SalesDrive Assessment Dashboard User Guide

Table of Contents

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

Quick Start

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

4 Steps to Sending an Assessment:

For video tutorial, please click here.

1. Login and click **SalesDrive Assessment Dashboard** under project name.

2. In the upper left hand corner, click **Register New Participant**.

3. Complete the form with your candidate's information. **Use your company name**, it populates into the email sent.

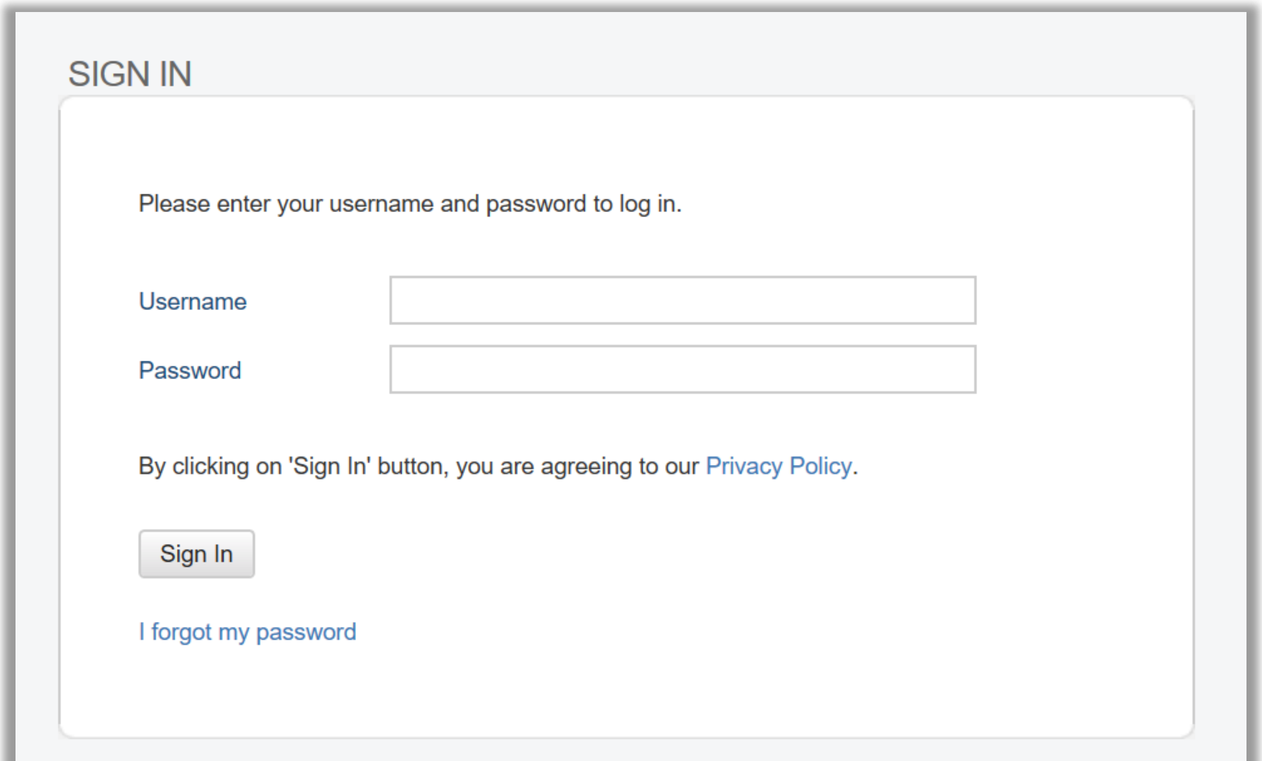
4. Click **Add Participant** and you're done. This action automatically sends an email to your candidate with a link to complete the assessment.

When the assessment is completed, you will get **email notification** that the results are ready to be viewed on the dashboard.

Accessing the Dashboard

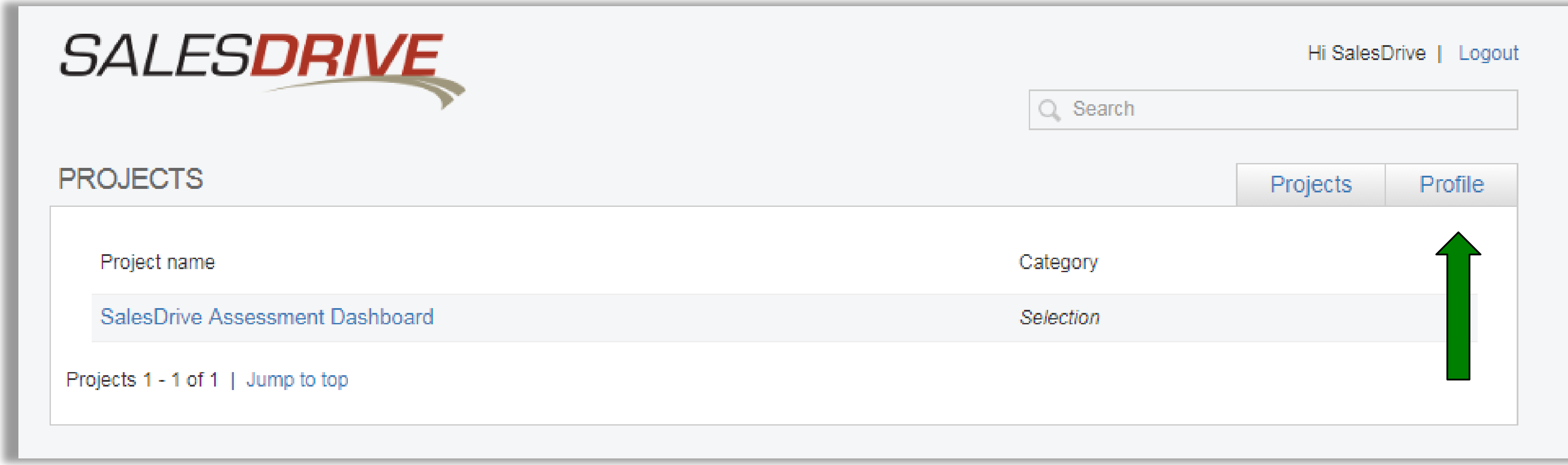
1. Go to https://salesdrive.quintelagroup.com

2. On the **SIGN IN** page, enter **Username** *(FirstnameLastname)* and **Password.**



Accessing the Dashboard *continued*

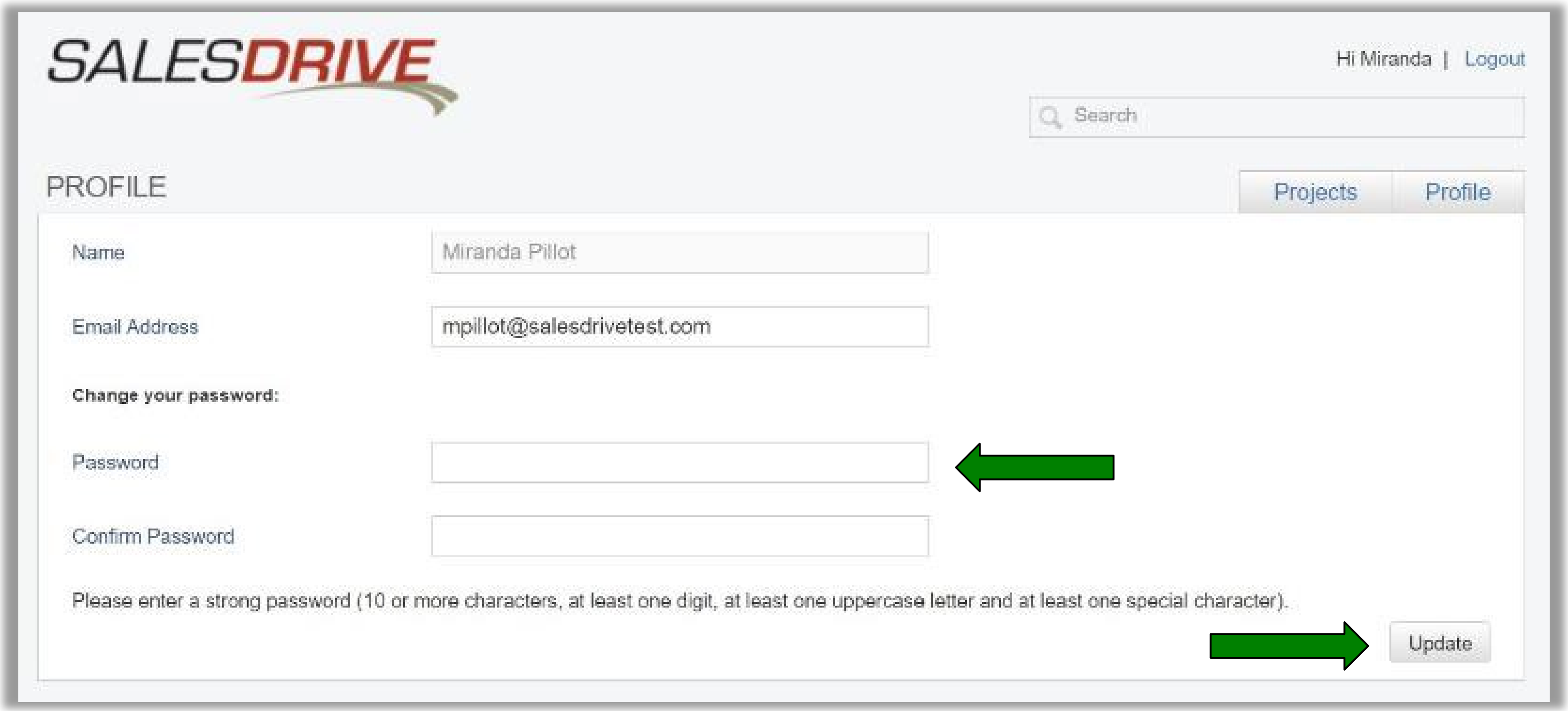
To change your password, after logging in, click **Profile** in the upper right hand corner.



