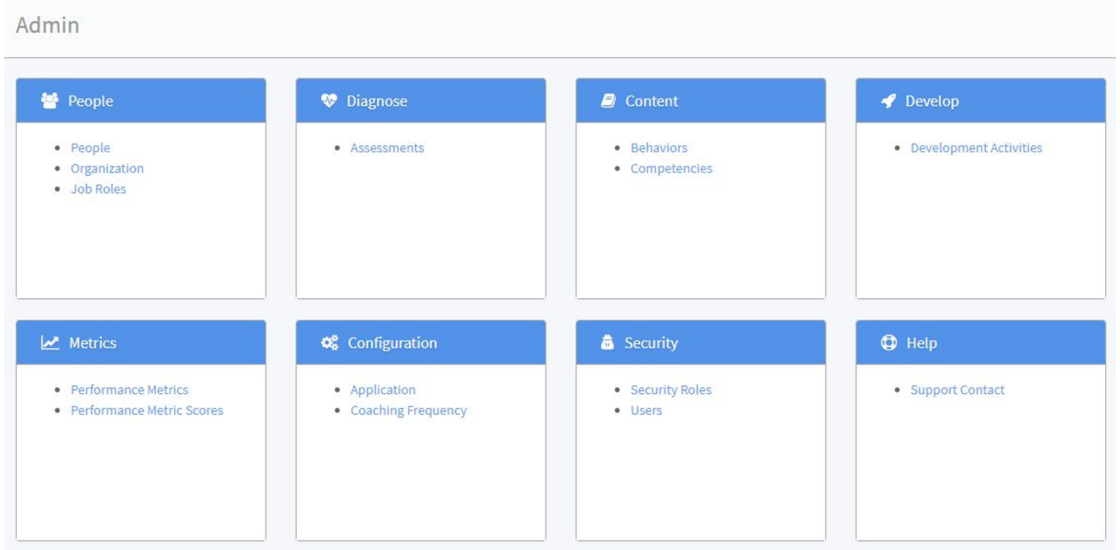
Launch!

Start Coaching!

What is the Admin Panel?

The Admin Panel is where you make changes to the types of items covered in this guide: People info, Assessments, Performance metrics, etc.





Access the Admin Panel by clicking the cog wheels in the header.

Where can I go to get how-to instructions as I go through this guide?

For step-by-step instructions on how to do a particular configuration task, see the Admin How To’s link in the Admin Resource Center.

Supporting Your Organization

Admin Support Workflow	This document will cover the support workflow and when to escalate issues or questions
Admin How To’s and FAQs	Videos, articles, and FAQ sheet to support the Customer Admin
Coaching How To’s and FAQs	Videos, articles, and FAQ sheet to support the Coach

Pre-Work

Answer the following questions before beginning:

- ★ Why is coaching important to your organization?
- ★ How will coaching be implemented in your organization? Describe how it looks like in the daily lives of your people.
- ★ Will there be reward structures around coaching?

Step 1 - Adding People and Coaching Relationships

Answer the following questions to help prepare to set up your People hierarchies.

★ Who will be coaches in your organization?

★ Who will need to see reports within the system?

★ Will a Team Member have just one coach, or will a Team Member have several coaches?

Collect People Info

Collect a user list of all people who will be using Coaching, including Team Members, Coaches, and anyone needing report access. Make sure this list includes the following information *at the very minimum*:

First Name	**Last Name**	**Person Email**	**Job Role**	**Organization Name**	**Manager Email**	**Assigned Coach**
Jane	*Doe*	*jdoe@example.com*	*Account Rep*	*Southeast Region*	*padams@example.com*	*Patty Adams*
Patty	*Adams*	*jsmith@example.com*	*Director of Account Management*	*Southeast Region*	*n/a*	*n/a*

This list of information will help you complete the following next steps.

Configure Org Structure

Review your People info list and note the different organizations in the file. Decide on the organization structure you would like to implement by creating an org file that looks like this:

Organization Name	Parent Organization
Headquarters	
Southeast Region	*Headquarters*
Southwest Region	*Headquarters*

Tips:

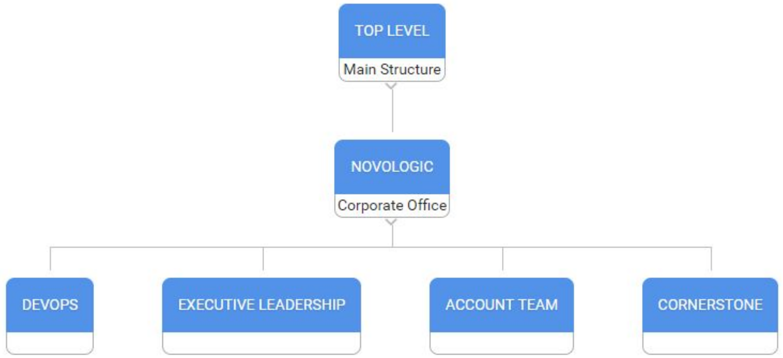
★ You can filter reports on organizations. Make sure your organizations are granular enough to help capture the type of reporting hierarchies you will be needing down the line.

★ Access a templated org file from the Organization page in the Admin Panel if guidance is needed.

Configure Org Structure

Once the Org structure is verified, upload the org list using the Import function on the Organization page within the Admin Panel.

When the upload is complete, you can view your structure by returning to the Organization List and selecting **View Structure**.



