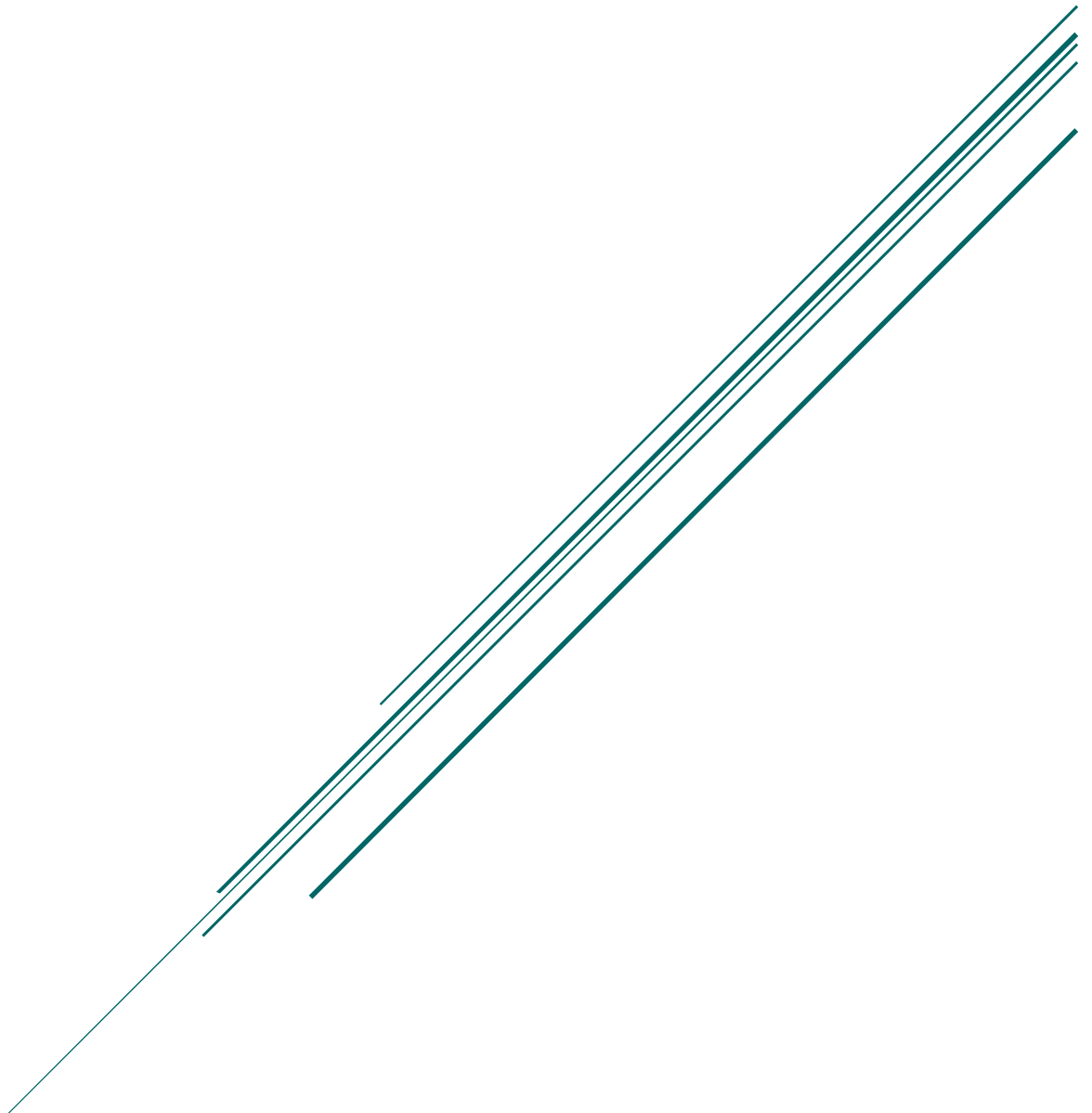


# **The Titan Coaching Hub**

# **Client Quick Start Guide**



TITAN Business Development Group, LLC  
[www.TitanBDG.com](http://www.TitanBDG.com)

# Titan Coaching Hub Client Quick Start Guide

1. Log onto System: <https://www.TitanBDG.com> / under “For Clients” tab / Titan Coaching Hub – Client Login
2. Navigation is done through the left-hand side bar. The links/tabs to navigate with are:
  - a. Overview
  - b. Stream
  - c. Session Notes
  - d. Actions
  - e. Journal
  - f. Worksheets
  - g. Files
  - h. And Metrics

