



**KII™ Partner Program**  
DASHBOARD GUIDE

# Setting Up Your Dashboard

Step 1: Becoming a Partner

Step 2: Clients

Step 3: Groups or Companies

Step 4: Generating Reports

Step 5: Finding Clients and Groups

Step 6: Express Checkout

# 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 \*  ZIP Code \*

Phone Number \*  Phone Type \*

Organization \*  Position/Title \*

Company Size \*  Industry \*

How did you hear about the KII™? \*

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### TRAINING AND BACKGROUND

Years of Training \*

#### 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](http://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 begin setting up and managing your KII Partner Dashboard.

## Step 1B: Becoming a Partner

The screenshot shows the Karen Keller logo with the tagline "Make an Influence Shift" and "KAREN KELLER". Below the logo is the heading "Shopping Cart" in green. To the right of the heading is a red "Checkout" button. Below the heading is a table with the following columns: Name, Price, Qty, and Total. The table contains one item: "Charter Partner Application Fee" with a price of \$495.00 and a quantity of 1. Below the item name is a "Remove" link. To the right of the quantity is an "Update" button. At the bottom of the table is a "Sub Total: (before shipping & taxes)" of \$495.00.

Name	Price	Qty	Total
Charter Partner Application Fee Remove	\$495.00	1 Update	\$495.00
Sub Total: (before shipping & taxes)			\$495.00

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.

The screenshot shows the Keller Influence Indicator logo with the tagline "Measuring Your Influence Potential". To the right of the logo is a "Log Off" button. Below the logo is a navigation bar with four tabs: "1. Demographics", "2. Assessment", "3. Results", and "4. Next Steps". The "1. Demographics" tab is selected. Below the navigation bar is a text box with the following text: "We are constantly updating and extending the volume of research for the KII™ assessment. To help us continue improving and refining this product please provide us with some basic information about yourself, which will be held securely and confidentially." Below the text box is a line of text: "By answering these demographic questions, you agree that your responses to them may be used for".

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

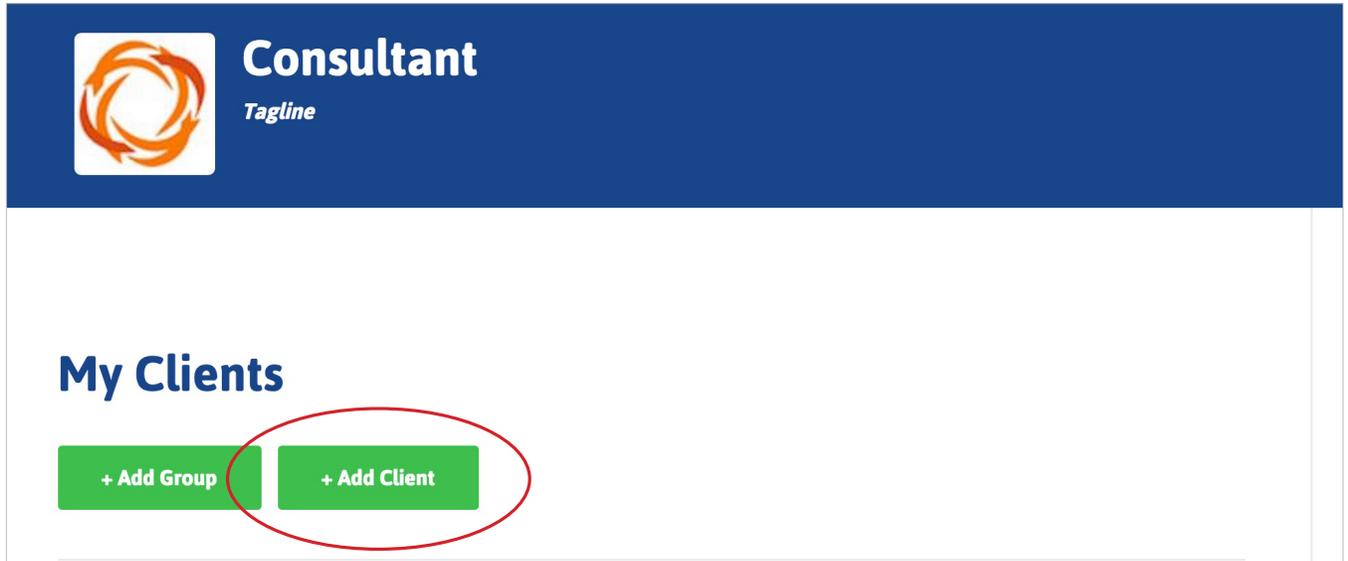
[Checkout](#)

