Executive Assistants Program

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Week 1: Navigating Ninety: The Basics

Facilitator Notes
Introduction
Welcome! I am overjoyed to have you all here today. We're going to have a ton of fun over the next 4 weeks. To start, I'm going to ask that we turn on our cameras and unmute- this is not a typical webinar where you can listen like a podcast while working on other tasks. We're going to become best friends by talking, interacting, and asking questions. You don't have to wait until the end of any session to ask questions- ask as they come up! This program is designed to help you level yourselves up to a practice manager for your coaching practice. I say YOUR coaching practice because this is a partnership with your Implementer. You are an integral part of this business, and if you don't feel that way now, then this program will help you adjust your mindset.

Each session is scheduled for an hour. I know how valuable your time is, so I very much appreciate you committing to the time each session, and hope you will find the content valuable to your business.
My name is Laura Levenstein, and I'm a Learning Experience Designer with Ninety, which means my entire seat is about creating resources that support all Clients, Implementers, and EAs using Ninety. Before we continue, I'd love to learn more about you! Can you share your name, how long you've been familiar with EOS, and how long you've been using Ninety?
Overview
This course is unique in that it's the first time offering education focuses on the EA-Implementer relationship vs the Implementer-client relationship. Overall, this workshop is Ninety specific- not training to be an EA in general. If anyone is looking for training on how to be an EA in general, we have a few incredible partners, and I'm happy to provide resources for their programs. In the beginning, it might seem simplistic or may cover things you already know, but as we progress, we'll focus more on topics that help you specifically as EAs. We just want to make sure we are providing the necessary skills and knowledge for you all no matter your experience with Ninety. What I hear from so many assistants, whether they're supporting 1 Implementer or 7, is that they couldn't be as successful without running the practice on Ninety because consistency = efficiency in your business. Within the system, client referrals, and setup are the same, as

are content, navigation, and one single point of human contact (your Partner Relationship Manager), the efficiency is unmatched.

In a similar vein, I'd love to hear YOUR experiences with Ninety and how you and your implementer use it together. I hope we can all learn together in this session.

So I can learn a little more about you and your business, please type into the chat how many clients you are actively supporting.

As a quick example of how overwhelming this can be, take a look at how many tabs you have open or how many you have open on any given day. This course is ALL ABOUT making managing this business easier for you.

Our goal for this workshop is to make your day and seat fulfilling and enjoyable with a system that supports you. So let's dive into session 1- we'll go over the general navigation of Ninety and how you should use it for the basic client needs so you and your Implementer are running as a partnership.

General Navigation

Let's get started with some general navigation. If you're not already logged into NInety, go ahead and do that now! At the top left of your Ninety screen you'll see the company name you're working in. To switch, click the dropdown. You'll see all the companies where you are in the directory. (not necessarily companies that you hare referrals for)

If you don't see the right company, you can log in as the implementer or be added by the client to the system as an implementer, so it's a free seat.

The create button follows you throughout the app, and when you're anywhere in Ninety, you can use it to create Issues, Rocks, To-Dos, Headlines, and Cascading Messages.

At the bottom right, there is a live chat support button. You can use this to speak with anyone in our live chat support team. it starts with a bot, but then you'll have a real person take over. They are FANTASTIC and can answer any questions you might have . Usually, it's a 3-4 minute response time.

If they can't answer right away, they will reach out to your Partner Relationship Manager and do a warm handoff to the right person. Also available on the Ninety site, so you don't need to be logged in to use it.

Each of you should have a seat inside the Implementer's free coach account and access to the Implementer's Partnerhub. If you do not- reach out to your Partner Relationship Manager. This is how you can look at your referred companies. If you aren't sure who your Partner Relationship Manager is- shoot me a message and I'll connect you.

V/TO

Let's move into V/TO®. From here, you can print out the V/TO. To prevent it from printing in a weird way, make sure that Custom Vision is turned off by going to Settings and toggling to the left.

This is automatically turned off, but sometimes when clicking through NInety, it gets turned on without realizing it, and sometimes messes up the printing.

The toggle at the top allows you to share the V/TO across all teams. In an EOS template, **the Core Values, Core Focus, and 10-year target automatically cascade to all teams**. The rest of the V/TO can either be hidden or cascaded. If hidden, each team can go in and make their own content for marketing strategy, 3-year plan, etc. If you share with all teams, everything from the Leadership team will be cascaded down to everyone.

Let's talk about V/TO as it relates to the coaching practice, not Client use:

- How many of you have a V/TO for the coaching practice?
- Did you build it together, or was it handed to you?
- Do you know what it is?
- Is it documented?
- Are you reviewing it together?

