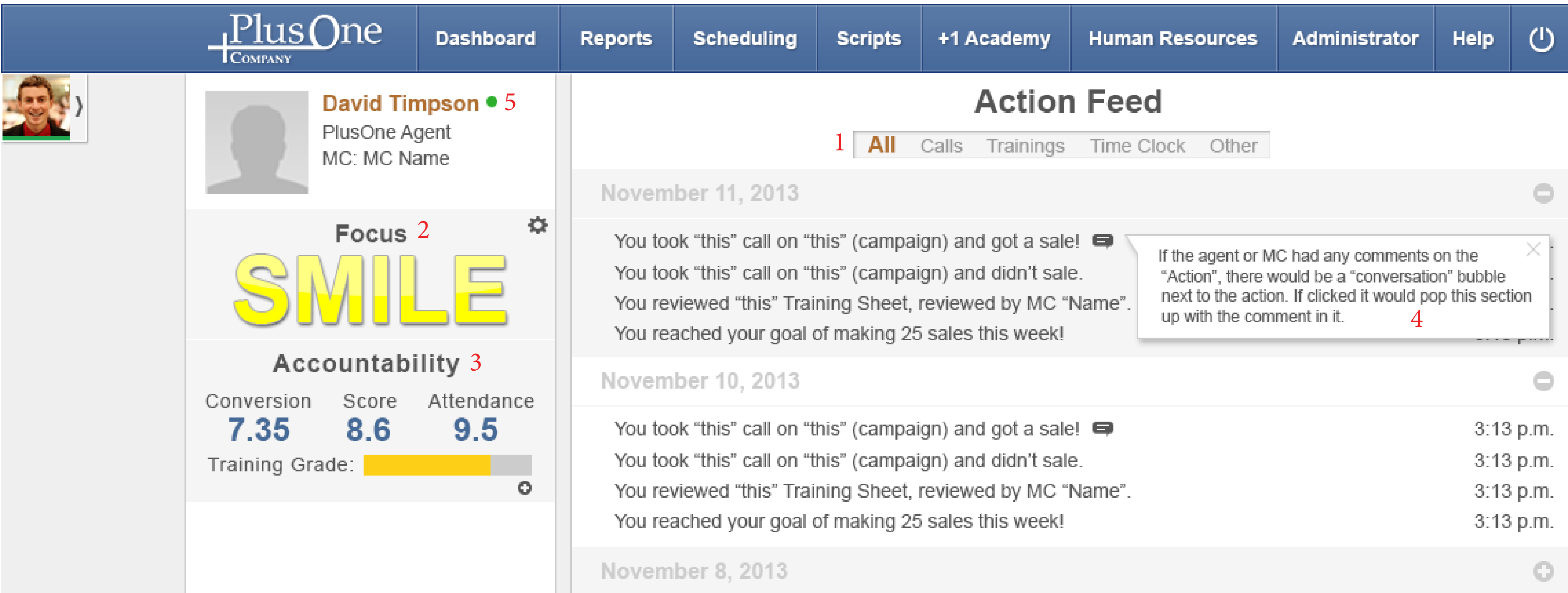

This is the PlusOne Agents / Ramp Agents personal "Training Profile"

1) The Action Feed. This tracks and displays all of the agents "Actions", their Calls, their training sheets and coaching sheets, their time clock (when they clock in, clock out, go on break, etc), and any other actions that they have taken. It will be grouped per day and the icons on the right side would expand/retract to show the actions taken that day.

2) Focus. This displays to the agent very clearly what their focus is. The cog in the top right corner is a way to edit/manage their focus widget.

3) Accountability. This is the agents stats, the results that they have recieved by doing everything that they have done. For now it would just be this widget, but further down the road we would build it to where the agent can see an entire "accountability page". This shows their score, their conversion %, and their attendance score. As well as an overal grade based off of their previous training sheets. The little plus icon in the bottom right would drop down and show their average score/grade on each of the pots & cans.

4) If there has been a comment submitted on any of the actions in the action feed, a comment icon would appear and if you clicked it, a hover box would show with the comment in it. The "X" in the top right corner would be there to close the comment.

