

RILA RETAIL ADVISOR -- QUICK START GUIDE

What this Quick Start Guide Covers

This guide is for all of the RILA Retail Advisors, including the [Advisor for Environmental Compliance](#), [Advisor for Energy Management](#), and [Advisor for Diversity and Inclusion](#). Each Advisor follows the same process and uses the same instructions. This guide covers how to get started with the Advisor and how to complete an assessment.


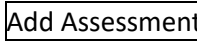
Step 1: Get registered

1. **Register your team** using this [form](#). You must identify an **Organization Manager**. This person will be the main Advisor contact and have administrative abilities such as starting assessments and managing team member roles. A good choice for the Organization Manager is the person who will be responsible for using the Advisor and filling out the assessment.
2. **Verify registration**. Each team member listed on the registration form will receive an email with information on completing the registration process. **Warning**--these emails often go to the junk folder. Send an email to advisor-help@rila.org if you do not receive the verification email.

Step 2: Start an Assessment

The Advisor is built around assessments that capture information about your company and your program. The assessment allows you to compare your program to your peers as well as the RILA leadership models.

To start an assessment, follow the steps below.

1. Log on using these links for the different Advisor modules: [Environmental Compliance](#); [Energy Management](#); [Diversity & Inclusion](#).
2. Select the blue “Add Assessment” button on the right side of the screen. **Only the Organization Manager can add an assessment or see the button.**
3. If this is the first assessment for your organization, you will be taken to the  screen. If there is an existing assessment, a popup box will ask if this is a “new” or “follow-up” assessment. Select “follow-up” to update an existing assessment, for example to track changes to your program against your goals.
4. Fill in information on the  screen.
5. Click the blue “Add” button on the lower right of the screen.
6. Your new assessment will now show up on the main screen.

Step 3: Add staff to an Assessment

Staff can be added to an assessment with different permissions such as editing the assessment or only viewing the results. Only the Organization Manager can add staff to an assessment.

1. Select an assessment and additional menu items will appear along the left side of the screen.
2. Select "Collaboration" from the left-side menu.
3. Click on "Select New Member" to see a dropdown list of team members. (These are the members originally added in the registration step. To add a new person, send an email to advisor-help@rila.org with the person's name and email.)
4. Select the new team member clicking on the blue box with the plus sign. Their name will appear in the line below and you can then select their role on the assessment.
5. Click the blue "Save" button on the lower right side of the screen.

Most menus on the left side of the screen only appear when an assessment is selected. Once an assessment is selected on the main screen, the menus will display, and actions will pertain to that specific assessment.

Step 4: Complete the Assessment

1. Select an assessment and the "Questions" menu will appear on the left side of the screen.
2. Click on "Questions" and the different sections of the assessment will display along with the percent of questions in that section that have been completed.
3. Answer each question, moving forward by clicking on the blue "Next" box on the bottom of the screen. You do not have to finish the assessment in a single session but can use the "Save Progress" blue button on the lower right side of the screen to save your progress.
4. Once the assessment is completed, you can use the "Guidance" menu on the left side to see recommendations generated by the system.
5. To download your assessment reports, select "Summary" on the left side menu and the "Reports" submenu. The "Generated Guidance" report lists the Guidance for the assessment. The "Questionnaire Responses" report lists all of your answers. Reports can be downloaded as a pdf by selecting the blue "Download" button.

Step 5: Review the Results and Benchmarking

There are several ways to review the results of your assessment.

1. Select an assessment from the main screen and then select "Leadership Model" under the Results & Targets Menu on the left side.
2. The first screen with the **Current Assessment** tab shows the results of your assessment in an aster plot. For more information, hover your cursor on the sections of the chart or click to go down a level. Alternatively, use the Category Key on the right to drill down into the different sections by clicking on each line.
3. For benchmarking, select the **Peer Benchmarks** tab above the aster plot. Use the "Peer Group" dropdown on the right side to select the peer group for comparison.

4. Drill down by clicking on the bars in the chart or on the lines in the Model Key (on the right side of the screen). Your results are the solid colors in the bars, the line and hash marked sections are the peer group results. Hover the cursor over the bar or the peer group line to see information on the results and peer groups.
5. To download the results, select “Summary” on the left side menu and the “Reports” submenu. The “Assessment Results” report shows your results and peer data on the leadership model matrix.

Step 6: Set Goals for Your Program

Users can set goals for their program for each element of the Leadership Model.

1. Select the Set/Review Targets tab from the Results & Targets page. The page will show your current assessment date and your goals will relate to that assessment. To set goals follow the steps below.
 - a. Set a date to reach your targets. This may be annual or semiannual.
 - b. The list below will show your current score for each element of the Leadership Model. Hover over the colored score circle to see name of the level and the score range. The blue circle with the “i” under the Score Guidance column also has the score levels. Note: you do not have to set a goal for each element.
 - c. Select the blue “Save” button on the lower right size of the screen.
 - d. Once saved, you can go back later and change or add additional targets to the assessment.