

USER
GUIDE

Parallel



TABLE OF CONTENTS

Parallel is a procedure management system that gives enterprises control of their procedures to maximize outcomes.

This document details Parallel's capabilities & functionality.



CREATING A PLAYBOOK



DESIGNING A PLAYBOOK



SHARING A PLAYBOOK



VIEWING A PLAYBOOK



CHANGING A PLAYBOOK



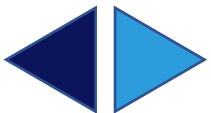
IN-APP DIRECT MESSAGING



USER ACCOUNTS



IN-APP HELP





CREATING A PLAYBOOK

A Parallel Playbook is a private website where your team can share & view procedures as well as communicate.

1

**YOUR NEW
PLAYBOOK**

2

**YOUR TEAM'S
NEW PLAYBOOK**

3

**CREATING MORE
PLAYBOOKS**



1

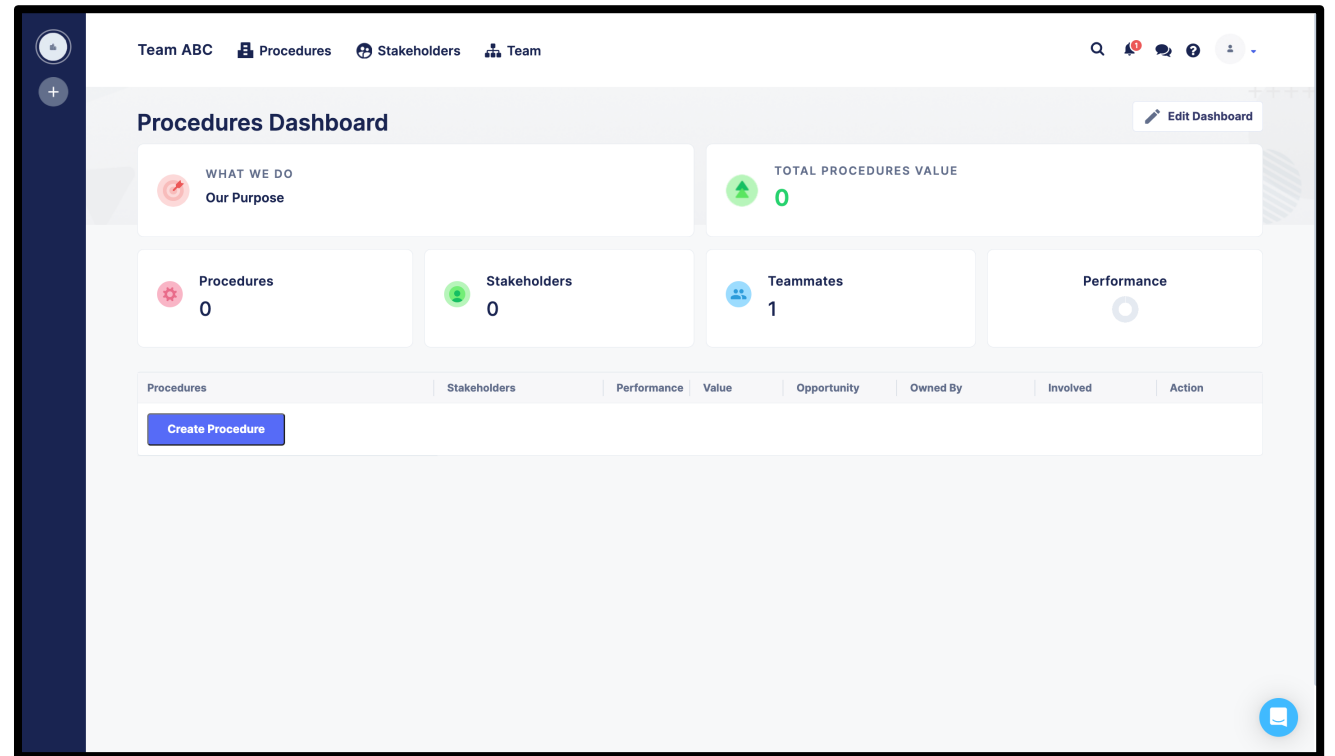
YOUR NEW PLAYBOOK

Contains:

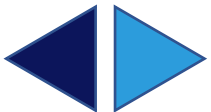
ZERO PROCEDURES

ZERO STAKEHOLDERS

1 TEAM MEMBER



NEW PLAYBOOK



YOUR TEAM'S NEW PLAYBOOK

The dark blue bar on the left is your playbook manager.

