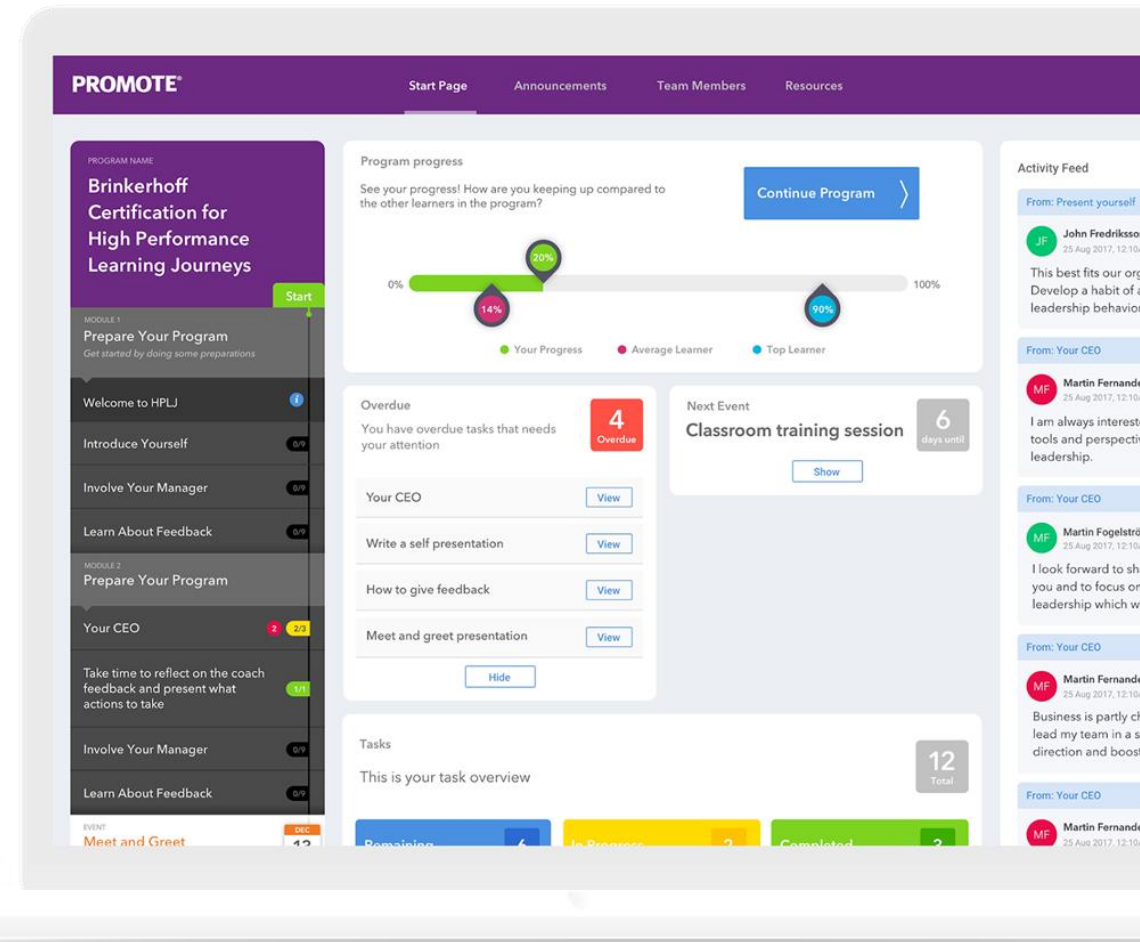# Run a pilot with Promote

Description of the pilot process

PROMOTE®

Welcome to Promote,
it is great to have you on board!

We are happy you have taken the decision to run your program in Promote. To get your program up and running we have gathered some information on how to do this as smoothly as possible together.

PROMOTE®

Start up

You will be introduced to the members of the Promote team that will be helping you build your program and support you through the onboarding process so you can get up to speed on the platform.

