



Best Practices for Entering Group and Individual Coaching

There are best practices when managing Coaching. Group coaching (with more than one org) is entered as a GROUP LEARNING event. And individual appointments (with one org) are entered in COACHING/CONSULTING Appointment Management.

GROUP COACHING

What

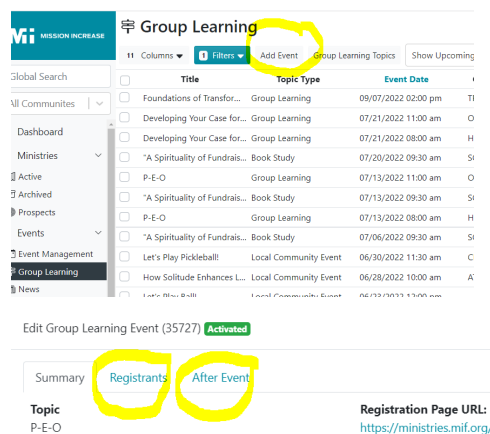
An AD coaches (or consults) with more than one organization, thus multiple leaders.

- May be a pre-planned gathering of orgs to coach on a particular topic
- May be entered after the coaching

How

Create an event in **GROUP LEARNING** as “group learning” type (Admin>left Nav Bar)

- When created ahead of time, leaders can register
- May also be created after the group coaching as a means of tracking
- Note images below. Once activated, Registrants and After Event tabs display, to manage and track.



INDIVIDUAL COACHING

What

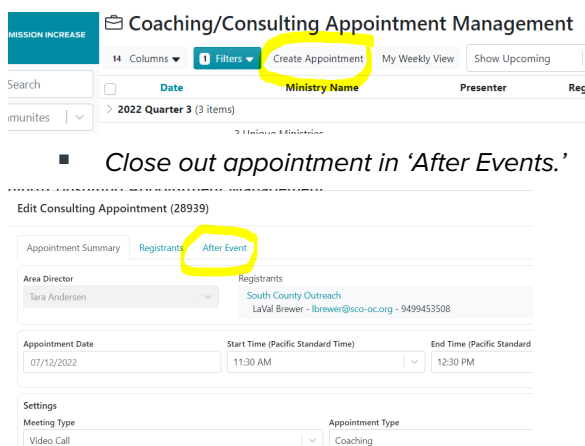
An AD coaches (or consults) with one organization, may be one or more leaders

- May be pre-planned and scheduled.
- May be entered after the coaching appointment.

How

Create an appointment in **COACHING/CONSULTING Appointment Management** (Admin>left Nav Bar)

- Can be created ahead of time or after the appointment
- Can be created manually by AD or automatically scheduled by leader through AD's coaching calendar



- *Close out appointment in 'After Events.'*