5) Agent widget. Just a standard widget that displays the which agents page you are viewing. Shows their employee status (PlusOne Agent, MC, PC) and also displays which MC Team that they are on.

PlusOne Company

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Benjamin Dockstader 2
Peer Coach
MC: Allen Timpson

Focus

SMILE

Accountability

Conversion	Score	Attendance
7.27	7.9	10

Training Grade:

Your Team 3

Search for an agent

Agent Name
View Training Profile
Train Agent

Call Status: Available
Time in State: 2:25
Campaign: Rosetta
Live Train 4

Agent Name
View Training Profile
Train Agent

Agent Name
View Training Profile
Train Agent

Select an Agent to begin Training

1 Team Action Feed

All | Calls | Trainings | Other

November 11, 2013

"Agent" took "this" call on "this" (campaign) and got a sale!
"Agent" took "this" call on "this" (campaign) and didn't sale.
"Agent" reviewed "this" Training Sheet, reviewed by MC "Name".
"Agent" reached your goal of making 25 sales this week!

If the agent or MC/PC had any comments on the "Action", there would be a "conversation" bubble next to the action. If clicked it would pop this section up with the comment in it.

November 10, 2013

"Agent" took "this" call on "this" (campaign) and got a sale!	3:13 p.m.
"Agent" took "this" call on "this" (campaign) and didn't sale.	3:13 p.m.
You reviewed "this" Training Sheet, reviewed by MC "Name".	3:13 p.m.
"Agent" reached your goal of making 25 sales this week!	3:13 p.m.

ber 8, 2013

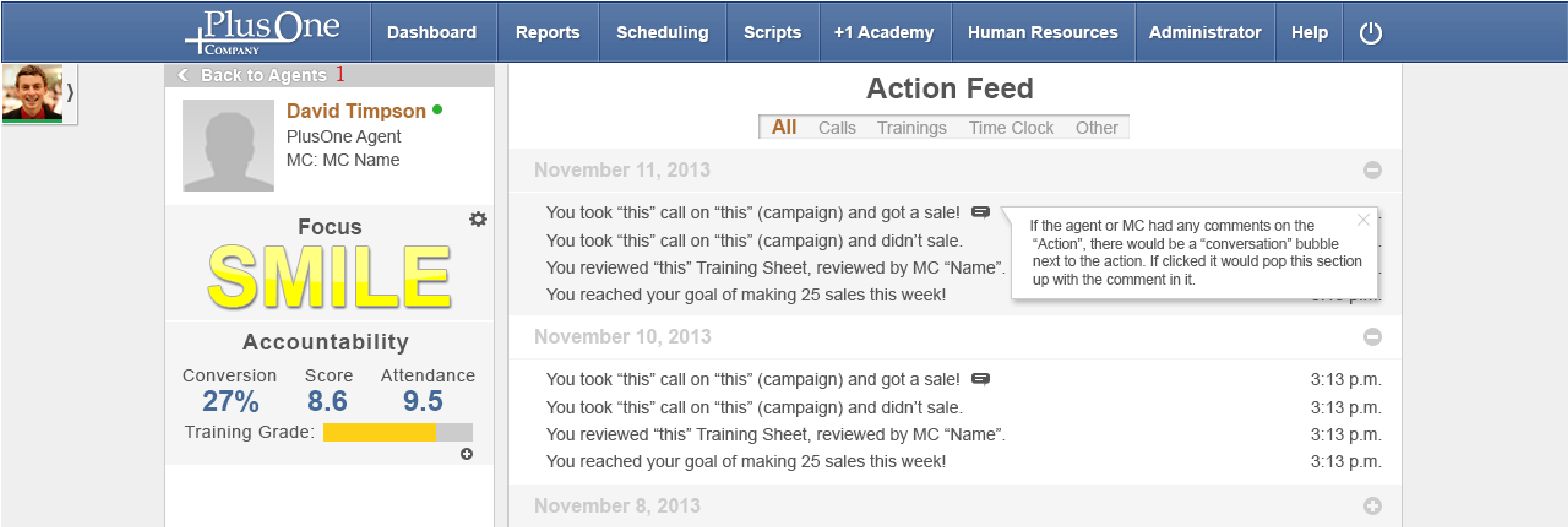
This is the MC/PC personal view of the tool.