If not, you're doing a disservice to the practice. Sometimes we have to force the implementers to practice what they preach and eat their own cooking. They talk about it every day and are in it every day. They push it out to others, but not all of them practice it.

Rocks

Let's talk about Rocks as they relate to the coaching practice, not Client use:

- How many of you set Rocks in your coaching practice?
- Are you given the Rocks, or do you set them with your implementer?
- If you struggle with rock-setting for yourself, a great tip is to ask your Implementer for 10 things that they're doing that they could delegate to you. This starts the conversation so you can play keep/kill/combine until you have your Rocks agreed upon.

Accountability Chart

Let's go into the Accountability Chart. You can search by seat or name by using the search bar at the top. To print, click the ellipses on the far right of the screen and select either multi-page or single-page.

You can also decide if you want to print a detailed seat type, which will list out the seat roles and responsibilities. Or, you can print a condensed version that will only show the seat title.

Recently, we added a feature in the Accountability Chart called drafts that lets you create a draft version of the Accountability Chart. You can make mock charts if you're thinking about restructuring and use them as a playground to test new Accountability Chart structures.

This feature was added only because we had a ton of feedback from users. That being said, I want to take a second and point out the 'Provide Feedback' button on the bottom left. The feedback we get is incredibly valuable because that is what we base our new features on.

We want to know what you all need to use Ninety effectively, so please use that to provide feedback!

Let's talk about Accountability Chart as it relates to the coaching practice, not Client use:

- How many of you feel like you own your role?
- Do you know what your role is?
- Is it documented?
- How often are you reviewing and revising it together?

Noticing a theme??

To be a successful partnership, you need to know what you are empowered to own. Your A/C seat roles directly into the 1:1 tool for quarterly reviews with you and your implementer.

Meetings

Moving onto L10 meetings with your implementer. YOU run their calendar! You have the power to ensure you are running L10s for the practice. Their quickstart brains aren't always going to ensure they're doing what they should.

You have the ability to customize L10s. Does anyone use the meeting customization now? *If they do, let them explain what they use. Then, show how to customize.*

Is everyone doing L10s with their implementer? If you aren't, put it on your list! We highly recommend putting in a calendar section using the customization tool so that each week

you can review upcoming meetings or events. Use the customization tool to add whatever you think is valuable to discuss with your implementer every week. When adding sections, you can also link out to slides, webpages, calendar links, whiteboards, and the coach dashboard to easily access the items you need to discuss each week.
When running your meeting in your coaching practice, you can use the headlines tool to review items you were able to take care of the previous week, like warm leads updates, scheduling appointments, etc. We know you all do a TON during the week, so this list should be pretty large. The benefit of doing these updates in Ninety is that it holds everyone accountable; you can check off that you discussed specific tasks and make notes on any items that need additional info. Keep in mind that at any time during your L10, you can right-click and create a to-do off anything. You'll notice the time during each section is pretty small, as you aren't meant to discuss things outside the Issues section. If you're reviewing something and it's taking longer than a few minutes to discuss, make it an issue.

The IDS section is where you should be spending most of your time during a meeting with your implementer. This is where you discuss anything that you could **not** take care of during the week before. You may not have time to discuss everything, so a great strategy is to use the rating system and decide what are the most important things to be discussed that day. At Ninety, 5 basically means something is on fire and needs to be, at the very least, discussed during the meeting. After rating, you can prioritize the issues by pressing the number sign at the top. If you notice that two issues are similar, you can merge them. All the details from each issue will be combined so you won't lose any data.
As you're discussing issues, make notes so you can remember what you talked about and what the outcome was. The meetings note section that is sent out at the end of the meeting doesn't attach to specific items, so it's typically better to use the details section so your notes are attached to the right issue. If a to-do is needed based on a discussion, you can right click the issue and create the to-do right from there.
The last thing I want to show you in Ninety is the Google integration, which is found in user settings. If you turn this on, any tasks that are attached to your name in Ninety are synced to your Google calendar. You **do** have to go in and do this for each team you're on individually because it will only affect the tasks for the company you're viewing.
Conclusion/Homework

Pause for questions. Before we move on to our homework (yes, there's homework!), what can I review again to make sure we're comfortable?
Okay, for your homework, I'm going to send you this Zoom recording to review and complete the action steps. https://www.ninety.io/empowered-assistants-program When we meet next week for session 2, can we agree that everyone will have run at least 1 L10 with your implementer and possibly play around with some things that we talked about today? There is a week between each session because we know how valuable your time is, and we want to give you enough time to implement what we learned each session. This was a very basic, high-level overview of the tool. Most of the program will be tailored to how you can use Ninety as an EA to add efficiencies to your coaching practice. Next section, we'll go into the Scorecard, talk about metrics you should be tracking, how to extract data and use it to provide insights to your implementer, and team health within the coaching practice and organizing your processes.

