**Client Communication**

Subject: Upcoming Change

Hello [Name],

Here at [Company Name], we're constantly looking for ways to provide an excellent experience for our clients. As you know, we've partnered with Principles and are using their assessment product to help [Brief Summary of the work you're doing with the Client].

Principles has since released a new experience and set of features to enable us, as coaches, to use their product in a more streamlined way to better fulfill your needs. As we pilot this new experience with the platform, I wanted to let you know ahead of time of a small change that will impact you . Once we migrate over to the new experience, you will no longer have access to the billing / administrative functionality that you have today. Going forward, this will be managed by myself and my team. We're hoping that this is a positive change, as we'd like to manage the administrative aspects of our engagement on your behalf as much as possible so that you can stay focused on the substance.

Please let me know if you have any questions / concerns about this and I'd be happy to discuss further.

Best,

---

**Internal Communication**

Hello,

I wanted to share some exciting news! As many of you know, we've been using PrinciplesUs - an assessment-based product designed to enhance team dynamics through better self awareness and understanding of others. Over time, we have found PrinciplesUs to be a great product to help facilitate more meaningful and effective engagements with our clients.

Principles has recently released a new experience and set of features specifically geared toward enabling coaches and consultants to use PrincipleUs in a more seamless & scalable way across clients. We're looking to pilot this new experience, but wanted to share some details and materials ahead of time.

**Ready to get started?**

- *If you do not already have an existing account*, you will receive an invitation email from support@principles.com to set up your account. Once you have signed in, you will have access to the Coaching Dashboard, where you will find a list of clients.

- *If you have an existing account*, next time you login to your Principles account, you will see the Coaching Dashboard and that we have migrated any existing clients into the dashboard view.

In either case, to access our internal team's account, simply click on the Avatar in the top right-hand corner of the dashboard and select "Switch Team."

**Are there any key things I should know?**

By default, *you will only be able to view and/or manage clients I have explicitly granted you permission to.* For these clients, you will have one of the following levels of access:

1) **Admin:** You will have the ability to manage billing & add seats for those particular clients from the Coaching Dashboard. You will also be able to access the Administration tab within the clients' accounts, where you can update general settings, invite users, and view assessment data.

2) **View-Only:** You will have access to view the client's data (assessments, groups, comparisons), but will not be able to manage billing nor access the Administration tab.

Below you will find a brief (~6 minute) Product Demo video, which gives a high level overview of the product and the features that you may have access to depending on your role. Attached you will also find a document that explains the features and current limitations of the application in more detail.
If you have any general questions or concerns, please reach out to me directly. If you have any specific product-related questions / issues, please reach out to support@principles.com.

Best,