Accessing the Dashboard *continued*

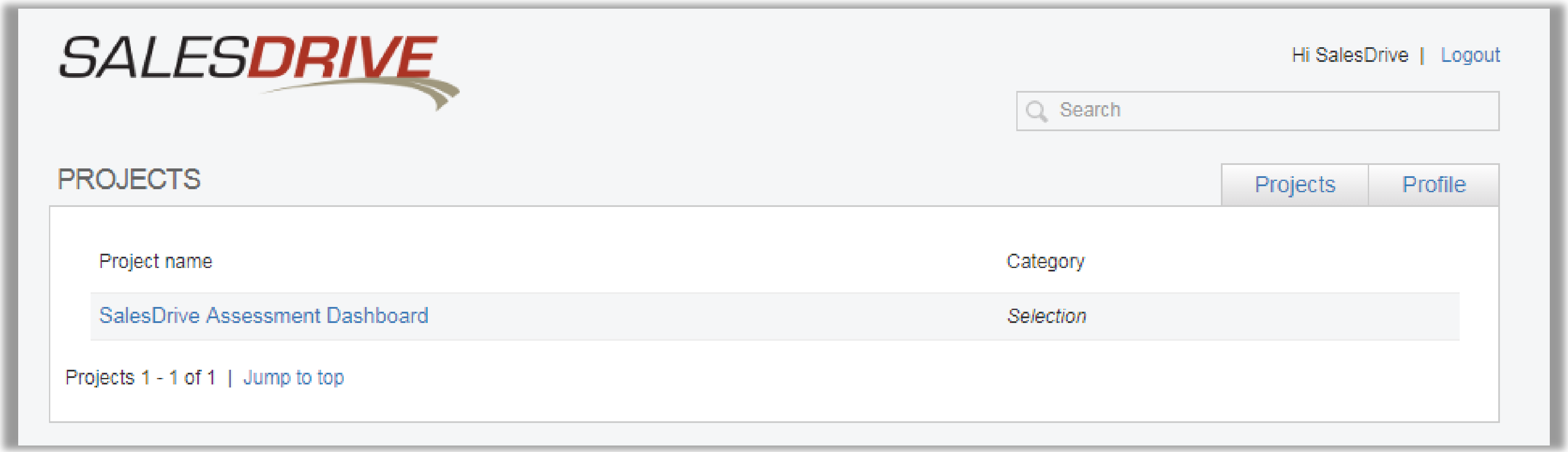
Under **Change Your Password**, enter your new password twice and click **Update**.

Requirement: *At least 10 characters, 1 capital letter, 1 number and 1 special character*



Accessing the Dashboard *continued*

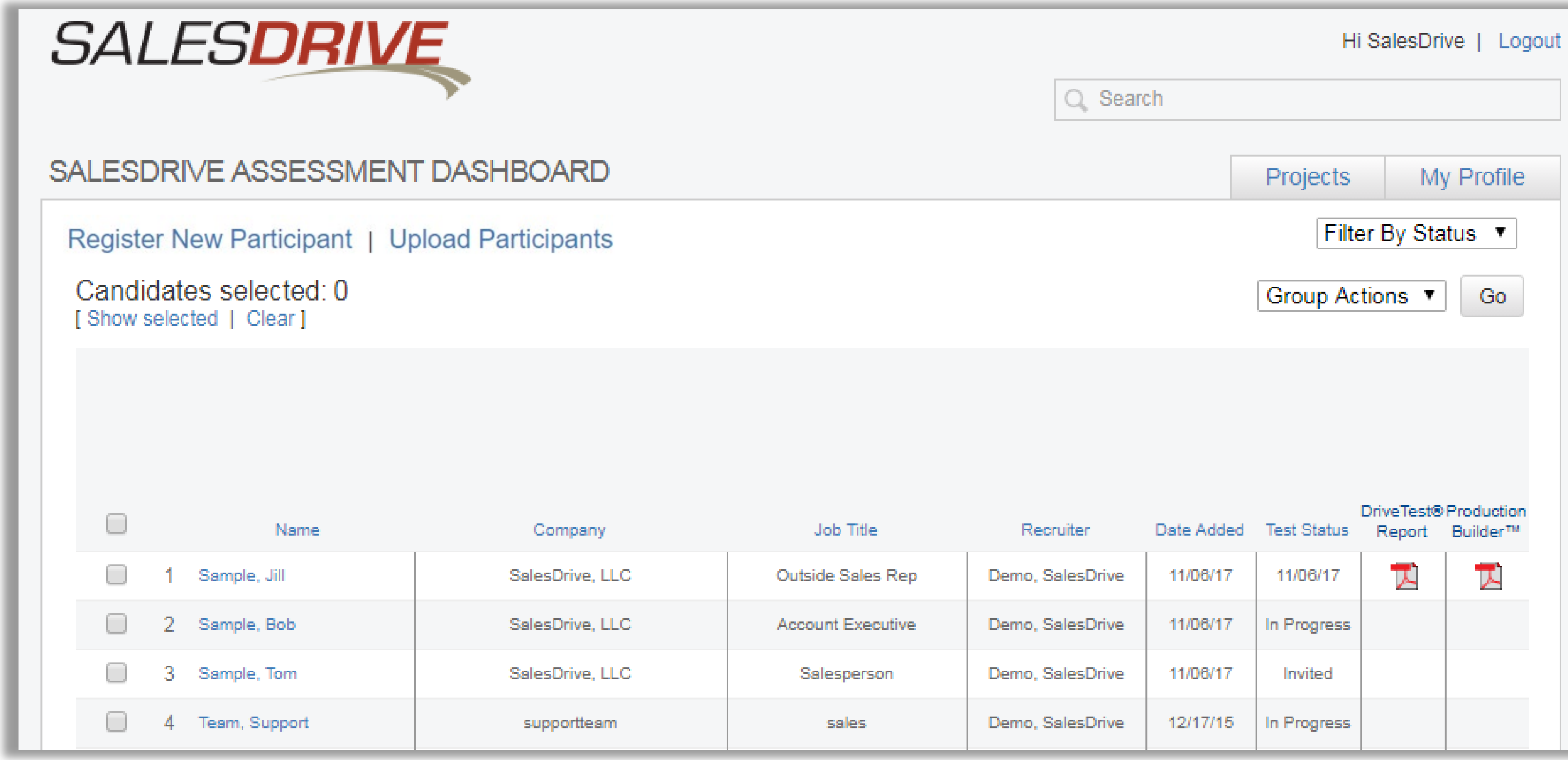
On the **PROJECTS** page, click on **SalesDrive Assessment Dashboard** project link.



Accessing the Dashboard *continued*

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

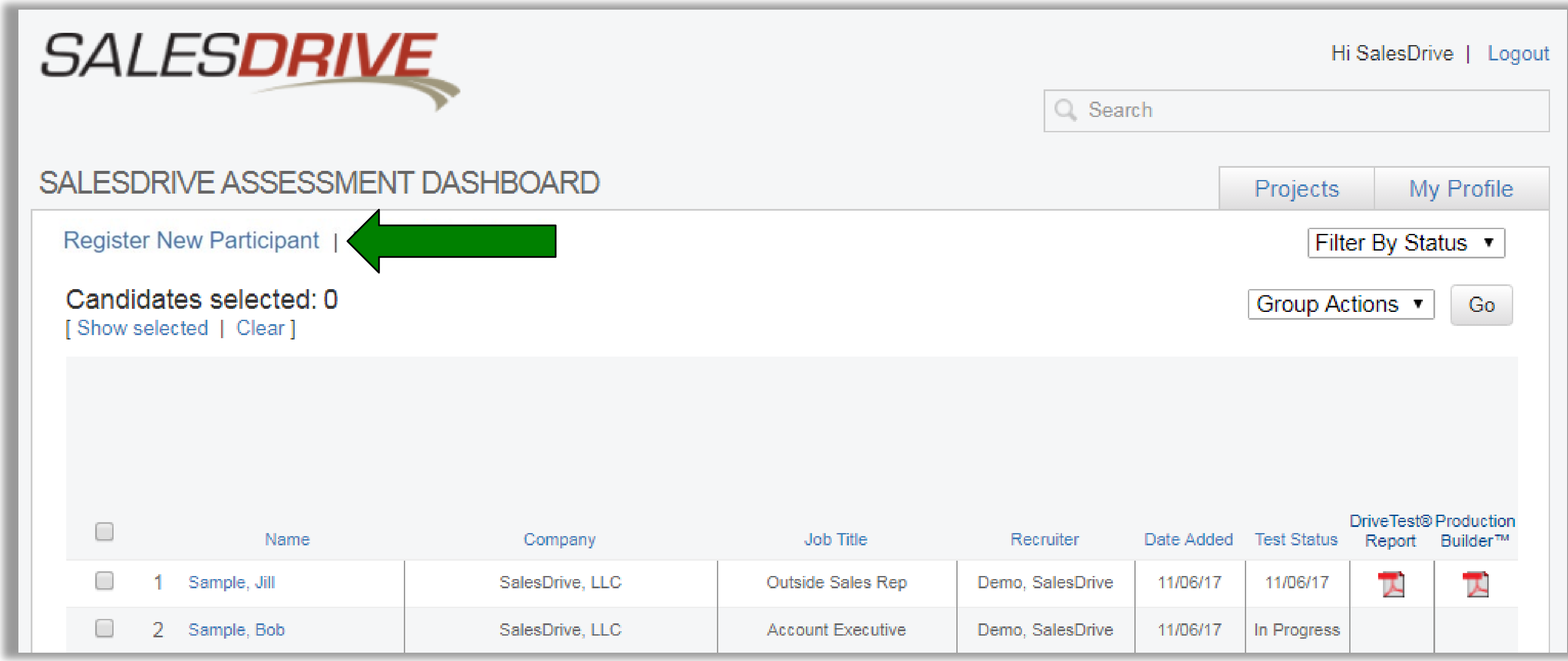
The SalesDrive Assessment Dashboard allows users to register participants, check assessment status, update participant information, send reminders and access reports.



