SkillScan

V2.0

Unlock the Full Potential

of SkillScan's Upgraded Website!

A Webinar for Organizations

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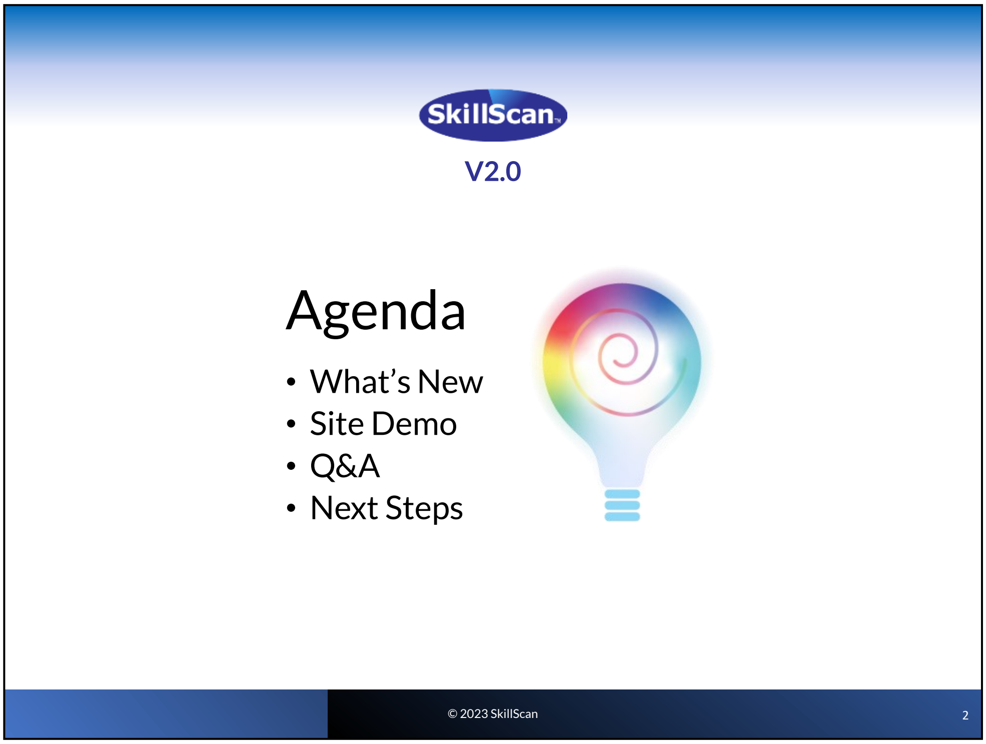
Welcome - I’m Christine Yoshida, a Customer Experience specialist working closely with Lesah on the launch of the upgraded SkillScan site. Today I’m excited to share some game-changing upgrades to the SkillScan site. In this session I’m going to walk you through all the new features and capabilities that we launched with SkillScan v2.0 on April 23.

As many of you know, we designed SkillScan to breakdown a complex process into 3 simple steps to sort skills by proficiency, preference (motivation), and development with results that can be used to gain personal clarity (by connecting skills to other preferences). This facilitates career exploration and provides a foundation of strengths for self-marketing.



Our agenda for today is to introduce you to all the new features, walk through SkillScan v2.0 in a live demonstration of the site, and answer your questions when we finish the demo. At any time, if you have questions that come to mind, feel free to type them into the Q&A tool so that I can answer them after the demo.

