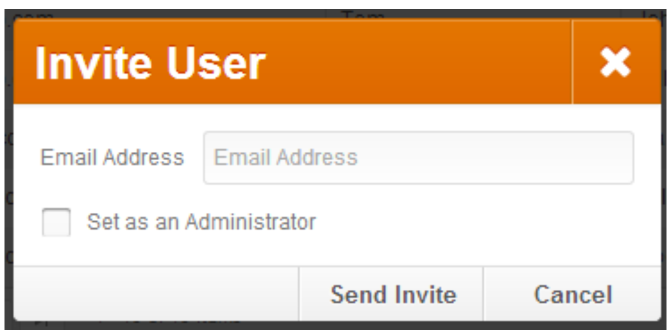
Proven business management methodologies.

Getting Started with Align

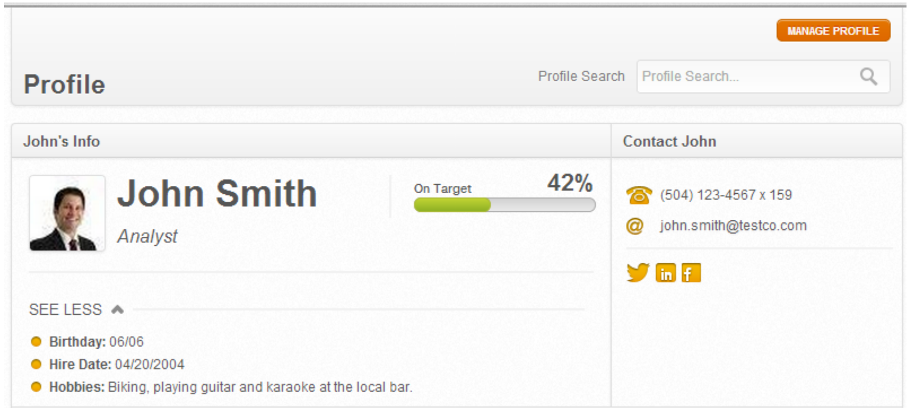
You've already completed the first step- creating your Align account, so now it's time to started and 'align' your team. Align has many features built into the software and you can decide to use all or only a select few- it's up to you. We will send you a few weekly emails in the beginning to get familiar with software.

Adding Users: For starters you need to add folks to your team so you're not doing all the work. Once you've logged in to your account select the Administration tab, then Mange Users. From here you can invite users to join you via their email address and designate if you would like for them to be an admin or not.



Managing your profile: Once you have created your login and password you can customize your Align profile and share information with your team members. The profile includes an option for you to add your photo, bio, update your password and upload your DiSC profile if you've taken one. We recommend a photo at the minimum to help distinguish priority owners on the Quarterly Priority tab.

To edit your profile you can either update your information from the 'Manage Users' option in the Administration or you can select your name from the top left corner. You can also search other users to learn about your team members.



Your Dashboard: The Dashboard in Align pulls data from other areas throughout the software to give you a quick look at your progress. Let's breakdown each area:

- **Critical numbers:** Critical numbers are values that measure key aspects of your business that you want to track on an on-going basis. The critical numbers will change color as their values are updated to represent how you are progressing towards your goals.

  You can enter up to five critical numbers on part one of the **One Page Plan** (link to One Page Plan email) . To create the critical numbers you will select the One Page Plan and enter the headers and numeric values to wish to measure. Once you have your targets you can update the critical numbers by clicking on the update critical numbers button at the bottom right corner of this section. A dialog will appear showing the critical numbers on the left and the values on the right. To update click on the value that you wish to change and you will be able to type in a new value or select a target from a dropdown. **Note: To update the critical numbers you must be an administrator.**

- **Top Priority:** Your Top Priority is the single most important thing for you to accomplish that day. You will enter your top priority in an "I will" statement and check off the priority once it's completed. Your Top Priority will also be visible in all of your Daily Huddles and on your Top Priority Calendar.
  To add or edit your Top Priority click into the white space below and start typing. You may format your content using the toolbar at the top. When you are finished you can save your Top Priority by either clicking the save button in bottom right corner of the text area or by clicking anywhere outside the text area.

- **My Quarterly Priorities:** The My Quarterly Priorities Overview section displays an aggregate view of how all of your quarterly priorities are progressing. It includes an overall percentage of completion marked as green if on target, yellow if falling behind, and red if behind schedule. Each individual priority is also shown with the color of the bullet (green, yellow, or red) indicating if the priority is on schedule.

- **Persons of Interest:** The Persons of Interest section allows you to view the progress of other people in your company. It will show their picture, name, title, email, phone number, social media accounts, and how they're progressing with their quarterly priorities. It also includes a link to their profile if you would like to see more information.

  To add a Person of Interest click on Manage Persons of Interest in the bottom right corner of the section. A dialog will appear allowing you to start typing in a coworkers name. As you start typing results will appear and you can click on the individual you want to add and then click the green plus sign to the right of the search bar. Note that you must select a person from the results to add them, you cannot just type in their name and click the green plus sign without selecting them.

- **Tasks:** The Tasks section allows you to create and manage your tasks. Each task has to have a name and a due date to be created. You can also mark a task as a top task, associate it to a quarterly priority, or add a note. Tasks that are due today will be yellow and tasks that are overdue will be red.

  To add a task click on the Add Task button in the bottom right corner. A dialog will appear where you can enter the task name, its due date, a quarterly priority to attach it to (optional), who owns it, whether or not it's a top task, and any notes you want to include.

Administration: If you are an administrator in your company's Align account you will see an additional tab along the your top tool bar labeled: Administration. From here you can manage various aspects of the software and customize your account.

- KPI Listings: Use the KPI listing to see a description of the pre-loaded Key Performance Indicators and create new ones for your team.
- Manage Users: Add or remove users, assign administration rights, reset passwords and view profiles of the users in your account.
- Manage Huddle Groups: You can add/remove Daily Huddle to your Align account as well as manage the users that are in each Huddle.
- Align Setting: Change the dates in which your quarters run, turn on/off weekly update and monthly invoice emails and select who sees the Critical Numbers on the Dashboard.
- Company Profile- Update the information for your company, add/edit your payment information and add your coach to your account (if you are working with one).

Over the next few weeks you'll receive updates on how to create your Daily Huddle, load Quarterly Priorities and fill in your One Page Plan. Click below for a sneak peak:

- Creating Quarterly Priorities (link to QP email)
- Managing your Daily Huddle (link to DH email)
- Setting up your One Page Plan (link to OPP email)