To get you started you will first of all get access to the *Promote Knowledge Platform* and get admin permissions on your own Promote set up:
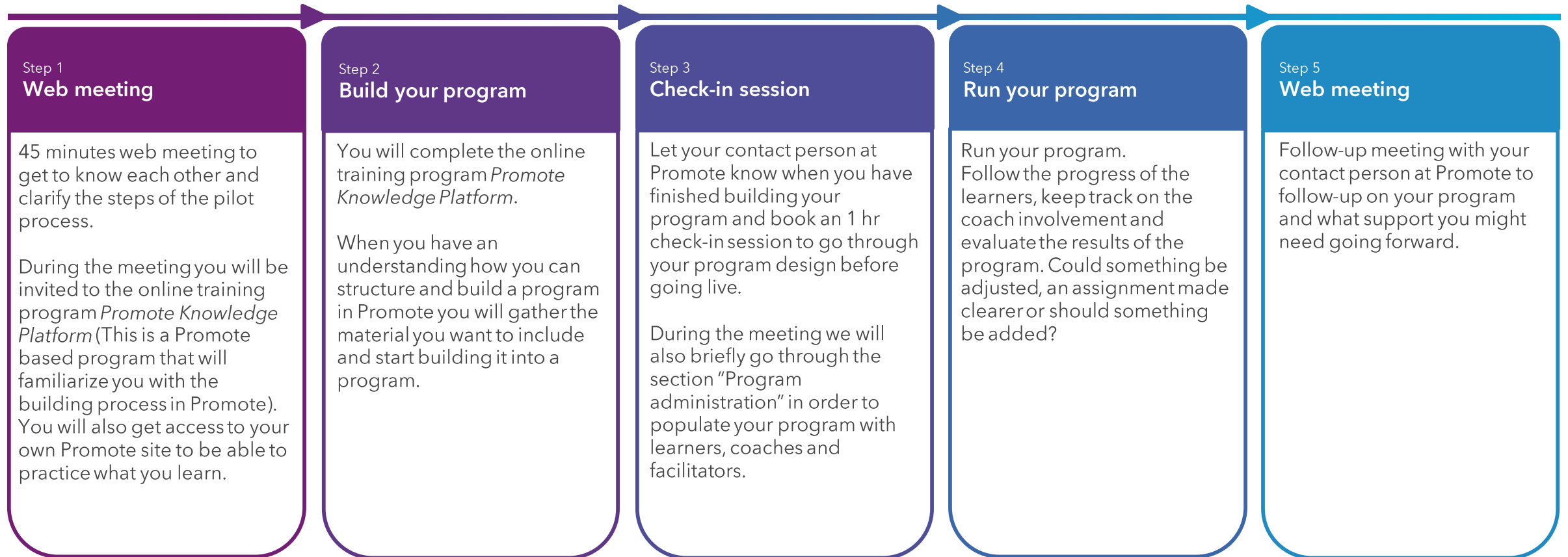
Invitation to
Promote Knowledge Platform

The online training program *Promote Knowledge Platform* is where you will learn everything you need to know about using the platform. You will be participating in the program along with other clients from different companies so you can share ideas and thoughts with each other. We recommend that you start going through the program before building your own program to get a greater understanding of the platform.

Access to
Your Promote site

You will get access to your own Promote site and have all admin permissions enabled. It is on your site that you will practice what you learn in the online training, and it is on your site that you will build, administrate and run your future programs.

The steps of the Pilot process

The overview below is the rough steps of the pilot process, adjustments to your needs and time frame will of course be taken under consideration.

Step 1
Web meeting

45 minutes web meeting to get to know each other and clarify the steps of the pilot process.

During the meeting you will be invited to the online training program *Promote Knowledge Platform* (This is a Promote based program that will familiarize you with the building process in Promote). You will also get access to your own Promote site to be able to practice what you learn.

Step 2
Build your program

You will complete the online training program *Promote Knowledge Platform*.

When you have an understanding how you can structure and build a program in Promote you will gather the material you want to include and start building it into a program.

Step 3
Check-in session

Let your contact person at Promote know when you have finished building your program and book an 1 hr check-in session to go through your program design before going live.

During the meeting we will also briefly go through the section "Program administration" in order to populate your program with learners, coaches and facilitators.

