More Configurations to Coaching

Updated 07-2019

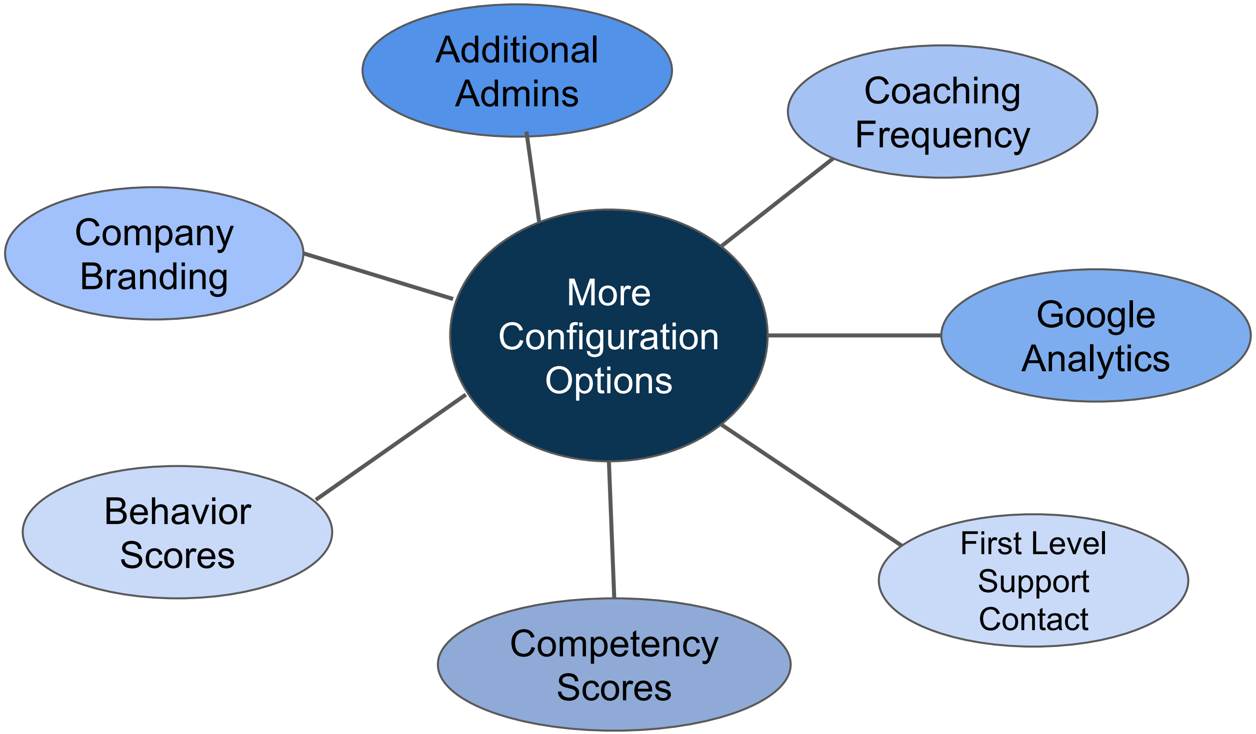
Additional Available Configurations

Coaching provides you the ability to configure the following features:

- ★ Company Branding
- ★ Behavior Scores and Competency Scores
- ★ Coaching Frequencies
- ★ Google Analytics
- ★ First Level Support Contact
- ★ Add additional admins

Overview

This guide covers the additional configurations you are able to make:



Customize Coaching with your Company Brand

How to:

- Select **Application** from the Admin menu.
- Review the configuration options and update as needed.
    - Browser Title - displays on Browser tab
    - Footer - displays on bottom left footer
    - Logo - displays on bottom right footer and on login page
    - Google Analytics - your account # to track activities and usage across all customers in your instance
    - Language - select the language to display for all users
- When finished, select **Submit.**

Configure Behavior and Competency Scores

Admins have the ability to configure the behavior scores and competency score scales for their organization. To set up this configuration, do the following:

1. Select **Application** from the Configuration Admin Menu.
2. Fill out the **Competency Report Scale** and **Behavior Report Scale** fields
    a. These two configurations will affect how the competency and behavior scores display to the end user.
    b. Examples:
        i. Setting the scales to 100 will make your organization's competency and behavior scores display on a 0-100 scale.
        ii. Setting the scales to 4 will make your organization's competency and behavior scores display on a 0-4 scale.

This scale is set on a 0-4 scale

This scale is set on a 0-100 scale

Add Coaching Frequencies

Coaching provides the ability for an organization to prescribe how often specific audiences are assessed and developed. By setting up a Coaching frequency for each job role, Coaches receive a To-Do when it's time to perform an assessment or to assign a development activity to Team Members.

How to:

- Select **Coaching Frequency** from the Admin Menu.
- Select the **edit icon** next to the coach for which you are setting frequencies.
- Select the team member.
- Select the coaching frequency desired for Development Activities and Assessment(s).
- Select **Save**.

Coaching will generate To-Do List items for the Coach according to the frequency established.

Example To-Do List

- John Smith needs to be assigned a Development Activity
- John Smith needs Diagnosing on *assessment name*

Track Activity and Usage with Google Analytics

Add your organization's Google Analytics Tracking ID to analyze and track activities and usage of Coaching.

How to:

- Select **Application** from the Configuration Admin Menu.
- Locate the **Google Analytics Tracking ID** field
- Enter the ID
- When finished, select **Submit**.

Add First Level Support Contact

The Help Center provides a **Contact Support** link which directs users to your organization's first level support staff (usually the customer admin) to address basic questions and issues.

How to:

- Select **Support Contact** from the Admin Menu.
- Select **Add New**.
- Insert desired support contact information in the text field.
- When finished, select **Submit**.

Example:

QUESTIONS? For assistance with Coaching, contact Amy Smith at 1-800-555-6789 for support.

Create New Customer Admins

If your organization will have more than one person who is responsible for configuring, updating, and supporting the Coaching platform, you can add additional admins. The Admin role can be assigned to any person who has been given access to login to Coaching.

To create a new customer admin:

- Select **Users** from the **Admin** menu.
- Select edit icon next to the user name.
- Click in the **Roles** field and select **Admin**.
- Select **Submit**.

The Admin menu icon will be able for this person when they login to Coaching.

Congrats!

You are done with additional configurations of Coaching. You are ready to begin preparations for training and launch.

Return to the Admin Panel to access the **Communication and Training Playbook** and **Launch Guide** for best practices on activating users.

Additional Resources

★ For How-To videos and articles on the above steps, refer to the **How-To resources** in the Help Center.