Registering Participants

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

1. To invite a single participant to complete the assessment, click **Register New Participant**.

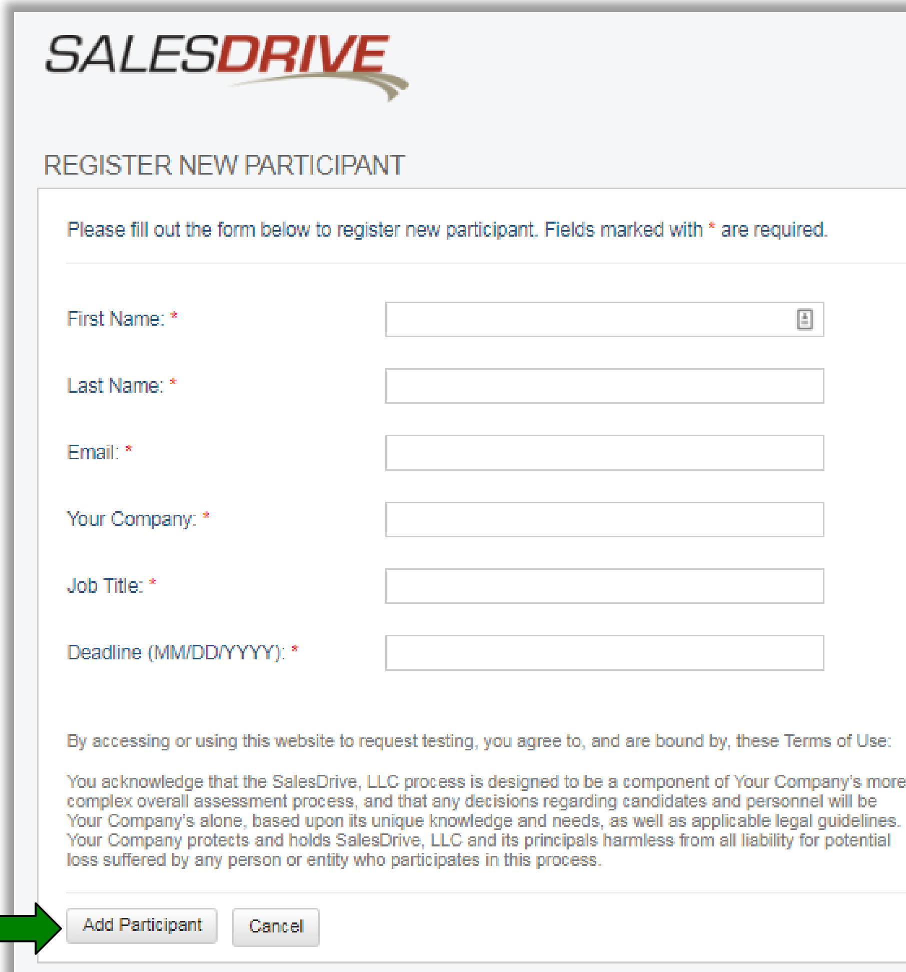


Registering Participants *continued*

2. Enter the participant's information in the fields provided.

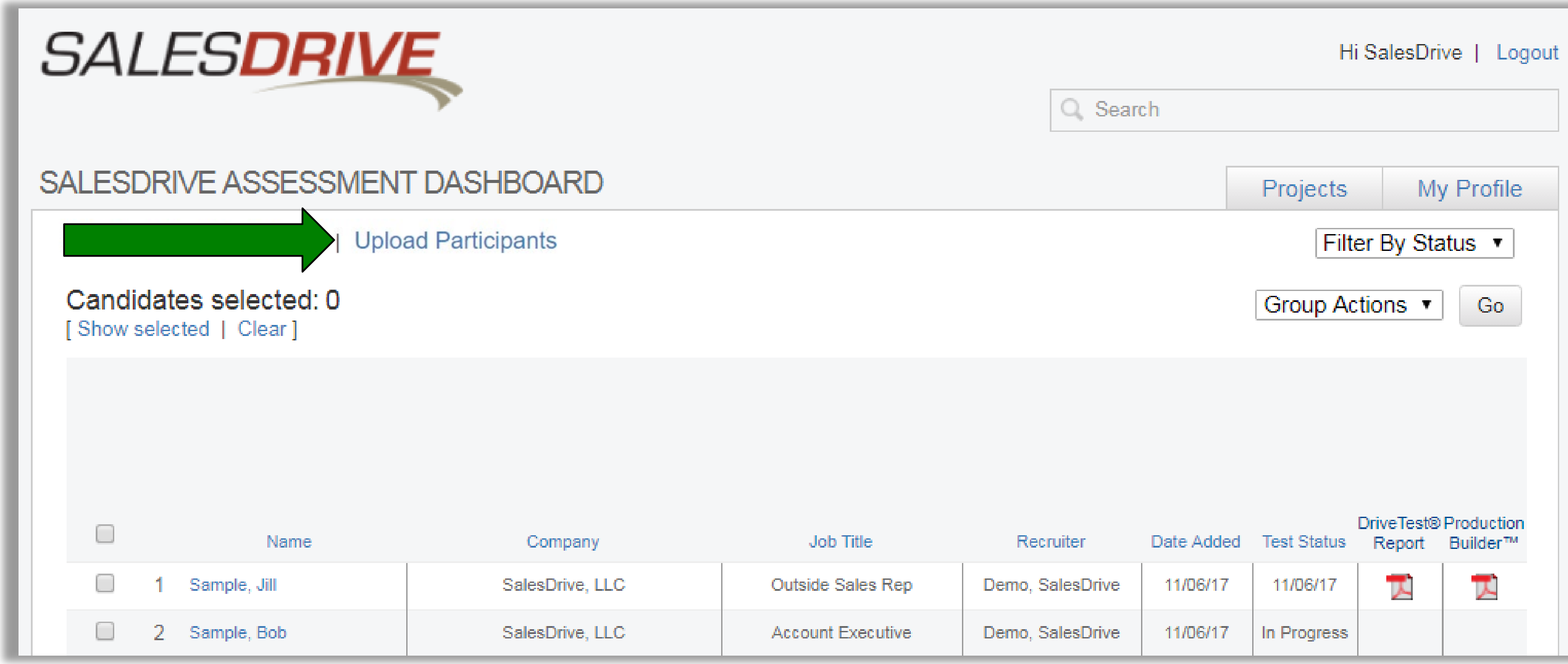
   <u>Use your full company name</u>. The company field will populate into the email invitation.

3. Once all required fields are completed, click **Add Participant** to send an email invitation to the participant. Alternatively, click **Cancel** to abort.



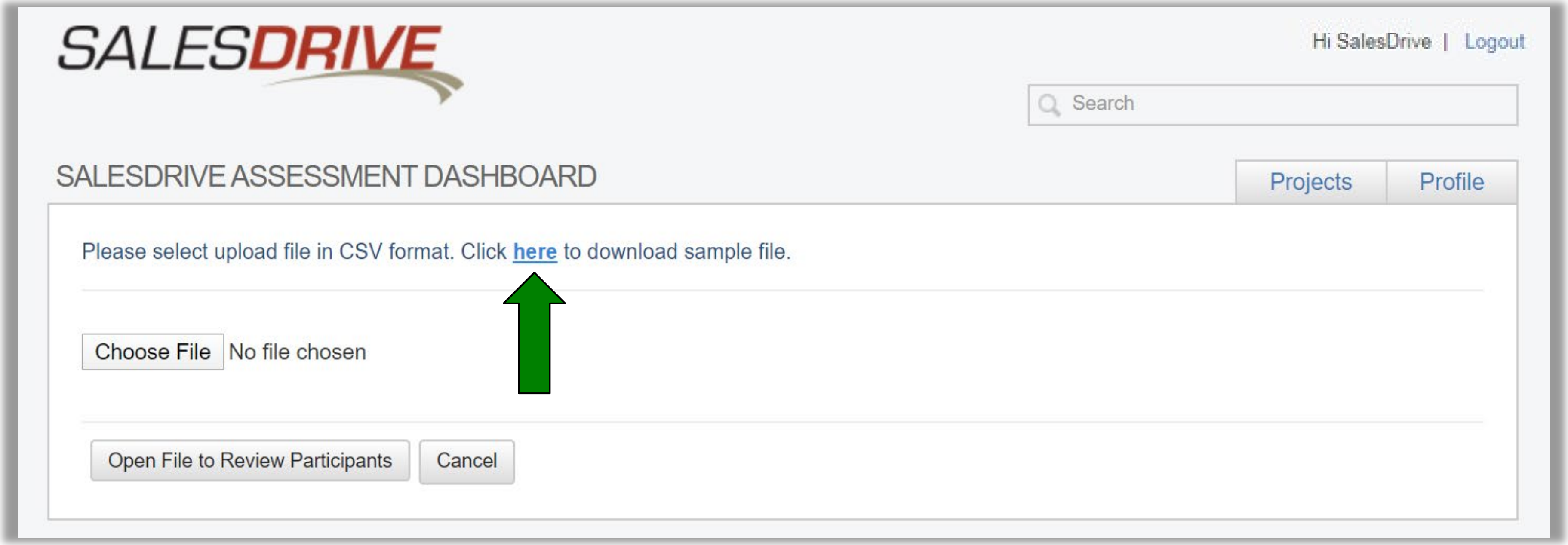
Registering Participants *continued*

1. To invite <u>multiple</u> participants at once to complete the assessment, click **Upload Participants**.



Registering Participants *continued*

2. Create an Excel (CSV) file or use the sample file provided by clicking **Here**. *(See next slide for file requirements.)*



Registering Participants *continued*

3. Create a column for the participant's information as follows (sample below):

- First Name
- Last Name
- Email
- Your Company Name
- Job Title
- Deadline

Note: The company field will populate into the email invitation. **Use your full company name**.

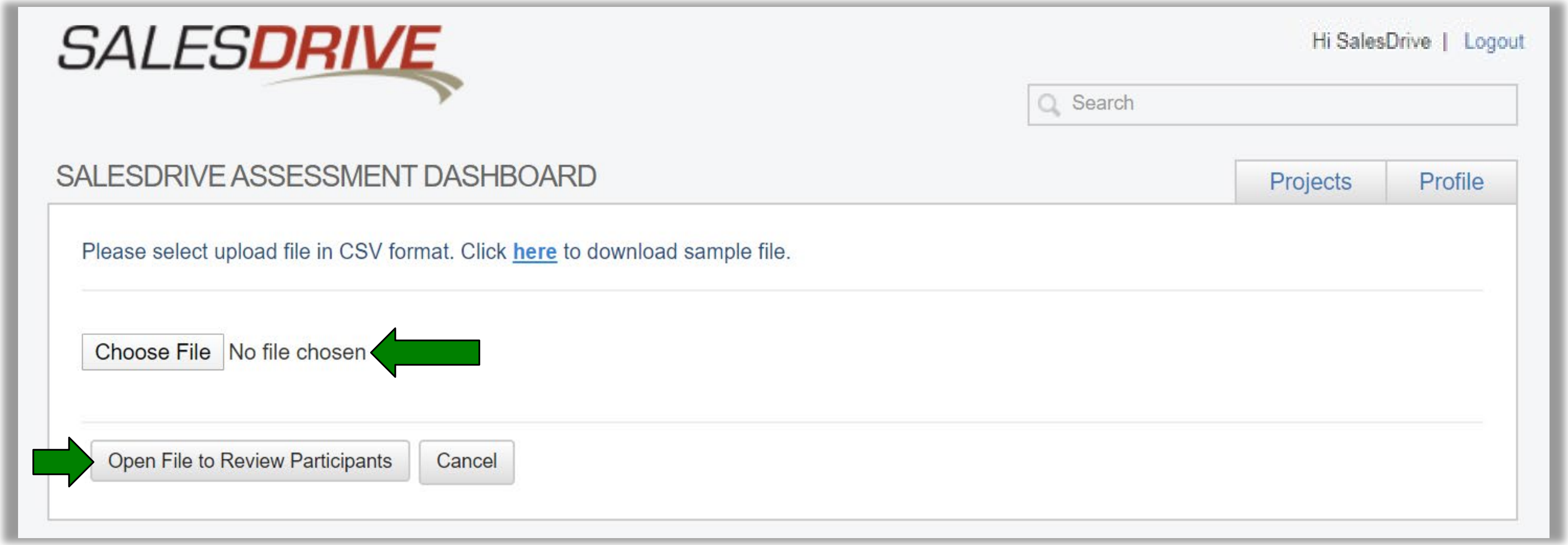
	A	B	C	D	E	F
1	First Name	Last Name	Email	Organization Name	Job Title	Deadline (MM/DD/YYYY)
2	Jon	Sample	jsample@test.com	SalesDrive	Sales Rep	4/1/2020
3	Sam	Test	sam@sampleco.com	SalesDrive	Sales Rep	4/1/2020
4	Tom	Example	tom.example@xyzinc.com	SalesDrive	Sales Rep	4/9/2020
5	Bob	Sample	bobsample@fake.com	SalesDrive	Sales Rep	10/14/2020
6	Mike	Trial	mike@mail.com	SalesDrive	Sales Rep	8/15/2020
7						