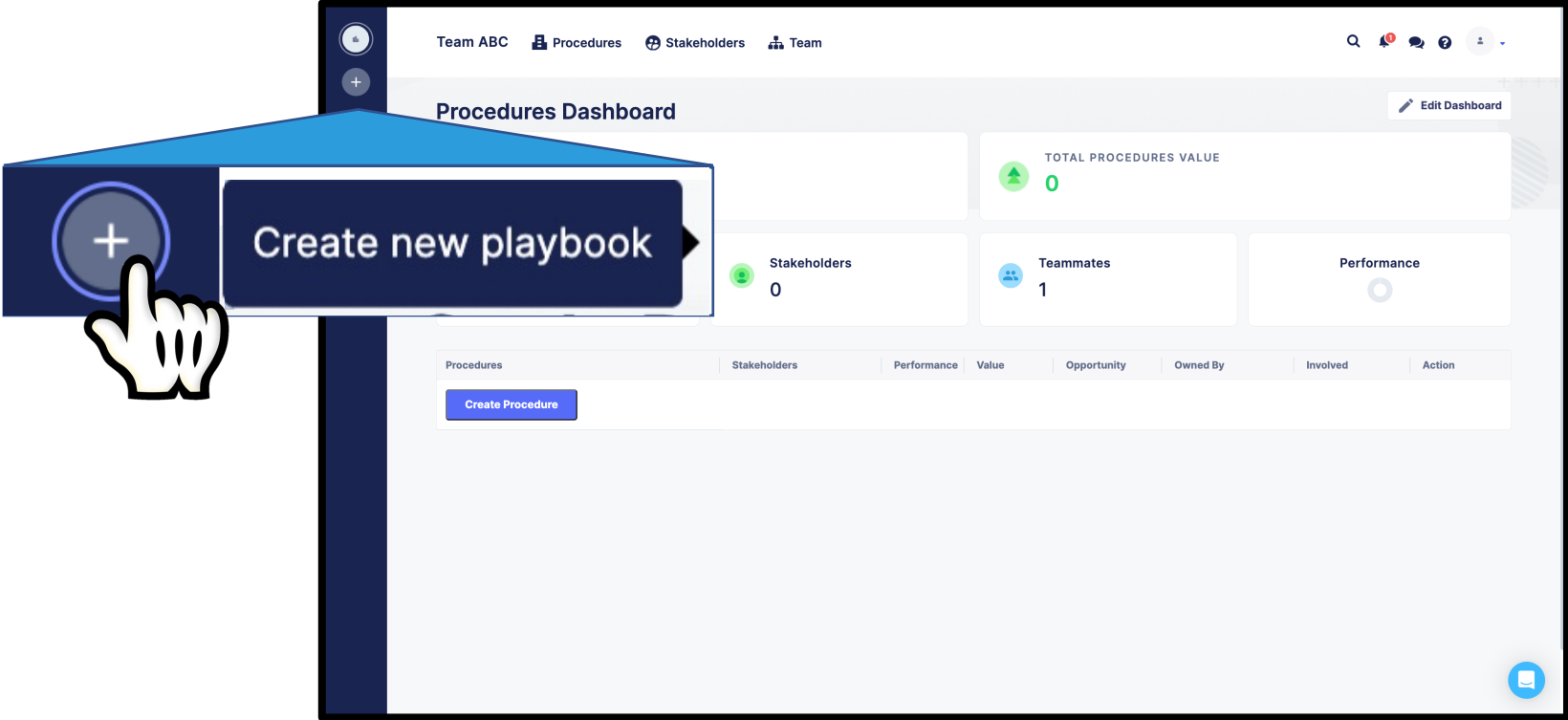
Rolling over the top circle reveals your playbook's name & purpose and provides a link to add your team's name and logo.

The image shows a user interface for creating a new playbook. On the left, a dark blue vertical bar contains a top circle with a building icon and a plus sign below it. A white hand cursor points to the top circle, which has a tooltip overlay. The tooltip is a dark blue rectangle with white text: "Our Company", "Our Purpose", and "Edit Playbook" in blue. Below the tooltip is a blue arrow pointing right. To the right of the tooltip is a white form for editing the playbook. The form has a header with a building icon and "Edit image" text. Below that is a "Playbook name" field with "Team ABC" and "8/25" on the right. There are "Go back" and "Save Change" buttons. Below the form is a "Duplicate Playbook" button and a "Delete this Playbook" button with a red trash icon. The main content area is a "Procedures Dashboard" for "Team ABC". It has a top navigation bar with "Procedures", "Stakeholders", and "Team" tabs. The dashboard has several cards: "WHAT WE DO Our Purpose" with a red target icon, "TOTAL PROCEDURES VALUE" with a green up arrow and "0", "Procedures" with a red gear icon and "0", "Stakeholders" with a green circle icon and "0", "Teammates" with a blue group icon and "1", and "Performance" with a blue circle icon. At the bottom, there is a "Create Procedure" button and a table with columns: Procedures, Stakeholders, Performance, Value, Opportunity, Owned By, Involved, and Action. A chat icon is in the bottom right corner.

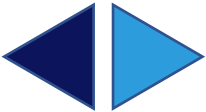
NEW PLAYBOOK

CREATING MORE PLAYBOOKS

Clicking the circle with the + creates new playbooks.



NEW PLAYBOOK





DESIGNING A PLAYBOOK

Parallel helps leaders share procedures, edit procedures & communicate change in a single motion.

1

CREATING
PROCEDURES

2

ADDING
PROCEDURE
SUB-GOALS

3

ADDING
SUB-GOAL
INFORMATION

4

ADDING
STAKEHOLDER
INFORMATION



CREATING PROCEDURES

On the *Procedures Dashboard*, users can create a procedure and have the option to catalog the procedure by:

THE STAKEHOLDER BEING SERVED

CURRENT PERFORMANCE

MONETARY VALUE

OPPORTUNITY

TEAM/INDIVIDUAL OWNER

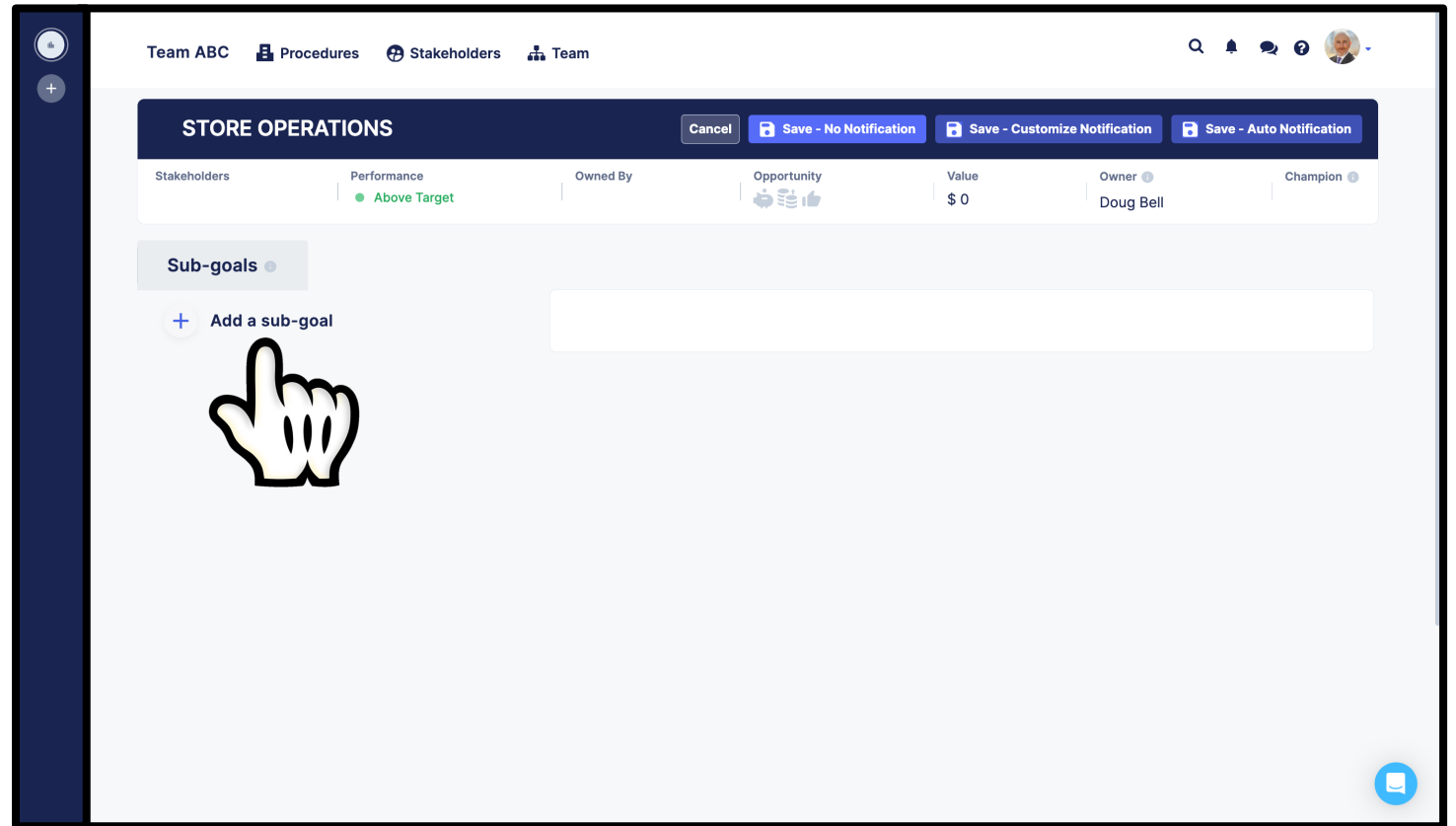
WHO ELSE IS INVOLVED

The screenshot displays the 'Procedures Dashboard' for 'Team ABC'. The dashboard includes several key metrics: 'WHAT WE DO Our Purpose', 'TOTAL PROCEDURES VALUE' (0), 'Procedures' (0), 'Stakeholders' (0), 'Teammates' (1), and 'Performance'. A 'Create Procedure' button is visible. Below the dashboard, a detailed view of the 'Create Procedure' form is shown, featuring fields for 'Goal name (required)', a dropdown menu for stakeholder selection, a radio button for performance, a text input for value, a social media icon, another dropdown menu, and a text input for 'Individual or Department name'. The form concludes with 'Cancel' and 'Add' buttons, with a hand cursor pointing to the 'Add' button.

ADDING PROCEDURE SUB-GOALS

On a *Procedure's page*, users can add procedure sub-goals that would need to be achieved for overall procedure success:

BY CLICKING *Add a sub-goal*



The screenshot displays the 'STORE OPERATIONS' procedure page. At the top, there are navigation tabs for 'Team ABC', 'Procedures', 'Stakeholders', and 'Team'. Below the tabs, there are three save options: 'Cancel', 'Save - No Notification', 'Save - Customize Notification', and 'Save - Auto Notification'. The main content area shows a table with columns for 'Stakeholders', 'Performance' (with a green dot and 'Above Target' text), 'Owned By', 'Opportunity' (with a thumbs up icon), 'Value' (\$ 0), 'Owner' (Doug Bell), and 'Champion'. Below the table, there is a 'Sub-goals' section with a '+ Add a sub-goal' button. A hand cursor is pointing at this button. A search bar is visible in the top right corner, and a user profile icon is in the top right corner.

THE 'STORE OPERATIONS' PROCEDURE

ADDING SUB-GOAL INFORMATION

After adding a sub-goal, users have the option to add sub-goal information:

SUB-GOAL TEAM OWNER →

SUB-GOAL STATUS →

SUB-GOAL OWNER →

SUB-GOAL TEXT →

**SUB-GOAL RESOURCES
(FILES & LINKS)** →

SUB-GOAL MOMENTS OF TRUTH →

SUB-GOAL

GENERAL & DAILY OPERATIONS

DEPARTMENT OWNER | SUB-GOAL STATUS | OWNER

+ Add Department | ● Not set yet > | + Add Owner

Info

Type your title
Type your text

Resources

+ ADD

Moments of truth

A moment of truth is simply any interaction with the customer.

Moment of truth	What to improve?	Opportunities
+ Add Moment of Truth		

Delete this sub-goal

ADDING STAKEHOLDER INFORMATION

On a *Stakeholder Page*, users have the option to share information about the stakeholder:

STAKEHOLDER STRATEGY

BY CLICKING *Edit*

A STAKEHOLDER PERSONA

BY CLICKING *Create Persona*

The screenshot shows a stakeholder profile for 'OUR CUSTOMER' (External). The profile includes a '3 PROCEDURES' section and a 'PERFORMANCE' section. A hand cursor points to the 'Edit' button in the top right corner. Below the profile is an 'EXECUTION' table with columns for Procedures, Performance, Value, Opportunity, Owned By, and Involved. The table lists 'CUSTOMER SERVICE' and 'CUSTOMER SUPPORT' with associated performance indicators and values. A hand cursor points to the 'Create Persona' button in the top right corner of the 'PERSONA' section. A blue arrow points from the text 'STAKEHOLDER STRATEGY BY CLICKING Edit' to the 'Edit' button. Another blue arrow points from the text 'A STAKEHOLDER PERSONA BY CLICKING Create Persona' to the 'Create Persona' button.

EXECUTION	Procedures	Performance	Value	Opportunity	Owned By	Involved
CUSTOMER SERVICE		●	\$ 0			Delegate >
CUSTOMER SUPPORT		●	\$ 0			Delegate >

A STAKEHOLDER PAGE





SHARING A PLAYBOOK

By inviting your team into your playbook, you can always keep everyone in-sync.

