HUMANIZING GROWTH PLATFORM

Transform®

Client-Coachee User Guide

User Guide for Clients / Coachees
Version 1.2. Date Aug 10. 2024

Overview

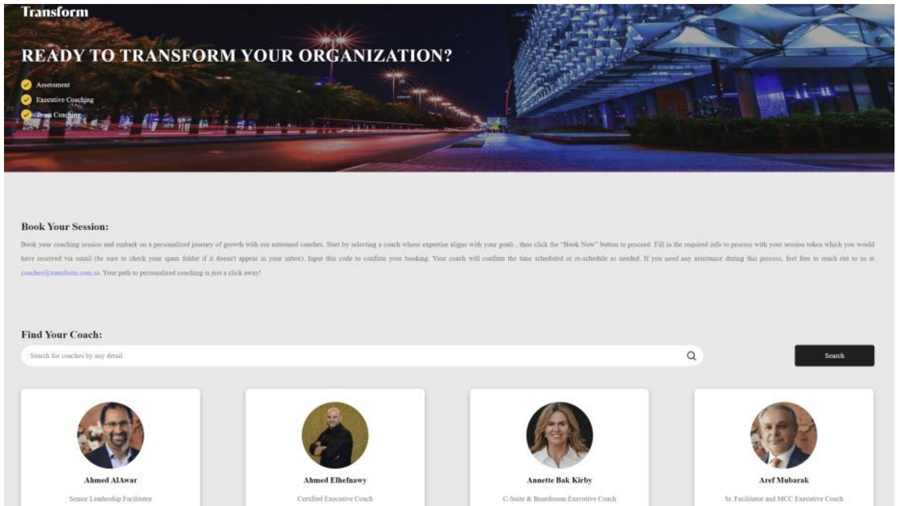
This document details the user experience and workflow for the Transform coaching platform. It aims to ensure a smooth user experience.

Note: in this document, the words “client”, “coachee” “you” or “your” refer to the individual taking the coaching session.

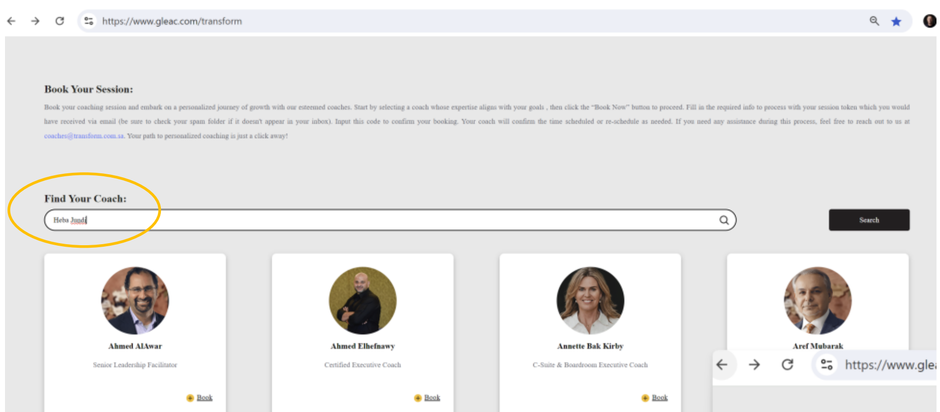
1. Coach Selection / Booking Homepage

- Access the Humanizing Growth Platform from
    - Directly using this link: https://transform.com.sa/systemic-coaching/
    - The link and login instructions are provided internally within SIDF.
    - Use the direct link to your assigned coach
- Alternatively use a longer path:
    - Find the link in the footer on the Transform website https://transform.com.sa/
    - Scroll down for a button on the Systemic coaching page on the Transform website https://transform.com.sa/systemic-coaching/

