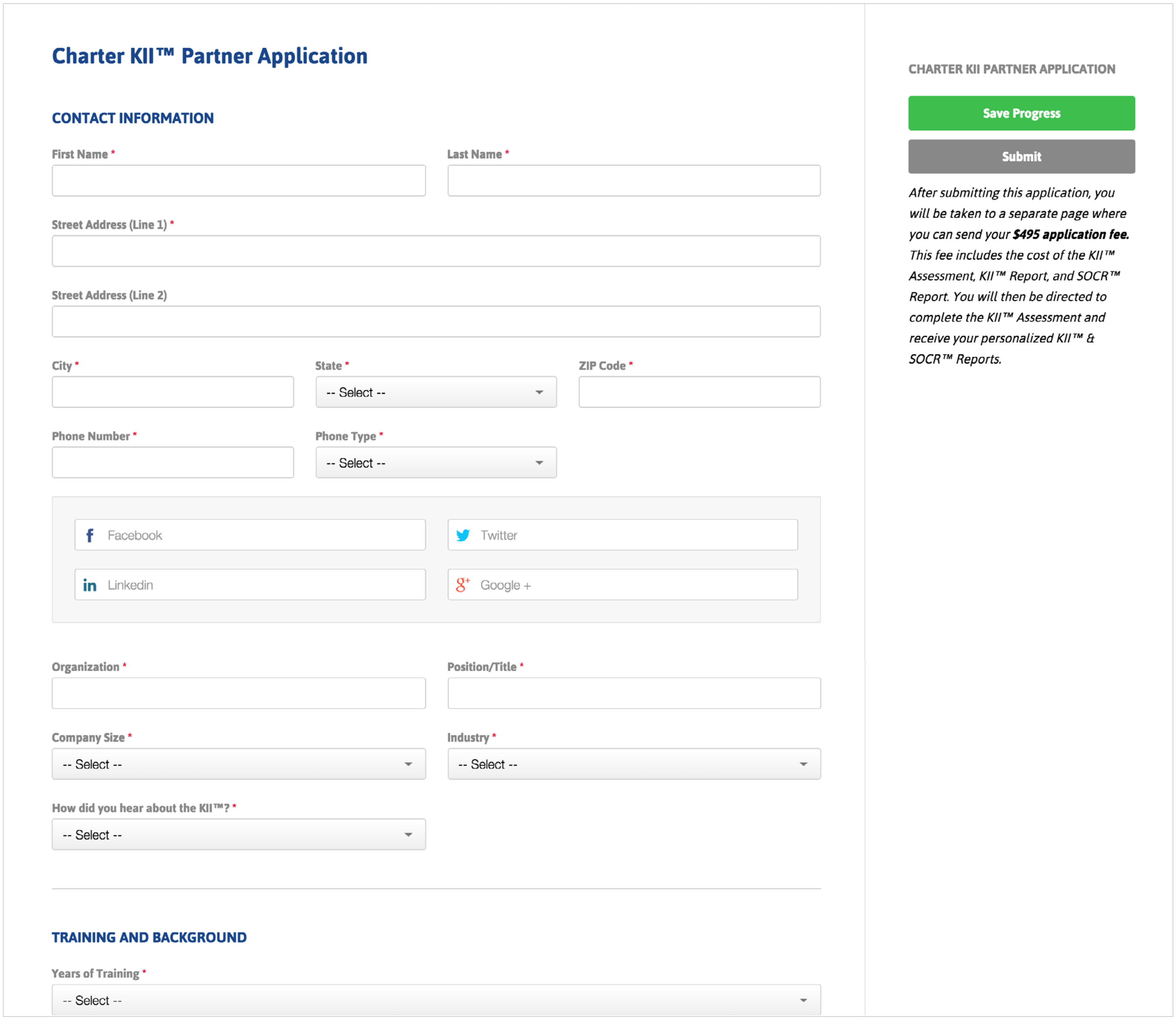
Keller Influence Indicator®

KII™ Partner Program

DASHBOARD GUIDE

Setting Up Your Dashboard

Step 1A: **Becoming a Partner**



Charter KII™ Partner Application

CONTACT INFORMATION

First Name *

Last Name *

Street Address (Line 1) *

Street Address (Line 2)