## Each Tab/Links Defined:

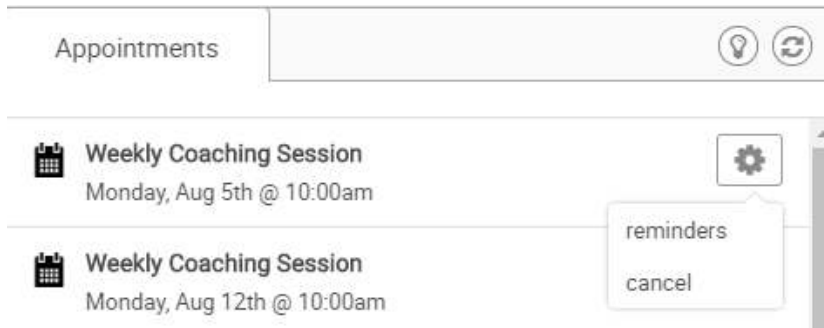
3. **Overview:** Here you'll find a nice summary of your upcoming assignments and appointments. For each item, you'll find (if appropriate) when it was created and when it is due.

Due dates are color coded: Red means late, Green means on time, and Yellow means about to become late.

<input checked="" type="checkbox"/>	Action due: Complete File: 2 Page Business Plan	7/30 @ 7:00pm	Late
<input checked="" type="checkbox"/>	Action due: Fill out Client's Session Log/Notes ("Worksheet") Found in Wo...	8/1 @ 5:00pm	Today
<input type="checkbox"/>	Worksheet due: Client's Post-Session Notes/Worksheet	8/2 @ 4:33pm	1 day
<input checked="" type="checkbox"/>	Action due: Gather Financial Statements, Upload them in Files and Share ...	8/2 @ 5:00pm	1 day

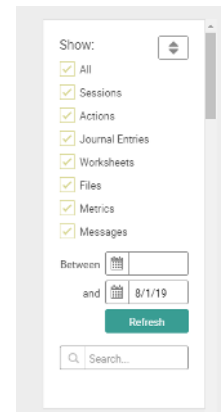
Important: Note that the Overview is meant for easy viewing only -- you can't actually mark items as completed, here.

Towards the right you'll find your Appointments that have been entered in the Hub. Note that you can click on the gear icon to set reminders for yourself. Your coach likely already set some reminders up when he/she entered the appointment.



- Your **Stream** (accessed via the *Stream* tab on the left sidebar) allows you to view a summary of what you've done in the system. This is a nice, quick way to gauge overall progress under your coach.

The controls on the right of the screen allow you to specify which items you'd like to show in the stream, if you would like, as well as widen or narrow the range of time that's displayed. Clicking the button next to *Show* lets you choose to sort items by date or by latest comment.



You and your coach can also record comments on each item within the Stream, making this a good way to keep the conversation going between sessions on things of concern.



You can also mark items as done by checking the box at the left of each item. (this will automatically bring you to the Actions tab where you will see that item marked off and moved under the “past” tab on your Actions Screen.)

*So, in short, both the Overview tabs and the Stream tabs show you different summaries of activities that have occurred. The Overview mainly gives you a summary of Actions you still need to take and their statuses. The Stream shows you the flow of different things that have been entered into the system, in general. Note too that the Overview tab doesn't show file-uploads, but those will show in the Stream.*

5. **Session Notes** are the summary notes your Coach made about your session and are good points of both review and future reference. Click on any Session Note to Read it. Note that \*you\* do not make \*your\* session notes here. You can make them as Journal Entries, which will address shortly.
6. **Actions:** The Actions screen shows you all the Action Items to work on, that your Coach has entered into the System. Note that most are grouped by the session that generated them. Those that are not grouped are Action Item entries that may have been periodically assigned or made by you between Coaching Sessions.

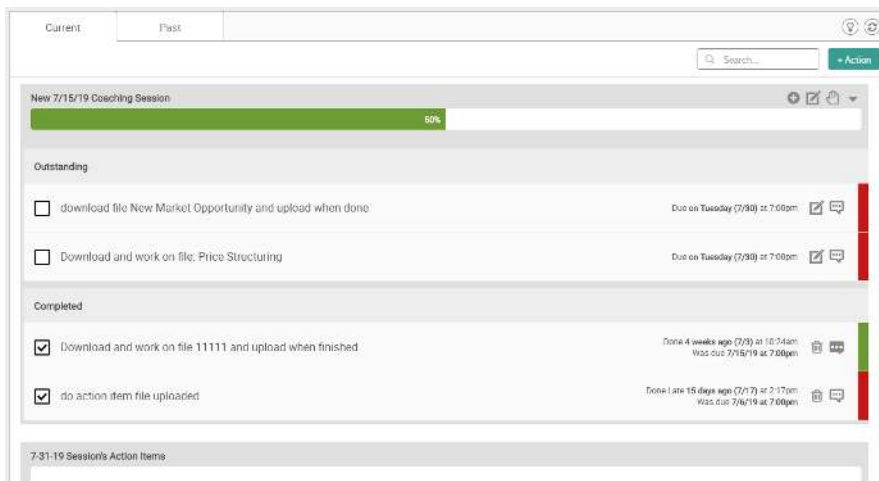
**IMPORTANT: As you complete your Action Items, you need to mark them off as completed by checking the box to the left of each line-item.**