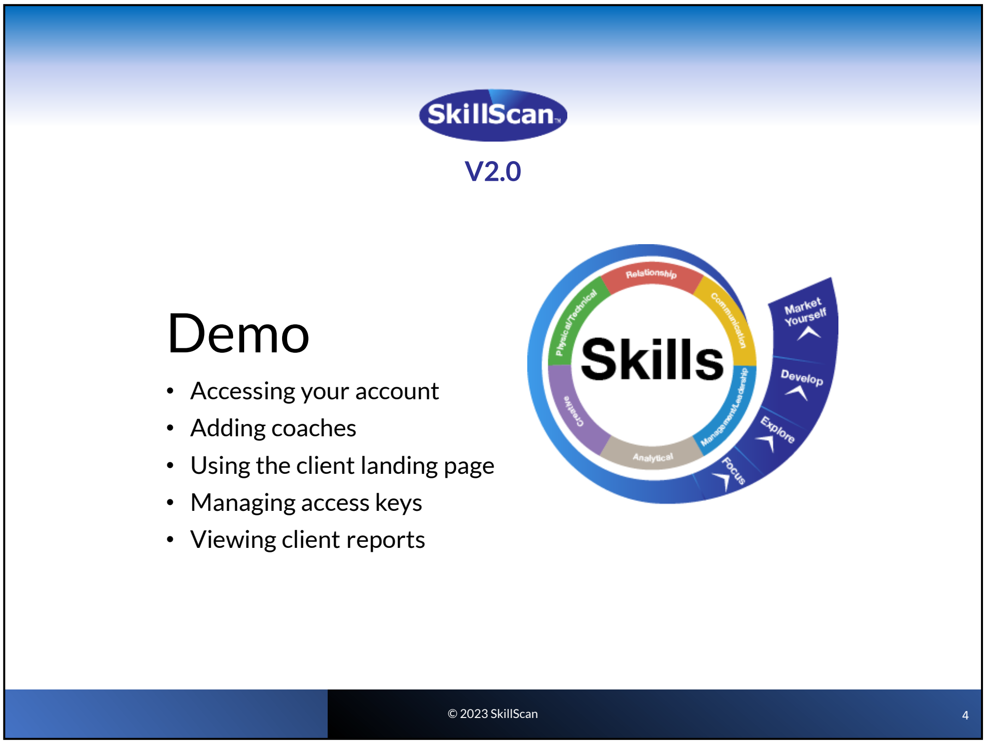
I also want to acknowledge that those of you in attendance today or listening to the recording later have different scenarios at your organization and with your clients that will impact which of the new capabilities will be of interest to you:

- Code scenario
- Site License scenario
- Pooled scenario
- Shared Account scenario

As I talk about each feature, I will describe which type of scenario the feature is best for.

So, what is new for organizations? The SkillScan 2.0 site offers new features and functionality for managing and sharing grantable uses, (now called **Access Keys**), administering assessments, and accessing client reports.

- **Organization Administration:** We now have an Organization Administrator account type in the new system. Each organization has one org admin account and will be able to use this account to manage the organization in the system to enable a custom landing page and control access.
- **Shared Access Key Pool:** Org admin accounts can add coaches to the organization, enabling all added coaches to gain access to send keys from the pool to individual clients.
- **Convenient Management:** Org admins can see the status and associated coaches for all access keys. They can also reclaim unused keys and review completed assessment reports all from one central location. Coaches will also be able to view this information for the clients they have sent keys to.
- **Easy Client Access:** Clients will no longer need to create an account to access an assessment. Instead, you can provide them with your organization's landing page URL where they can enter their email address and optional security code to access the assessment, or your coaches can send individual clients unique access key links directly.



Now let's take a tour of the upgraded site and the new features. I'll be walking through the main areas of the site and demonstrating how to complete essential tasks.

As I demonstrate each feature, I will be highlighting the following features for the particular scenarios:.

- **Code and License scenario** – If you organization has been providing clients with a code, or if you have been using a site license, you will want to start using a **client landing page** as your primary method of giving clients access to assessments if most of your clients use the same email domain in their email address.
- **Pooled scenario** – If you have a pool of access keys that you have been distributing across several coaches, you might only be interested in the **Send Access Keys** page rather than the Client Landing Page method. This is especially true if your clients all have different email address domains – in that case, the client landing page won't be a good fit. Either way, you will want to add all your coaches to your organization in the system.
- **Shared** – If you are an organization that has been using only one account in the SkillScan System that everyone in your org uses to log in, you may want to change this approach by designating only one employee as the org admin with their own login, and having everyone else create a coach account that will be associated with your org. The coaches will be able to send access keys and view

client reports.

Accessing Your Organization Administrator Account:

- The URL is still skillscan.com.
- If you were an early adopter of the upgraded site, you can continue using the organization administrator account we set up for you.
- If you were not an early adopter, you can simply log into your account as you were doing on the legacy site using the same credentials. If your organization was using a shared account to access the legacy system, you can continue to use the same credentials.
- If you forgot your password, click the **Reset your password** tab.

Adding Coaches

- If you previously let us know about the coaches you wanted to be added or removed from the system, we have made those updates and have migrated your existing coaches to the upgraded system as part of your organization.
- If you have any new coaches to add, ask them to create their own account in the system, and then you can log in using your org admin account and add the new coaches to your org so they can gain access to your org's pool of access keys. Coaches in your organization can send access keys, copy and reclaim keys, and view completed assessment reports for keys they sent (as can org administrators).
- You can also remove coaches from the organization.

Using the Client Landing Page.