City *

State *

-- Select --

ZIP Code *

Phone Number *

Phone Type *

-- Select --

Facebook

Twitter

Linkedin

Google +

Organization *

Position/Title *

Company Size *

-- Select --

Industry *

-- Select --

How did you hear about the KII™? *

-- Select --

TRAINING AND BACKGROUND

Years of Training *

-- Select --

CHARTER KII PARTNER APPLICATION

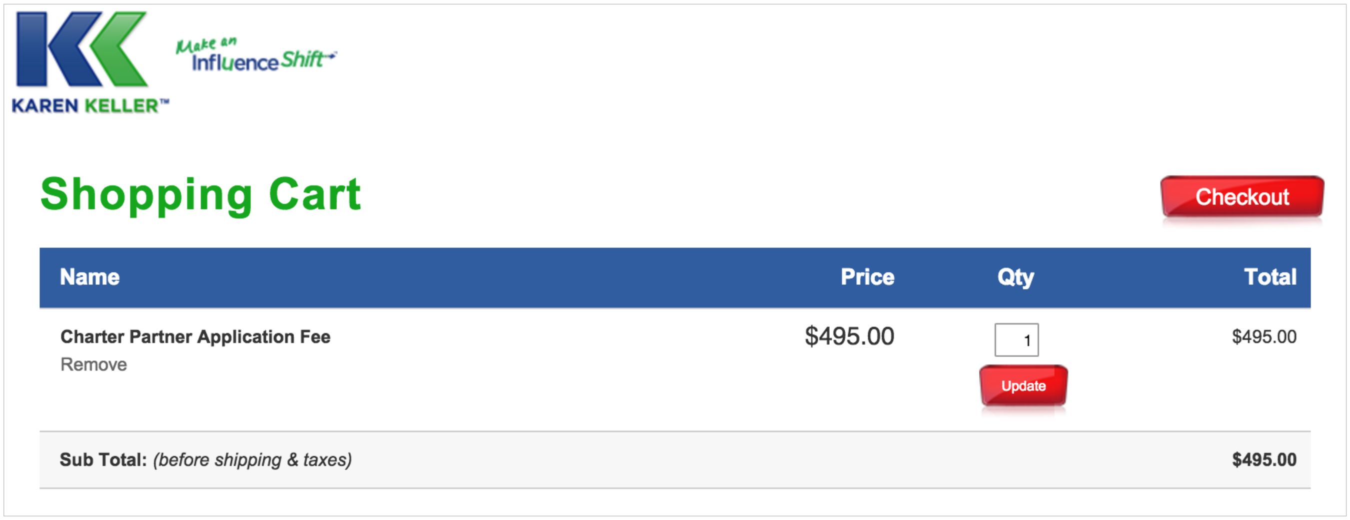
Save Progress

Submit

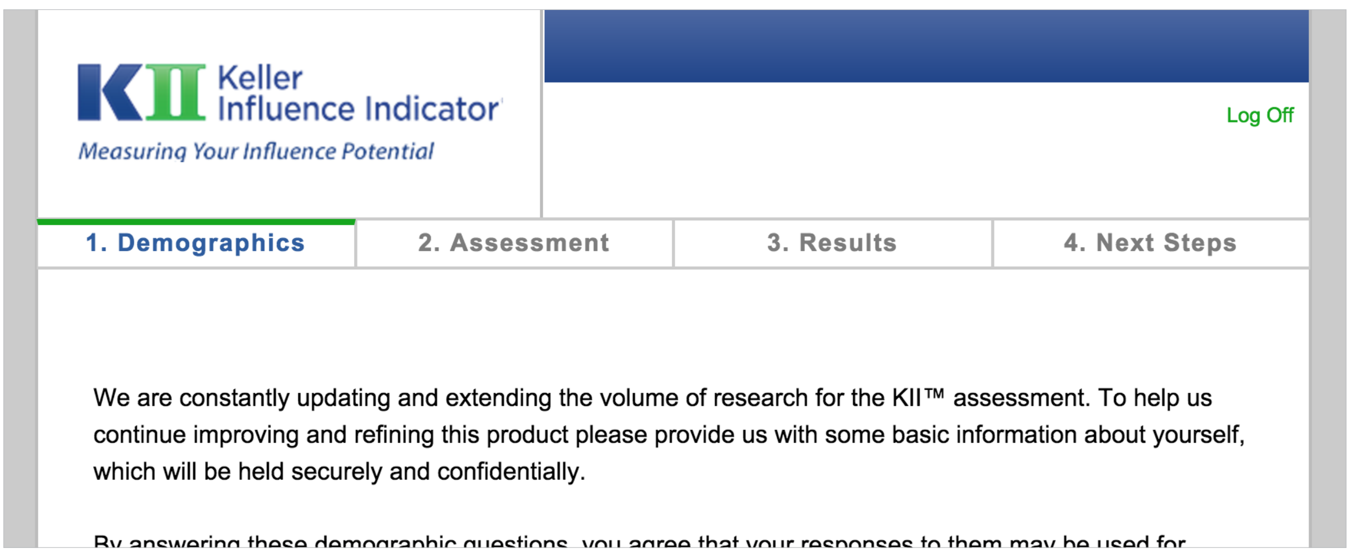
*After submitting this application, you will be taken to a separate page where you can send your **$495 application fee.** This fee includes the cost of the KII™ Assessment, KII™ Report, and SOCR™ Report. You will then be directed to complete the KII™ Assessment and receive your personalized KII™ & SOCR™ Reports.*

To begin administering to and using the KII™ with your clients, complete and submit the application form at **karen-keller.com/partners/becoming-a-partner.** Once you become a KII™ Partner, you will receive your new partner login credentials via email and you can began setting up and managing your KII Partner Dashboard.

Step 1B: Becoming a Partner



Upon completion of your application, you will be asked to submit the $495 application fee. This fee includes the KII™ Assessment, KII™ Report, SOCR™ Report, a 60 minute educational session with Dr. Keller, and other KII™ coach/client materials which will be shortly available.



You will then be directed to complete the KII™ Assessment (if you haven't already done so) and receive your personalized complete KII™ & SOCR™ Reports. (**NOTE:** if you have already taken the KII™ Assessment, you will skip this step and your reports will immediately be upgraded and found on your account dashboard.)

Step 1C: **Becoming a Partner**

Home › KII™ Certification › Application Received

Application Received

Thank you for applying!

We have received your application. Your Full KII® and Full SOCR™ reports will be ready on your dashboard in a few minutes.

In the meantime, **schedule your Charter Partner interview here**.

You can access your dashboard **here** or by clicking the "Dashboard" link in the upper menu.

After receiving your personalized KII™ and SOCR™ Reports, you will receive an email where you can schedule your 60 minute session with Dr. Keller.

KAREN KELLER™

Make an Influence Shift

Shopping Cart

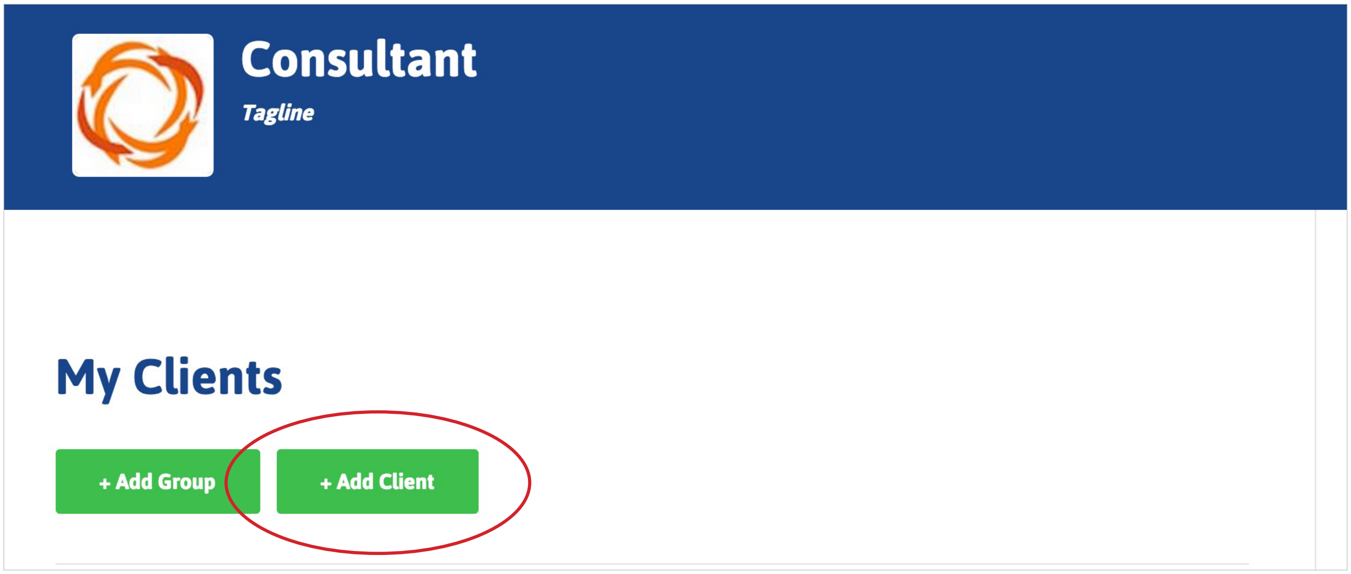
Checkout

Name	Price	Qty	Total
Charter KII™ Partner Licensing Fee Remove	$195.00	1 Update	$195.00
Sub Total: *(before shipping & taxes)*			**$195.00**