Week 2: Managing a Coaching Practice in Ninety

Facilitator Notes
Introduction/Objectives
Welcome back! I'm so happy to see everyone, and speaking of seeing everyone...make sure cameras are on and you're unmuted! Let's do a quick check-in on your homework last week. As a reminder, the homework was to watch the session 1 video, review the assistance track, and run at least 1 L10 with your implementer. I'd love to hear from everyone and see how it went! *Allow people to share regarding homework.*
Awesome! If anyone is struggling to schedule those L10s with their implementer, let me know, and we can discuss ways to get it done.
Today, we're going to review how to make you a Ninety power user. We'll give you the tools and tips to become more of a partner in the coaching business and not a dumping ground for to-dos for the implementers you support. The plays we'll look at will allow you to have strategic check-ins with your implementer vs. checking off whether things were done or not done. We're going to look for trends in the data to help inform strategic moves.

We know the relationship between Visionary and Integrator™ is like yin and yang. We must adjust our thinking and realize the same applies to the implementer-EA relationship. You are a practice manager who is digging into the client data and pointing the implementer in the right direction because you know which clients need immediate attention and why. Having everything organized and laid out for session days is an indispensable part of the practice.

Scorecard

Let's talk about the scorecard. The point of a scorecard is not just to *have* one but also to track the data, find trends, and discover opportunities.

What are some common measurables you use to manage your coaching practice? Number of client meetings per week/month? Number of new leads or potential clients? Make an issue and review your scorecard to add relevant measurables

The measurables on your scorecard should align with your vision, 3-year goals, and 10-year goals for your coaching practice. The whole point of the scorecard is to determine what you need to do to achieve your goals and to spot trends and opportunities.

While you're in L10, you can easily convert measurables to issues for IDS later.

If a measurable has a green bar it indicates that it has been on track for the previous 3 reporting intervals.

Yellow indicates it was off track at least once over the previous 3 reporting intervals
Red indicates it was off track for the previous 3 intervals.

That's a great place to reference to determine if an issue should be made out of a measurable in the scorecard.

Before we move on to data that can be pulled from Meetings, are there any questions about the Scorecard?

Meeting Recaps

Who goes through the meeting recap emails they get from clients? What do you do with that information? Do you track it? *Allow for responses and insights*.

That is a great place to start when it comes to data collection because they give you a lot of important info to track for that client. If you aren't getting those emails, you can still access the report from Ninety.

Click into the meetings tool and pick a meeting you want to view data from. This is where you will get the data from the companies that are conversation starters for your Implenters. Add these to your Issues list for the coach and turn them into coach to-dos.

Here are some data points to highlight:

- # of Issues they have vs. # of issues they solved. If the company is consistently solving a small percentage of their issues, you may want to look into why.
- Meeting ratings will give you an idea of how efficiently they are running their meetings. If they are rated low, that's a great place for your implementer to work with the client.
- You can also see attendance and confirm that everyone who is supposed to be attending the meetings is attending. (like is the CEO attending the meetings they should be)
- Review the section durations to make sure teams aren't spending more time in each section than necessary. For example, if a team is spending 20 minutes in the scorecard, there's something there that the implementer can address.

Thoughts about the data found in the meetings recap? *Allow time for responses.*

Toolbox & KST

Moving onto the EOS Toolbox. When you're in the Client's account, you'll notice it's client-specific, but the EOS toolbox in your Coach account for the coaching practice is fully customizable. Feel free to add anything you and your implementer should go over for Mastery.

You can add the mastery section to your quarterlies to go over relevant topics, like how you run your practice on Ninety or how you leverage your Ninety Partner Relationship Manager. Anything practice-related can be built out within the coaching practice team.

1-on-1 Tool

Let's move on to the 1:1 Tool. How many of you run quarterly conversations between you and your Implementer right now?
If you don't, how do you know you and your partner are on the same page?

The 1:1 tool takes you through a Core Values check, GWC check, gives you the opportunity to assess your tool health over the previous quarter, and grade yourself and your implementer to make sure everyone is getting what they need because you both deserve that.

When filling out the form in the 1:1 tool, the other person can't see your assessment until you've both completed it- no cheating! When you both complete the form you'll be able to start the meeting and see both of your responses to the assessment at the same time. Keep in mind, this isn't an L10- this is time dedicated specifically to ensure you're both on the same page.