Name	Price	Qty	Total
Charter KII™ Partner Licensing Fee <a href="#">Remove</a>	\$195.00	<input type="text" value="1"/> <a href="#">Update</a>	\$195.00
<b>Sub Total: (before shipping &amp; taxes)</b>			<b>\$195.00</b>

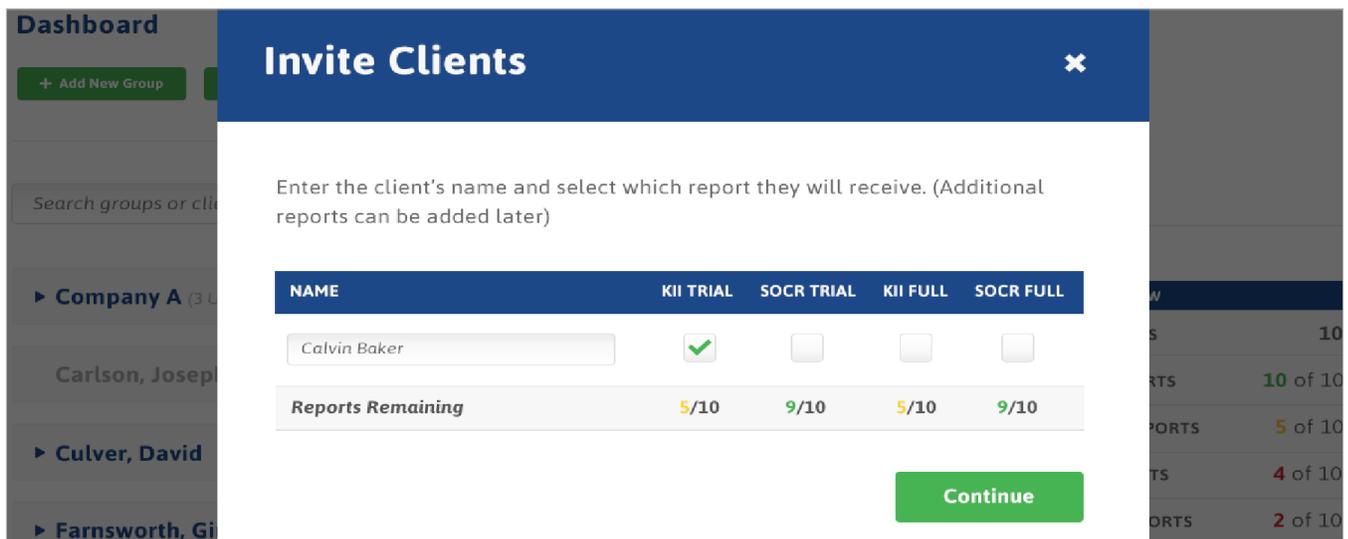
Enter a Promo Code:  [Apply](#)

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

**Invite Clients** ✕

Email this link to Calvin Baker so they can create their account:

<http://karen-keller.com/groups/jfq20rg0123120394/welcome>

Here is a sample email you can use:

Greetings!

Please click on this link and follow the directions to setting up your account then begin taking the KII Assessment:

<http://karen-keller.com/groups/jfq20rg0123120394/welcome>

If you have any questions, please visit the KII [FAQs](#) or contact support at [support@karen-keller.com](mailto:support@karen-keller.com).

Regards,

[Open Email Client](#)

Thomas	tedwards@gmail.com	Completed 4/20/15	✓	✕
thary	zach-green@hotmail.com	Completed 4/28/15	✓	✕

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

▶ <b>Company A</b> (3 Users)	3 Completed   3 KII®   1 SOCR®	▼ Actions
Carlson, Joseph	Invited 8/10/15	▼ Actions
▶ <b>Culver, David</b>	Completed 4/31/15   KII®   SOCR®	▼ Actions
▶ <b>Farnsworth, Ginda</b>	Completed 4/28/15   KII®   SOCR®	▼ Actions

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.

▼ <b>GROUP A</b> (2 users)							▼ Actions
<b>K-Factor® Score: 57</b>							
COMMITMENT <b>67</b>	CONFIDENCE <b>68</b>	COURAGE <b>61</b>	EMPOWERING <b>63</b>	LIKEABILITY <b>67</b>	PASSION <b>67</b>	TRUSTWORTHINESS <b>59</b>	
▶ <b>TIM MONTE</b>	Completed on 12/4/15   KII® Full   SOCR™ Full					▼ Actions	
▶ <b>JEN MILLER</b>	Not Started					▼ Actions	

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

The screenshot shows a client list with the following details:

- Search bar, Filter, and Sort dropdowns at the top.
- Client 1: GREG WILLIAMS, Completed on 8/27/15 | KII® Full | SOCR™, Actions dropdown.
- Client 2: GREG WALKER, Invited 8/10/15, Actions dropdown (highlighted with a red circle). The dropdown menu includes: Send reminder, Invite Client, Edit, and Delete.
- Client 3: GREG SWANSON.