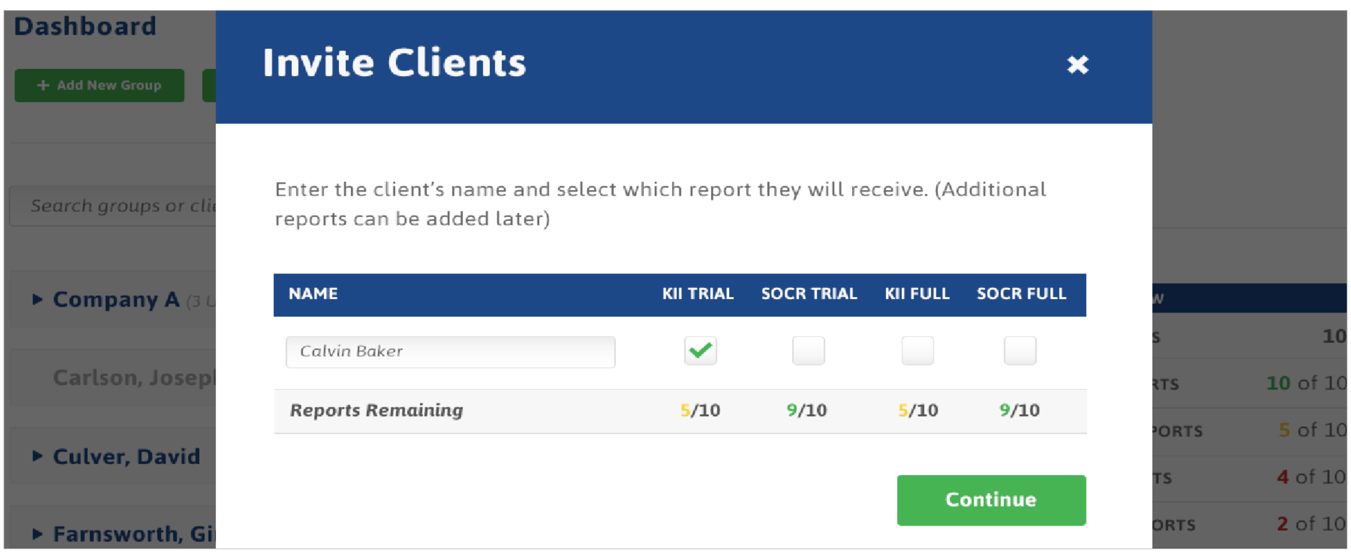
Enter a Promo Code: Apply

Within 7 business days you will receive notification of your acceptance status. Once accepted, you will receive an invoice for the Certified KII™ Professional annual licensing fee of $195. You will be granted access to your KII™ Partner Dashboard immediately upon submission of the licensing fee.

Step 2A: Clients

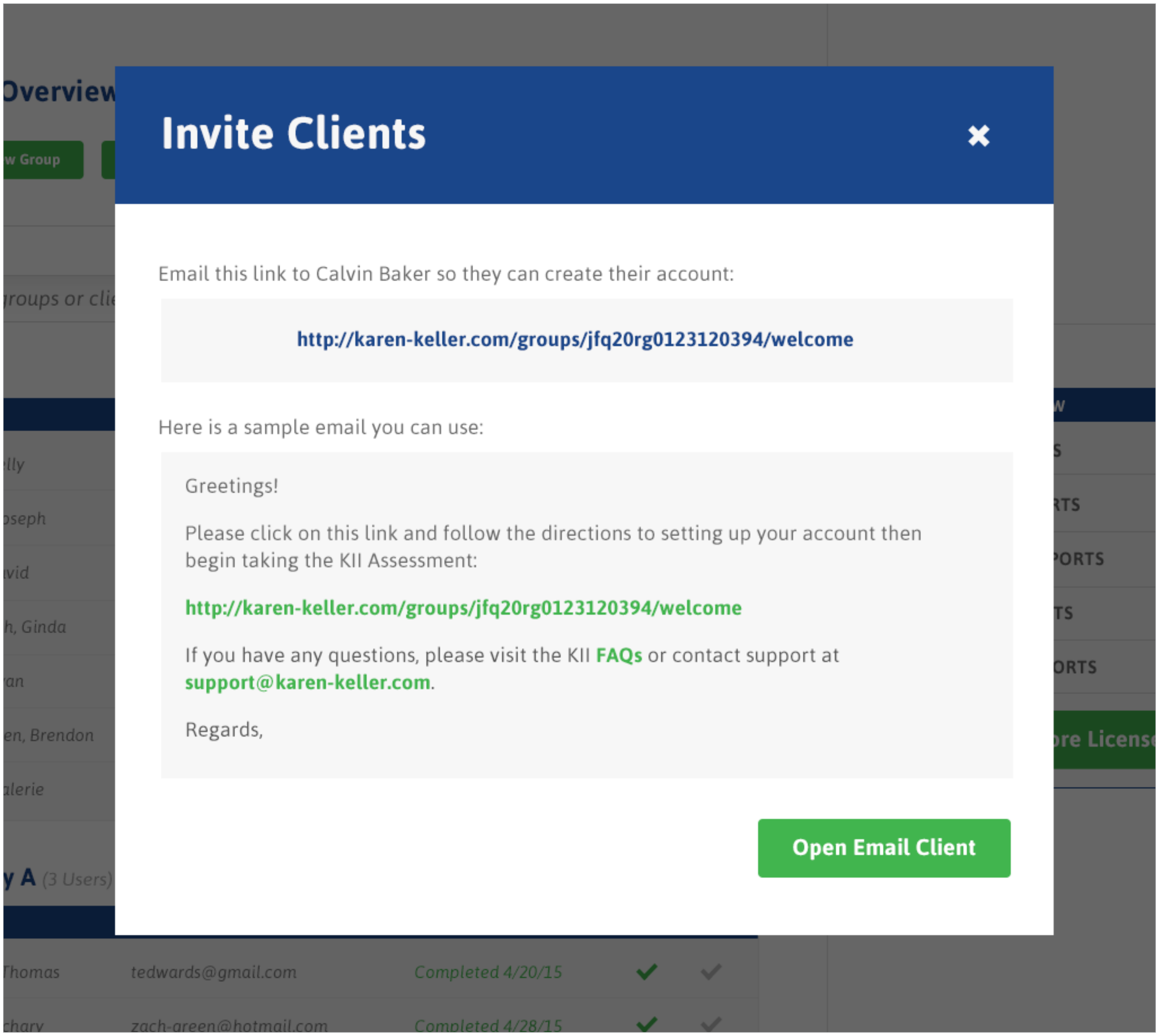


Now that you are a KII™ Partner you can start adding clients. For client that are not part of a group or company you start by clicking on the "Add Client" button.



