

Best Practices for Remote Coaching

During the coronavirus pandemic, we are focused on supporting participants in the Family Self-Sufficiency (FSS) programs that we run with housing providers to access resources that ensure their immediate health and financial needs can be met. As a result, we want to share some tools and resources Compass uses to conduct remote coaching with FSS participants in case they are helpful to your organization.

- **Connecting Virtually.** We use [RingCentral](#) for all of our online video meetings and appointments and to conduct all texting and phone calls. You can easily download an app on your cell phone to do texting and phone calls. Every call or text that comes to our main line or an individuals' work number can be answered. This also allows our staff to not have to use or give out their personal phone numbers, and they can set a "snooze" on the app so that if a client calls or texts at a late hour, you can silence your phone. Some other tools that are out there include [Zoom](#) and [Google Voice](#) and [Google Hangouts](#).
- **File Sharing and Data Tracking.** All of our file-sharing and data-tracking tools are web-based. We use [box.com](#) to store files, which is great because you can create secure file-sharing links to share COPs and other documents. You can also email links to individuals, like clients or other colleagues. All of our coaching tools and data tracking are all housed within [Salesforce.com](#).
- **Obtaining Signatures.** For things that need signatures, like COPs, interim withdrawal requests, or graduation documents, we use [DocuSign](#). Clients and our housing providers can securely sign documents from their email, and everyone gets an emailed copy of the final document with all signatures.
- **Sharing Information Securely.** For sharing information securely over email, we use [Virtru](#) to encrypt sensitive information. This way we can send clients their credit reports, or clients can share their pay stubs or other documents that may have personally identifying information, like SSNs. It's also easy for clients to snap a photo of something with their phones, like a pay stub or documentation for an interim withdrawal and share it securely with their coach.
- **Remote Outreach.** We are also able to do orientations and enrollment online and over the phone as well. We can walk the client through the program requirements, share a client video, answer questions, and have the client sign their enrollment documents with DocuSign.
- **Booking Appointments.** Lastly, all of our coaches are on [youcanbook.me](#) and we do all of our client appointment scheduling through that platform. Clients can see your availability and book a time.
- **Protecting Privacy.** We use privacy screens on our laptops and close out absolutely everything unnecessary before screen-sharing with a client. In normal times, we also try to make sure that we are in a quiet and private space and that the client is too. Now with everyone at home and with kids too, we focus on asking for permission. For example, letting the client know that your kids are at home and asking them if it is okay to still conduct the appointment, or asking the client if it's a good time to talk. Using headphones during video appointments is essential so that what the client says can be heard by only you.