Step 4
Run your program

Run your program. Follow the progress of the learners, keep track on the coach involvement and evaluate the results of the program. Could something be adjusted, an assignment made clearer or should something be added?

Step 5
Web meeting

Follow-up meeting with your contact person at Promote to follow-up on your program and what support you might need going forward.

PROMOTE®

GET STARTED: Introduction and set expectations.

GET TO KNOW PROMOTE: Get familiarized with the structure of a program and the different roles in Promote; learner, coach and facilitator.

BUILD & DESIGN: Learn how to build a program in Promote and what you should think about when you design your program.

PROGRAM ADMINISTRATION: Learn how to get your programs up and running, e.g. set up a new program with dates, members, invitations etc.

SUPPORT: Get useful tips on how you can support your Promote users.

WHAT HAPPENS NEXT: Share your story to help and inspire others.
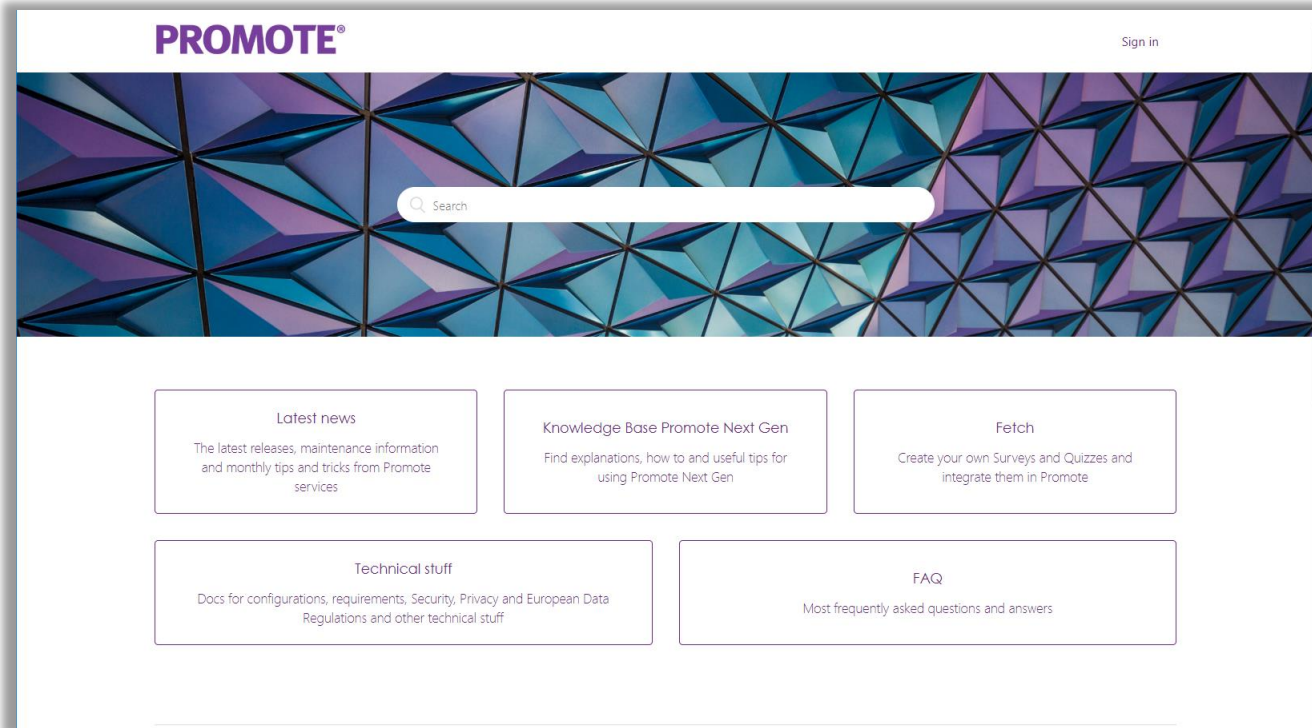
Program overview

Promote Knowledge Platform

This is the program overview of the *Promote Knowledge Platform*. See what each section will teach you in the program overview here to the left. To learn more, watch this video

PROMOTE®

Sidebar menu items:

GET STARTED
- Welcome to the program!
- Your expectations

GET TO KNOW PROMOTE
- Program basics
- From the learner's view
- From the coach's view
- From the facilitator's view
- From the admin's view

BUILD & DESIGN
- Create your first program
- Build the 3 level structure in Promote
- Customize your assignments
- Create an Event
- Create goals
- Fetch
- Design
- Inspiration
- Conduct a demonstration

PROGRAM ADMINISTRATION
- The Admin View
- Copy program & Set dates
- Add members
- Send Invitations

SUPPORT
- Support tips and tricks
- Forgot password
- Didn't receive invitation

WHAT HAPPENS NEXT?
- Reflect, share and evaluate

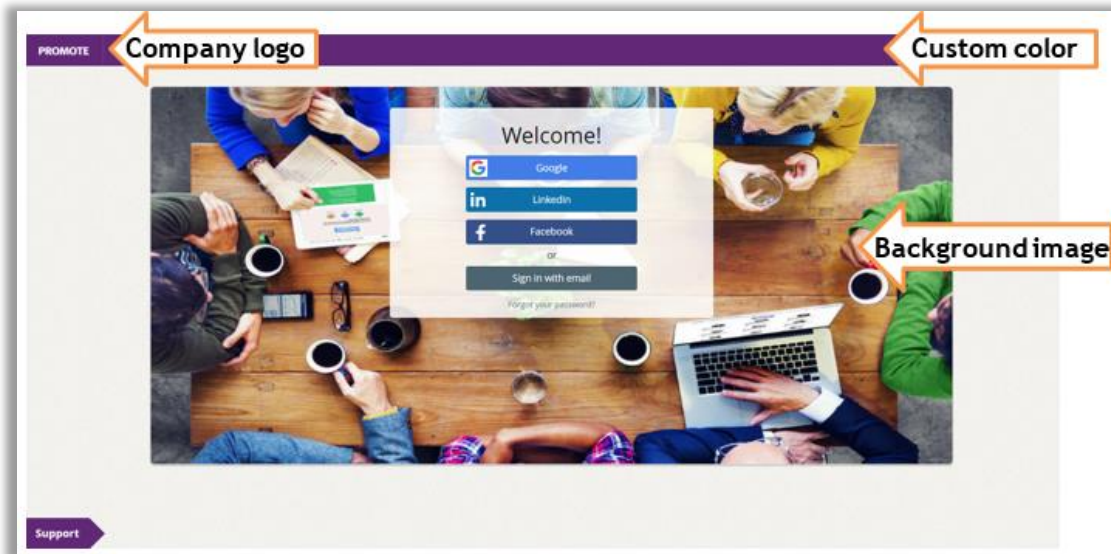# Promote Help Center https://promote.zendesk.com/hc/en-us

The Help Center is tailored to provide you with a complete self-service option for all your Promote support and administration needs. Here you will find a knowledge base of topics and articles; designed to help answer questions regarding your Promote site, supporting you with step-by-step descriptions on everything from building to administrate programs.

Branding of your site

In this article in our Help center you can see what material you need for the branding of your site: https://promote.zendesk.com/hc/en-us/articles/360012032673-Branding-Promote-Next-Gen

