

Train the Trainer Guide

This is a manual to help staff to guide residents in accessing Cubigo for the first time.

Please be aware that other support material is available like in the online Help center, videos and flyers.

SUMMARY

Training residents requires some key steps and advance planning:

Communicate

- Inform residents that the platform is coming to the community in advance of the launch.
- Set a Community Go-Live Date

Trainings

- Set-up dedicated resident training sessions for the Go-Live week
- Limit the size of the groups to ensure you can assist those struggling
- Group users with the same device (iOS v. Android) for example
- If you are launching a "Full" platform, consider splitting the trainings:
 - Week 1: The Basics (Profile, Newsfeed, Activities)
 - Week 2: Making Requests
 - Week 3: Dining: Meal Ordering & Table Reservations

BEFORE THE TRAINING

We advise to **communicate** upfront with residents about Cubigo and **invite** them at least one week prior to the training. The ideal set-up for a training is 2 trainers (one lead trainer and one providing individual support) for a group between 10 and 20 residents. A training session will take at least 1 hour including Q&A. This could take longer depending on the number of residents. We advise to build up their engagement step by step, handling only a couple of services/topics per session.

Each community has its own priorities that define the key topics for resident training.

Practical organization

Staff organizes the training facilities:

- A training room (comfortable seats)
- A screen to project on
- A PC with Cubigo installed (a test resident profile, not a staff profile)
- If possible, also connect an iPad to a 2nd screen (or the same screen)
- The list with the credentials for all the residents attending
- Printed labels with their credentials for each resident
- The summary handout with some basic information about Cubigo and where to get more information

Residents need to bring the following items to the training

- All their fully charged devices (smartphone, tablet and laptop)
- Their iOS/Android credentials (to be able to download apps from the store)

General tips and tricks

- Create a comfortable setting for the training
- Be enthusiastic
- Start with a short introduction round (I'm, I work at)
- Show interest in their personal context! (Why are they interested to learn Cubigo?)
- Focus on the resident empowerment and independence!
- Be patient! Repeat if needed.
- Speak loud and clearly!
- Reassure them that they can't misuse Cubigo, everything they do on Cubigo is valuable.
- Curiosity is important: let them click/touch the cubes and discover what lies behind!

TRAINING

We have designed a script with **10 steps** for the first training

1. Downloading and Installing Cubigo

Make sure to get all the residents up and running before the training session starts. You can either extend the session to one hour and a half or ask them to come early to install the application. Provide the **Wi-Fi code** for residents that aren't online yet (personal post its or on big screen). The trainer(s) explains that Cubigo can be accessed on all their devices (smartphones, tablets and PC's). It is important to help residents with the instalment of the application on their devices **and to log-in before starting the actual training**. Foresee **at least 5 min per resident**. The staff members should be familiar with how to install Cubigo as explained in the staff hand-outs.

2. Introducing Cubigo

The trainer starts by explaining to the residents what the benefits of Cubigo are for the residents

- a. Cubigo is developed with seniors for seniors! User-friendliness is priority number 1. All end-user feedback is relevant and valuable for Cubigo.
- b. All the information is stored in **one place** and is easily accessible, no hassle with multiple passwords or with different applications. They are **no longer dependent** on the office opening hours. They can decide for themselves without informing staff about their activities. They'll be **informed** about what's going on every day! Some examples of the type of information they can find: the activities schedule, the dining menu, the resident and staff handbook, community news items, ...
- c. Cubigo allows to make **service requests** in a couple of clicks. At start this will be enabled for maintenance requests and excursions sign-ups.
- d. The smart notification system will help to **not miss** any activity or excursion and to be proactively updated with regards to the maintenance requests

Important to mention:

- The Cubigo platform evolves over time, adding new features on a monthly basis.
- Even residents that don't have access to Cubigo or only limited access will be impacted, through the digital signage system and through a more efficient handling of their request by staff members, that will all have access to Cubigo to help them in their day-to-day jobs.

Tips & tricks:

- Try to pinpoint some of their specific needs and match them with Cubigo's functionalities to create a clear added value. For example: consulting the menu without going to the restaurant, sign up for activities without calling the front desk, ...

3. The Homepage

Important is to be aware that some residents will see the iOS interface and others are seeing the Android/Web interface. These are a little bit different in design. Ideally the trainer is able to show both designs on the big screen and show each action in both environments. Start explaining the Homepage consisting of 3 major elements:

- a. The Cubes: these represent the different services (activities, dining, maintenance and general information)
- b. The personal schedule, if nothing is scheduled there is a message "nothing scheduled for today"
- c. The news, notifications and profile settings on the top bar (Web) or on the bottom bar (iOS)

4. Updating profile

The first step is to update their personal profile. Invite all residents to click on their profile picture in the right corner (web) or on the profile icon at the right bottom (iOS). Help residents to update their password (we need to avoid all residents keeping the default password). Resident should **note down their password** in their booklet/on their post-it if they are worried about forgetting it. To start they can all have the same password (e.g. name community).

Everyone using Cubigo via an application (not iOS) can adjust the letter font (bottom right panel).

Cubigo iOS app will adjust the letter font according to the device settings.

Persons who are experienced using apps, can activate the widgets for the home screen. In general, the residents use the home screen without widgets. This is a customizable setting per resident.

5. The News

Show the News Items on the homepage. Explain that this will be used by staff to make important communications, share information and promote events. Residents can comment on the news articles.

6. Introducing the different cubes

This is the core of the training, explaining the different cubes. Highlight and start with the cubes that are most important for your community.