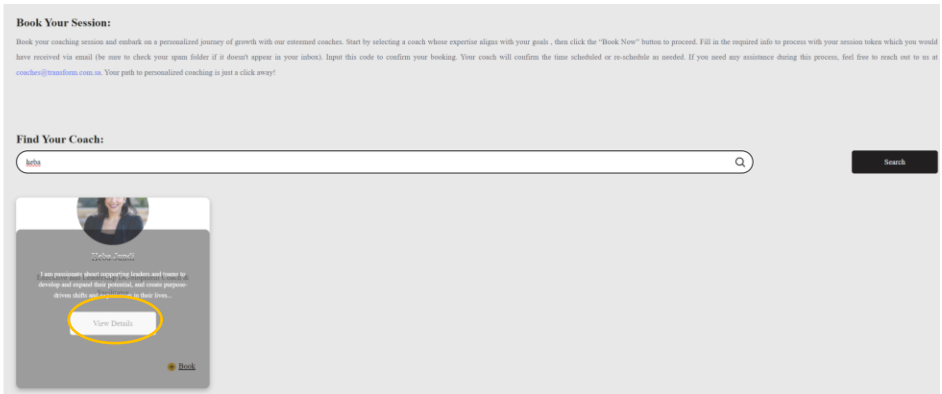
To access the Coach selection landing page



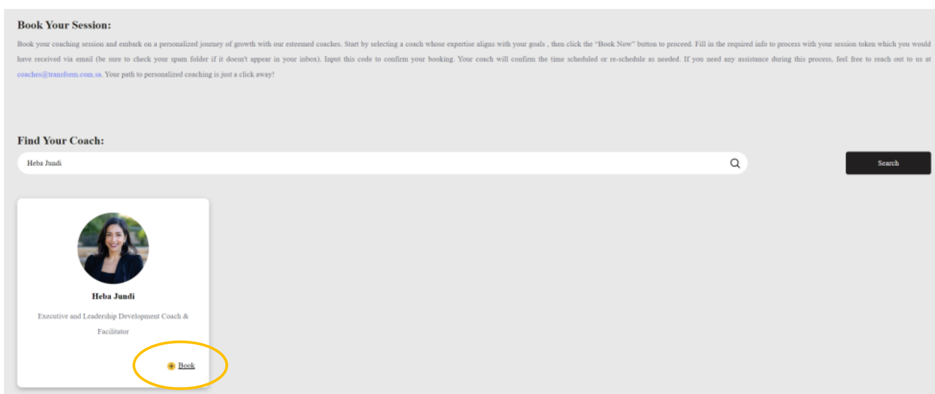
- Search your assigned coach in the “**Find Your Coach**” search bar



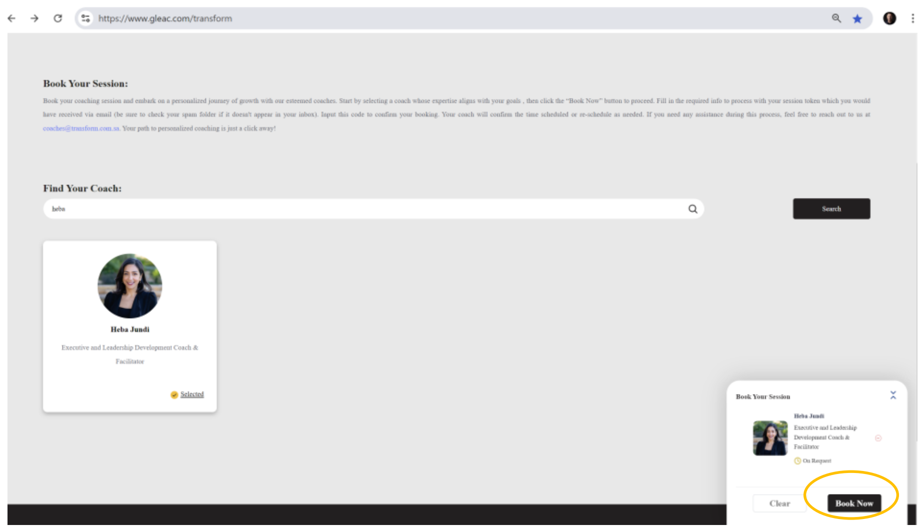
- Hover your cursor over the profile and click “**View Details**” to get more information about your coach