4. Add as many participants as you would like and Save the file.

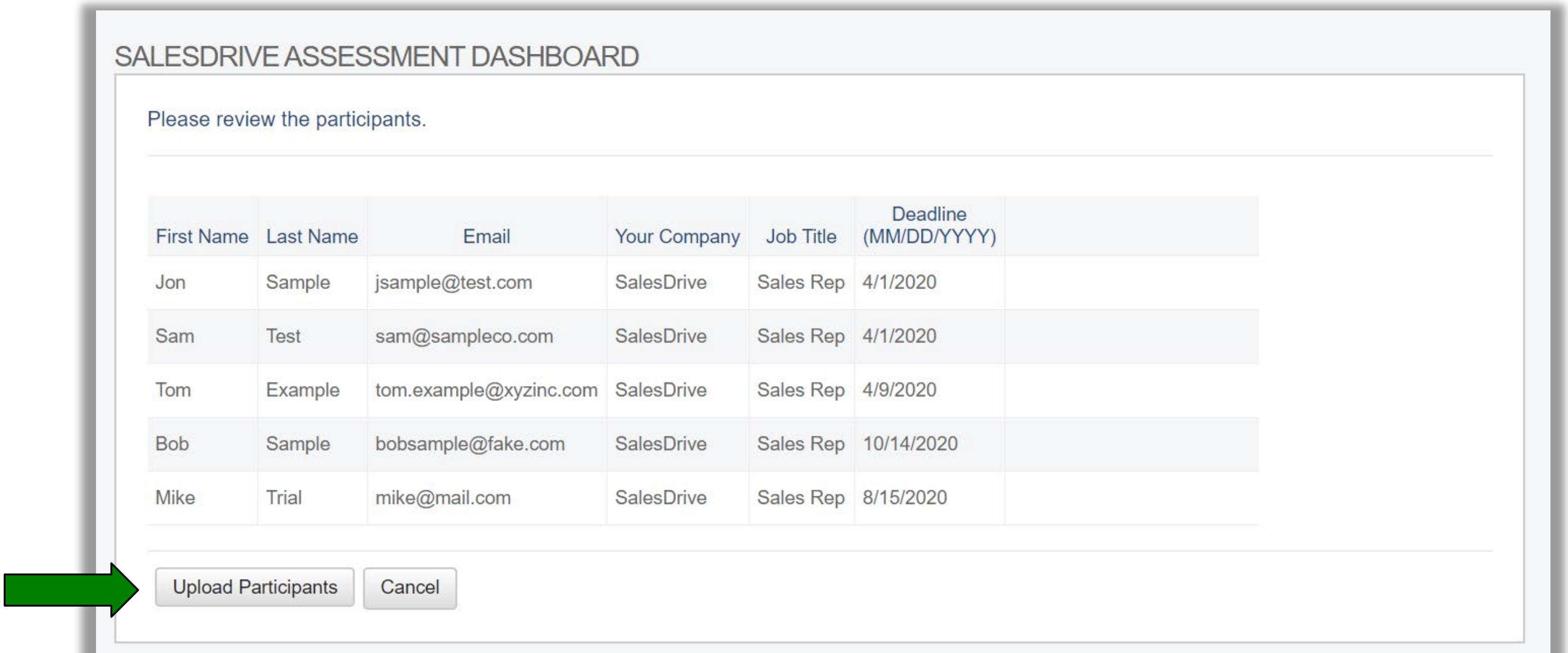
Registering Participants *continued*

5. Once your participants have been saved to the file, click **Choose File** and select the file you want to upload.

6. Click **Open File to Review Participants** to review your file before sending an email invitation to your participants. Alternatively, click **Cancel** to abort.



6. Review participants to ensure there are no errors. Click **Upload Participants** to send an email invitation to each participant simultaneously. Alternatively, click **Cancel** to go back and upload a new file or abort.


SALESDRIVE ASSESSMENT DASHBOARD

Please review the participants.

First Name	Last Name	Email	Your Company	Job Title	Deadline (MM/DD/YYYY)
Jon	Sample	jsample@test.com	SalesDrive	Sales Rep	4/1/2020
Sam	Test	sam@sampleco.com	SalesDrive	Sales Rep	4/1/2020
Tom	Example	tom.example@xyzinc.com	SalesDrive	Sales Rep	4/9/2020
Bob	Sample	bobsample@fake.com	SalesDrive	Sales Rep	10/14/2020
Mike	Trial	mike@mail.com	SalesDrive	Sales Rep	8/15/2020

Registering Participants *continued*

SalesDrive Assessment Email Invitation

SalesDrive LLC <salesdrive.support@quintelagroup.com>
Invitation from Sample Company to Complete an Assessment
To jenniesample@sample.com

Dear Jennie Sample,

You are being asked to complete an online assessment. Expect to spend approximately 20 minutes to complete the assessment.

It is best to complete this assessment in a single session. However, if you need to log out, you can log back in using the link provided and all of your completed answers will be saved.

PLEASE COMPLETE THE ASSESSMENT BY 12/31/2022.

Link to assessment:
https://salesdrive.quintelagroup.com/a/529520e8-f0b2-414b-8308-8b2f2c255fcf/75bde148-8597-4f43-87af-58ae782e371f/

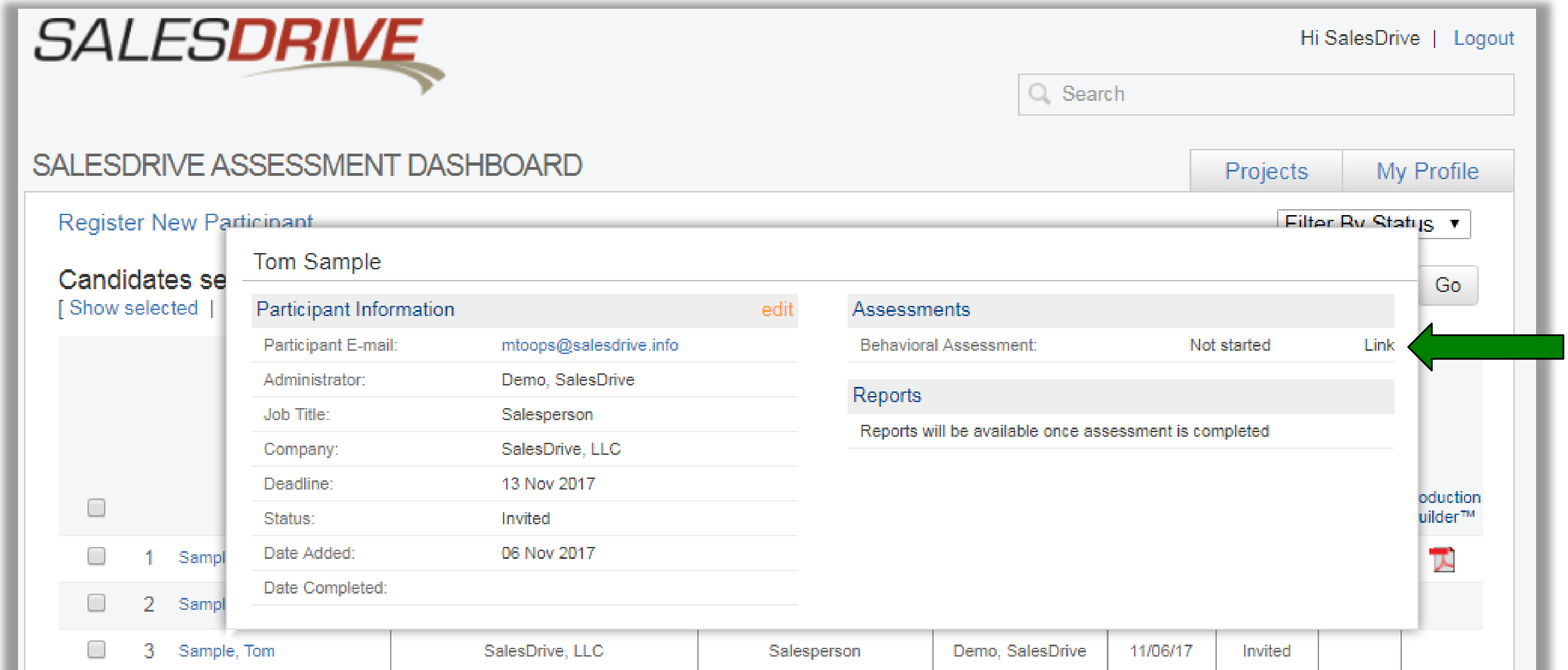
For technical support, please contact salesdrive.support@quintelagroup.com.

Thank you so much.