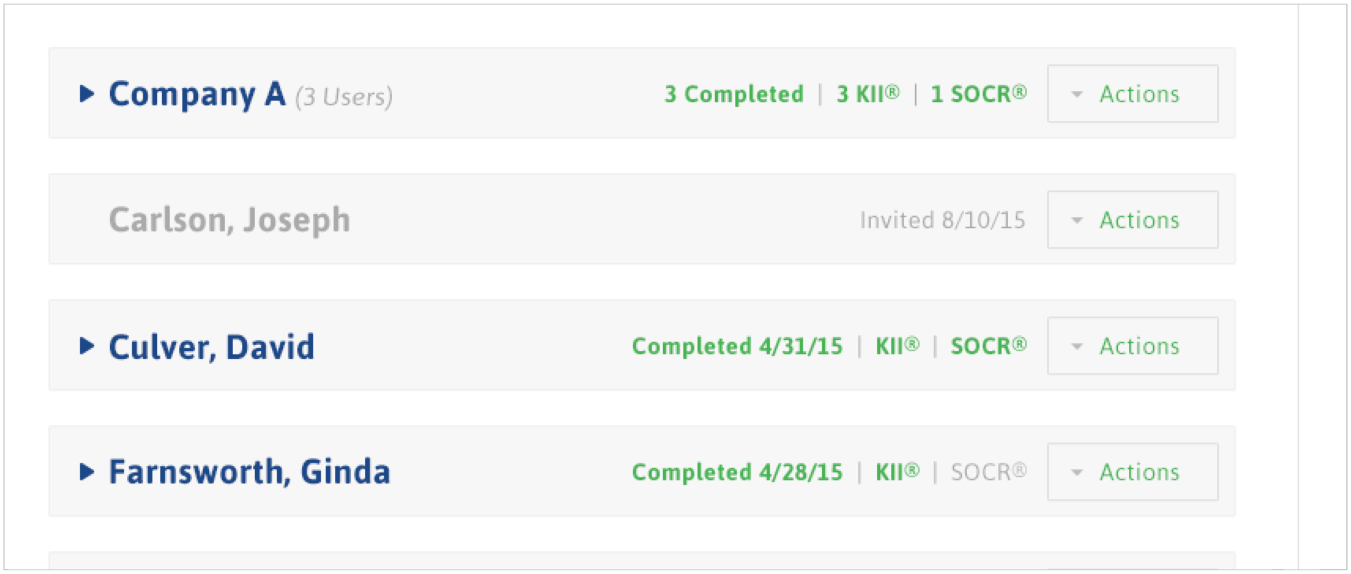
To send an invitation, the Partner must select which reports will be generated. Additional reports may be generated later, but at least one report must be selected at this stage.

Step 2B: **Clients**

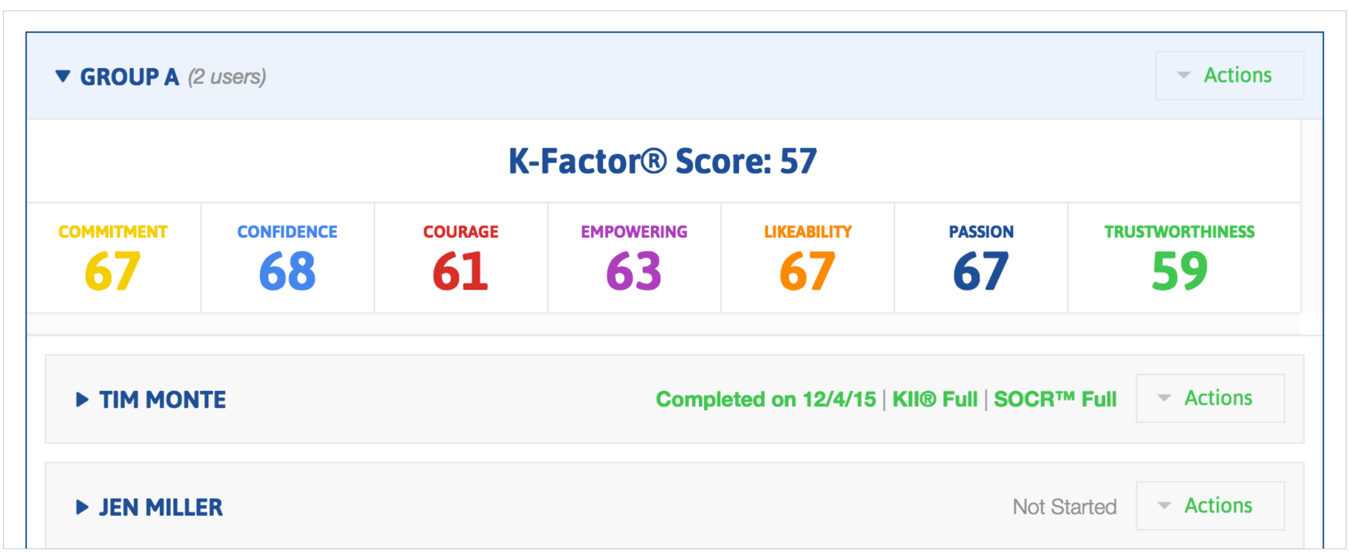


A unique link is generated for each new client. The partner should email this link to his or her clients, inviting them to take the KII™ Assessment. A sample email is provided, but the partner may also write a custom message. In either case, the partner must use this link in their email message.