- Click “**Book**” to book the coach

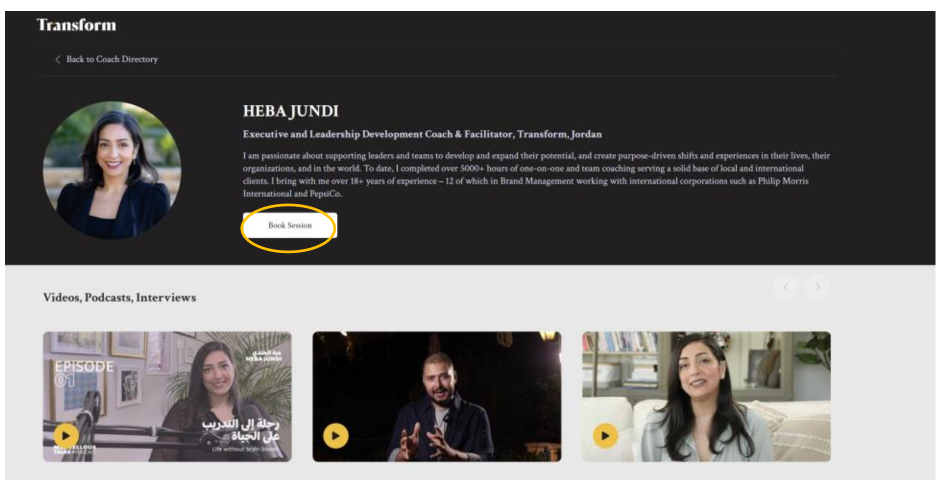


- Click the "Book Now" popup screen in the right-hand side corner

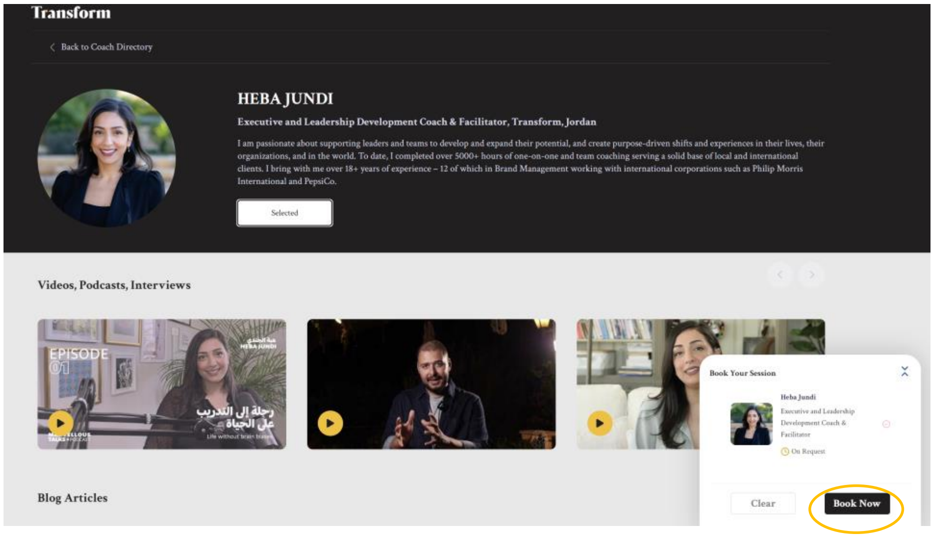


2. Finding your Coach with a Direct Link

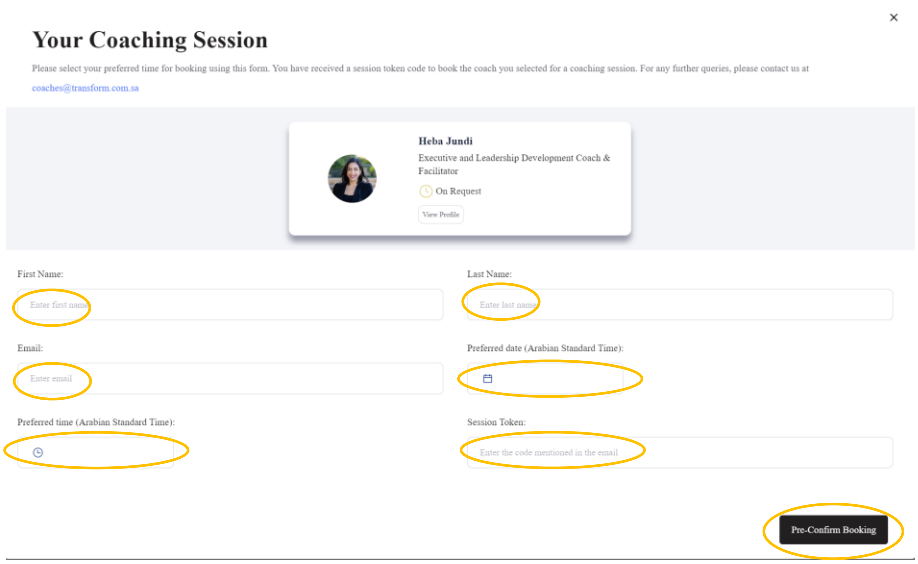
- Access the coach's profile using the link provided to you
- Click "**Book Session**"



○ Click “**Book Now**”



3. Booking your Assigned Coach



- Provide your first name (or the first name of the person on whose behalf you are booking) in the “**First Name**” field
- Provide your last name or the first name of the person on whose behalf you are booking) in the “**Last Name**” field

- Provide your email address (or the first name of the person on whose behalf you are booking) in the "**Email**" field. Note: the confirmation email and calendar invite will be sent to this email address.
- Click in the "**Preferred Date**" field. A calendar showing the available dates of the coach will pop up. Select your preferred date.
