



Welcome to #teamEPIC. We are so excited for you to join the team.

## CLIENT REMINDERS TECHNOLOGY PROCESSES AND TOOLS

At Elevation Pageant and Interview Consulting we pride ourselves on communication. That communication is timely, responsive, and uses a variety of technology tools which are outlined below. Please read this document before you use your chat to communicate on technology questions.

### FACEBOOK MESSENGER

#### Social Media Coaching

We always operate as a team with each client and do our best to respond to you in a timely manner. You can expect a response within 12-24 hours.. All clients who have paid for social media coaching have a private Facebook Messenger chat that includes our coaching staff, you, and anyone else you desire to be included in your coaching prep. **If you are planning to shop for your wardrobe using your social media coaching, please ensure a coach is available during your timeframe BEFORE you schedule the session at the clothing store.** Remember that we work full time so we can't always answer if you don't include us in the planning.

#### Sessions

Video sessions will occur using Facebook Messenger unless otherwise specified by the client. Other options could include Facetime or Zoom if needed. You must request each time for this to be the option or we will forget and call you on FB Messenger as it is the preferred communication.

### DUBSADO PORTAL AND INVOICE SYSTEM

- Video assistance on how to look at portal- second half after Google drive  
<https://www.facebook.com/100005643346563/videos/1217772935528480/>
- Login: Your email you originally entered
- Password: EPICCLIENTFN! EPIC Client First name all together !

### Home tab includes:

- **Unsigned contracts:** welcome packet
- **Incomplete forms/requesting new packages:** You will be sent a form Choose Epic Packages each time you need new packages. You must request the form to be sent to you. You cannot reuse the same form. You must request a new one via email to [elevationconsulting@gmail.com](mailto:elevationconsulting@gmail.com). Intro forms will be located here.
- **Unread emails:** means unread emails
- **Open invoice count:** means unpaid
- **Invoices & Payment**
  - EPIC utilizes an invoicing system through which we bill all of our clients. You will receive an emailed invoice which you can pay for using Square, PayPal which connect directly to the invoice portal. You can also pay via Venmo- katiecole2512. There will be a fee on top of the invoice to cover usage of the systems. We will no longer accept cash or checks. You will need to pay in advance for all packages before sessions are scheduled, social media coaching starts, or any work done on paperwork, intros, etc.

### Projects tab includes:

- **Appointments**
  - You can cancel and reschedule sessions here. You must cancel your sessions if we did not do it for you, or they will be inaccurately reflected.
- **Appointment Schedulers**
  - You will receive schedulers for all three coaches once you have paid your invoice. They are attached to your dubsado portal and emailed. You can find them in appointment schedulers. They immediately are outdated if you do not book right away. Example Katie says available on that day for Friday in two weeks. You wait until the weekend to book. Katie already booked choreography on Friday and marked it unavailable. It updates the links but then you need a new scheduler as it doesn't kick to your portal. The system does not let us double book coaches. If you have a slot you want that the coach is normally open check in your chat if it is open and we can likely accommodate it.

- **YOU NEED TO BOOK ALL YOUR SESSIONS OUT ON YOUR PACKAGE** or the schedulers immediately are outdated. They are working to fix this but, this is the reality right now. You are responsible for knowing how many sessions you have booked and used. We do track it in your invoice, but ultimately you need to know what you have left. We will direct you to your invoices to check what has been tracked in your package.

We are here to be your biggest supporters, mentors, and cheerleaders! However, it is ultimately your responsibility to utilize services for which you have paid and scheduling in a timely manner. **Our appointment times are limited during busy seasons**, and availability is on a first-come, first-served basis.

- **Contracts**

- Completed contracts show up here for review.

- **Documents**

- Anything Green is completed- Anything Red is outstanding and needs completed
- Pricing information
- Choose Epic Packages completed forms
- Client Portal Guide- tells you everything on this document
- Introduction Documents filled out- must be requested and paid for

### **Profile tab includes:**

- Your email info
- Personal info
- Google Drive easy link

## **GOOGLE DRIVE SESSION NOTES**

- Video assistance on how to use Google Drive:  
<https://www.facebook.com/100005643346563/videos/1217772935528480/>

### **Session Notes**

- We will take notes during your session via Google Drive folder and Docs which will be shared with you after your first session. This document will serve as an ongoing tool for both you and us to keep track of things we discussed as well as assign homework and to-dos. It is our expectation that you use this document in between sessions. If you do not complete the homework and work between sessions, you will not improve quickly

and will likely need to utilize more coaching. These are organized by year. We request that you upload all paperwork to your drive. Best practice is to create a google account and the client can be invited to it. **THESE ARE NOT ON THE DUBSADO PORTAL, however, you can find the copied link in your “Company email in portal”**

## PRIVATE EPIC FACEBOOK GROUP

- Request to join- used for posts if wanted and people who have not yet paid for sessions can be added; [https://fb.me/g/p\\_kupkJTKCxSzyXvEn/93ylcFTB](https://fb.me/g/p_kupkJTKCxSzyXvEn/93ylcFTB)

## PUBLIC EPIC FACEBOOK PAGE

- Go like the page and follow to get updates for placements at pageants. <https://www.facebook.com/elevationconsulting>

## TEAM EPIC BAND

- Request to join:  
[https://band.us/n/a3a297Bbwe02N?mibextid=Zxz2cZ&fbclid=IwAR1A6AwBB6KWYa-7b2yiMwvZcO4Nxjlt9Qg6Mat-llpKXI\\_baTbZo6UBU54](https://band.us/n/a3a297Bbwe02N?mibextid=Zxz2cZ&fbclid=IwAR1A6AwBB6KWYa-7b2yiMwvZcO4Nxjlt9Qg6Mat-llpKXI_baTbZo6UBU54) Must be an active client in a 12 month look back meaning you have purchased coaching or have won a title and are not preparing for another pageant/not working with a different coach.

## ELEVATION WEBSITE

[www.elevationconsulting.com](http://www.elevationconsulting.com)

- **Home:** How to contact us and fill out a form to get information
- **Coaches and Consultants:** look at this for information on the coaches
- **Pageant Coaching:**
  - Our services outlined and all system logos we have worked with and photos

- Pageant Calendar- when pageants occur that we are tracking on and ones you can look up for additional information. Please research pageants before you ask us to tell you about all of them.
- Pageant Client Page: Reminders on all the client things also in this packet AND a quick link to the portal login. Gray button says Client Portal Login.
- **Professional Services:** listed out what we do for professional services