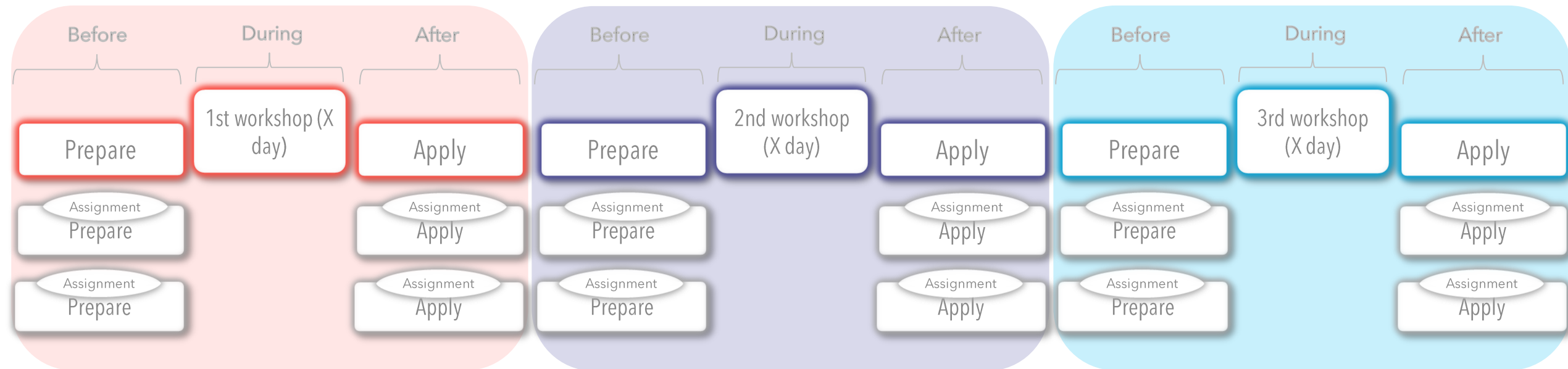Send the branding material to your contact person at Promote and she/he will customize your site accordingly.

PROMOTE®

Structure of your program
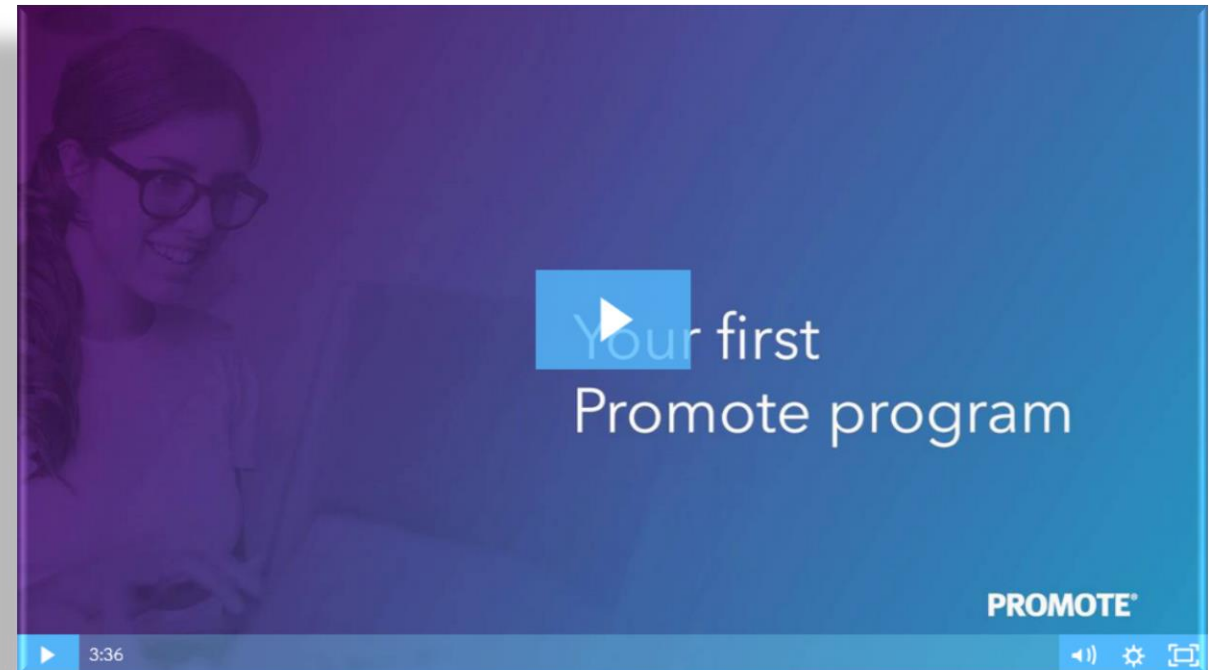
Program name:

Target group:

Number of workshops:

Start date:

Once again, a very warm welcome!

Log in to your Promote set up, get started in the *Promote Knowledge Platform* and do not hesitate to reach out to your contact person at Promote if you have any questions!

Click play to watch a short introduction video.