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.

The 'Send Reminder' modal window displays a sample email template:

Here is a sample email you can use. Cut and paste this email copy into the email you send to John Smith.

Greetings!

Please click on this link and follow the directions to setting up your account then begin taking the KII® assessment:

<http://keller.r.rapidg.com/client/95931d4ad66ab21f058e2a3f71d24d95/welcome>

If you have any questions, please visit the KII® [FAQs](#) or contact support at [support@karen-keller.com](mailto:support@karen-keller.com).

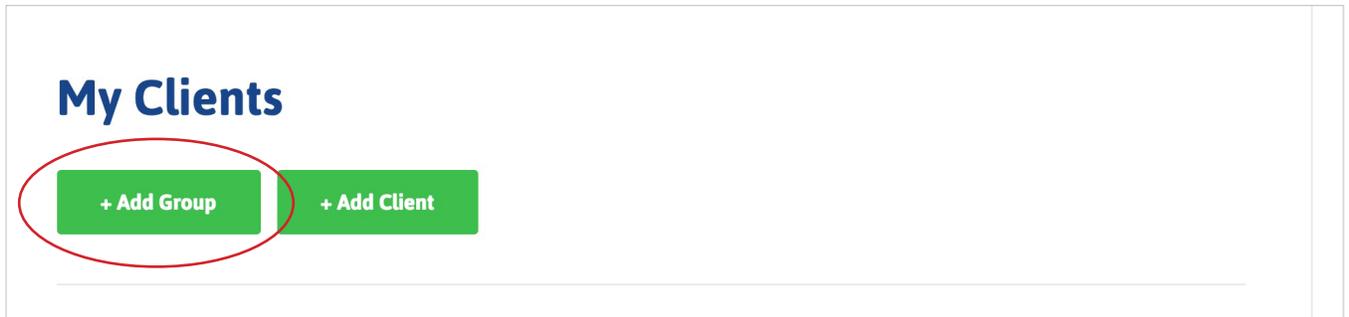
Best,

Or you can open this message **directly in your native mail client by clicking here.**