- Click in the "**Preferred Time**" field. A time selector will pop up.
    1. Scroll up and down to find time
    2. Click a time that is clickable (indicated in black). Non available times remain grey and unclickable
- Click the "**Session Token**" section field. Enter the session token you received from your internal coaching project team member.
- Finalize the booking by clicking the "**Pre-Confirm Booking**"

Notes:

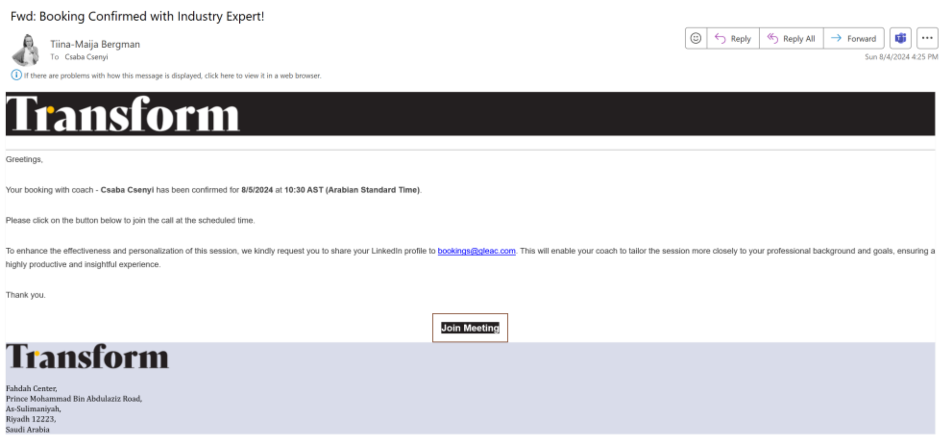
1. Coachees and their assistants can make a booking only
2. Bookings can only made using a valid token only
3. The same coaching is to be used to book coaching sessions during the project
4. One booking can be made at a time
5. The booking is considered pre-confirmed until the coach accepts it. Please note that
    - multiple bookings can come in time
    - while the availability is shown properly owing to a synchronization of the coach's calendar, at the time you pre-book circumstances may not fully be appropriate for a deep, focused discussion for maximum impact for you.