Step 2C: Clients

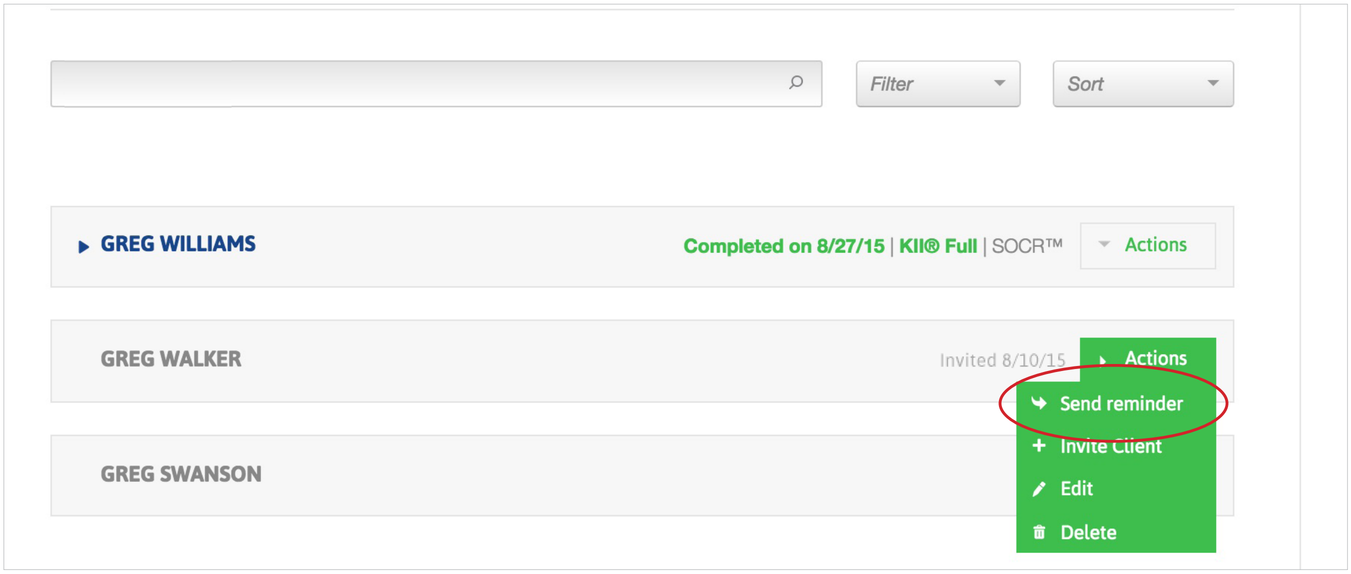


Your dashboard provides significant and organized information on each of your potential and current clients. For example, for clients you have recently invited, not only do you know the date that they were invited, but you also know how many days ago they were invited. Your dashboard also tells you when you sent a reminder.

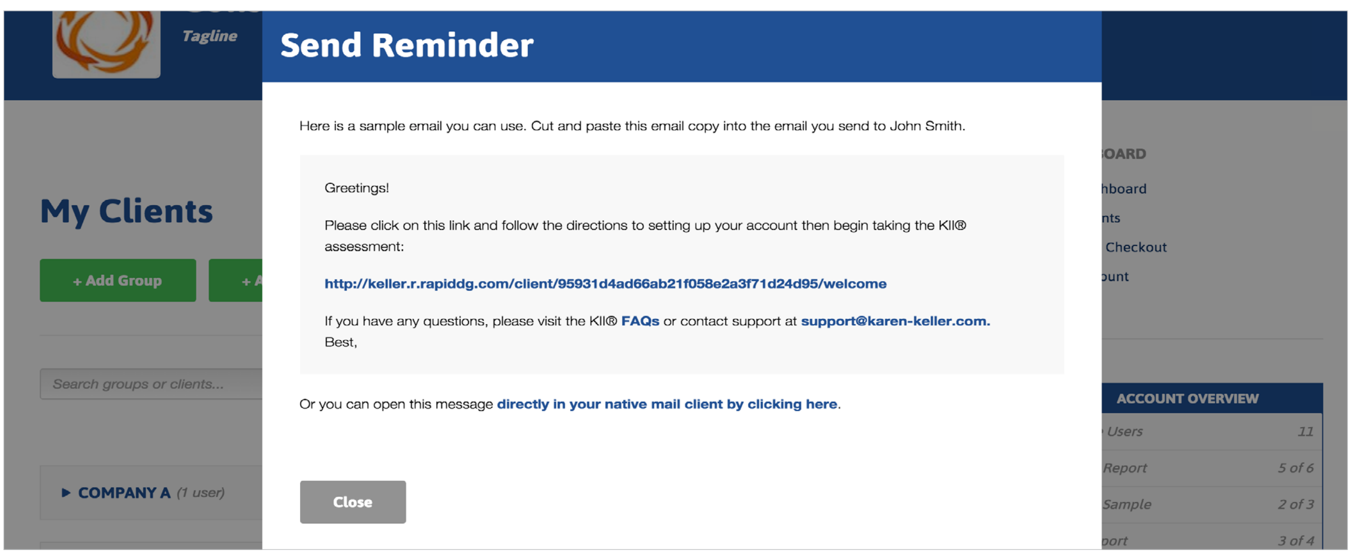


As a Partner you will have quick access to data at your fingertips when using this information as a marketing tool or in a conversation with a potential or current client.

Step 2D: **Clients**

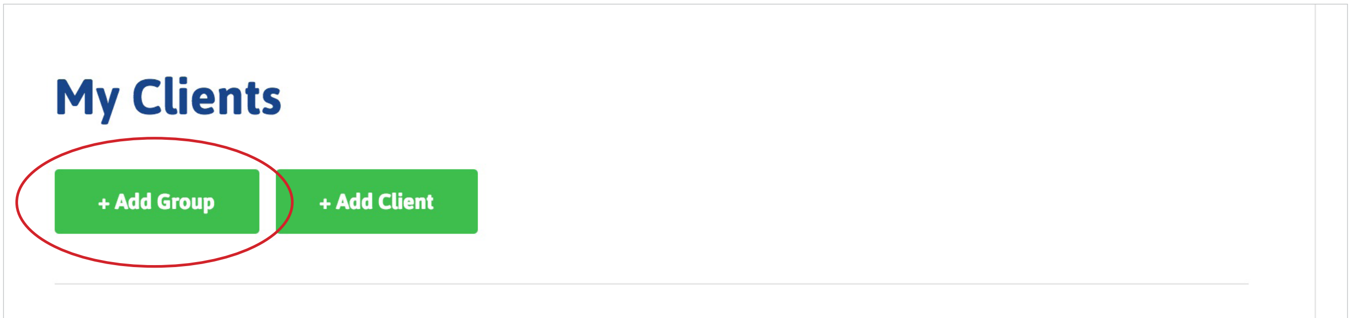


If a client has not responded to an invitation to take the KII™ Assessment, you have the capability to send a reminder. This will keep you in front of your potential client, which will increase your chances of attaining a client.

