



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 *

-- Select --

ZIP Code *

Phone Number *

Phone Type *

-- Select --

f Facebook

in LinkedIn

Twitter

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 begin setting up and managing your KII Partner Dashboard.

Step 1B: Becoming a Partner




Shopping Cart

Checkout

Name	Price	Qty	Total
Charter Partner Application Fee Remove	\$495.00	<input type="text" value="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.

[Log Off](#)

1. Demographics

2. Assessment

3. Results

4. Next Steps

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.

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™**

Shopping Cart

Checkout

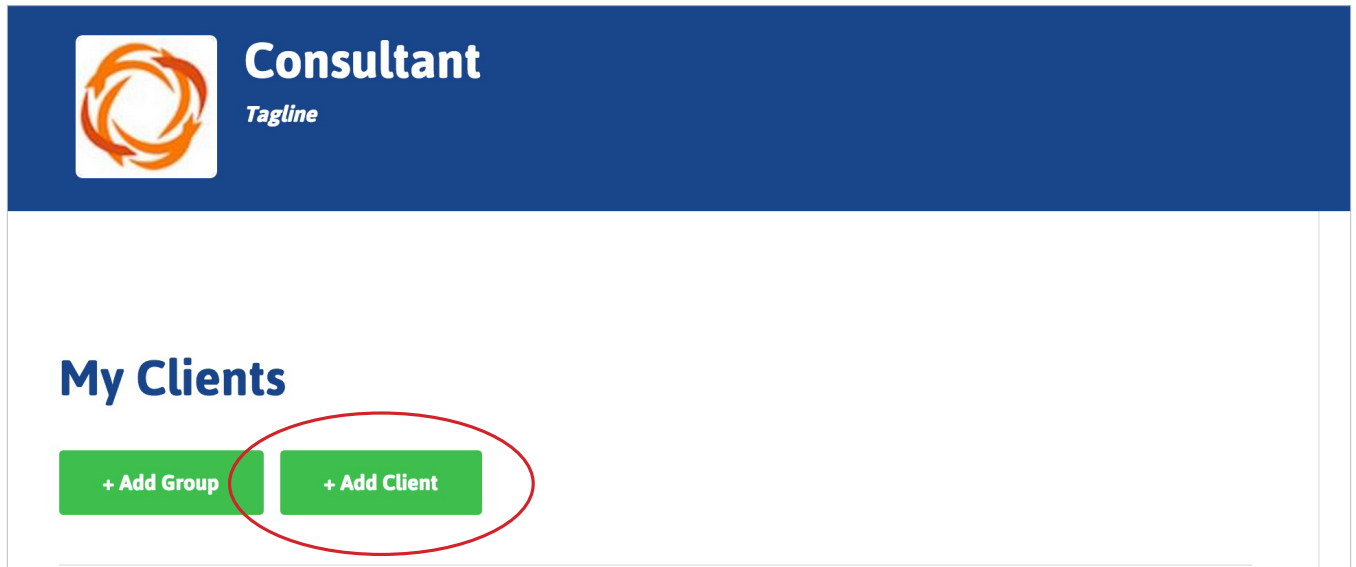
Name	Price	Qty	Total
Charter KII™ Partner Licensing Fee Remove	\$195.00	<input type="text" value="1"/> <div>Update</div>	\$195.00
Sub Total: (before shipping & taxes)			\$195.00

Enter a Promo Code:

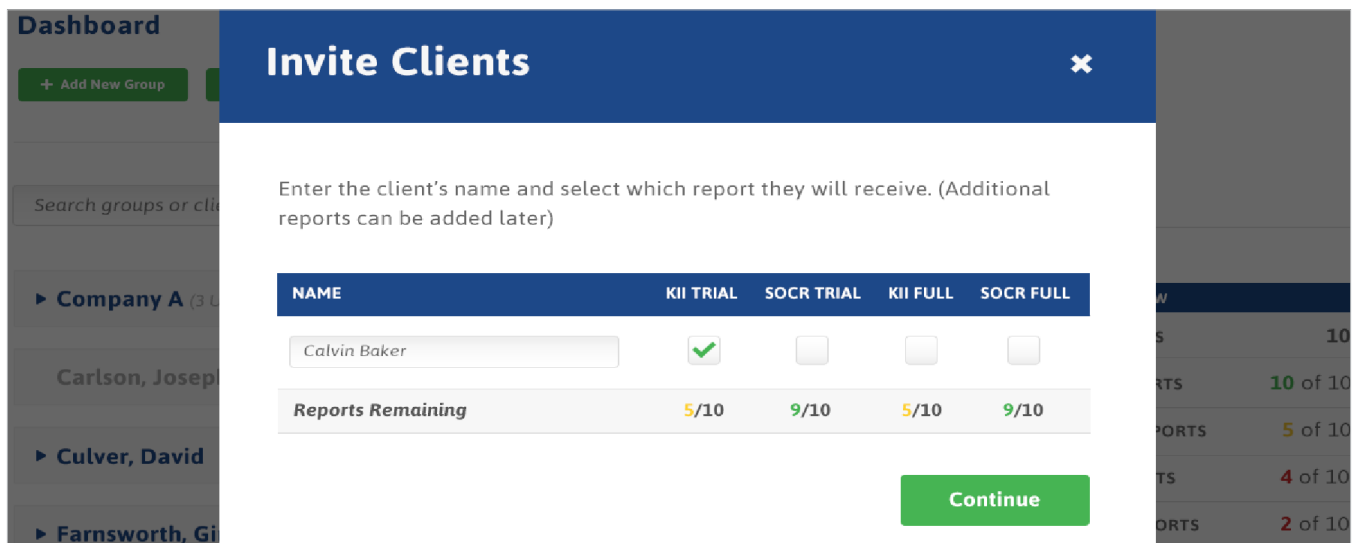
Apply

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

Invite Clients [Close]

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.