Additionally, this is a conversation, not a consequence, if you don't hit your targets. If there are any discrepancies between your assessment and your Implementers, now is the time to address them.

The scorecard is just for you to track and review, not your team scorecard for the practice. This is a personal scorecard you are tracking and reviewing.

Who has a personal scorecard? What are you individually tracking? Some examples could be how many weekly coach meetings you have, weekly email volume, referrals sent to OBS, etc.

In the Leadership and Management commitments section, as the assistant, you will "grade" your implementer to ensure you're getting the tools and resources needed to do your job efficiently. If not, this is the time to have the conversation.

When you're done, sign at the bottom.

1-on-1 Insights

https://help.eos.ninety.io/en_US/insights/the-insights-tool

The Insights tool is a great tool to show your coach that can provide better insights into the individual accounts that they are working with. If you or your coach log into a businesses' Ninety account, you can access their Insights tool to review how their 1-on-1 discussions are progressing.

You can also easily see and review aggregate details of:

- LMA assessment
- GWC
- Core Value ratings

At the company or departmental level.

Once the conversations have been completed, the coach can also generate a Right Person Right Seat Report for the company that will allow them to easily identify how well team members are exhibiting the company core values and GWC.

Process

The process tool is for streamlining and organizing the coaching business. It is the most underutilized tool in Ninety. This is where all your SOPs should live so they are transparent and configurable. Additionally, you can use this tool to build your coaching practice SOPs.

Some of the more common SOPs we've seen for EAs in the process tool are EOS Journey, Client Journey (where you can add any attachments you need along the way), retention (where you can add existing measurables that correlate to the process), leads and referrals. One person can own each process. You assign them by opening the specific process and clicking the person icon.

Another great use for EAs in the process tool is to store company information so you can see it all in one place. Typically, we see 3 processes, or cards, created for Clients.: Onboarding Clients, Active Clients, and Graduated Clients. Within these cards, you can add all the companies that fall within those categories.

When you set this up, create a template card and clone it for each company. Some info you may want to include is the SLT, Kolbe scores, logistics, hotel information, meeting times, etc. Add whatever info you want to be easily accessible. When they move from one

card to another, let's say active to graduated, you can move the whole card with the company info to the right process.

This is an example of how this program was created to "break" Ninety so that it would work for EAs. Ninety wasn't built specifically with EAs in mind, but we tried to uncover every way an EA could use it instead of just Clients using it in session.

Wrap Up/Homework

For your homework, I want you to review session two on the landing page and when we meet for session 3, our intro will be that everyone gets to share one data-driven item they uncovered for their practice. You may have gone into the meetings tool and seen that not everyone who is supposed to attend attended, or you may have seen a company spent too much time in to-dos or discussed the measurable examples from the page and added something to your coaching practice's scorecard. Whatever the data point is, come prepared with something you uncovered. Another version of this exercise is to look at all the data you can for one Client and use it to tell a story. What does the data tell you about that Client? Remember, data is only as useful as the information you can pull from it.

Week 3: Preparing a Client

Intro/Review

Welcome back! We're excited for another session! During this session we're going to learn how to set up a new Client, but before we do that, I want to check in on last week's homework.

So let's go around and talk about the different trends you were able to uncover using the data we discussed last week.
Go around and have everyone answer.

Preparing Clients

Awesome. I love the takeaways that I'm hearing! Let's dive into session 3 and talk about preparing Clients. Previously we talked about everyone having access to PartnerHub for your Implementers. Does everyone currently have access to Partnerhub? *If someone doesn't, add access for them and make sure they have the EOS template in the drop-down when creating a new company.*

Who has used Partnerhub? *Wait for responses*

The first thing it's useful for is setting up new Clients. The Implementer gets to choose how they onboard new Clients- there isn't a one size fits all. It's a conversation between you, the Implementer, and the Client about how you want to go about it. What we have found that gives us the best conversion rate and stickiness is to go into PartnerHub **the day prior to focus day and set up the company yourself.**

To do that, go into Partnerhub go to referred companies, and on the right you'll see new company. You'll put in the company name, a point of contact email for the company. This can be anything- it can be the visionary, the integrator, it doesn't matter because it's not going to send them anything. This is just for Partnerstack purposes. Then you'll choose the EOS template. If you get in here and don't see the EOS template, contact your Partner Relationship Manager.

The only time you're not choosing EOS is if your implementer is using a custom template, which is pretty rare in the EOS world. For example, there may be a custom template if it's in another language, or if your implementer has a custom EOS Toolbox and has that as part of a template, but again this is super rare.