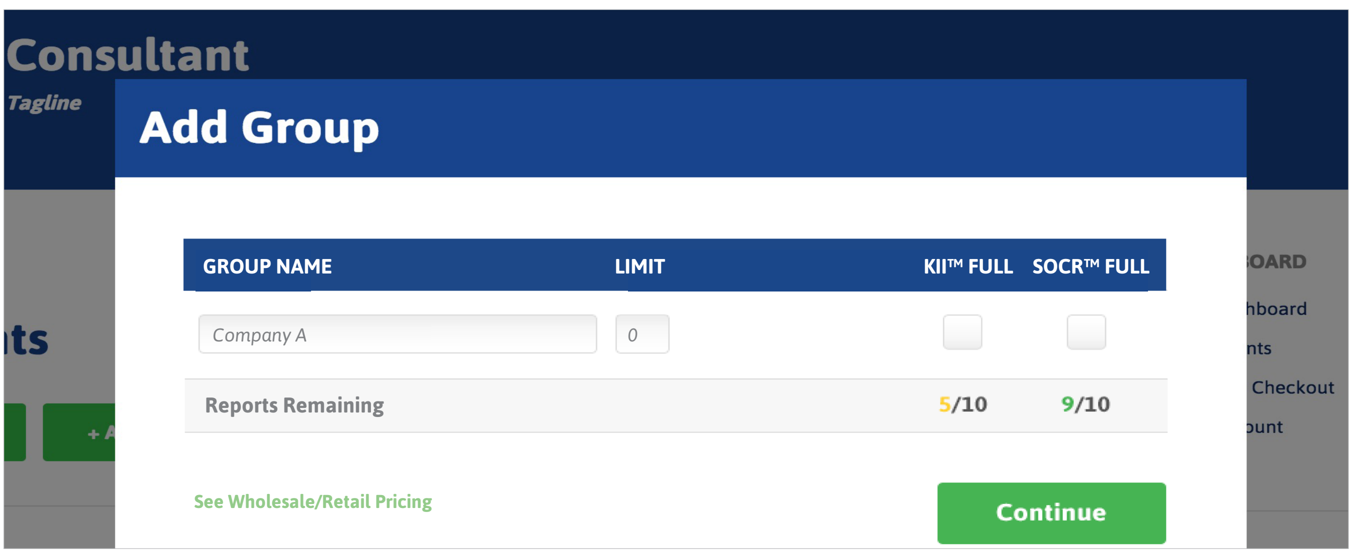


A sample email is provided, but the partner may also write a custom message.

Step 3A: Groups or Companies

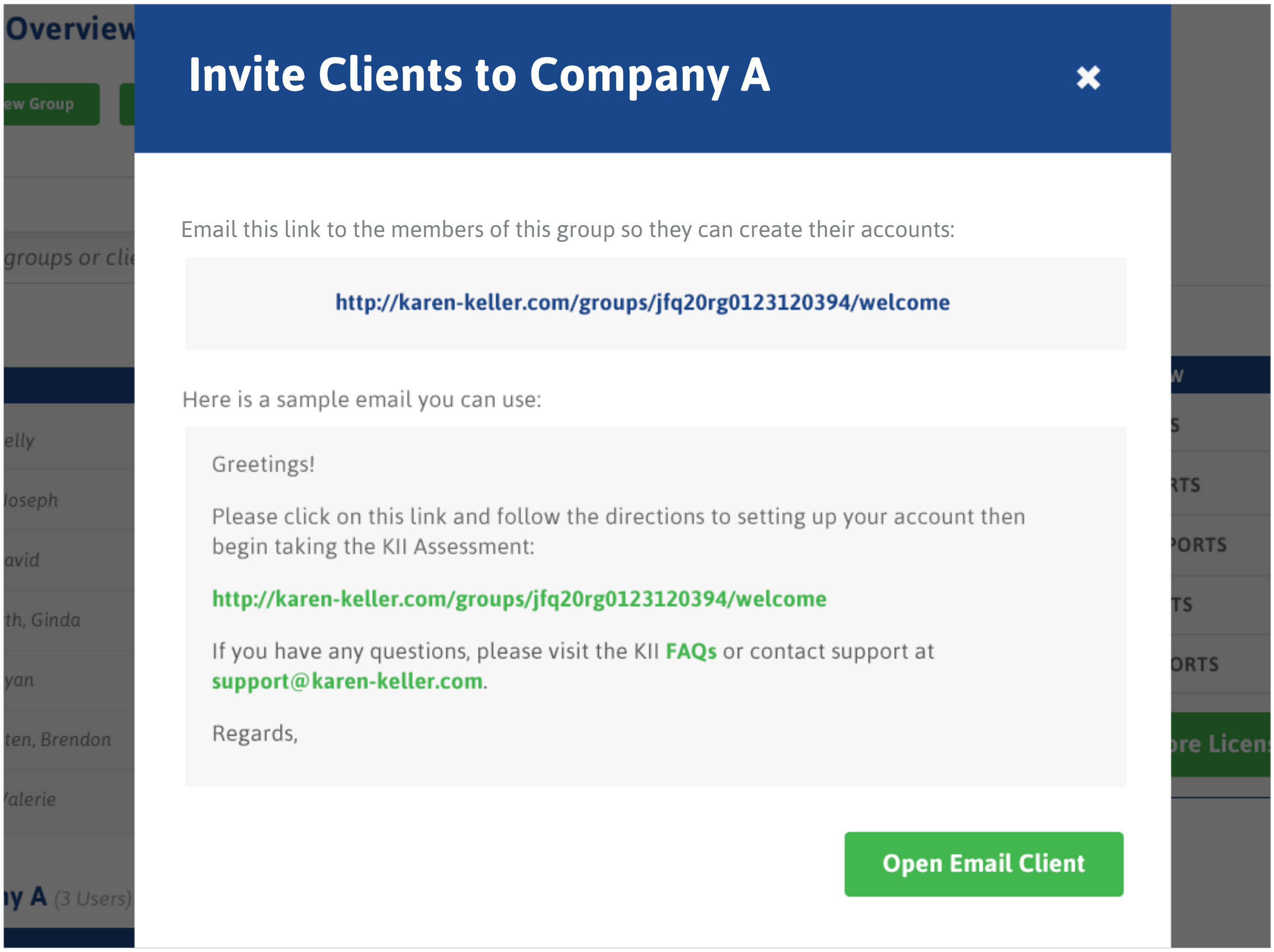


If a client is part of a company and decides to use the KII™ within that company, then the Partner can set up a new group for this purpose. All of the above applies to using this in a group. You still have information on a group's status, and the availability of group members.