   In this case, an alternative time slot will be offered.

4. Acceptance

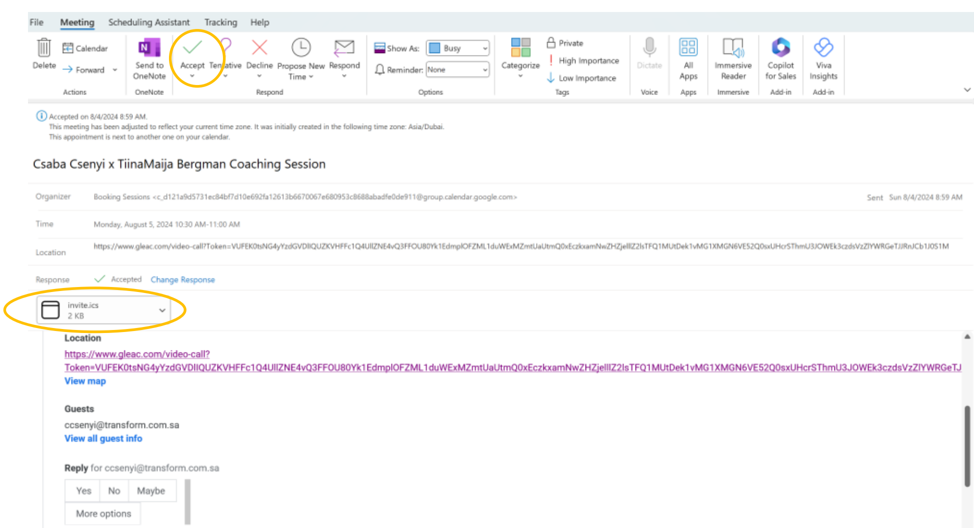
- You will receive a confirmation email and a calendar invite confirming
    - The date and time of the coaching session
    - The coach name
    - Login instructions

- **Confirmation email**: save it for future use (Note: you might want to flag it for future reference



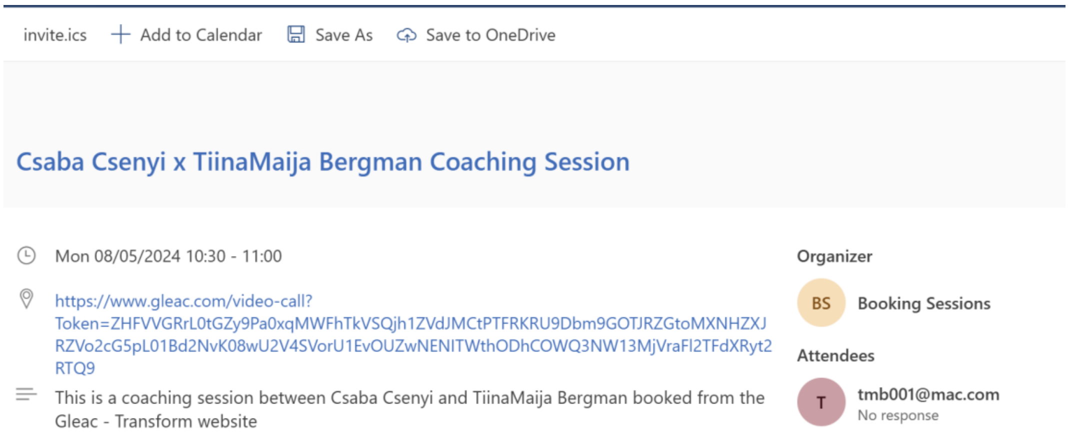
    - Save the confirmation email, should you wish to join the session from this confirmation email