Regards,

[Open Email Client](#)

Thomas	tedwards@gmail.com	Completed 4/20/15	✓	✓
Chary	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

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

▼ GROUP A (2 users)						▼ Actions
K-Factor® Score: 57						
COMMITMENT 67	CONFIDENCE 68	COURAGE 61	EMPOWERING 63	LIKEABILITY 67	PASSION 67	TRUSTWORTHINESS 59
▶ TIM MONTE						Completed on 12/4/15 KII® Full SOCR™ Full ▼ Actions
▶ JEN MILLER						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:

Client Name	Status	Invited Date	Actions
GREG WILLIAMS	Completed on 8/27/15 KII® Full SOCR™		Actions
GREG WALKER	Invited 8/10/15		Send reminder, Invite Client, Edit, Delete
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 for a client named John Smith. The template includes a greeting, a link to the KII assessment, and contact information for support.

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.

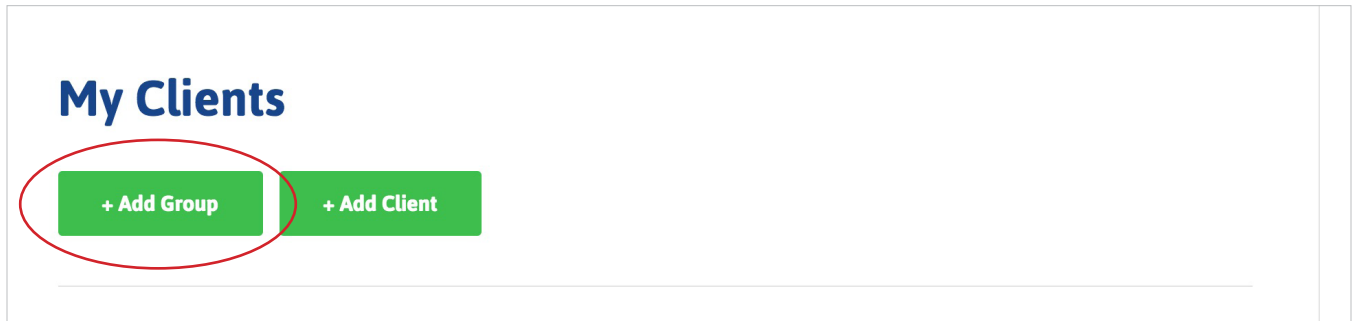
Best,

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.

The screenshot shows the 'Add Group' form in the Consultant dashboard. The form has a dark blue header with the text 'Add Group'. Below the header, there is a table with the following columns: GROUP NAME, LIMIT, KII™ FULL, and SOCR™ FULL. The first row of the table has the following values: 'Company A', '0', and two empty checkboxes. Below the table, there is a section labeled 'Reports Remaining' with the following values: '5/10' for KII™ and '9/10' for SOCR™. At the bottom of the form, there is a green button labeled 'Continue'.

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 screenshot shows a modal window titled "Invite Clients to Company A" with a close button (X) in the top right corner. The modal contains the following text:

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.

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. On the left, there are buttons for '+ Add Group' and '+ Add Client'. Below these is a search bar and filter/sort options. A list of clients is shown, including 'COMPANY A (1 user)', 'GREG WILLIAMS', and 'EMILY JOHNSON'. For each client, there is an 'Actions' menu. The 'Generate Reports' option in the 'Actions' menu for 'GREG WILLIAMS' is circled in red.

My Clients

+ Add Group + Add Client

Search groups or clients... Filter Sort

COMPANY A (1 user) 1 Complete | 0 KII® | 1 SOCR™ Actions

+ Invite Clients

Generate Reports

Download Reports

Edit

Delete

GREG WILLIAMS Completed on 8/27/15 | KII® Full | SOCR™ Full

EMILY JOHNSON Completed on 8/27/15 | KII® Full | SOCR™ Full

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' modal window. It has a title bar 'Generate Reports' and a subtitle '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 modal.

Generate Reports

Use your licenses to print KII and SOCR reports for **Company A.**

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	

Close Submit

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

My Clients

[+ Add Group](#) [+ Add Client](#)

Filter Sort

[▶ GREG WILLIAMS](#) Completed on 8/27/15 | KII® Full | SOCR™ Actions

[GREG SWANSON](#) Actions

[My Dashboard](#)
[My Clients](#)
[Express Checkout](#)
[Wholesale/Retail Pricing](#)
[My Account](#)

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.

My Clients

[+ Add Group](#) [+ Add Client](#)


Invited Sort

[JOHN SMITH](#) Invited 5 days ago


[DASHBOARD](#)
[My Dashboard](#)
[My Clients](#)
[Express Checkout](#)
[Wholesale/Retail Pricing](#)
[My Account](#)

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


Express Checkout



Quantity

Options
digital


Add to Cart



Quantity

Options
digital

Add to Cart



Quantity

Options
digital

Add to Cart

DASHBOARD
[My Dashboard](#)
[My Clients](#)
[Express Checkout](#)
[Wholesale/Retail Pricing](#)
[My Account](#)

MY CART

10	KII™ Report DIGITAL	x \$910
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.