1

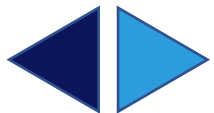
**INVITING
YOUR TEAM**

2

**GRANTING
PERMISSIONS**

3

**ASSIGNING
ROLES**



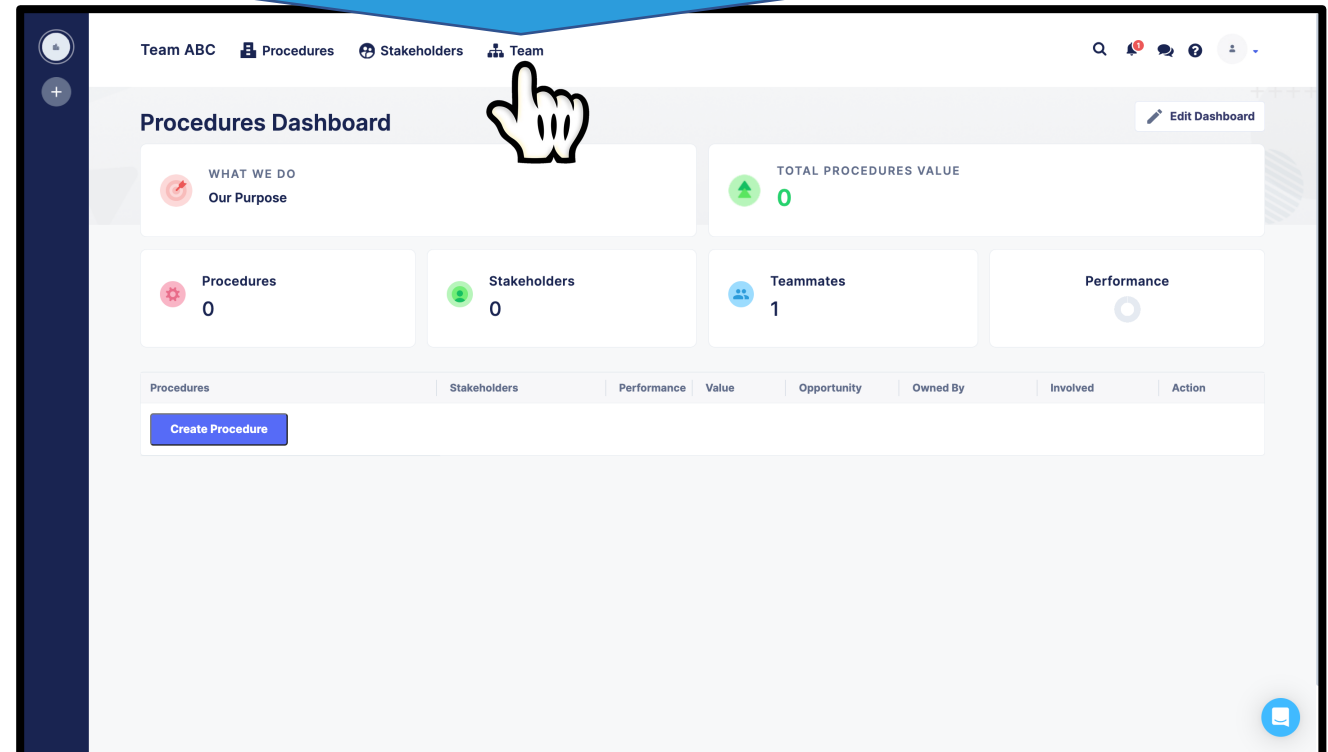
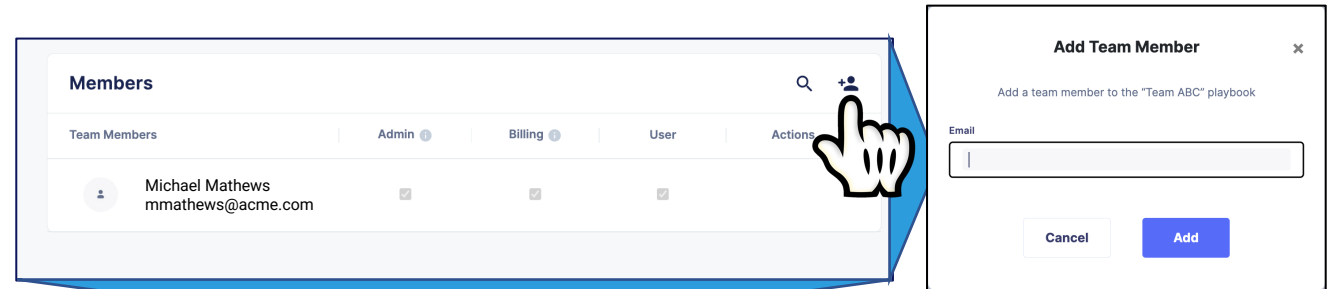
INVITING YOUR TEAM

Clicking on **Team** opens the **Team** page where new members can be added by:

CLICKING ON THE **Add Member** icon.

TYPING *an email address*.

CLICKING the **Add** button.



GRANTING PERMISSIONS

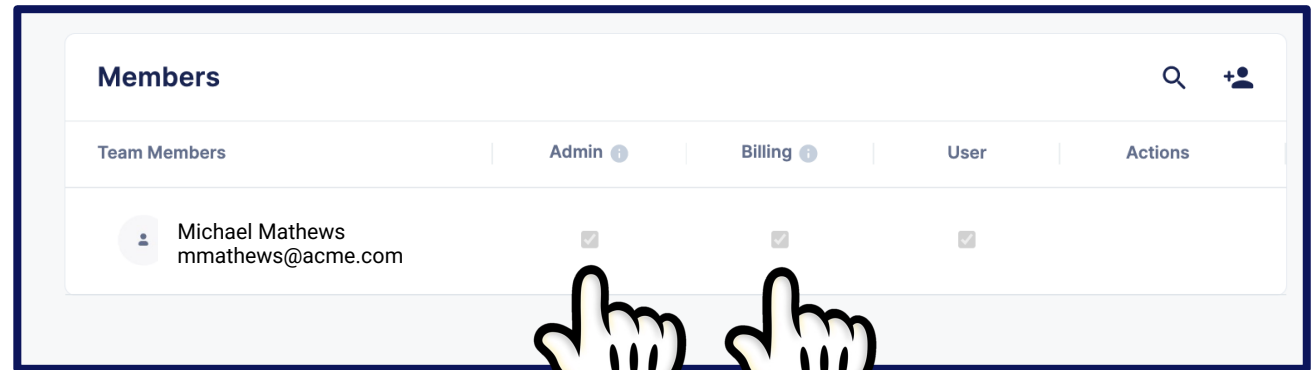
On the **Team** page, the following playbook permissions can be granted:

ADMIN

HAS FULL PLAYBOOK CONTROL. THEY CAN EDIT EVERYTHING, ADD/REMOVE USERS, AND MANAGE USER PERMISSIONS & ROLES.

