Step-by-step Guide for Getting Started with My Coach Solutions

My Coach Website (10-minute set-up)

Home Page

- Enter company name and tag line
- Upload photo of yourself
- Update name

About Your Coach Page

- Update name
- Add/edit bio information
- Upload photo of yourself

Coaching Page

- Update quote, if desired

Contact Page

- Message Me – update with the email where messages are to be received
- Life Calling Assessment – add the email where notification goes of people who download form
- Let's Be Social - add your links to all active social media icons; remove others, as appropriate
- Contact - update phone number, email and mailing address

My Coach Portal (~ 1-hour set-up)

Suggestion:

Each new coach to set themself up as a 'dummy client, which has several benefits.

- Coach can mimic the client by filling out the various forms and know what the client will experience,
- Coach will receive emails as the client forms are submitted, know where to go look for them and know what to be expecting from each new client
- Coach will have time to create a first portal in which to make all the edits then convert it to a template for use with all future clients.
- Coach can be assured that the client will have an excellent experience with their portal.

A. Create Client Portal (suggest setting up first one as a portal for test client)

1. Add Title: "client's name coaching portal" e.g. Happy Camper Coaching Portal
2. Choose a Template: select *Coaching Portal Template* from dropdown menu
3. Custom Branding section **Required Edits**:
    a) Your Phone: enter coach's phone number
    b) Your Email: enter coach's email address
    c) General Information:
        - Add your email address in space provided
        - Add calendar link (if using) otherwise revise text accordingly
        - Enter conference number and access code (if using) otherwise revise text
    d) Click *Update Project* to save changes
4. Click *Preview Changes* in top right corner to review the changes as they'll appear for your client
5. Scroll down to *Phase 1 Module 6 Book Your Next Call* and click down arrow on far right to expand
    a) Scroll down to *Module Type* and add URL for calendar link, if using
    b) Click *Update Project* button
6. Scroll down to *Phase 2 Module 3 Book Your Next Call* and click down arrow on far right to expand
    a) Scroll down to *Module Type* and add URL for calendar link, if using
    b) Click *Update Project* button

    Note: Once the client has been added, come back here to assign them. Do not assign client yet.
7. Click *All CP Projects* under My Portals in left side menu to view new client portal created
8. **Convert First (test client) Portal Created to a Template**:
    a) Hover over the new client portal just created
    b) Click *Convert to Template* (this template containing all the edits and updates just made will then be used for each additional client you bring onto service; saving time not making the same edits for each client)
    c) Rename template to something you'll always use e.g. SLH Main Portal Template

    d) To view new template, click *All CP Project Templates* under My Portals in left side menu

B. Revise Coach and Client Agreement

1. Navigate to All Content Pages under My Portals in left side menu
2. Scroll down through content pages to Coach and Client Agreement
3. Hover over Coach and Client Agreement and select *Duplicate*
4. Rename it e.g. Sherry's Coach and Client Agreement
5. **Required edits:** (starting at paragraph "For purposes of this agreement")
    - Enter client's full name in space provided (changed to…*myself and Sherry L Hoppe agree to* …)
    - Enter coach full name in space provided
    - Enter start date of coaching (reworded to eliminate need for a specific date)

      Note: By eliminating client's name and start date allows the agreement to be used continually without additional changes for each new client.
6. Make any other wording or coaching fee changes, as applicable
7. Click *Publish*

C. Add Revised Coach and Client Agreement to the Main Portal Template

1. Navigate back to All CP Portal Templates
2. Hover over the template you just created, containing all your changes
3. Click *Edit*
4. Scroll down to Phase 1 *Module 3: Coach & Client Agreement*
5. Click down arrow at far right to expand
6. Scroll down to see Module Type and Content Page
7. Click down arrow for *Content Page* to view options
    - Select Coach and Client Agreement that you just published
    - Click the *Preview* button to ensure you selected the desired document
8. Click *Update Project* button at the bottom of Phase 1
9. Click *Update* button at top right

Going forward, each new client coaching portal you create using the Main Portal Template will now include the updated coach and client agreement.

D. Add New Client (suggest setting up first one as a test client):

Note: Be sure to enter info under "***Add New User***" vs "*Add Existing User*"

1. Username: Enter a test client name as user (only lowercase letters and numbers allowed)

2. Email: Enter client's email address
3. Role: Click dropdown arrow for Role and select *CP Client*
4. Skip Confirmation Email: check the box so client is not required to confirm themself as a client (if box left unchecked, you will not be able to add client to their portal until the client responds to confirmation email)
5. Click *Add New User* button to save client information

   Note: As soon as you add the new client, two emails immediately are sent out to the client

   - Email #1 from My Coach Solutions says "You are invited to join your coach online…"
   - Email #2 from My Coach Solutions says "Account Activated" and contains the Login and Password information that allows the client to log into their portal.
   - Email #3 from Your Coach says "Hello, a new project has been created for you…" (this email can be turned off; submit request to support@mycoachsolution.com
6. Navigate to *All CP Projects* under My Portals in left side menu

   a) Hover over client (test) name and click *Edit*

   b) Scroll down to *Client Accounts*, located just above Phase 1

   c) Place cursor in box and a list of client names will be displayed

   d) Click on client name to assign to the portal

   e) Click *Update Project* button

   f) Click *Update* button

E. Adding the First Fee for Service Client using above steps

1. Step A: *Create Client Portal*:

   a) Complete only items 1 through 6 using client actual name and information

   *For item 2, be sure to select the Main Portal Template you created with all the edits
2. Skip Step B & C
3. Step D: *Add New Client*:

   a) Complete items 1 through 6