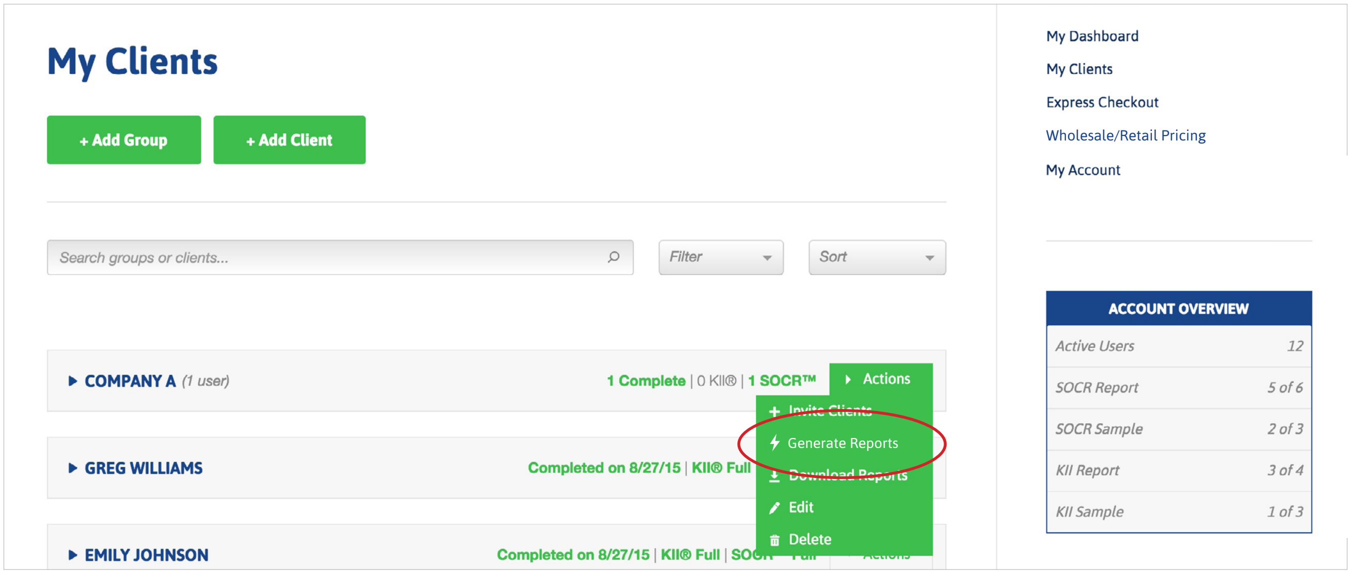
Enter the group name and select which reports will be generated. Additional reports may be generated later, but at least one report must be selected at this stage. Unlike single clients, group members do not have the option to access trial reports, because they will already be a paid client or company.

Step 3B: **Groups or Companies**

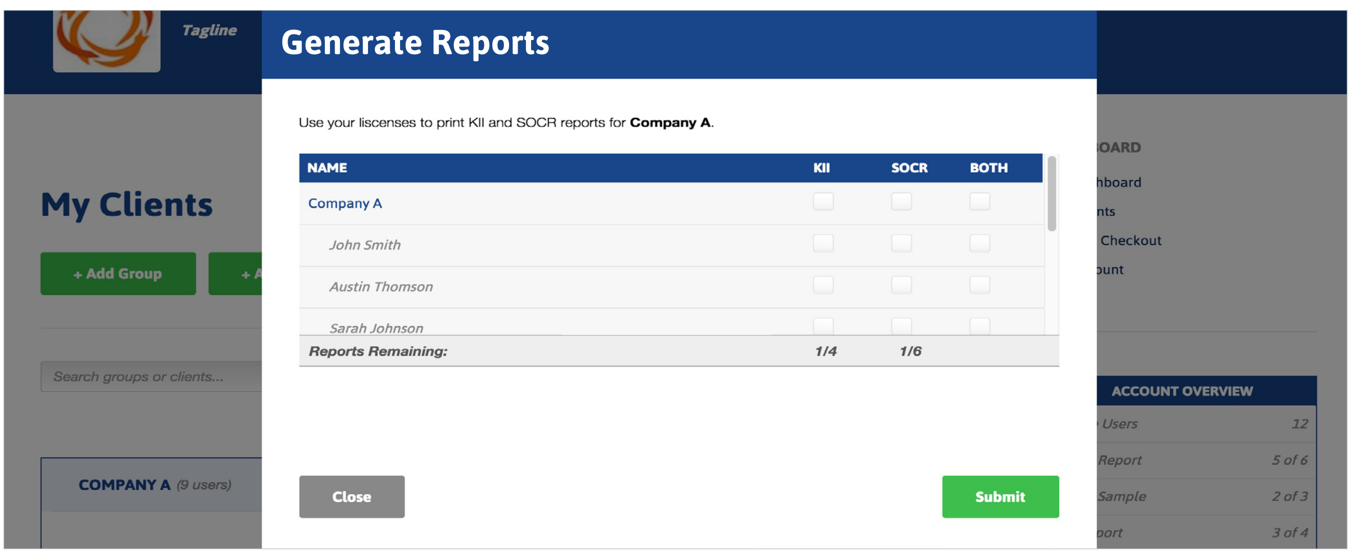


The partner can then email this link to his or her clients in the group, inviting them to take the KII™ Assessment. A sample email is provided, but the partner may also write a custom message. In either case, the partner must use this link in their email message.

Step 4: Generating Reports

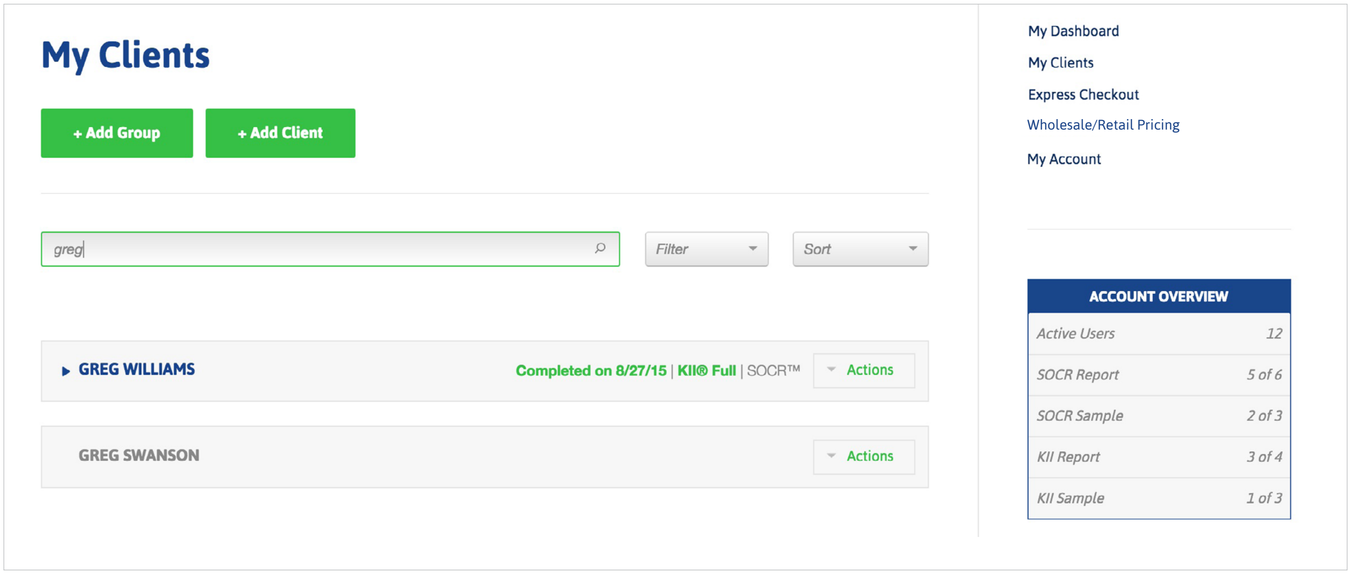


To generate reports for clients or groups, select "Generate Reports" from the Actions menu.