- **Calendar invite**: save it for future use (Note: you might want to flag it for future reference)



    - Accept the calendar invite to save it in your calendar

Depending on your settings, the calendar invite may look like as below:



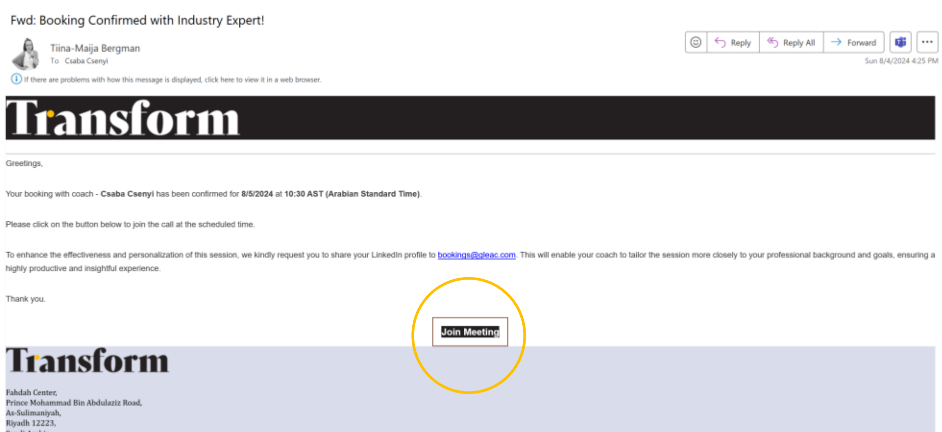
If your invite appears as above, follow the instructions provided earlier.

Note: in case of doubt or an inappropriate date or time indicated, reach out for assistance at HG.Platform@transform.com.sa

5. Jong the Session

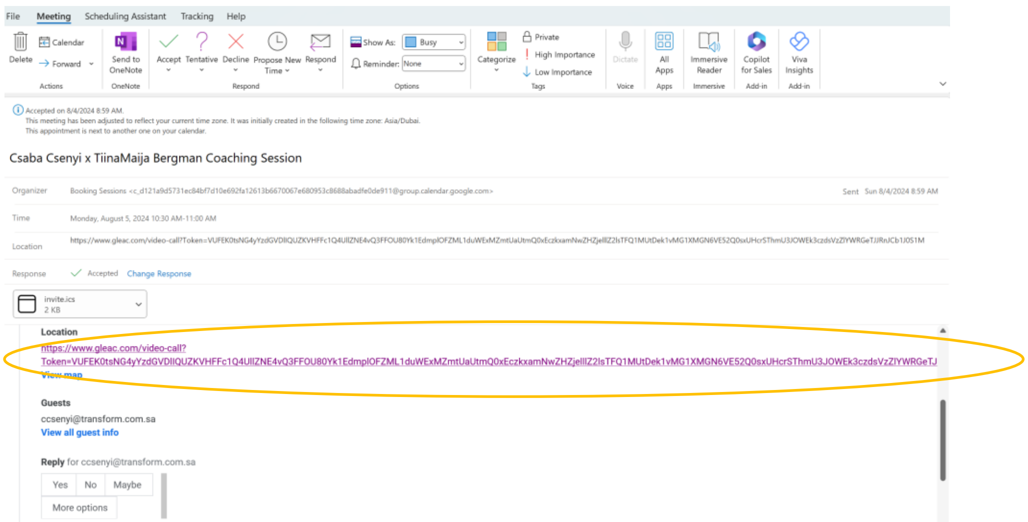
You (or the individual, on whose behalf you booked the session) have two ways to join the session

- Open the confirmation Email.