BILLING

HAS FULL ACCESS TO BILLING. THEY CAN ADD AND UPDATE PAYMENT & SUBSCRIPTION TYPES. THEY ALSO HAVE ACCESS TO VIEW INVOICES AND SEE PAYMENT HISTORY.



TEAM PAGE



ASSIGNING ROLES

For each procedure, leaders can be assigned roles:

OWNERS & CHAMPIONS

WHO ARE RESPONSIBLE FOR THE SUCCESS OF THE PROCEDURE

AND

EDITORS

WHO CAN EDIT THE PROCEDURE

The screenshot displays a user interface for assigning roles to team members for a specific procedure. The top navigation bar includes 'Team ABC', 'Procedures', 'Stakeholders', and 'Team'. The main content area is titled 'Team' and features a 'User roles' menu item highlighted by a hand cursor. Below this, a table titled 'STORE OPERATIONS' lists four team members and their assigned roles.

Users	Owner	Champion	Editor	Contributor
Maxwell Morton	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gwen Garrett	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mason Woods	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Erika Morgan	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Below the table, there are sections for 'CUSTOMER SERVICE' and 'CUSTOMER SUPPORT', each with a search icon and a right-pointing arrow.

USER ROLES FOR THE 'STORE OPERATIONS' PROCEDURE



VIEWING A PLAYBOOK

Team Members can view their team's procedures by name, stakeholder, or search making them easy to find when they are needed.

1

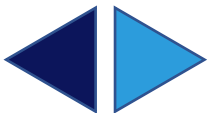
**YOUR
PROCEDURES
DASHBOARD**

2

**YOUR
STAKEHOLDERS
DASHBOARD**

3

SEARCH



1

YOUR PROCEDURES DASHBOARD

Your *Procedures Dashboard* is your landing page when logging into Parallel.

Clicking on any procedure on your *Procedures Dashboard* takes you to that procedure's page.

The screenshot displays the 'STORE OPERATIONS' dashboard. At the top, it shows 'OUR CUSTOMER' with a performance status of 'Above Target' and a value of '\$ 0'. The dashboard is divided into several sections:

- Sub-goals:** A list of sub-goals including 'GENERAL & DAILY OPERATIONS', 'STORE HOURS', 'ATTENDANCE', 'CUSTOMER SERVICE', 'INVENTORY MANAGEMENT', 'LOSS PREVENTION', 'STORE MAINTENANCE', and 'STORE POLICIES'.
- Info:** A section with three cards: 'Store Atmosphere' (dark blue), 'Cash Handling' (green), and 'Prevent Shoplifting/Safety and Security' (orange). Each card contains a brief description of the goal.
- Resources:** A row of five small images representing various store operations.

Below the dashboard, a table lists various procedures with their performance status, value, and owner:

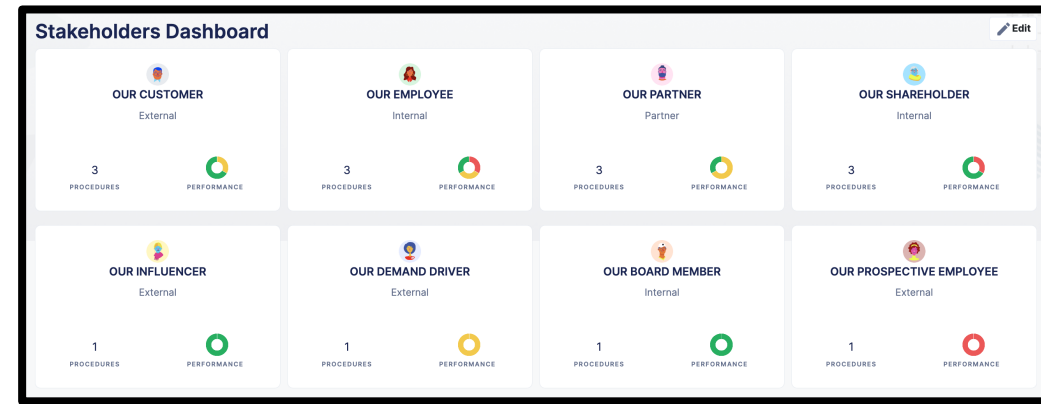
Procedure	Customers	Performance	Value	Opportunity	Owned By	Involved	Action
STORE OPERATIONS	OUR CUSTOMER	Green	\$ 0	👤👥👍	-	-	View >
CUSTOMER SERVICE	OUR CUSTOMER	Yellow	\$ 0	👤👥👍	-	-	View >
ONBOARDING	OUR CUSTOMER	Green	\$ 0	👤👥👍	-	-	View >
TRAINING	OUR EMPLOYEE	Red	\$ 0	👤👥👍	-	-	View >
BENEFITS	OUR EMPLOYEE	Yellow	\$ 0	👤👥👍	-	-	View >
PARTNERSHIP GOAL #1	OUR EMPLOYEE	Green	\$ 0	👤👥👍	-	-	View >
	OUR PARTNER	Green	\$ 0	👤👥👍	-	-	View >



2

YOUR STAKEHOLDERS DASHBOARD

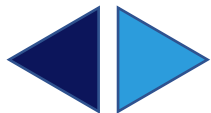
Clicking on *Stakeholders* opens your *Stakeholders Dashboard* where you can find & view the procedures you need by stakeholder.