Sample Company

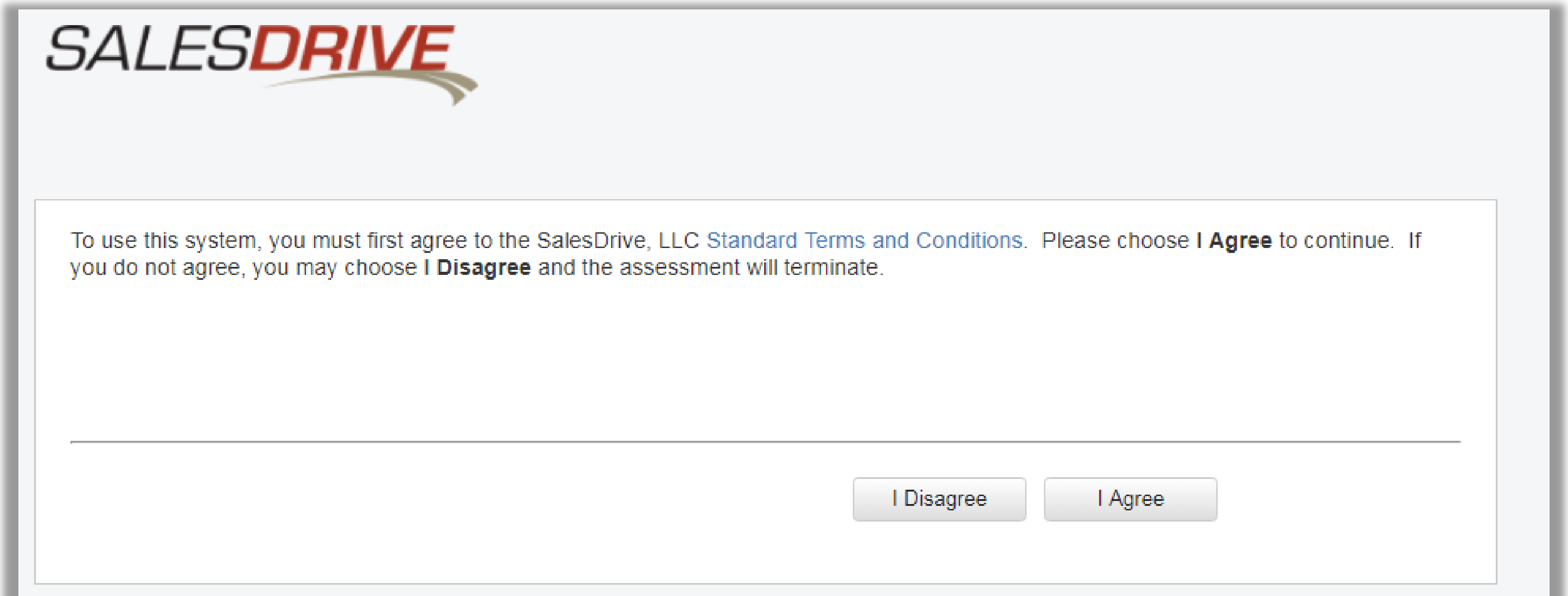
Registering Participants *continued*

If your participant **does not get the email invitation**, hover your cursor over the participant's name on the dashboard. This launches the Tooltip box. To resend the link to the participant, right click **Link**. Copy link address and paste it in an email to the participant.



Participant Experience

This section provides users with the participant's perspective when accessing the assessment. Participants will see the SalesDrive, LLC Standard Terms and Conditions page after clicking the URL in the assessment email invitation.



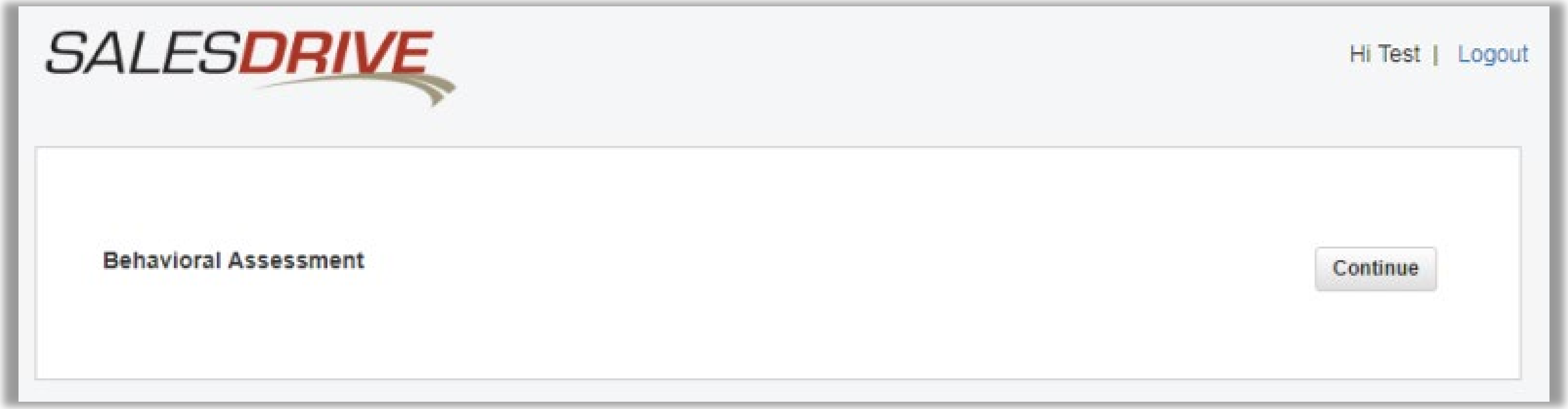
Participant Experience *continued*

The participant will see the **Assessment Menu** after agreeing to the Standard Terms & Conditions.

Participants click **Start** to begin the assessment.

Participant Experience *continued*

The assessment allows participants to logout and log back in, therefore, participants will see a **Continue** option when logging back into the assessment menu.



After completing the assessment the participant is redirected to the assessment menu. The assessment is marked as **Finished** after the assessment is completed.

Checking Assessment Status

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

The dashboard displays a status column for the assessment. There are 3 common status categories:

Status Categories:

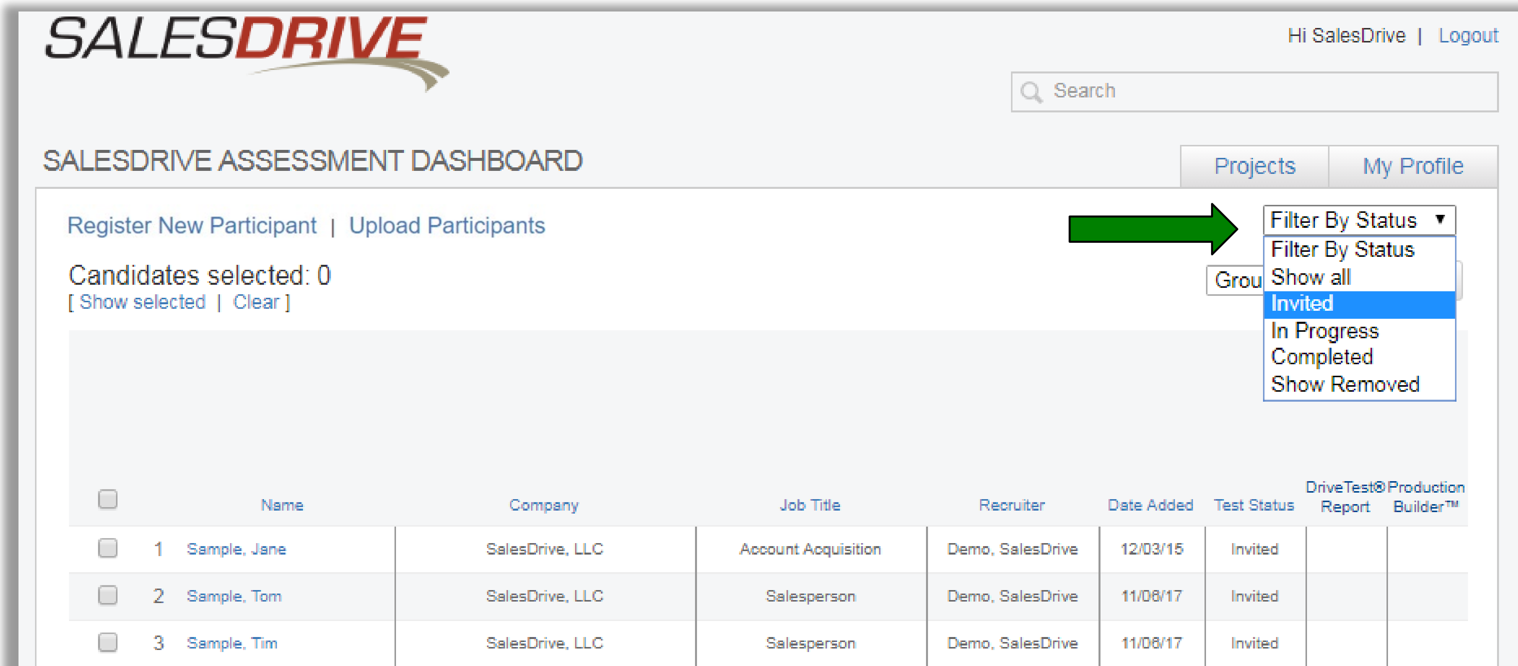
- **Invited** – Email invitation sent. Assessment not started.
- **In Progress** – Assessment started but not yet completed.
- **Date** – Assessment completed on displayed date.

		Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
	1	Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDriv		11/06/17		
	2	Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDriv		In Progress		
	3	Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDriv		Invited		

Checking Assessment Status *continued*

The **Filter By Status** function allows users to view groups of participants according to their overall assessment status.

1. Under **Filter By Status**, click to view the dropdown menu.
2. Users can select to view all participants that are either **Invited**, **In Progress**, **Completed** or **Removed**. The **Show All** option resets the filter to display all participants in the dashboard.



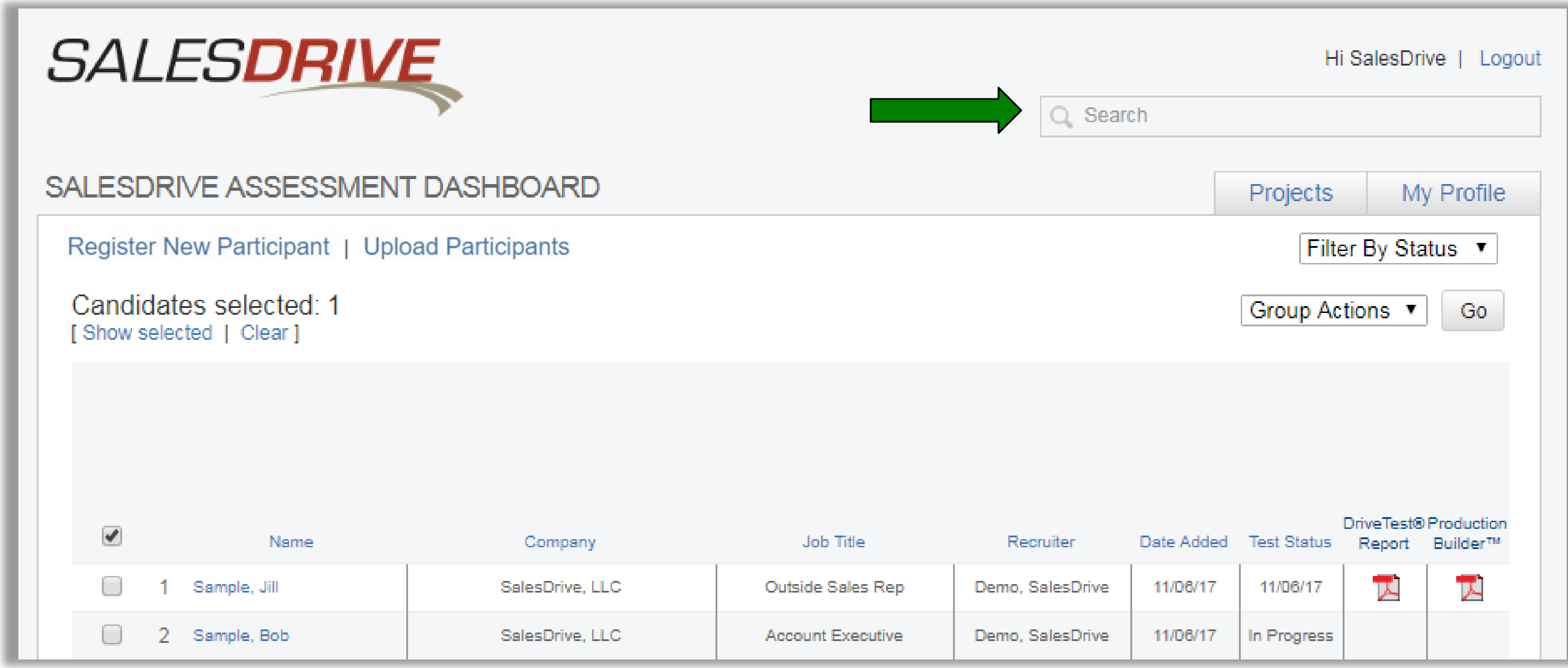
Checking Assessment Status *continued*

The 5 possible participant overall assessment status categories are defined below:

- **Invited** – An email invitation has been sent to the participant, but they have not started the assessment.
- **In Progress** – The participant has started the assessment.
- **Completed** – The participant has completed the assessment.
- **Show Removed** – When a participant is removed, their assessment link is deactivated and they are no longer visible on the dashboard. This option allows users to view only removed participants.
- **Show All** – This option resets the filter and shows all active participants.