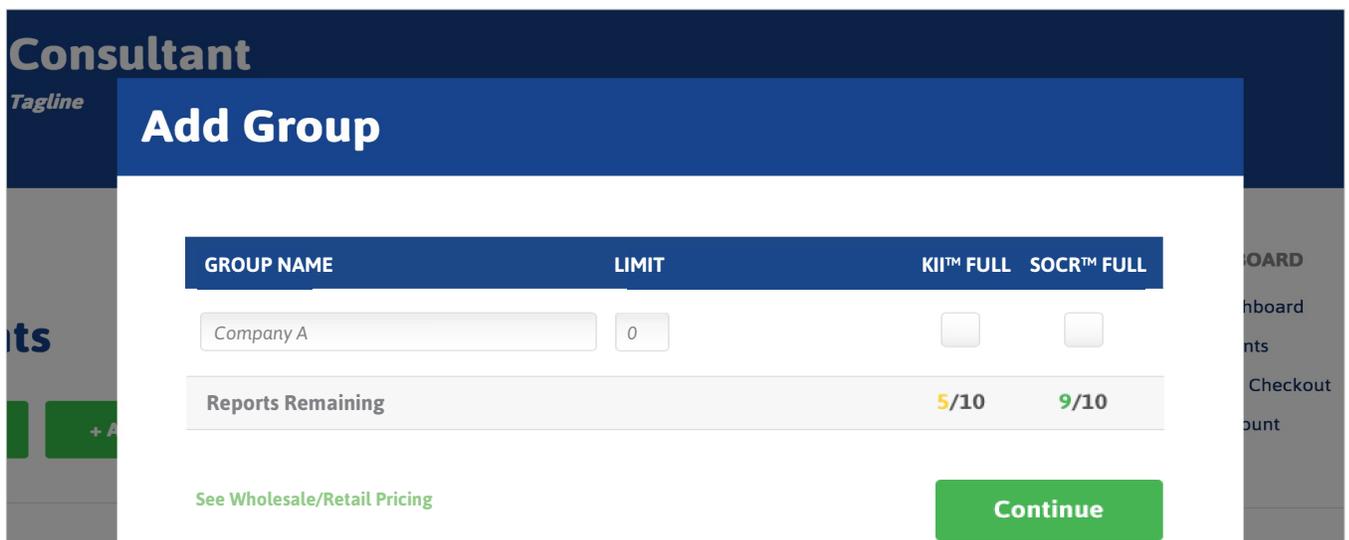
Close

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

## Step 3A: Groups or Companies

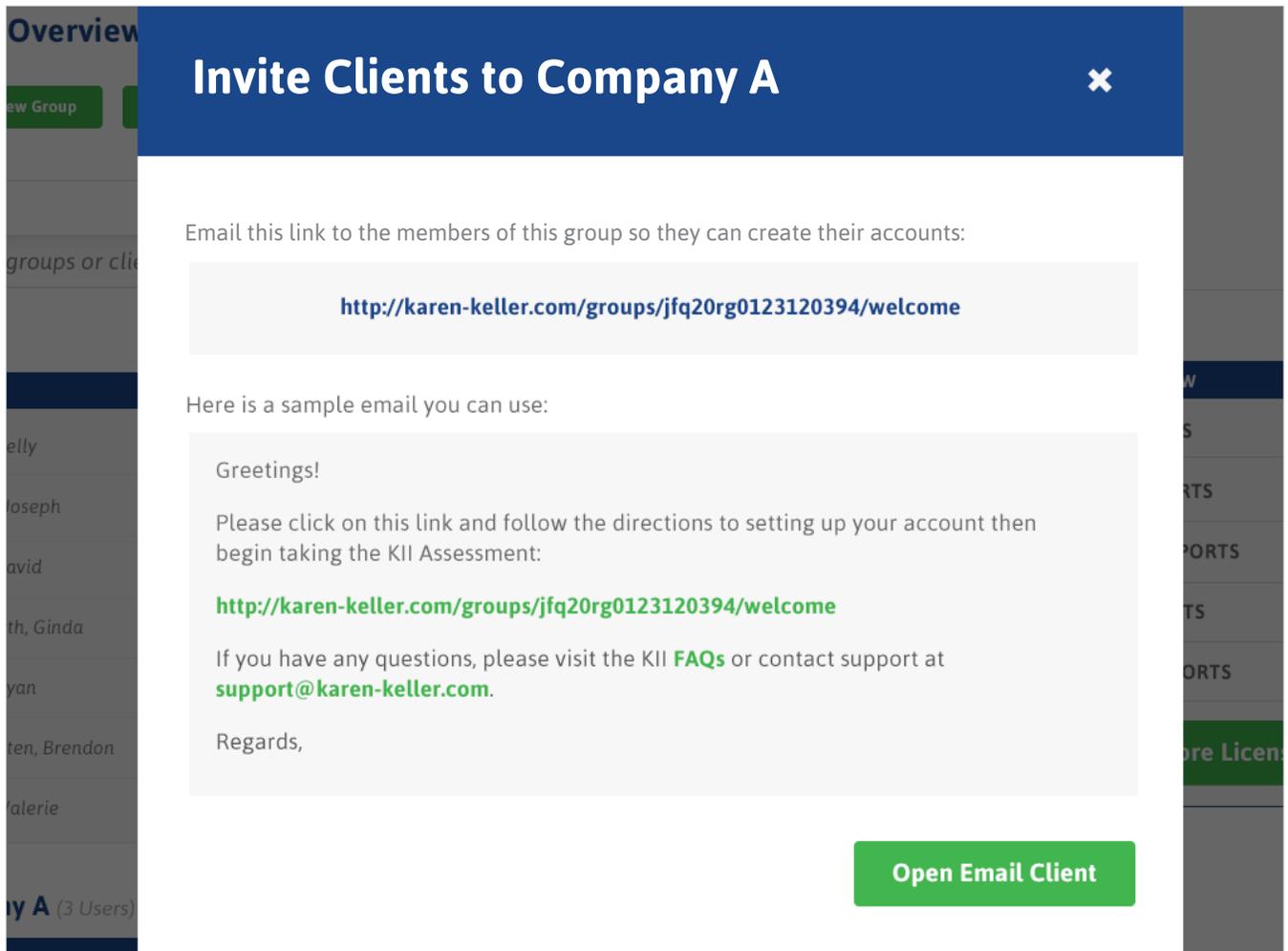


If a client is part of a company and decides to use the KII™ within that company, then the Partner can set up a new group for this purpose. All of the above applies to using this in a group. You still have information on a group's status, and the availability of group members.