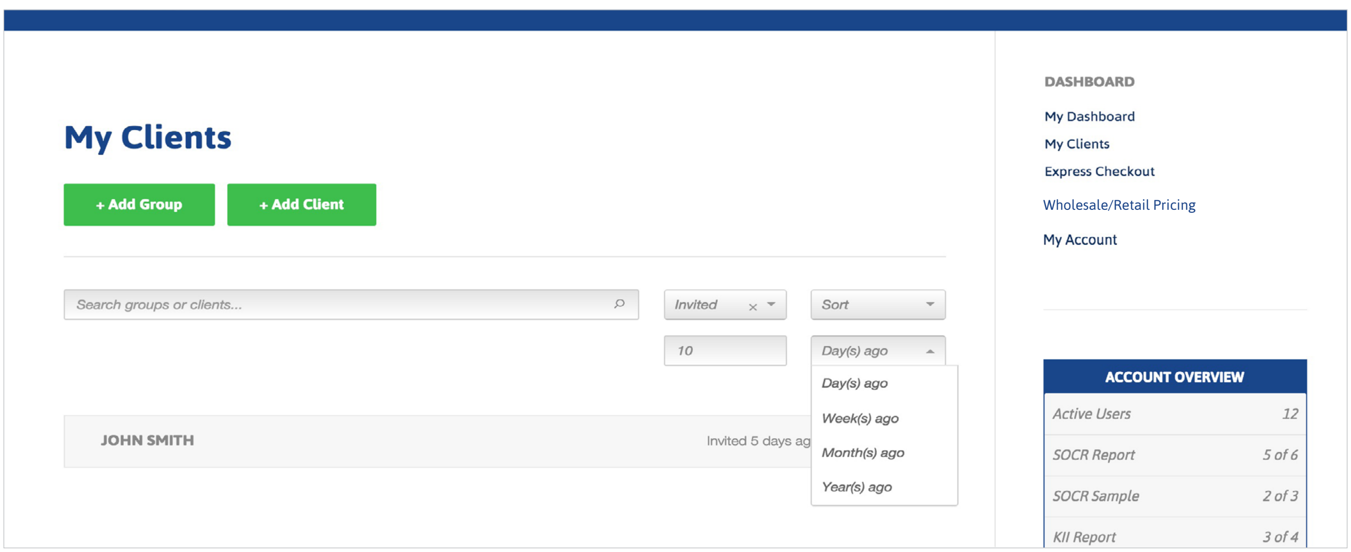


Here, the partner can select all of the reports that they want to generate for users and groups. The remaining reports are listed at the bottom of the table. If there are no reports remaining in a category, more must be purchased before those reports can be accessed.

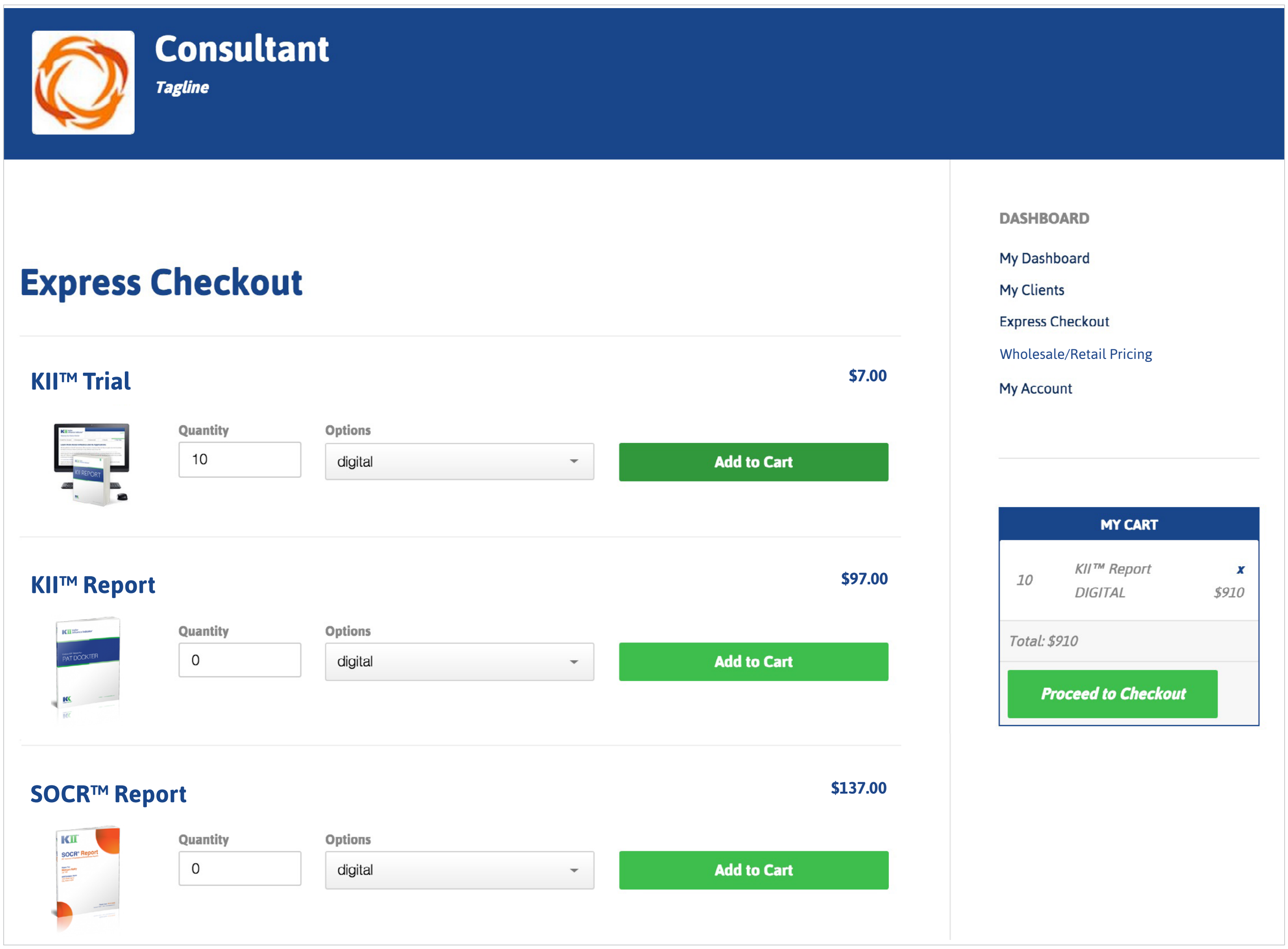
Step 5: Finding Clients and Groups



The search and filter options at the top of the dashboard can be used to quickly find a client or group within a long list.



Step 6: Express Checkout



To quickly purchase items from the KII™ store, partners can use the express checkout feature. Here, a partner simply enters the quantity desired for each type of product and then selects "Add to Cart." When finished, the partner selects "Proceed to Checkout" to continue with their purchase.