



10 Steps to Successfully the Launching DISC Professional Styles Assessment

1. Use this link to create a new authorized partner account:

<https://www.onlineworksolutions.com/cgi-bin/disc/account.pl>

Create New Account

**Please enter your contact details and click
on the arrow below to proceed.**

First Name

Last Name

Email Address

Please click on this checkbox to confirm that you want DISC Professional Styles to use your contact information to conduct your DISC assessments and absolutely nothing else.

2. Setup: Page 1

- Identify how many persons you are going to invite and other entries to make clear who is the client, the client contact, etc..

3. Participants: Page 2

- Identify participants (enter one by one or you can use the "Batch Import Option" to import your list of names and email address, so have your list ready to copy and paste into a text area.)
- Set the deadline and timezone.
- Email Invitation Delivery Preferences: Select email delivery options - Send or just Load.
 - a) Send: Allow the DISC Tool to send emails to participants on your behalf.
 - b) Load only: From your email account send participants your email invitation. The DISC Tool specifies email content, Page 4 Email, and will only LOAD participants on the final Review and



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Load page. Then you will need to send them an email with the specified link/button.

- The DISC login asks the participant to login with their email address which you have just loaded up. The DISC login checks the participant email address against the DISC database. If it finds the email address it advances the participant to the survey (and emails them login information should they need to login in again to finish their DISC survey). This email address login may only be used once by the participant.

4. Payment: Page 3

- Use PayPal to pay for the Disc participant you are going to input. You don't need a PayPal account. PayPal can simply process your credit card.
- If not all your participants complete the Disc, your account will be credited for those "uncollected" Disc reports.

5. Email Content: Page 4

- Customize email communications (add your own subject line and preface).
If you choose to email participants yourself, please use the custom link displayed.

6. Reminders: Page 5

- Schedule reminders and/or a delayed start date (optional).
If you choose to email participants yourself, you can still use the DISC Tool reminders. The DISC Tool will send participants the custom link only to those who have not completed.

7. Review and Launch: Page 6

- Review setup options, participant details, email communications, and scheduled dates.



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- Launch the DISC.
If you choose to email participants yourself, the DISC Tool will only load the participants into the DISC. You still need to email them custom link shown to you in step (6) above.

8. Report:

- Once participants have completed the DISC you may start to collect reports. Look for the Reporting button on the Participant Page 2.
- You may create and deliver the DISC Report(s) to the email addresses you specify in Option 3 or you may just create them and then download them by clicking on the download arrow under the column Download option.

9. Post Launch: How to administrate your DISC(s):

- Participant's page
 - (1) **Log in:** If you only have one DISC running, you'll be directed to the participant page; otherwise select which DISC you want to view from your account page.
 - (2) **Participation:** The Participant page 2 displays the real time completion rates.
 - (3) **Bad addresses:** If you have sent/loaded a bad email address, we will notify you to revise and resend the errant email invitation. Do this on the Participant Page 2.
 - (4) **Reminders/Deadline Extensions:** The participants page allows you to send reminders and deadline extensions if you have not already set up pre-scheduled reminders.

You can send reminders to everyone not completed or selected individuals. Use the Email Page 3 to add a preface to specify the urgency of your reminder. Then back on the Participants Page 2, select the appropriate checkboxes and click Revise/Resend button at the bottom of the page to send reminders.



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10. Frequently Asked Questions:

- Post Launch
 - **Question: How do I add participants after DISC is launched?**
Answer: Under the participant table look for "Add Members". Select the number of participants/rows to add. and click on the yellow plus sign to the right. Rows will be added to the bottom of the participant table above. Enter new contact information in the new empty rows. Check the Send now or Load now checkbox in the row and click on the Send now or Load now button.
 - **Question: How do I pay for additional participants after DISC is launched?**
Answer: You may have already collected credits, that is, you paid for X Disc surveys, but only Y completed, so you have X - Y credits. These credits will be used to pay for the occasional persons you add after you have launched to a group of participants.