- a. Start explaining the general **information cube**: this is a cube where resident can easily find all information regarding the community (resident handbooks, floorplans, ...). This information is kept up to date by staff members, if residents have suggestions for other types of information that could be kept there, these are more than welcome. Important is also to show them the staff and resident directory. Inform residents that the directories are only available for community members, strong emphasis on **privacy**.
- b. The next cube to explain is the **activities cube**:
 - i. On the cover page of the cube they can find general information about the activities department.

- ii. There are 2 buttons: one button to subscribe and a second button to view booked activities. This concept is repeated in every cube.
- iii. After clicking on the View button, it is important to show the different views: day/week/month view and the ability to easily go from one day to the other
- iv. Make sure to present the right calendar (Resident IL, Resident AL...). All roles have their own calendar.
- v. Click on one of the activities, residents can see: the time, location, activity type and other members attending
- vi. Explain the difference between:
 1. I'm going letting the other community members know that you are going to this activity (you will appear on the attendee list) and receive notifications when the activity is about to start or if there are changes
 2. I'm interested: you want to be notified in case there are changes, but you don't want to appear on the attendee list
 3. Sign-up: this activity/excursion requires mandatory sign-ups. If you are signing-up this means that you need to attend.
- vii. Explain that for recurrent activities they can sign-up for one single occurrence or for the whole series of activities
- viii. Have residents sign-up for one activity they are sure to attend in the coming weeks

If you have a "full platform", consider limiting the first session to this, and then having additional sessions for the other cubes.

- c. The **request cubes (Maintenance, Housekeeping, IT Support, Suggestions...)**: explain that this will make life easier for the different department. They'll have a good overview about things that are going wrong and need to be prepared. It helps them a lot in their daily work at the community. Teach them how to easily make a request filling in the form step by step. Show them where the resident can check the status of their request (via the notifications and via the personal schedule or via View button).
- d. The **dining & Table Reservation cube**: show them the dining offer via the View button or via the widget if activated for them (breakfast, lunch and dinner). Explain the daily menu if this is offered. Teach them how to click step by step to order a meal (if dining orders are available in your residence). They can add an extra comment/wish for the kitchen staff. Show them that this order is put in the personal schedule on the home screen. Show them how to book a table in the dining room.

7. Explain how to ask for Help

- a. Cubigo Help center: accessible by "Help" in the middle of the bottom of the page. For iOS users, click on Profile to go to the Help center. For every cube they'll find here questions and answers illustrated with pictures.
- b. Answer not found here? Send a mail to Cubigo asking for help. Show residents how to create a ticket in the support portal
- c. Cubigo e-mail support: support-community@cubigo.com
- d. Motivate the residents to join the Cubigo classes, organized by the community.

8. Next steps

Tell residents that there will be follow-up trainings (give a date or recurrence if possible) and more communications to come. Again, motivate them to exercise and experiment with Cubigo (no mistakes possible) and join the next Cubigo classes to learn more.

Ideas to boost engagement:

- Create exclusive content on the platform
- Identify resident ambassadors, being able to engage their peers
- Let residents have a say in the content: if they have nice pictures on their mobile phone from past events,... Let them be part of the platform.

9. Upcoming Features

Tell residents there'll be more features in the future. If residents have feature suggestions, these are strongly encouraged, and residents can send them to Cubigo via the support portal or communicate them via local staff.

10. Q&A

Some Frequently Asked questions from Residents:

Q: Does the app work on a Kindle?

A: You can use the web version and add it as a bookmark. We don't have an appl for Kindles.

Q: Can residents keep their default password?

A: Sure, but we advise to change it for privacy reasons.

Q: What should we do if we are a couple with the same email?

A: You can link one account to the email address and the other one to a dummy address

Q: Where can I find my Apple ID and how can I download the Cubigo App?

A: Apple ID: <https://support.apple.com/en-us/HT201354>. Navigate to the App Store/Play Store and type in "Cubigo" to find the **Cubigo Community Application**

Q: What to do if I forgot my password?

A: If you have a verified account (linked to your personal email address), you can reset your password via the "reset password" button. If you don't have a verified account, the admin of the platform can change your password.

Q: What about my privacy (because residents often see it like Facebook, and are worried about data...)

A: Cubigo App is a closed platform, only available for users within the residence. Data is never shared with anyone outside your own residence.

Q: What if we have product requests or feedback for new features?

A: Communicate it to the local staff & they will pass it to Cubigo. Local staff can also look for a temporary work-around.

VIRTUAL TRAININGS

- Installing the app, sending the cubigo invitation and sharing log-in credentials beforehand are essential as Team Members will not present during the session to help.
- Share the Zoom Meeting ID + Password with residents so they can join easily from their home and personal devices
- If you can project the meetings in a large room for residents that don't use Zoom (in a socially distanced way) this is also recommended
- Make the **paper documentation** available for residents to have at home.
- If possible, have a drop in hour once a week for residents that have questions
- post 1 Cubigo video a week on the newsfeed, to gradually increase their knowledge of the platform

AFTER THE TRAINING

It is crucial to have a quick follow-up with all the residents that have attended the training. Making sure that they start using Cubigo as what they have learnt will fade away if they don't engage with the platform.

Some steps to take after the training:

1. Gather feedback regarding the training session (was everything clear, what can be improved) - this can even be done at the end of the Q&A, if the session hasn't overrun.
2. Visit the residents with desktop PC's that would like help with installing the desktop app on their PC (recommended, better experience than the website)
3. Check-in a couple of days later if they have used Cubigo (at least one functionality)
4. Prepare a follow-up training to go more in depth into certain functionalities
 - a. Inserting the activities interests
 - b. Updating the profile information
 - c. Some general tips and tricks
5. The Cubigo team will provide weekly reporting to monitor engagement

***We wish you lots of success and joy to onboard and train your residents!
Cubigo team***