If those situations don't apply, you're going to choose EOS.

After I hit create company I'll be inside of their Ninety Instance, the one I just created. I can tell where I am by looking at the company in the top corner. After I create the account, if I have any data I can go ahead and start populating it for the client.

Remember, this is pre Focus Day. I'm going to go into the directory and invite the Implementer. Then start to add everybody from SLT, but I'm not going to invite them yet. I'm going to uncheck the invite email. This way, I have everyone logged in here from the leadership team, but they won't get an email invite. If you send it pre focus day, they'll try to log in, play around, not know what they're looking at, and you'll have 1000 questions to answer. So, just add them to the directory and don't invite them yet.

There's one thing I want to point out that I think makes a difference when setting up the company. I go into their company settings, update the logo, and update their custom colors. You can use the little dropper to make sure you're getting the color exact. It changes the logo next to their company name and the colors throughout the Ninety instance. It just makes it feel a little bit more personal and helps to visualize themselves using Ninety. It makes them feel like it's theirs. You can always google the company to find the logo and colors if you need to.

Set it up so at the end of Focus Day, all the Implementer has to say is "we've gone over a ton of info. Good news, I have a tech solution that's going to solve it all for you" and then they can pull up their Ninety Instance. They shouldn't be giving a demo or any training with Ninety, it's just a smooth transition from Focus Day to starting their trial with Ninety. They just say "we've created your account, so-and-so is going to introduce you to my

point of contact at Ninety and set you up with an onboarding specialist. They'll do demo, training, data migration, all of that. You'll have a direct point of contact at Ninety for anything you need to get set up."

Data and Billing

I also wanted to let you know that whether you are creating the account pre or post Focus Day, Ninety has a data upload team that can go in and update the information in Ninety so it's all there once session is over. It is a completely free service. Anytime they have session day data or historical data from a different system, you can send it all over to NInety and we can upload it on their behalf. Our data upload team manually goes through every data point and uploads it for you. It usually takes around 2-3 business days for completion. It's a huge time saver. They can also take pictures of their whiteboard they use for sessions, anything like that, so they don't lose anything from their session. It's a heavy lift on the Client to have them move it all over.

If they decide at the 30 day mark they don't want to use Ninety, they just won't put in billing information and the account will go inactive. If they do want to use it, they'll just need to put in billing info at the end of their 30 day trial.

There's no contract with Ninety, it's month to month, so they can leave us at any time. We want to be one of the most trusted companies in the world and that really fuels everything we do. We will never gate keep their data.

After the Implementer shows them their NInety instance and you're ready to invite them, all you have to do is go into the directory- you'll see invite buttons and all you have to do is click it for each name and they'll get their invite.

Does anyone have an Implementer who uses Ninety during focus day? That's a really good opportunity- especially if they're already using NInety for their quarterlies and annuals. I'm interested to see if anyone is interested in using a custom focus day agenda in Ninety.

If you wouldn't mind, I would love for you to throw that on your next L10 Issues list to discuss with your Implementer. If you do that, you won't need a data upload or have to do it manually because they'll just be filling in all the information during the Focus Day Session.

It's not necessary to run Focus Day in Ninety but it's definitely an option. I would love to know the Implementer's thoughts, if you can bring that back next week!

If they don't want to, that's also totally ok!

Referral Links Option

Ok moving on- if you and your Implementer decide you don't want to create the accounts in Ninety that's totally fine. What you'll do in that case is click on referral links in PartnerHub. You'll have a primary referral link here that you can just copy and give out. Just make sure it's clearly communicated that if they want to sign up for Ninety, they should use this link.

Anyone who clicks this link, whether actively coached or not, it's going to automatically connect that referral to your implementer in Partner Stack for referral rewards and it's going to automatically add them into the directory.

We've done a ton of Partner Stack clean up, and missing companies, and people not getting connected right. If you want to put it on the client to set up their own Ninety account,, be sure to send them this link. Don't send them to the generic Ninety site because it won't know who they belong to.

We're working really hard on communication on our end. We want to make sure any Coach referred companies are flagged as such, and using the link or creating the company yourself will do that.

If they go through the generic Ninety site, they'll get information about Coaches who may be a good fit and self-implementing resources. We don't want that to happen if they're working with someone already.

There is also the option for custom referral links. It’s not used a ton by EOS; sometimes I'll see it if the Implementer is running an event and wants to track attendance or something like that. You can use the additional referral links that you can send out for specific things.