1) Team Action Feed. This would function the same as the "Action Feed" the difference is it would pull all the actions of the agents that are in your team. Same functionality as the "Action Feed". Also there would be an option to switch between their team feed and an individual feed.

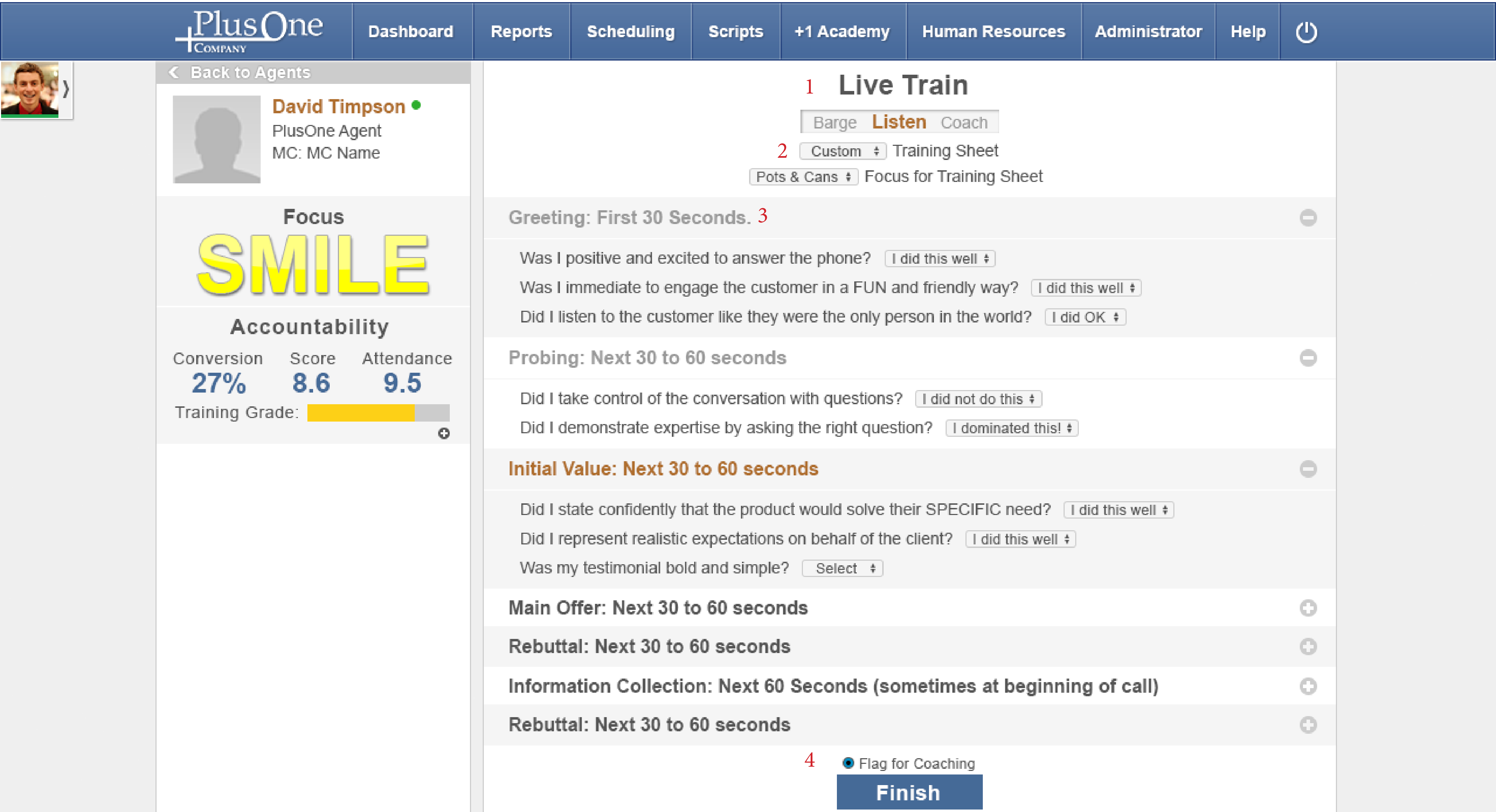
2) Agent widget. Displays the agents page that you are looking at. (In this example, I am viewing as if I was Ben Dockstader)

3) Your Team. This is a list of the Agents in the coaches team. You can search for a specific agent, or scroll through and find them. Displayed by their name and their profile picture. To go to the agents training profile, you would click "View Training Profile".