- Whether or not you are sharing a pool of access keys across coaches, you may be interested in this client landing page as another option for clients to access the assessment. This option is great if you have many clients who need access at the same time, such as workshop attendees or students.
- This gives you the ability to provide the same landing page URL to your clients, where they can each then securely gain access to the assessment.
- Use of the landing page is optional. If you do use one, you must include at least one email domain that clients must include in their email address.
- Use of a security code is optional but highly recommended to ensure only authorized clients gain access to the assessment.
- The system will send clients a unique link to access the assessment via email. We highly recommend you ask your IT team to add **support@skillscan.com** to your organization's whitelist to ensure the email is not filtered out.

Managing Access Keys:

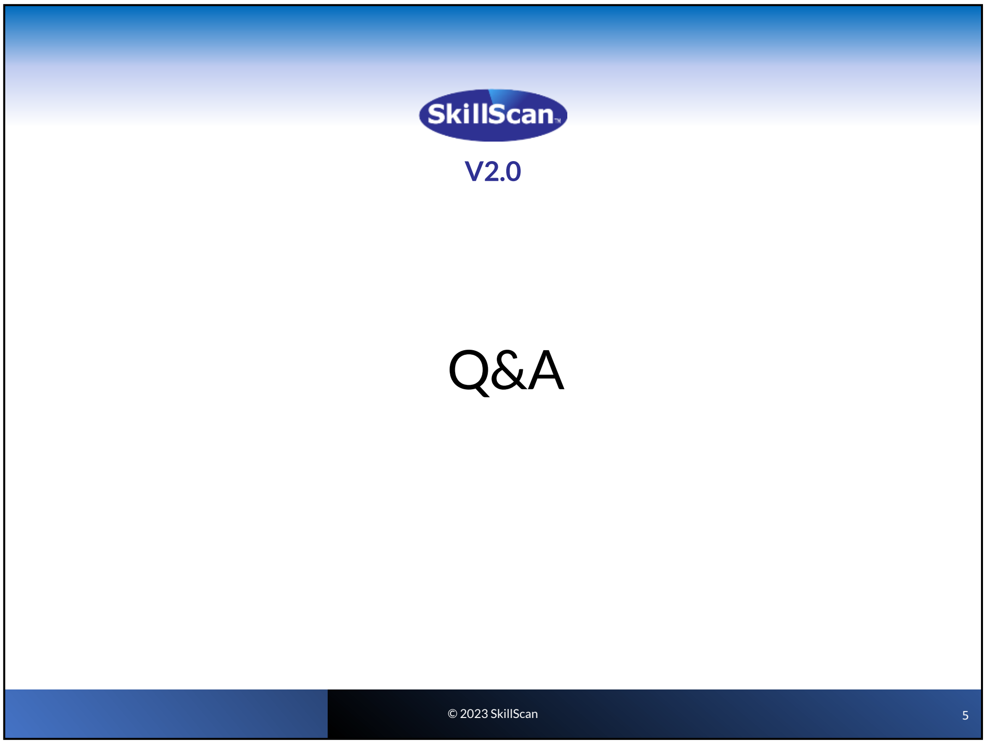
- The **Sent Keys** page is where you can view the status of any client who has been sent a key or gained access via the landing page.
- If a client doesn't start the assessment, you can reclaim their key at any time to put the key back in your organization's pool of keys.
- If a client needs their unique access key link, you can copy it and send it a different way

such as through your own email system.

- You can also send individual clients a unique access key link using the **Send Access Keys** page. Coaches can also send keys using this page.

Viewing Client Reports:

- When a client completes the assessment, you will be able to find it on the **Completed Assessments** page where you can search by their name or email address.



Q: What can org admins and coaches do?

- Coaches can view send keys and completed assessments for any clients they sent keys to using the Send Access Keys page.
- Coaches can also view sent keys and completed assessments for any clients who accessed the assessment from the client landing page
- Org admins can see all keys and client reports send from all coaches in their org as well as keys accessed via the client landing page.
- In the org admin views, the name of the first coach listed will be displayed as the coach for any keys accessed via the client landing page.
- Only org admins can add or remove coaches and customize the client landing page.

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Next Steps

- Login to your account and launch the site **Tour**
- Check out the **How To** tab, reviewing the **Guide for Organization Administrators**, and the **FAQs**
- Get started by adding coaches to your organization, using a client landing page and/or having your coaches send **Access Keys**
- To view client assessments on the previous version of the site, visit legacy.skillscan.com. The site is now **read-only** and you can view historical client reports there.
- **Need more help?** Email support@skillscan.com or attend an Office Hour webinar – see the Training & Events page