We call this 90 for Nurture- this is on the site so you can do it for your homework. 90 for Nurture basically means you’re getting self implementers connected to your coach. Your implementer can put that referral link anywhere- on their email signature, socials, marketing materials, bookmarks, etc.

If a company signs up using that code, even if they never met the Implementer, they get the referral rewards and the Implementer will be automatically added onto their directory. They can then go in, review their data, and basically show the company why having an implementer is valuable. They can leverage that to turn them into a new Client.

If they have a 90 minute meeting that doesn't convert, or if they choose to self implement for a while, offer them a tech solution until they’re ready. The Implementer gets the referral rewards, and having the implementer on the account gives the opportunity to show the value of the data you’re pulling to start conversations between the client and implementer.

In PartnerHub is where you would create those custom templates we talked about earlier. Again, not very common, but if anyone has questions about configurability of custom templates, book some time with your Partner Relationship Manager and they can go through it with you.

Referral Process

Back to the referral process itself- whether you're creating it in PartnerHub or using the Coach's referral link, the biggest part of the next step is that you're always going to introduce the Implementer to the PRM. We have some templates you can use if you don't already have one. That's the next step in the process. Once their account is created or the Implementer has mentioned Ninety, you'll make the connection between the company and the PRM. The only way to get that white glove experience is by you introducing them to your PRM. We want you to keep your one point of contact at NInety, which is why we want you to introduce them to the PRM, who will take the company through the next steps.

Your PRM will match the company with the right OBS. The PRM will take it, introduce the company to the onboarding specialist, and then they will take it from there.

The PRM will track it on their end. Once they move to converted, meaning they are continuing to use Ninety, or they don't, the PRM will send an update to the Implementer letting them know. This way, you'll know that you should see them in Ninety in the company drop-down, AND in your PartnerStack/Hub. It's just nice to know when you have a session day coming up that they either decided to continue with Ninety or not, so you know where their data lives.

Partnerstack Info

Who here has used Partnerstack? *Allow time for answers.* Partnerstack is a 3rd party company, so our PRMs can only do so much. But the referred companies list in PartnerHub will show you every company who is connected to your implementer's partnerstack for rewards. This list is not always going to be the same as the drop down list from the top left. Just because you have a company in your drop down does NOT mean that you are necessarily getting referral rewards from that company. If someone is missing from your referred companies list that you referred to Ninety, tell your PRM so we can get them connected correctly.
When it comes to partnerstack, there are a couple things that we can be doing. At the end of our session in the recap email I'll send you a video about PartnerStack and how to get it set up. Just to go over referral percentages, which are all set by EOS worldwide: A professional earns 10%, certified earns 15%, and an expert earns 20%. Your rewards are paid out monthly in arrears. If I sign up a Client in March, they'll have their free trial until April. They'll make their first payment in April, and you'll see the rewards in May. If you are managing the withdrawals and referrals for the Implementer (which you may want to take off their plate if you're not already), I will send you links to create a team in Partnerstack and add yourself as a separate team member in there so that you'll have

access, you'll get copied on the emails and be able to put in payment information, withdrawals, all of that.

If anyone has an implementer who is weary about earning a rev share off their referrals, that's ok. We do have people in a non-earning group but we still want you to have that referral link. If at any time they want to change that, the PRM can.

Something else to know is that we see a lot of implementers who take their rev share at the end of the year and donate it back to one of the non-profits they work with or a charity of their choice. They can then let all their clients know that they helped make a contribution to this non-profit, charity, etc. It's their money so they can do what they want with it.

If any of your referrals are non-profit, just as an FYI, they get a 50% discount, so make sure to let your PRM know during the intro.

I want to make sure you guys are checking the list for your implementers, in PartnerHub, under referred companies. It would be wonderful if you are checking that once a month, or once a quarter. We try our best to make sure everyone is connected properly, but if they're not and we don't catch it, your implementer is going to miss the rewards- and we don't want that to happen.

We can't go back and do retro-rewards so it really is up to the implementer to let us know if they're missing anyone.

The average rev share by EOSi designation:
The professionals on average are earning about $100 a month, the certified are earning about $500 a month, and the experts on average are earning $1000 a month.

The only time you're going to stop earning is if the company stops using Ninety or if another implementer steps in as the active coach. If that happens, tell your PRM so they can switch them over to the right implementer. It has to be switched manually.

Any questions about PartnerHub, percentages, Partnerstack- any of that?

Homework/Wrap up

Ok, here is your homework! Review session 3 on the landing page (I'll include the link in the recap email). You'll watch the video for session 3 and complete the action steps.

I'll also send the intro template for passing the Company to the PRM.