Searching for Participants

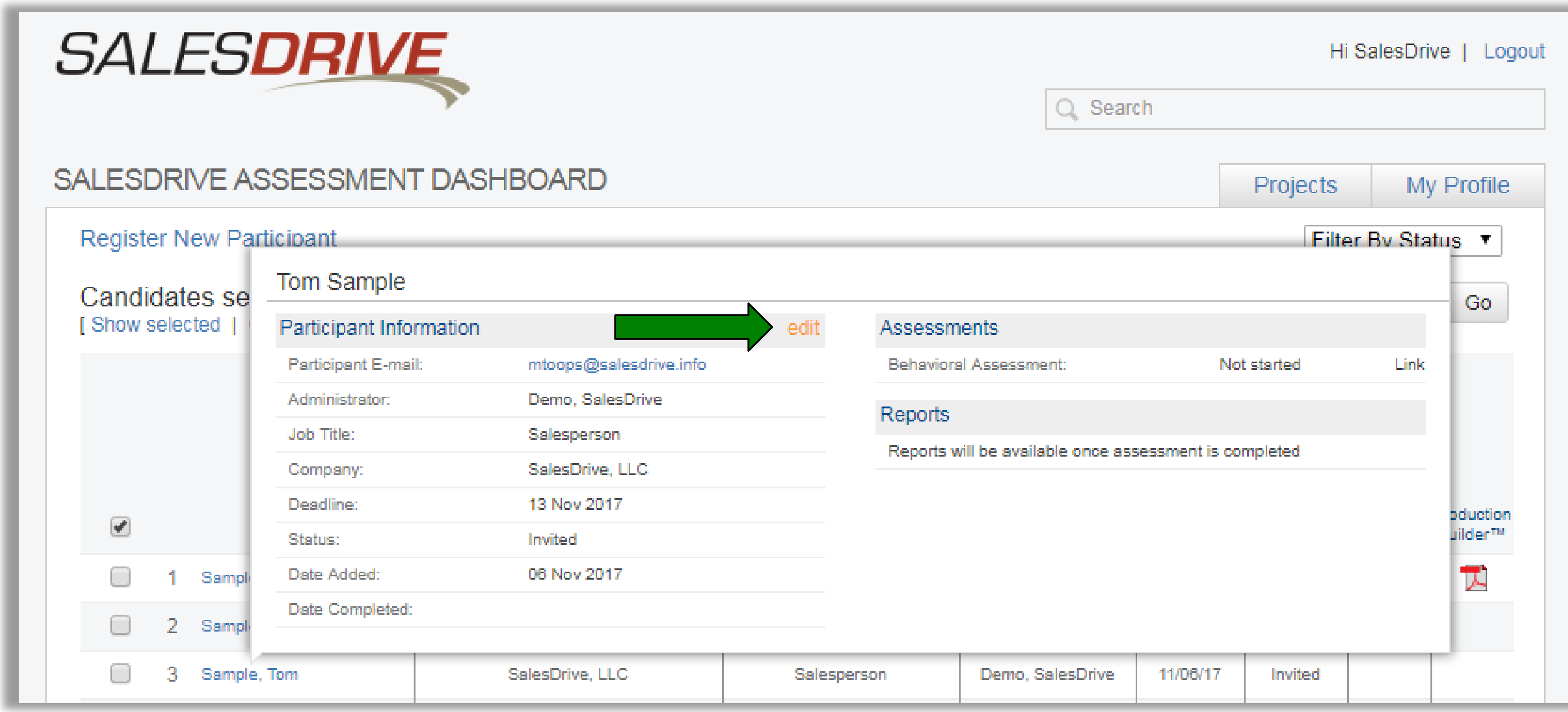
To locate a specific participant, enter the participant's first name, last name or email address into the field designated as **Search** and click **Enter**. This performs a search for all participants that fit the entered criteria.



Updating Participant Information

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

To update participant information, hover your cursor over the participant's name on the dashboard. This launches the **Tooltip**, which displays all participant information provided at the time of registration. To update this information, click **Edit**.



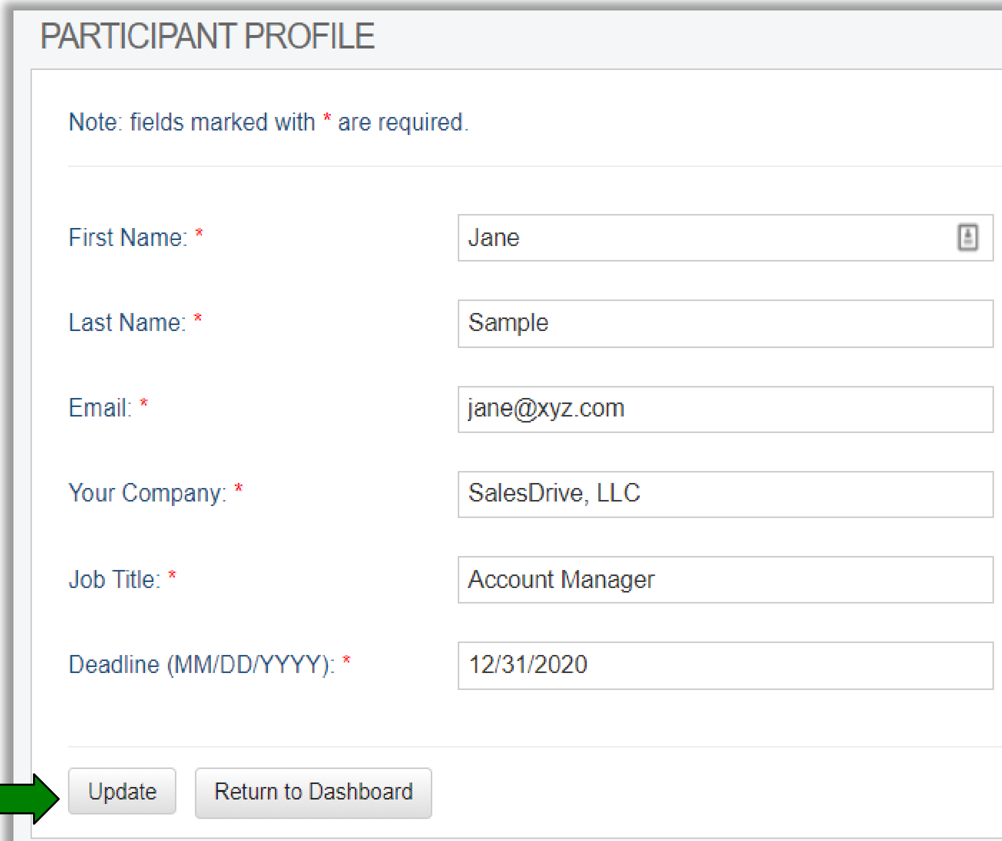
Updating Participant Information *continued*

1. Enter updated participant information.

2. Click **Update** to save the new information. *"Participant profile has been successfully updated"* message will be displayed at the top of the form.

3. Click **Return to Dashboard** after the profile has been successfully updated.

Note: The invitation email <u>will not</u> be resent. To send the assessment to a new email, please see <u>page 30</u>.

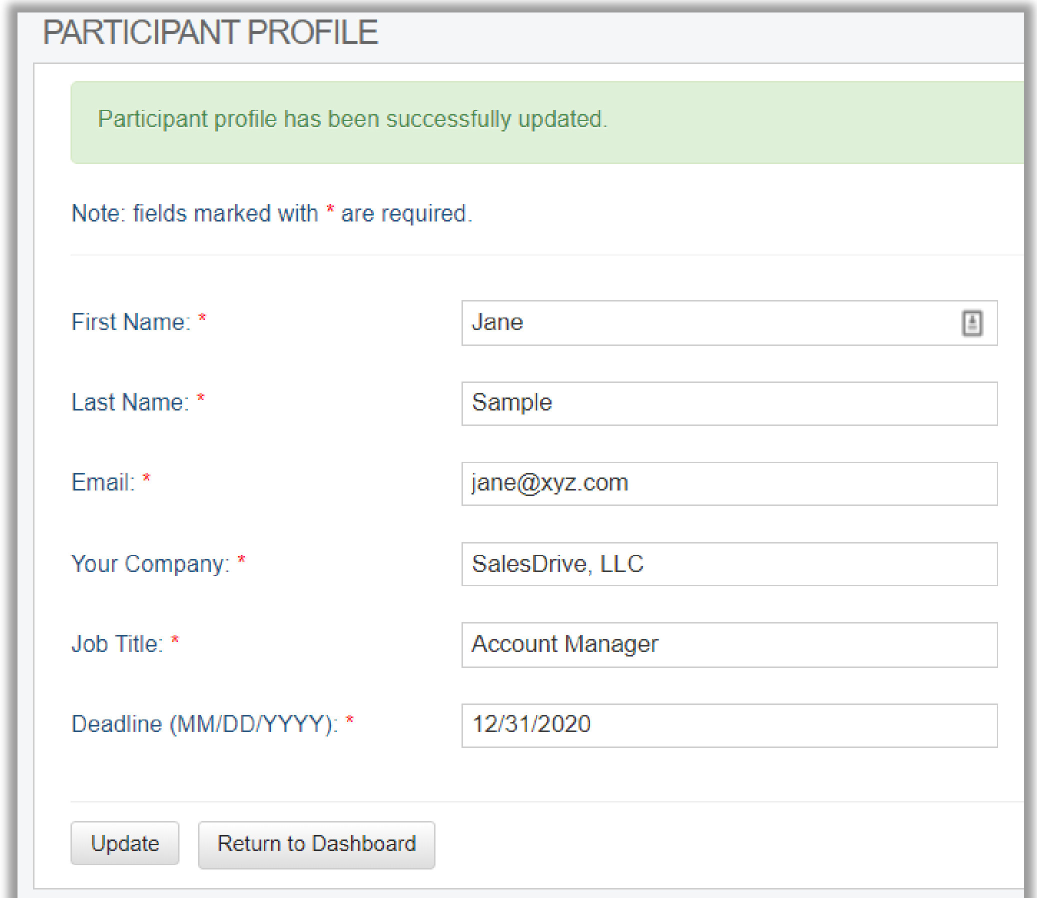


Changing Deadline Dates

- Update deadline date in the participant profile and click **Update.**
- All future reminders for this participant will include the updated deadline date.