4) To the right of the agents name is a colored bubble. The color depends on the call status that the agent is in. Green if available, red if unavailable, etc. If you click on the bubble or on the agent name it brings up a popup box that shows the state the agent is in, the time in that state, the campaign of the call that the agent is on. It also gives an option to "Live Train" the agent. The way that these agents would be filtered would be: "On a call" at the top of the list, "Available" after that, "Unavailable" after that, then "offline" at the bottom, which would then sort in alphabetical order.



This is the view of an agents Training Profile from an MC/PC view. This would work the same way as the agents view of their training profile. Only difference is the option to go (1) "back to agents".



1) This is the view for a MC that is “Live Training” an agent. Gives the MC options to “Barge” which would be them being able to hear, talk to the agent and the customer that the agent is talking to as well. “Listen” which would be the default option, just allowing the MC to hear the call as it goes. “Coach” whic would allow the MC to talk to the agent only as the call proceeds.

2) As they go through the call with the agent, they would fill out a “Training Sheet”. They can pick a custom training sheet which would be based off of the Pots & Cans that they select. Or they can pick a default Training Sheet which would just be a standard training sheet.

3) This is the Training Sheet. The functionality is the same as the Action Feed in that there are categories that you can expand/retract by clicking the -/+ buttons to the right. It is broken up in sections of the call. There are questions nested under each category and as they go the MC would answer the questions. The options are “I dominated this”, “I did this well”, “I did OK”, and “I did not do this”.

4) Flag for coaching takes the agent into an unavailable state after the call ends, and takes the MC to a page with a coaching sheet that they can fill out with the agent. Would keep the MC on call with the agent.

PlusOne Company | Dashboard | Reports | Scheduling | Scripts | +1 Academy | Human Resources | Administrator | Help

< Back to Agents

David Timpson
PlusOne Agent
MC: MC Name

Focus

SMILE

Accountability

Conversion	Score	Attendance
27%	8.6	9.5

Training Grade:

1 # Coaching Sheet

Step 1 - Account 2

Did they do:

- ◉ Smile
- ○ Be Present
- ○ Answer Q with Q
- ○ Use Script
- ◉ Close Them
- ○ Keep Closing (LACRC)
- ○ Keep Closing (upsell)
- ○ Trust
- ◉ Need
- ○ Value
- ○ Confidence
- ○ Urgency

Step 2 - Did well on?

Did I take control of the conversation with questions? [I did not do this]

Did I demonstrate expertise by asking the right question? [I dominated this!]

Step 3 - Coach thought you did well on?

Did I state confidently that the product would solve their SPECIFIC need? [I did this well]

Did I represent realistic expectations on behalf of the client? [I did this well]

Was my testimonial bold and simple? [Select]

Step 4 - Do differently?