You can also add your own Action item by clicking on the + sign next to the Word “Action, on the side bar, and create your own Action item complete with a due date and reminders. (Under the Project setting on the dialogue box, assign it to a session or a new project if you would like to keep them and other entries made or that you will also make, together.

Note in this screen shot, that the outstanding and completed Action Items assigned in the 7/15/19 Coaching Session all appear in the greyed-out box. When the Outstanding items are completed, the whole section will move to under the “Past Tab”

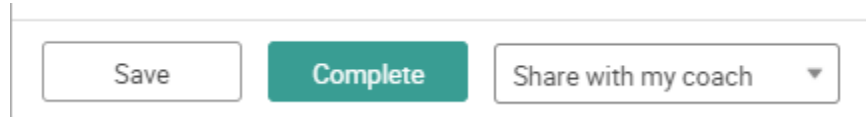
You will also note that there is a green bar showing your completion rate.

Lastly, note that each item is color-coded here as well (red = late, green = on-time and yellow + about to become late).




7. **Journal:** This is where you keep your notes about things you’ve thought of along the way, ideas, “golden nuggets”, notes - anything at all. You can review all your past or current journal entries here (current and past tabs).

To make a new journal entry, click on the + sign on the left sidebar. You will then have a pop-up to make an entry, click save to save your progress in case you need to come back to it. When you are done, you MUST click on “complete”. You will also have a drop-down box that lets you share the post with your Coach (Coach will see it in the system) or keep it private.



And – if you share them with your Coach, he or she can comment on them as well. You will receive a system email telling you there is a comment and the comments will also appear under your Stream tab for reference.

- 8. Worksheets:** Your coach may assign you worksheets to complete, that can be populated right on your screen. One example might be one for YOUR session Notes in a predetermined format that is often automatically sent to you after a meeting.

To Start a new Worksheet, click on 

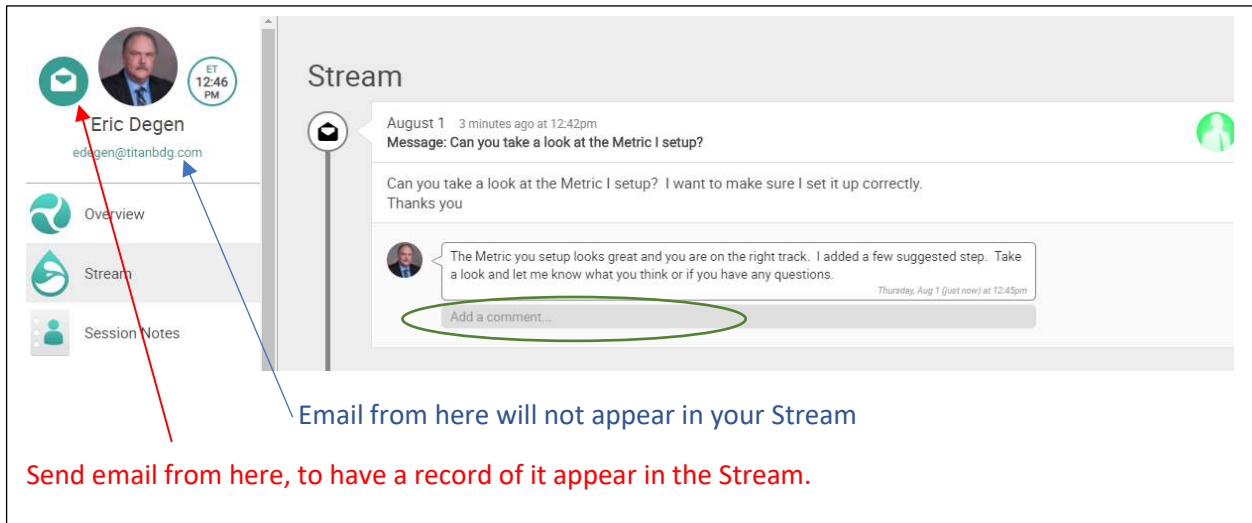
**IMPORTANT: Don't confuse this with any files your Coach may send you that may be “worksheet style” but that you need to get from your Library, print, complete, scan and upload back into the Library.**