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



Overview

### Invite Clients to Company A

Email this link to the members of this group so they can create their accounts:

<http://karen-keller.com/groups/jfq20rg0123120394/welcome>

Here is a sample email you can use:

Greetings!

Please click on this link and follow the directions to setting up your account then begin taking the KII Assessment:

<http://karen-keller.com/groups/jfq20rg0123120394/welcome>

If you have any questions, please visit the KII [FAQs](#) or contact support at [support@karen-keller.com](mailto:support@karen-keller.com).

Regards,

[Open Email Client](#)

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

The screenshot shows the 'My Clients' dashboard. At the top, there are two green buttons: '+ Add Group' and '+ Add Client'. Below them is a search bar with the placeholder text 'Search groups or clients...'. There are also 'Filter' and 'Sort' dropdown menus. The main content area lists three clients: 'COMPANY A (1 user)', 'GREG WILLIAMS', and 'EMILY JOHNSON'. For 'COMPANY A', the status is '1 Complete | 0 KII® | 1 SOCR™'. An 'Actions' menu is open for 'COMPANY A', showing options: '+ Invite Clients', 'Generate Reports' (circled in red), 'Download Reports', 'Edit', and 'Delete'. On the right side, there is a sidebar with navigation links: 'My Dashboard', 'My Clients', 'Express Checkout', 'Wholesale/Retail Pricing', and 'My Account'. Below the sidebar is an 'ACCOUNT OVERVIEW' table.

ACCOUNT OVERVIEW	
Active Users	12
SOCR Report	5 of 6
SOCR Sample	2 of 3
KII Report	3 of 4
KII Sample	1 of 3

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

The screenshot shows the 'Generate Reports' dialog box. At the top, it says 'Use your licenses to print KII and SOCR reports for Company A.' Below this is a table with columns: NAME, KII, SOCR, and BOTH. The table lists 'Company A', 'John Smith', 'Austin Thomson', and 'Sarah Johnson'. At the bottom of the table, it says 'Reports Remaining: 1/4 KII, 1/6 SOCR'. There are 'Close' and 'Submit' buttons at the bottom of the dialog box. The background shows the 'My Clients' dashboard with 'COMPANY A (9 users)' selected.

NAME	KII	SOCR	BOTH
Company A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
John Smith	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Austin Thomson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sarah Johnson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports Remaining:	1/4	1/6	

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 screenshot shows the 'My Clients' dashboard. At the top left, there are two green buttons: '+ Add Group' and '+ Add Client'. Below these is a search bar containing 'greg|' and a magnifying glass icon. To the right of the search bar are 'Filter' and 'Sort' dropdown menus. The main content area displays a list of clients. The first client is 'GREG WILLIAMS', with a status 'Completed on 8/27/15 | KII® Full | SOCR™' and an 'Actions' dropdown. The second client is 'GREG SWANSON' with an 'Actions' dropdown. On the right side, there is a sidebar with navigation links: 'My Dashboard', 'My Clients', 'Express Checkout', 'Wholesale/Retail Pricing', and 'My Account'. Below these links is an 'ACCOUNT OVERVIEW' table.

ACCOUNT OVERVIEW	
Active Users	12
SOCR Report	5 of 6
SOCR Sample	2 of 3
KII Report	3 of 4
KII Sample	1 of 3

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.

This screenshot shows the 'My Clients' dashboard with a different set of filters. The search bar contains 'Search groups or clients...'. The 'Filter' dropdown is set to 'Invited' with a clear 'x' button. The 'Sort' dropdown is open, showing options: 'Day(s) ago', 'Day(s) ago', 'Week(s) ago', 'Month(s) ago', and 'Year(s) ago'. The '10' filter is also visible. The client list shows 'JOHN SMITH' with the status 'Invited 5 days ago' and an 'Actions' dropdown. The sidebar and 'ACCOUNT OVERVIEW' table are identical to the previous screenshot.

ACCOUNT OVERVIEW	
Active Users	12
SOCR Report	5 of 6
SOCR Sample	2 of 3
KII Report	3 of 4

## Step 6: Express Checkout



**Consultant**  
Tagline

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### Express Checkout

**KII™ Trial** **\$7.00**



Quantity:  Options:  [Add to Cart](#)

**KII™ Report** **\$97.00**



Quantity:  Options:  [Add to Cart](#)

**SOCR™ Report** **\$137.00**



Quantity:  Options:  [Add to Cart](#)

**DASHBOARD**

- My Dashboard
- My Clients
- Express Checkout
- Wholesale/Retail Pricing
- My Account

**MY CART**

10	KII™ Report DIGITAL	x	\$910
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Total: \$910

[Proceed to 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.