  - Click the "**Join the Session**" tab and follow the instructions

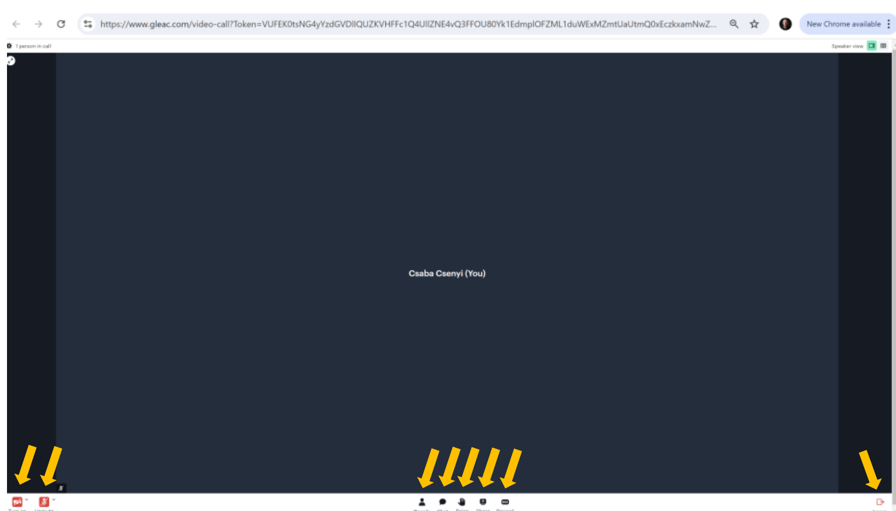
- Alternatively, open the Calendar Invite



  - Click the link and follow the instructions

6. The Session

The conferencing tool is designed to be simple and sleek minimizing destruction and increasing focus.



- Turn your camera on and off – Click the "**Camera**" icon in the bottom left corner

- Mute or unmute yourself – Click the “**Mute/Unmute**” in the bottom left corner
- Check the number of attendees – Check the number next to the “**People**” icon
- how many people
- Chat with your coach – Click the “**Chat**” icon, using the pop-up window
- Raise your hand – Click the “**Hand/Raise**” icon. Click again to un-raise your hand
- Share your screen – click the “**Arrow/Share Screen”**: icon
- Record the session – Click the “**Record**” icon to record the session. Click “**Stop**” button to stop recording
- record the call. **Note that the sessions are not recorded by default**.
- Leave the meeting – Click the “**Leave**” icon in the bottom right corner

7. The Recording

The recording is designed to maximize the insights and personalization of your development journey using an AI assistant.

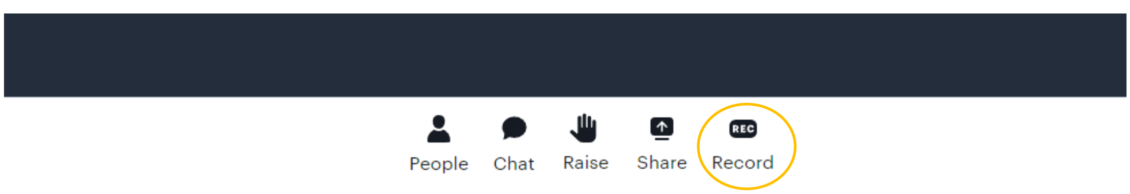
The sessions are not recorded by default. Should you opt to record the session to leverage the capabilities of AI, you need to start the recording. Starting the recording expresses your explicit consent to and acknowledgement of the Privacy Policies of Transform.