- 9. Files:** This is where you and your coach share files. You will note that there are folders, just like any typically computer file structure. You can add new folders by clicking +Folder in the upper right-hand corner, and add files (for example, your completed ones) by clicking the green +Shared File in the upper left-hand corner. When uploading a file for your Coach, click in “Send (your coach) a notification email” so he knows it's there, then click “Share”. Note – in many cases you will have an Action item assigned that is a file uploaded for you, that you will need to print, complete, scan and upload back for your Coach.
- 10. Metrics:** This is where the coach, or you, can set up a way to track progress, a plan, steps, etc. You may. For example, let's say you have a goal of making 200 cold calls a month. This is where you or your Coach setup a metrix to track your progress, where you would go in and enter your daily (for example) number of calls made and let the system track your tallies while also letting your Coach know how things are progressing so he/she can step in and give you a gently nudge if you are falling off track. Your Coach will spend time with you on setting Metrics up if you have one you would like to add, and on how to enter data for Metrics that may have been entered for you.

## Emailing Your Coach From the HUB:

If you want to email your Coach and capture the question or conversation in the HUB's Stream, send the email from within the Hub/System (emails sent through the system can be replied to with your regular email program and will still be captured in the Stream as well, as long as the first email came from within the Hub).

To mail from within the Hub, simply click on the Envelope Icon by your Coach's picture. The Stream will now capture the conversation for later reference. (Clicking on the physical email address will send the email outside of the Hub.) You can also comment in the Stream entry itself.



The screenshot shows the Titan Coaching Hub interface. On the left is a sidebar with navigation options: Overview, Stream, and Session Notes. The main area is titled 'Stream' and shows a message from Eric Degen (edegen@titanbdg.com) dated August 1 at 12:42pm. The message asks, 'Can you take a look at the Metric I setup?'. Below the message is a reply: 'Can you take a look at the Metric I setup? I want to make sure I set it up correctly. Thanks you'. A second message from Eric Degen follows: 'The Metric you setup looks great and you are on the right track. I added a few suggested step. Take a look and let me know what you think or if you have any questions.' Below this message is a text input field labeled 'Add a comment...'. A red arrow points to the envelope icon next to Eric Degen's profile picture, and a blue arrow points to the text input field. Text below the screenshot reads: 'Email from here will not appear in your Stream' and 'Send email from here, to have a record of it appear in the Stream.'



**We recommend you also read The Manual:**

**The Basic Mechanics of Using the Titan Coaching Hub**

**A copy should be in your Hub's Library (under Files in the Administrative folder)  
or your Coach can also provide a copy.**

## Putting it all together: So how should I use the Hub?

You should follow this rough general outline for using the system, though you may find a better way of using it once you gain familiarity. Remember, this is a tool – use it how it best works for you:

- Prior to meeting with your coach, you may want to review your last session's notes and any journal entries you've made. You will also want to make sure any completed Action Items are marked completed.
- Meet your Coach/Have Coaching Session.
- You will receive emails letting you know when notes, files and tasks are entered into the Hub by your Coach.
- Login and take a look at your **Overview** tab to get a general collective picture of things you need to do as well as see the color-status of items (explained above).
- Look at your **Stream** to see comments, details, etc. You can also comment back and forth with your Coach, here, under any item, and the responses back and forth will all stay associated with whatever item you may be sending the question or comment from.
- look under the **Worksheets** tab for any Worksheet that your coach sends you – such as for YOUR meeting notes. (PS you will receive an email anytime one is assigned to you.
- Look in your **Action** items to see your assigned (or self-assigned) Actions, due dates and any that are outstanding. \*Remember to mark-off the items as done once you complete them!
- Grab any **Files** the Coach has sent you (or that you want to review again), download, complete, scan and upload back. Remember to “share them with your Coach” [button] unless they are files for you, alone.
- Make Metric entries if any are setup for you (which your Coach will go over in more detail) or enter any Metrics you might wish to have.
- Use the Hub as an ongoing tool and also revisit the Hub between sessions for any additional communications, notes, activity, Action Item and metric tracking, etc. You will receive emails alerting you to new items or comments from your Coach and as long as you “share with your Coach”, he/she will see your activity as well.
- Don't hesitate to call your Coach if you need any help.