Step 5 - Practice

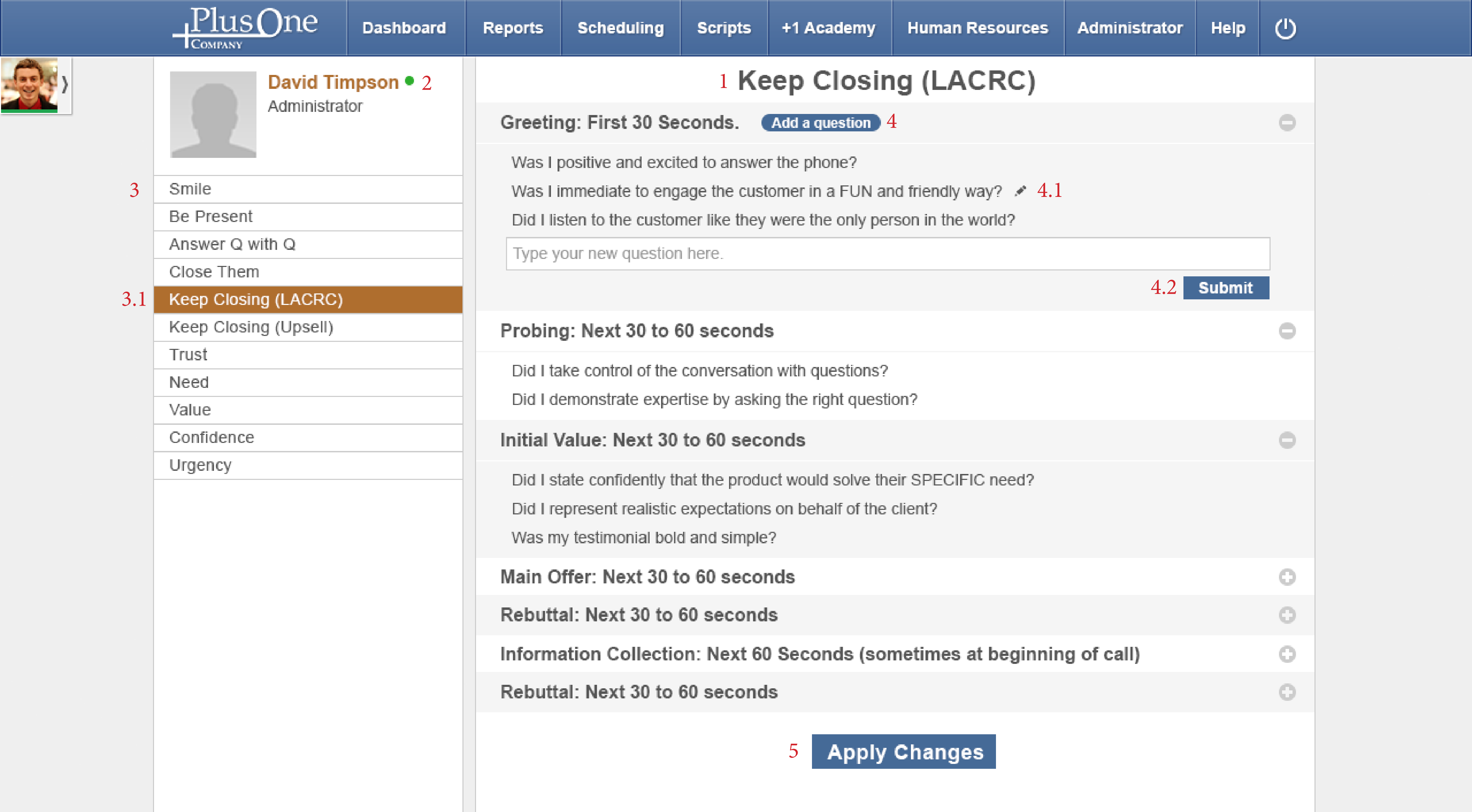
Step 6 - Can you see yourself doing this on your next call?

Step 7 - What commitments

Finish

1) This is a view of the Coaching Sheet that would pop once they flagged the agent for a coaching session. The left bar would be the same as what is displayed on the Agents “Training Profile”.

2) Same as the training sheet and action feed as in functionality. Would be organized differently, which we will have to discuss to figure out how we want to design the sheet. Once you are finished with one of the categories and have filled up all necessary info, the title of the section would lighten. If you havent visited the section, the title would be darker. The title of the section that you are currently viewing would be colored copper. (this would be the same for the training sheet as well)



1) This is a view of the training sheet based off of which “Focus” is selected. Within the functionality an editor is built in to add, remove, and edit questions.

2) The user widget, showing who is viewing. Only administrators would be able to view and access this page.

3) This is a menu of all of the “Focuses” (pots & cans). If one of these menu items is clicked it would re-populate the right side accordingly. (3.1) The background of the menu item would change if hovered over.

4) Just like a training sheet, this would be broken into the different sections of a call. To add a new question to that section, hover over and a button appears allowing you to add a new question. If it is clicked (4.2) a text input box appears with a “submit” button. (4.1) The pencil icon allows you to edit an existing question.

5) To make the changes final, you would click the Apply Changes button.