Note:

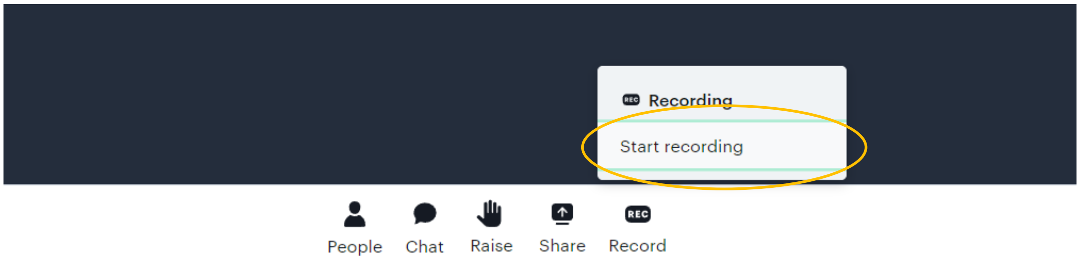
- The recordings are not shared by any third party and kept in the secure environment of the platform.
- Only our coach has the option to re-listen to your session
- Upon your explicit request to your coach, your coach will download and send you the recording but will not share it with anyone else).

7.1. Staring the recording

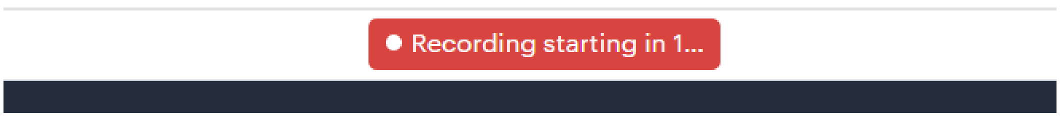
- Click the “**REC Record**” icon



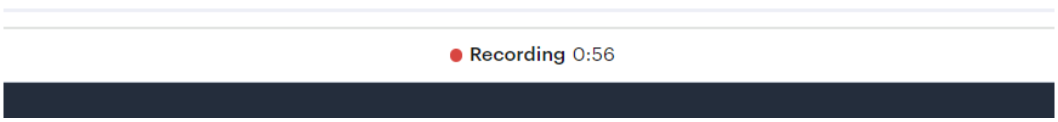
- To start recording the session, click the “**Start recording**” button



On the top of the screen an information bar will pop up to inform you 3 seconds in advance before the recording starts. The system will start countdown.

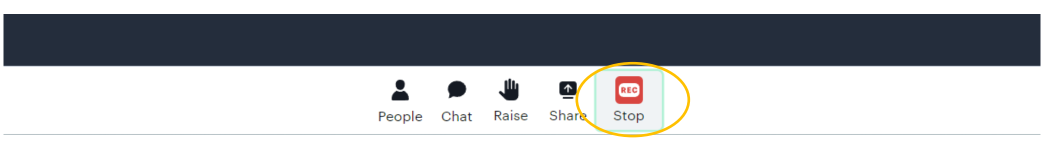


As the recording is in progress, the system alert will remain on, informing you that “recording is in progress”.



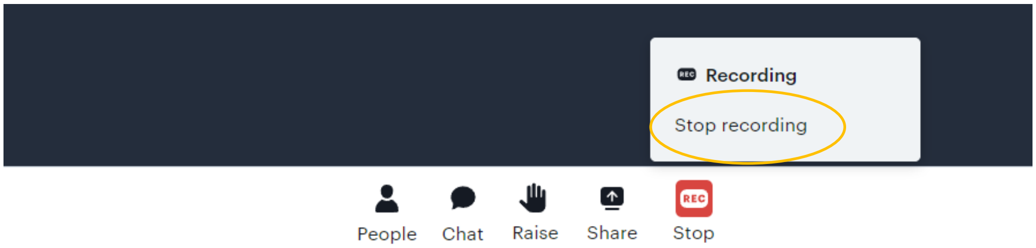
To stop recording, follow the steps below:

- Scroll down to the bottom of the screen
- To stop recording the session, click the “**Rec Stop**” button



The system will request you to confirm your intention to stop recording.

- Confirm your intention by clicking the "**Stop recording**" button



For further information and in case of questions, send an email to HG.Plafrotm@transform.com.sa