COACHMETRIX

Participant Onboarding Guide

Coachmetrix is the coaching platform that you will be using to manage all aspects of your coaching engagement: where you will add your goals and supporters, create a discussion with your coach and access resources and assignments.

Activate/Set Up Coachmetrix Account

- Your Coach will send you an email from Coachmetrix (noreply@coachmetrix.com) with a link to activate your account. The email will look similar to this:

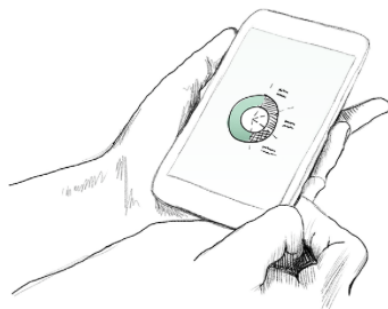## COACHMETRIX

Welcome to Coachmetrix

Hello Nyah Williams,

We'll be using Coachmetrix to facilitate your coaching and leadership development experience. You'll go here to create your action plan, review pulse feedback, exchange discussions and receive content from the program.

Set your password and login

— Kim

- You will click on the link to access Coachmetrix. On the login page, enter a password:
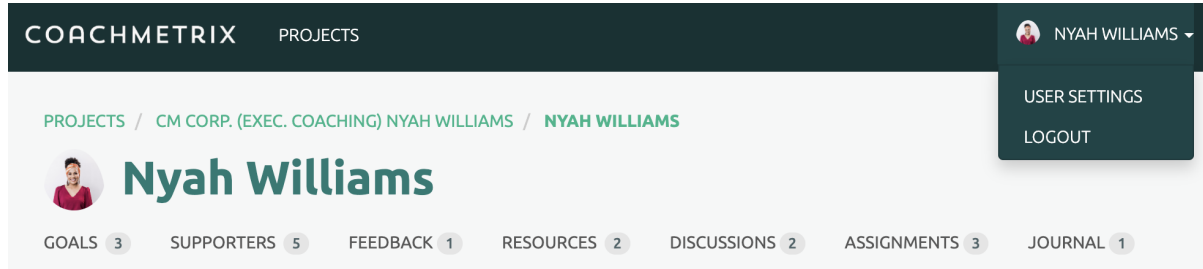
COACHMETRIX

✉ Your Email

🔒 Your Password

LOGIN

☐ Keep me logged in.

Forgot your password?

Create a Coach Account

COACHMETRIX

Navigating within Your Coachmetrix Account

COACHMETRIX   PROJECTS

NYAH WILLIAMS ▾

USER SETTINGS

LOGOUT

PROJECTS / CM CORP. (EXEC. COACHING) NYAH WILLIAMS / **NYAH WILLIAMS**

Nyah Williams

GOALS 3   SUPPORTERS 5   FEEDBACK 1   RESOURCES 2   DISCUSSIONS 2   ASSIGNMENTS 3   JOURNAL 1

User Settings - located in the black bar on the far right side. Click your name to see a drop down menu. User settings allow you to update your contact information, change your password and add a profile photo.

Quick Links - are located under your name at the center of your dashboard. Click a link to navigate to the corresponding feature page (Goals, Supporters, Feedback, Resource, Discussion, Assignments, Journal).

Getting Started with Your Coachmetrix Account

● Make it easy to access your account any time, anywhere. Here's how to create a mobile device shortcut: Mobile Shortcut

● Get to know the Coachmetrix Terms and the Process

Need Help?

● The Coachmetrix Knowledge Base is a great resource to help you get started, answer questions or go deeper into any of the functional areas. It includes videos, instructions and FAQs. To access the Knowledge Base, click on the green conversation icon found on every page.

● The Support Team is available to solve any technical issue or help to answer any questions. Reach out if we can support you in any way: support@coachmetrix.com