Note: Assessments will remain active beyond the deadline date.

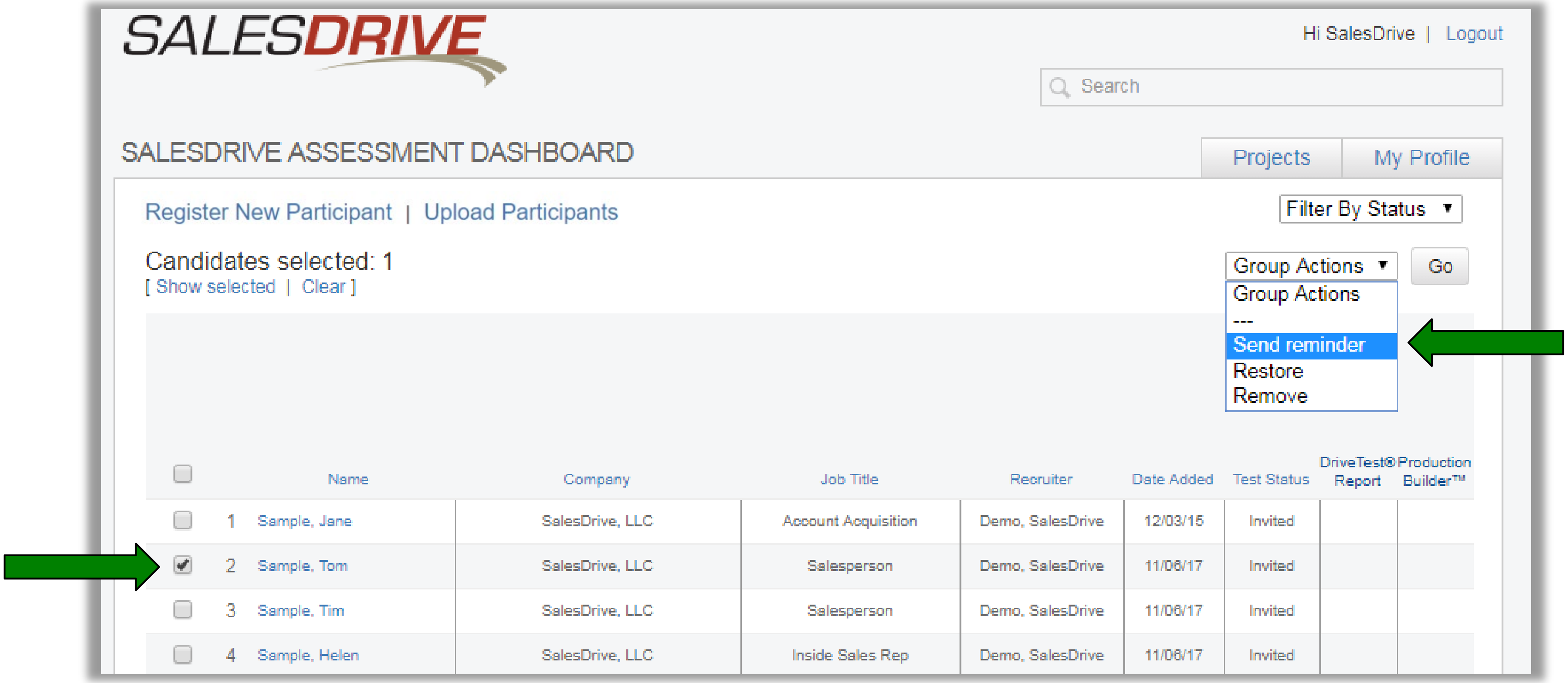
To deactivate an assessment, see page 31.



Sending Reminders

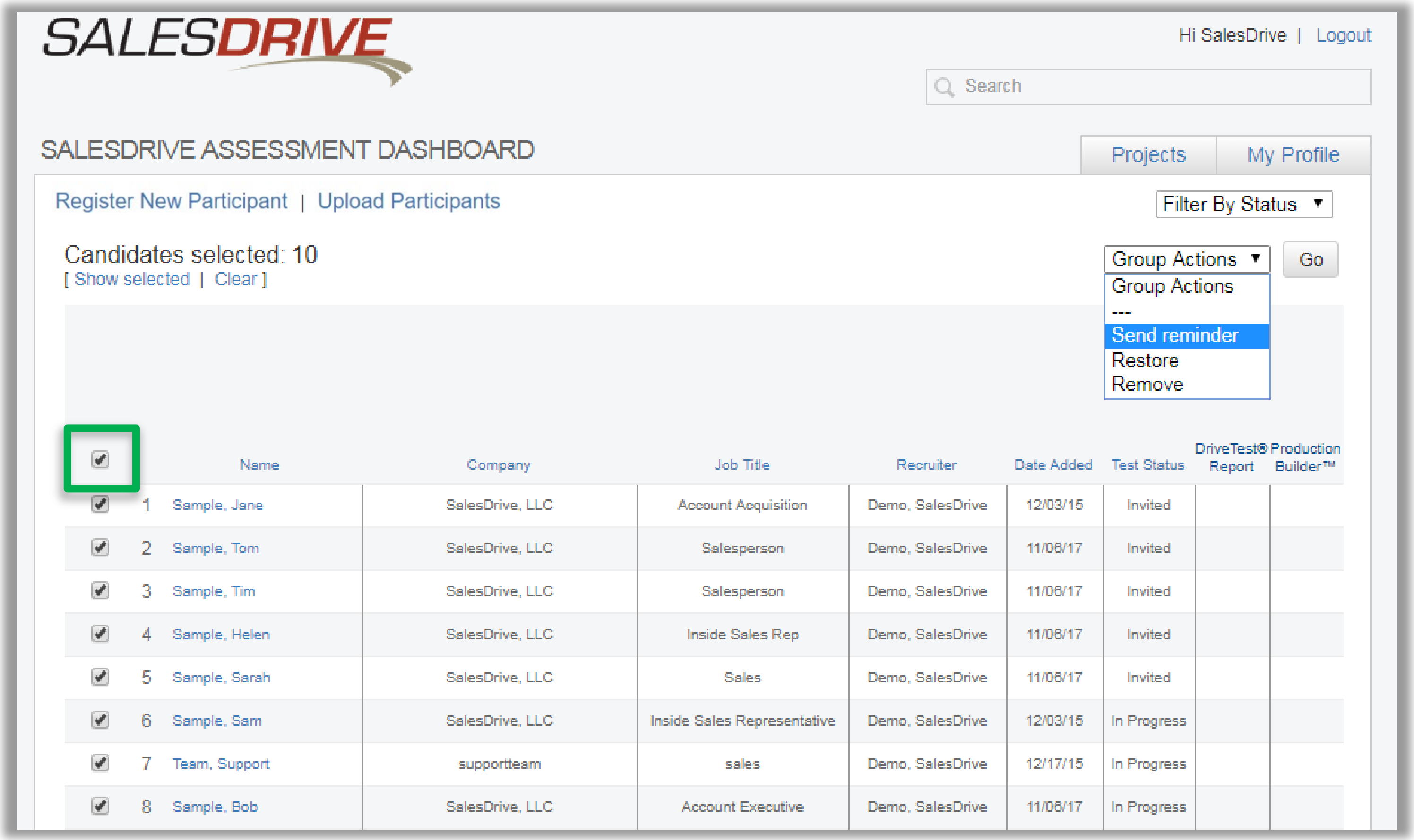
To send reminders to participants:

1. Click on the boxes next to all participants' names for whom a reminder should be sent.
2. Under **Group Actions**, select **Send Reminder** and click **Go**.



(**Note**: To clear selections, click "Clear" under Candidates Selected)

To select all participants, click the box at the top left of the Name column.



		Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
✔	1	Sample, Jane	SalesDrive, LLC	Account Acquisition	Demo, SalesDrive	12/03/15	Invited		
✔	2	Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
✔	3	Sample, Tim	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
✔	4	Sample, Helen	SalesDrive, LLC	Inside Sales Rep	Demo, SalesDrive	11/06/17	Invited		
✔	5	Sample, Sarah	SalesDrive, LLC	Sales	Demo, SalesDrive	11/06/17	Invited		
✔	6	Sample, Sam	SalesDrive, LLC	Inside Sales Representative	Demo, SalesDrive	12/03/15	In Progress		
✔	7	Team, Support	supportteam	sales	Demo, SalesDrive	12/17/15	In Progress		
✔	8	Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive	11/06/17	In Progress		

