

Coaching Launch Guide

Updated 07-2019

© 2019 NovoLogic All rights reserved.

Before Launching: Prepare System and Users

Be sure you have prepared your audience for the launch so that they understand

- ★ how Coaching aligns with the mission of your organization
- ★ how to login
- ★ who to contact for help

Refer to the Admin Resource Center for communication and training best practices.

Before Launching

Add your first level support contact using the Support Contact page within the Admin Panel.

The Help Center provides a Contact Support link which directs users to your organization's first level support staff to address basic questions and issues.



Launching Coaching

The following slides will walk through best practices of launching Coaching and activating users in your organization.

Step 1: Launch to Pilot Group

When Coaching configuration is complete, it is a good practice to invite a small group of users (3 - 5) to login to Coaching. This allows you to tweak any configurations prior to launching to a larger audience.

Have the small group of test users do the following activities:

- ★ Activate small group of users, including at least 1 coach
 - Verify you, as the admin, can activate a new user within the Admin Panel
 - Verify the activation email goes to users' Inbox (and not in spam)
 - Verify users can complete the registration process to access Coaching

- ★ Have at least 1 Coach user can Diagnose, Develop, and Debrief a Team Member

Step 2: Activate Larger Organization

When you are ready to launch to a larger group of users, use the Bulk Activation Feature.

How to:

- Select **People** from the Admin Menu.
- Select **Bulk Activate**.
- Type or paste email addresses of people that you would like to bulk invite to Coaching.
- Select **Activate**.

Tips:

- ★ An email icon in Allow Login column indicates the individual has not yet activated the account. You can select the email icon to resend the invite.
- ★ If you have a large number of users, a phased launch allows your organization to progressively ramp up knowledge of the product, the teams and fine-tune the flows and processes for maximized user experience.

Launch Checklist

Prep Work: Prepare System and Users

- Complete System Configurations
- Identify champion/pilot group
- Deliver communications and train user groups
- Setup First Level Support contact

1. Launch to Pilot Group

- Activate small user pool
- Verify activation email goes to users' Inbox (and not spam)
- Verify users can complete Activation process
- Test the coaching process with at least one coach user

2. Activate Larger Audience

- Activate remaining users
- Provide additional trainings and communications as needed

Congrats!

You are done with the activation and launch of Coaching! Your organization is now ready to begin team member development.

As the Admin, you will be their first level of support. Refer to the How-To articles and videos, FAQs, and Reference Guide to aid in answering questions.