I also want you to identify your PRM. Does anyone not know who they work with at Ninety? If you have not interacted with them, I want you to introduce yourself.

Any questions about homework?

I'll send out the recording, the links about PartnerStack in the recap email. Is there anything else we want to cover today? Great! We'll meet same time, same place next week!

Week 4- Ongoing Client Management

Intro
Welcome back to our last session! During session 4 we're going to be talking about ongoing Client Management. First, let's go through the homework from last week which was to introduce yourself to your PRM (if you haven't already), review session 3 on the EAP landing page, and the Ninety for Nurture document. I'm also curious if anyone spoke to their implementer about potentially using Ninety for their Focus Day? *Go around and have everyone share their homework.*
To start, we're going to talk about quarterly planning. First thing I want to talk about is pulling out data from the L10 recap email/or from Ninety and the dashboard. We went over

this in session 2, but we'll go ahead and do a refresh through the perspective of your quarterly planning meeting.

How can I pull data from the L10 recap from within Ninety?

As a refresher, go into meetings, click past meetings at the top, filter to the team and meeting type you want to review the meeting for, select the meeting from the meeting history, and the report will generate on the right. Some things to look for are the meeting ratings, as well as their section durations. Are they spending the right amount of time in each session? Another thing to look for is their solved issue rate- are they solving an appropriate amount of issues? Also, are the right people attending the right meetings?

Quarterly Meetings: Data Options

If your implementer is not using Ninety during the Client quarterly meeting, and you need to extract that data for them, you can go into the Client's V/TO and download the quarterly export. That's going to give you the whole list of their scorecard, rocks, to-dos, etc. That's going to give you all of that good stuff in one print out. If they don't want the whole packet, you can go into each individual tool and pull those reports individually.

If they're not using tech in session, remember that during session they can take pictures of whiteboards, notes, spreadsheets, or anything that contains content and send it over to

our data upload team to add into Ninety. Just remember, it takes about 2-3 business days to budget for that data upload.
Who here uses tech in the session room? *Pull up quarterly agenda in meeting* The benefits of running your quarterly inside the platform is that the agenda has everything laid out exactly as EOS says to. I can archive the V/TO automatically, I can edit it real time on the screen, we can archive old rocks, we can turn issues into rocks, we can keep kill, combine using the merge issues button. Implementers can also use the meeting notes section to add homework so that it's included in the recap email. We can also customize the implementers My90 page to show client insights and prepare for Quarterly discussions. If you're in the clients account, you can go to the edit layout option and add and remove widgets that you want to show on the client's dashboard. So, you can track everything you talk about in the quarterly right on their dashboard.
Best practice around clients and EAs for quarterly sessions is ensuring the clients are set up

for success by creating around 5-7 issues prior to session and finishing those 1-1 quarterly conversations prior to session found in the 1-1 tool. That's going to fuel some of the things that should be discussed in the quarterly. Another thing to do is update and prioritize issues prior to the session. These are all things that should be done prior to the quarterly session so they can be on the issues list and solved while the client is in session.

Ninety Roll out

One thing I want to bring up that I think is a big thing for implementers and Ninety is roll out. When I say roll out, I mean expanding the use of EOS throughout the entire organization, not just for the SLT.

When you're going through the EOS process, we talk about Focus Day, VB1, VB2, quarterlies, and annuals, but the last part is rollout and I think gets skipped often.

We're right now creating more resources to help support when companies are ready to roll out EOS.

What do your implementers do right now for roll out, if anything? *Go around and ask everyone to respond.*

Share this link for roll-out series: https://www.ninety.io/live-training

Rollout is very unique- it's not going to be the same for every company, or every implementer. There is no one size fits all for rollout from any of the resources. However, it is a core part of the EOS process. If your entire organization isn't working towards the things that are being taught to the leadership team then your core values, goals, and the processes you're working towards may not be cohesive.

Ninety can help with mid-manager training to help with rollout if the company decides to also roll out Ninety. It's a good conversation to start with the implementer.

All Ninety clients are assigned to a client success manager and that's the person we would loop in for that rollout conversation. Very similarly to how we hand off new Clients to the OBS when they first start using Ninety, we would introduce the company to the CSM when they are ready for rollout.

Sometimes the implementer likes to sit in on the initial kickoff call between the mid managers and the CSM. That way when EOS questions come up the implementer can take them and the CSM can take the tool questions.