Sending Reminders *continued*

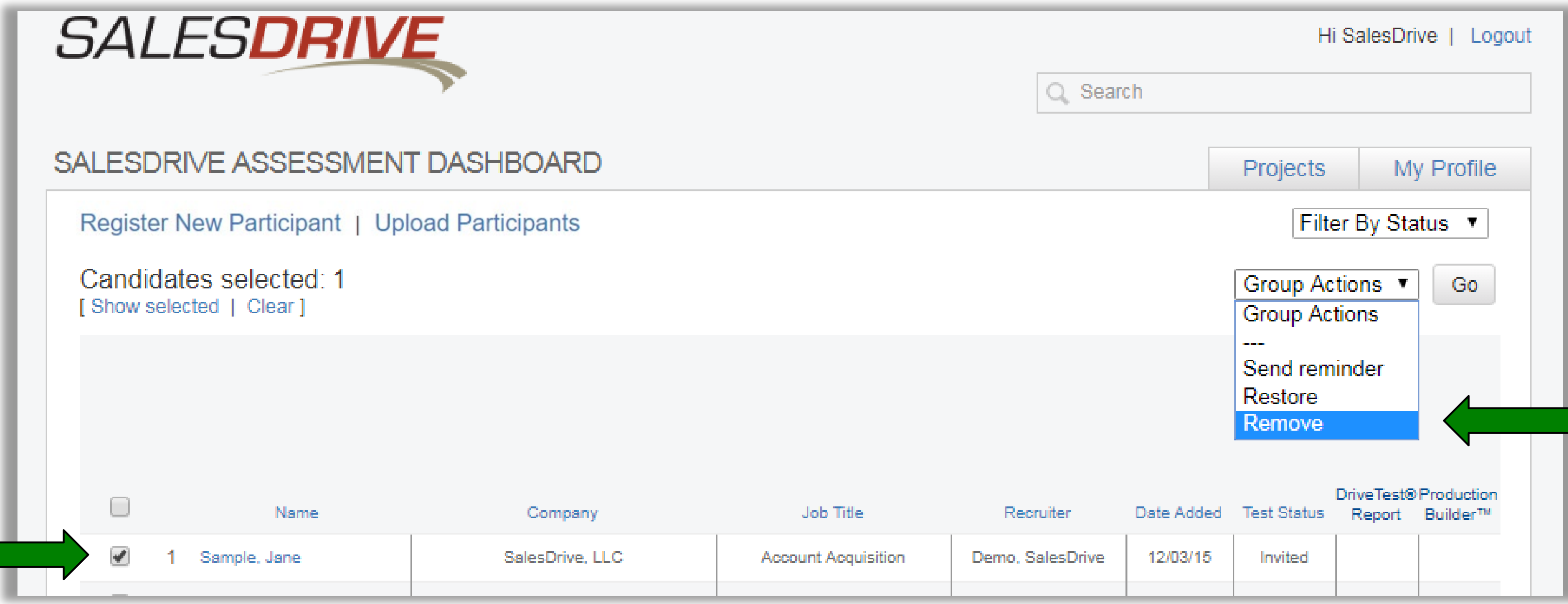
To send a reminder to a group of participants by overall status:

1. Under **Filter By Status**, click to view the dropdown menu.
2. Select to view all participants by **Invited**.
3. Click the box to the left of the column header "Name". All boxes for the visible participants should be selected.
4. Under **Group Actions**, select **Send Reminder** and click **Go**.
5. To clear selections, click "Clear".
6. Under **Filter By Status**, click to view the dropdown menu and select **Show All**.
7. Repeat the steps 1 through 6 for the **In Progress** participants.

Removing Participants

To remove a participant:

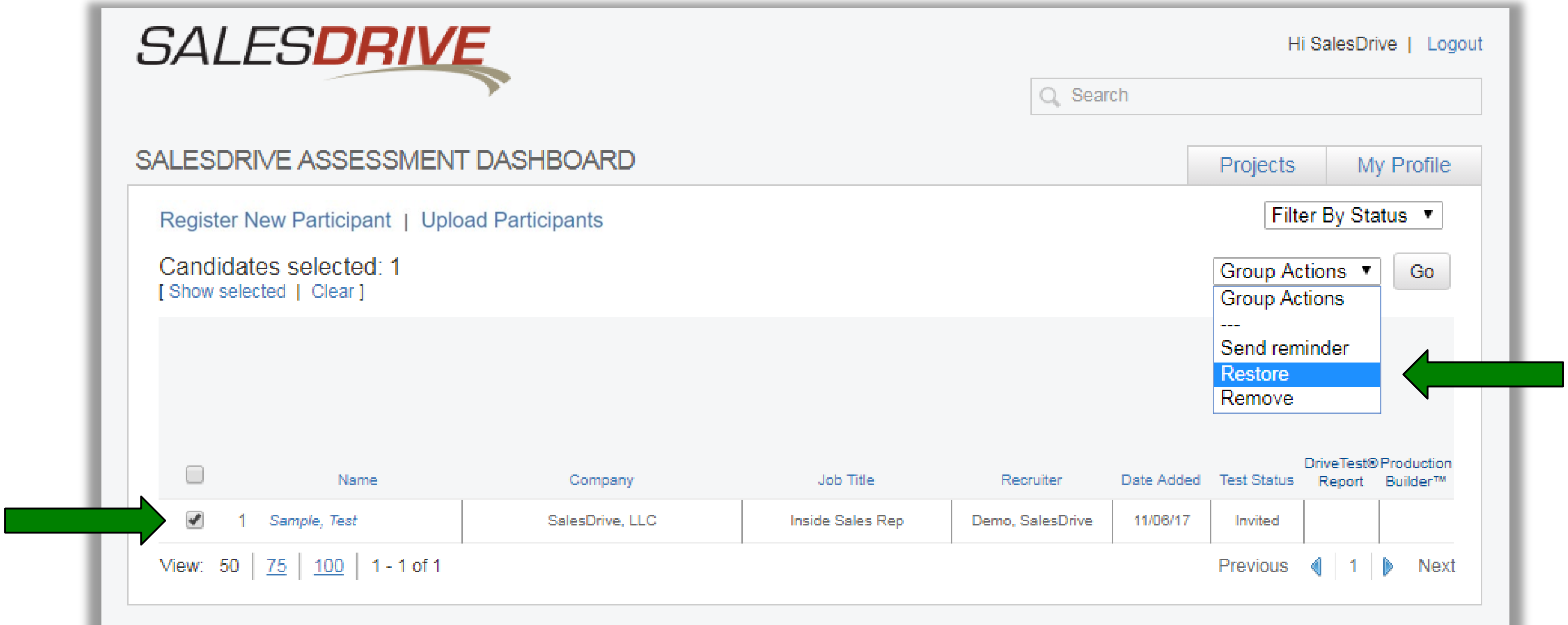
1. Click on the box next to the participant's name for whom you wish to remove. Removing a participant will **deactivate** the assessment link, removing access to the assessment.
2. Under **Group Actions**, select **Remove** and click **Go**.



Restoring Participants

To restore a participant:

1. Under **Filter By Status**, select **Show Removed**.
2. Click on the box next to the participant's name for whom you wish to restore. Restoring a participant will **reactivate** the assessment link, granting access to the assessment again.
3. Under **Group Actions**, select **Restore** and click **Go**.



Accessing Reports

SALESDRIVE LLC
NEVER HIRE A BAD SALESPERSON AGAIN

A notification email is sent to the recruiter who set up the assessment after the participant completes the assessment. This email contains a link to view the reports.

All reports can be viewed on the dashboard by <u>all</u> users.

SQ

SalesDrive LLC <salesdrive.support@quintelagroup.com>

Assessment completed: Bob Sample

To Miranda Toops

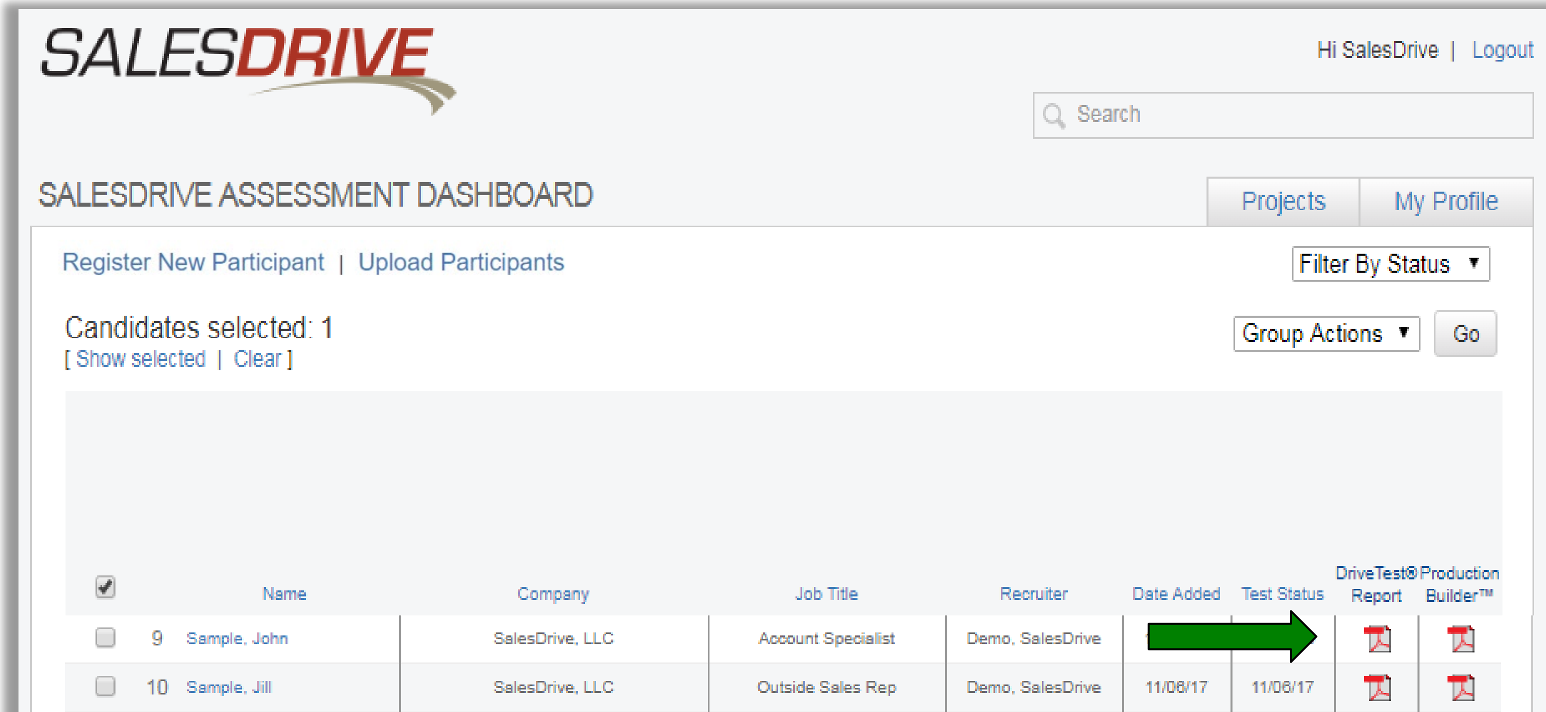
Cc Miranda Toops; Kerri Valentino; Dr. Christopher Croner

The following candidate has completed the assessment:
Bob Sample

Please log into the administrator site to view the assessment results using the link below:
https://salesdrive.quintelagroup.net/dashboard/7fd9f8dd-8846-4223-8260-4164f796944c/094b7c57-3479-47c8-9654-20ec7dfb766b/

Accessing Reports *continued*

The DriveTest® Report *(for sales interviewing and hiring)* & Production Builder™ Report *(for training/development of new and current salespeople)* can be accessed by clicking the PDF icons in the two far right columns on the SalesDrive Assessment Dashboard.



Contact Technical Support

If dashboard users or participants attempting to complete the assessment require technical assistance, please email support at support@salesdrivetest.com.

If you would like to add additional users to your account, please send the first and last name(s) and email(s) to Miranda Pillot at mpillot@salesdrivetest.com for set up.

We appreciate the opportunity to be of service!