Example of an imported org structure

Configure Job Roles

Review your People info list and note the different job roles in the file. Once the job roles are verified, upload the job role list using the Import function on the Job Roles page within the Admin Panel.

Tips:

★ You can filter reports on job role. For this reason, make sure your job roles are granular enough to help capture the type of reporting hierarchies you will be needing down the line.

★ Access a templated job role file from the Job Role page in the Admin Panel if guidance is needed on uploading.

Configure People

Review your People info list. Once the user list is verified, upload your users using the Import function on the People page within the Admin Panel.

Tips:

★ All organizations and job roles existing in the People file must already be created in Coaching **prior** to uploading the People file.

★ Do not invite users to login until the system configurations are complete.

Assign Team Members to Coaches

Next, you will need to access the People record for each coach and add their Team Members to their coaching team.

Tips:

★ To help you with assigning Team Members to coaches, refer to your People list and sort the file based on the coach.

Step 2 - Assign Assessments and Coaching To-Do’s

Answer the following questions to help prepare to set up Assessments.

★ Which assessments should relate to each job role?

★ Is there a specific company policy on the completion cadence of a particular assessment?

Assign Assessments

Review the list of assessments available to you in Coaching using the Assessments page within the Admin panel. Then assign each job role the appropriate assessment(s) using the Job Roles page within the Admin panel.

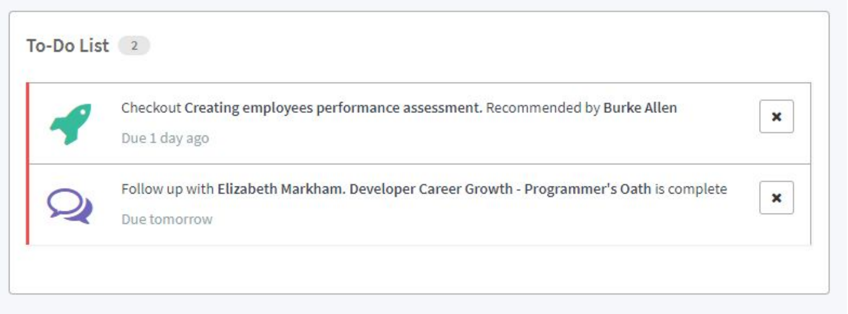
Job Role	**Assessment**
Account Rep	*Compliance I* *Listens Carefully*
Frontline Employee I	*Compliance I* *Communicating Effectively*
Frontline Employee II	*Compliance I* *Teamwork*

Tips:

★ To view a description of each assessment before assigning it to a job role, go to the Assessments page on the Admin Menu.

Assign Coaching To-Do’s

By setting up Coaching Frequencies, Coaches receive an automatic To-Do when it’s time to **1.** perform an assessment or **2.** to assign a development activity to Team Members. Set up automatic To-Do’s for Coaches using the Coaching Frequency page within the Admin panel.



Example of To-Do’s

Step 3 - Add Performance Metrics

Answer the following questions to help prepare to set up Performance Metrics.

★ What are the outcomes your organization is looking for?

★ What metrics provide real insight into the overall health of your product or organization?

Define performance metrics for each job role

Use the below chart to help you identify and define a few key performance metrics you would like to record in the system.

Performance Metric	Associated Job Role	Where will data come from?	Is it a results or productivity metric?	Who owns gathering metric data?	How often will metrics be updated in Coaching?
Revenue	*Sales Team*				*Bi-monthly*
New Opportunities	*Sales Team*				*Once a month*

Add performance metric definitions

Add these performance metric definitions into the system using the Performance Metrics page within the Admin panel.

Performance Metric	Associated Job Role	Where will data come from?	Is it a results or productivity metric?	Who owns gathering metric data?	How often will metrics be updated in Coaching?
Revenue	*Sales Team*				*Bi-monthly*
New Opportunities	*Sales Team*				*Once a month*

Gather Performance Metric Data

Next, collect the metric data as defined in the previous slide into a single spreadsheet.

Performance Metric	Team Member Email (for whom the data relates to)	% of Goal	Date
Revenue	*Wjames@example.com*	*120*	*7/30/2019*
Revenue	*shenderson@example.com*	*80*	*7/30/2019*
New Sales Opportunities	*tallen@example.com*	*90*	*7/30/2019*

Upload Performance Metric Data

Upload the performance metric scores using the Import function on the Performance Metrics Scores page within the Admin Panel.

Performance Metric	Team Member Email (for whom the data relates to)	Goal	Actual	% of Goal
Revenue	*Wjames@example.com*	*100*	*120*	*120*
Revenue	*shenderson@example.com*	*100*	*80*	*80*
New Sales Opportunities	*tallen@example.com*	*50*	*45*	*90*

Recap: Configuration Checklist

The next slide will contain a summary checklist for you to follow to ensure a successful onboarding.

System Configuration Checklist

1. Setup People

- ❏ Collect People Info
- ❏ Configure Org Structure
- ❏ Configure Job Roles
- ❏ Configure People
- ❏ Assign Team Members to Coaches

2. Setup Assessments

- ❏ Assign Assessments
- ❏ Assign Coaching To-Do's

3. Setup Performance Metrics

- ❏ Define and add performance metrics
- ❏ Collect and upload performance metric data

Congrats!

You are done with the initial setup of Coaching. You are ready to begin communicating and preparing your audience for launch.