The Procedures Dashboard for Team ABC shows the following overview:

- WHAT WE DO: Our Purpose
- TOTAL GOALS VALUE: \$0
- Procedures: 16
- Customers: 8
- Teammates: 2
- Performance: (Green)

Procedures	Customers	Performance	Value	Opportunity	Owned By	Involved	Action
STORE OPERATIONS	OUR CUSTOMER	Green	\$ 0	👤👍👎	-	-	View >
CUSTOMER SERVICE	OUR CUSTOMER	Yellow	\$ 0	👤👍👎	-	-	View >
CUSTOMER SUPPORT	OUR CUSTOMER	Green	\$ 0	👤👍👎	-	-	View >
ONBOARDING	OUR EMPLOYEE	Red	\$ 0	👤👍👎	-	-	View >
TRAINING	OUR EMPLOYEE	Yellow	\$ 0	👤👍👎	-	-	View >
BENEFITS	OUR EMPLOYEE	Green	\$ 0	👤👍👎	-	-	View >
PARTNERSHIP GOAL #1	OUR PARTNER	Green	\$ 0	👤👍👎	-	-	View >



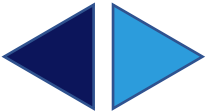
SEARCH

Team members can search by procedure name or procedure sub-goal to find & view the information they need.



The screenshot shows a 'Procedures Dashboard' for 'Team ABC'. At the top, there are navigation tabs for 'Procedures', 'Stakeholders', and 'Team'. A search bar is visible in the top right corner. The dashboard includes several summary cards: 'WHAT WE DO Our Purpose', 'TOTAL GOALS VALUE \$0', 'Procedures 16', 'Customers 8', 'Teammates 2', and 'Performance'. Below these is a table with columns for Procedures, Customers, Performance, Value, Opportunity, Owned By, Involved, and Action.

Procedures	Customers	Performance	Value	Opportunity	Owned By	Involved	Action
STORE OPERATIONS	OUR CUSTOMER	Green	\$ 0	👤👥👍	-	-	View >
CUSTOMER SERVICE	OUR CUSTOMER	Yellow	\$ 0	👤👥👍	-	-	View >
CUSTOMER SUPPORT	OUR CUSTOMER	Green	\$ 0	👤👥👍	-	-	View >
ONBOARDING	OUR EMPLOYEE	Red	\$ 0	👤👥👍	-	-	View >
TRAINING	OUR EMPLOYEE	Yellow	\$ 0	👤👥👍	-	-	View >
BENEFITS	OUR EMPLOYEE	Green	\$ 0	👤👥👍	-	-	View >
PARTNERSHIP GOAL #1	OUR PARTNER	Green	\$ 0	👤👥👍	-	-	View >





CHANGING A PLAYBOOK

Each user receives notifications of the procedure changes that are important & relevant to them in their roles making it incredibly easy to stay in-sync.

1

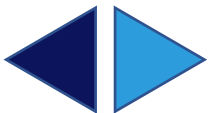
**CREATING
NOTIFICATIONS
OF CHANGES**

2

**IN-APP
NOTIFICATIONS**

3

**DAILY 'CHANGE
NEWS'**



CREATING NOTIFICATIONS OF CHANGES

As they save changes to procedures or stakeholders, users have the **option** of:

NO NOTIFICATION

FOR CHANGES THAT DON'T REQUIRE COMMUNICATION

A CUSTOM NOTIFICATION

TELLING THE TEAM EXACTLY WHAT THEY NEED TO KNOW AND POINTING THEM TO THE CHANGE MADE

AN AUTO NOTIFICATION

THE SYSTEM NOTIFIES THE TEAM AND POINTS THEM TO THE CHANGE MADE

 **Save - No Notification**

 **Save - Customize Notification**





 **Save - Auto Notification**

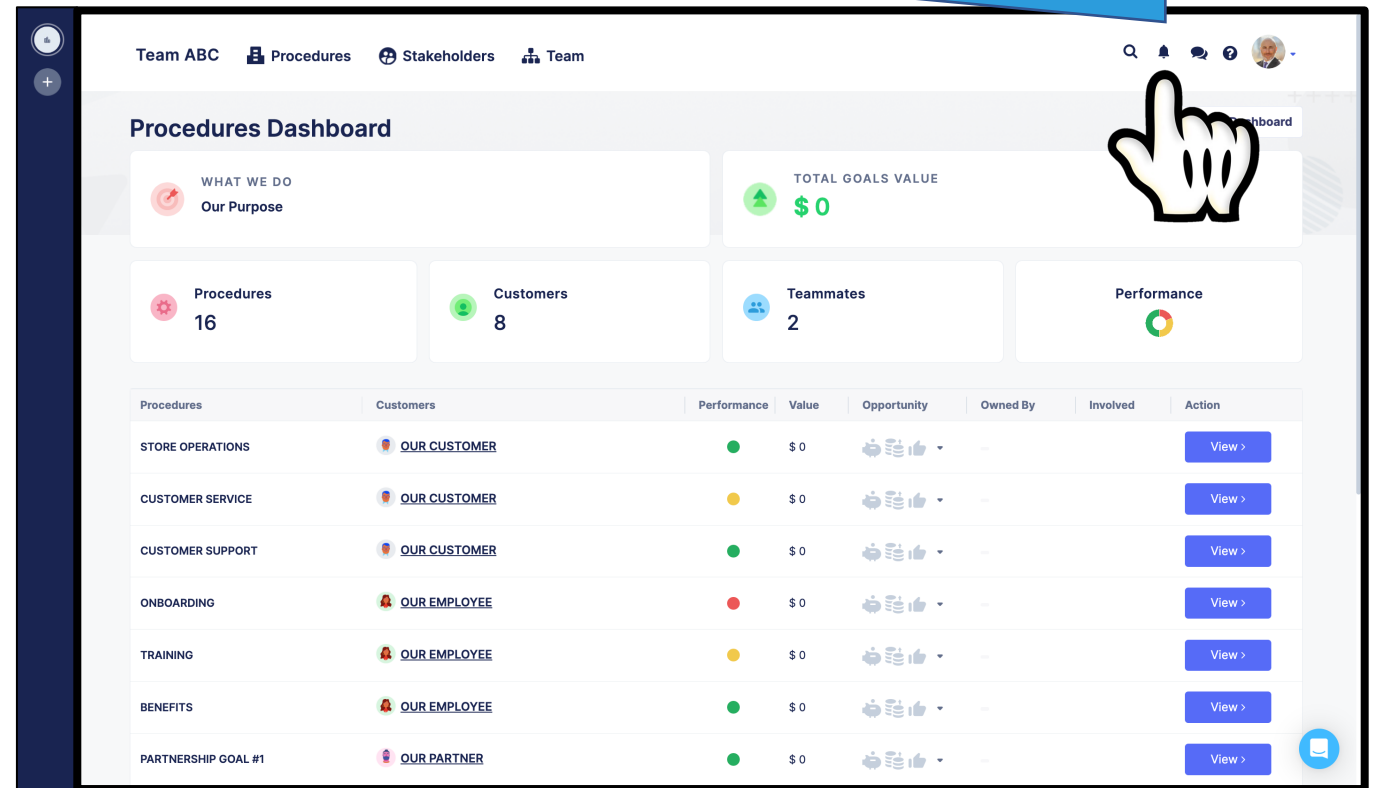


IN-APP NOTIFICATIONS

When in Parallel, users receive notifications of changes as they are communicated in real time.

Notifications Mark all as read

- 
Maxwell Morton added a video illustrating our new & improved process for closing a store
14 hours ago
- 
Gwen Garrett updated new holiday hours effective immediately
14 hours ago
- 
Mason Woods updated our loss prevention process to help us lose less & make our lives easier.
14 hours ago
- 
Erika Morgan updated our mask policy to give us as much freedom as possible while staying safe for those who need it most
14 hours ago



The screenshot shows a mobile application interface for 'Team ABC'. The top navigation bar includes 'Procedures', 'Stakeholders', and 'Team'. The main content area is titled 'Procedures Dashboard' and features several key metrics:

- WHAT WE DO**: Our Purpose
- TOTAL GOALS VALUE**: \$0
- Procedures**: 16
- Customers**: 8
- Teammates**: 2
- Performance**: (represented by a progress indicator)

Below these metrics is a table listing various procedures with their associated customer or employee status, performance indicators, and values.

Procedures	Customers	Performance	Value	Opportunity	Owned By	Involved	Action
STORE OPERATIONS	OUR CUSTOMER	Green	\$ 0	Icons	-	-	View >
CUSTOMER SERVICE	OUR CUSTOMER	Yellow	\$ 0	Icons	-	-	View >
CUSTOMER SUPPORT	OUR CUSTOMER	Green	\$ 0	Icons	-	-	View >
ONBOARDING	OUR EMPLOYEE	Red	\$ 0	Icons	-	-	View >
TRAINING	OUR EMPLOYEE	Yellow	\$ 0	Icons	-	-	View >
BENEFITS	OUR EMPLOYEE	Green	\$ 0	Icons	-	-	View >
PARTNERSHIP GOAL #1	OUR PARTNER	Green	\$ 0	Icons	-	-	View >



DAILY 'CHANGE NEWS'

Outside of Parallel. Users receive a daily **CHANGE NEWS** email with an aggregated list of change communications.

Each communication links to the detailed procedure change made in Parallel.





The screenshot shows an email header with the Parallel logo and the title 'CHANGE NEWS' dated Tuesday, December 06, 2022. Below the header is a list of four change communications, each with a circular profile picture, the user's name, a description of the change, and the time since it was posted. A hand cursor is pointing at the first item.

Parallel

CHANGE NEWS

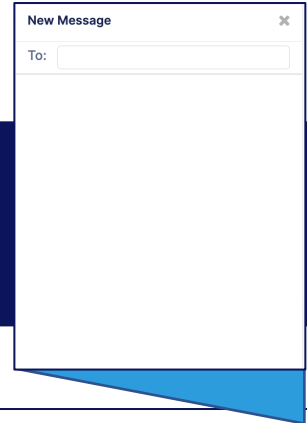
Tuesday, December 06, 2022

-  **Maxwell Morton** added a video illustrating our new & improved process for closing a store
2 hours ago
-  **Gwen Garrett** updated new holiday hours effective immediately
3 hours ago
-  **Mason Woods** updated our loss prevention process to help us lose less & make our lives easier.
5 hours ago
-  **Erika Morgan** updated our mask policy to give us as much freedom as possible while staying safe for those who need it most
9 hours ago





IN-APP DIRECT MESSAGING



Parallel users can message each other directly inside the app.

Our Team Goals Customers Team

Goals Dashboard

WHAT WE DO
Our Purpose

TOTAL GOALS VALUE
\$0

Goals 16 +16 this week

Customers 8 +8 this week

Teammates 2 +1 this week

Performance

Goals	Customers	Performance	Value	Opportunity	Owned By	Involved	Action
STORE OPERATIONS	OUR CUSTOMER	Green	\$0	👍👎👏	-	-	View >
CUSTOMER SERVICE	OUR CUSTOMER	Yellow	\$0	👍👎👏	-	-	Delegate >
CUSTOMER SUPPORT	OUR CUSTOMER	Green	\$0	👍👎👏	-	-	Delegate >
ONBOARDING	OUR EMPLOYEE	Red	\$0	👍👎👏	-	-	Delegate >
TRAINING	OUR EMPLOYEE	Yellow	\$0	👍👎👏	-	-	Delegate >
BENEFITS	OUR EMPLOYEE	Green	\$0	👍👎👏	-	-	Delegate >
PARTNERSHIP GOAL #1	OUR PARTNER	Green	\$0	👍👎👏	-	-	Delegate >
PARTNERSHIP GOAL #2	OUR PARTNER	Yellow	\$0	👍👎👏	-	-	Delegate >
PARTNERSHIP GOAL #3	OUR PARTNER	Yellow	\$0	👍👎👏	-	-	Delegate >





USER ACCOUNTS

Parallel users can manage their accounts with ease.

1

PROFILE & PASSWORD

2

USER SETTINGS



1

PROFILE & PASSWORD

Change your profile or update your password by clicking on ***the personal icon*** in the top right corner and then by clicking ***My account***.