A lot of clients don't consider Ninety and EOS as 2 different companies; they think it's the same thing. So sometimes they will come to us with EOS questions and we will refer back to

the coach, because we are very careful to draw that line that we are not the coach. The same might be true for you in that the clients ask you questions about Ninety and you have someone to refer back to on our end.
When they're working with the CSM for mid manager training for rollout, the CSM can sit in during the first few L10s and give them on the spot feedback as they're going through the meetings tool for the first time. They can do this team by team or company wide.
I do have a Ninety rollout guide that I want to share with you: https://www.ninety.io/hubfs/90u%20Library%20Materials/Guides/PDF/On%20Rolling%20Out%20Ninety%20Guide%20%E2%80%94%20Ninety.pdf
It's all about the tools and the system, not EOS. The Coach is going to be the main resource to roll out EOS, but we are here to help with rolling out Ninety to use EOS throughout the org.
We go over what a BOS is, setting up and running on Ninety for different teams. If your implementer already has a system for rollout, that's great. If they don't, just know this support is available and they aren't on their own. If the Client is already running on Ninety it's really easy for us to connect them with the CSM and get the whole team running on Ninety.

The timeline for rollout can vary greatly between companies. Some companies want to only keep EOS and Ninety at the leadership level for a certain period of time until they have a handle on it and decide to push it out to the rest of the organization. We will follow the implementer's lead, because they really know what's best for their client.

Any questions about rollout?

Resources: Thrive Meetings

Our focus at Ninety is helping organizations focus, align and thrive. Not just the clients' businesses but also your implementer's coaching practice.

The Partnerships Team has started holding Thrive meetings with our partner Implementers. Thrive Meetings are intended to be every 90ish days and provide an opportunity to discuss what's working and not working yet, as well as any exciting updates from Ninety. However the real focus is on your business with a reflection on the last 90 days and how we can help support your upcoming goals - beyond just our software.

We are invested in your teams and your success, so we have programs in place to support your business. Things like business development support, social media boosting, event support, and capturing testimonials and case studies that your Implementer can use as shareable assets.

Be sure to reach out to your Partner Relationship Manager (aka Coach Advocate) to set up a Thrive Meeting!

Resources: Event Support

We also offer event support. If they're running strong in 6, great boss workshops, or another event loop in your PRM to the conversation. We have different sponsorships for in person events and online events. We have custom marketing assets, postcards, one pages, all EOS branded with the implementer referral links. We can send pop-up banners, or potentially even a local Ninety rep to speak or set up a booth. Sometimes they can do tablet demos.

This is still being fully flushed out and we're trying to figure out what works best for you. Some people request adding Ninety into their presentation of EOS. We can send slides, we can help social promotion, and sometimes we can invite self implementers close to the event using our uncoached, unaffiliated database of people.

This is another example of taking Ninety out of just software and how else we can help support all of your efforts. We are a partnership and we want to know what's important to you so we can help with that. There is no additional charge for when you and your coach have a thrive meeting with your PRM. Afterward, we'll send over a deck that has all the links you would need and see everything you went over.

The objective is to do these regularly, whether that's 2 times or 4 times a year, that's up to you. They're meant to be a strategic partnership. The CAs will also do some cleanup in partnerstack to make sure everyone is getting their rev share rewards correctly and that all clients are flagged properly to make sure they're getting the correct communication.

This is also a good opportunity to clean up our communication efforts at Ninety. We want to be absolutely certain that the comms we are pushing out are going to the appropriate parties. Companies get flagged in a few different ways- if they either have the implementer in their directory, and/or they have what we call a partnerkey, meaning they're attached to someone's partnerstack. Companies who are not flagged as being affiliated with a coach are going to get different communications than those who are.

We want to give those companies who are not affiliate the chance to maybe hire a coach, or send them resources for what it would look like to hire a coach. We would potentially invite them to events, so the attendees are focused and meaningful leads to those types of events. When you do the thrive meetings, you'll go over each of the implementers ICPs and see if they're accepting new clients, what does the ideal client look like, is it a certain MRR, a certain niche, a certain number of employees, etc. We want to know all of those things so we can get really granular so we know the best resources to push out.

Closing
Before we move on to homework, what questions can I answer? Who is ready for homework? So I want you to review session 4's video and then complete the action steps, first one being to create a new team in Ninety. If your implementer doesn't have their custom branded marketing materials, we want you to request them here. Finally, put the rolling out Ninety guide on your issues list for your next L10 with your implementer.
I'm going to send you an anonymous survey at the end of the meeting. We want to make sure this is useful and learn what we can do to improve! You're one of the first groups that went through this so any and all feedback is wildly valuable. I'm going to stay on for a few minutes in case anyone needs anything else but other than that, we are all done! Remember, after this meeting you can always reach out to your PRM if you ever need anything Ninety related. We appreciate your partnership and thanks so much for joining!