My account

Account

My account

User Settings

Upload photo

JPG OR PNG FORMAT, MAXIMUM 500KB

Profile

First name

Doug

Last name

Your email

negaxaquf@getairmail.com

Business name

Password

Current password

New password

Confirm new password

Update

?

My account

Sign out

Our Team Procedures Customers Team

Procedures Dashboard

WHAT WE DO

Our Purpose

TOTAL GOALS VALUE

\$ 0

Procedures 16

Customers 8

Teammates 2

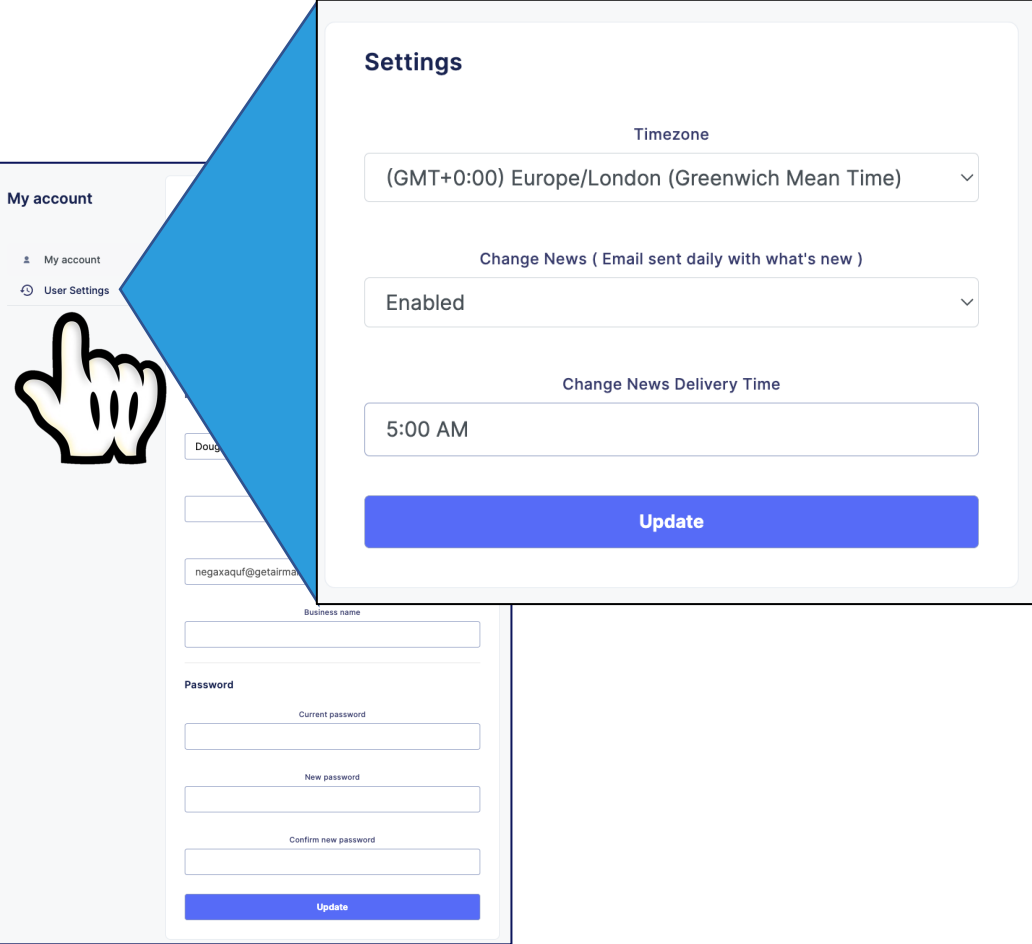
Performance

Procedures	Customers	Performance	Value	Opportunity	Owned By	Involved	Action
STORE OPERATIONS	OUR CUSTOMER	●	\$ 0	👍👎	-		View
CUSTOMER SERVICE	OUR CUSTOMER	●	\$ 0	👍👎	-		View
CUSTOMER SUPPORT	OUR CUSTOMER	●	\$ 0	👍👎	-		View
ONBOARDING	OUR EMPLOYEE	●	\$ 0	👍👎	-		View
TRAINING	OUR EMPLOYEE	●	\$ 0	👍👎	-		View
BENEFITS	OUR EMPLOYEE	●	\$ 0	👍👎	-		View
PARTNERSHIP GOAL #1	OUR PARTNER	●	\$ 0	👍👎	-		View



USER SETTINGS

Update your time zone & schedule the delivery of your daily CHANGE NEWS email by clicking on **User Settings** from the **My account** screen.





IN-APP HELP

Users have direct access to the Parallel Team by clicking the the bright blue button that always appears in the bottom right corner of the screen.

The screenshot shows a dashboard with a dark blue sidebar on the left containing a home icon and a plus sign. The main content area is titled "Goals Dashboard" and includes a navigation bar with "Our Team", "Goals", "Customers", and "Team". Below this, there are two summary cards: "Goals" with a value of 16 and a "+16 this week" trend, and "Customers" with a value of 8 and a "+8 this week" trend. A table below lists various categories with associated roles and status indicators:

Goals	Customers	Perform
STORE OPERATIONS	OUR CUSTOMER	
CUSTOMER SERVICE	OUR CUSTOMER	
CUSTOMER SUPPORT	OUR CUSTOMER	
ONBOARDING	OUR EMPLOYEE	
TRAINING	OUR EMPLOYEE	
BENEFITS	OUR EMPLOYEE	
PARTNERSHIP GOAL #1	OUR PARTNER	\$ 0
PARTNERSHIP GOAL #2	OUR PARTNER	\$ 0
PARTNERSHIP GOAL #3	OUR PARTNER	\$ 0

Overlaid on the right is a chat window titled "Parallel" with the message: "We help teams work in parallel to achieve big goals quickly!". A user profile picture and the text "We'll reply as soon as we can" are visible. At the bottom of the chat window, it says "This chat is powered by Intercom" and includes a "Send a message..." input field with "GIF", "Smiley", and "Attachment" icons. A blue "Delegate" button is located at the bottom right of the chat window, next to a floating chat icon.

