HOW TO ACCESS THE DECISION MAKING FRAMEWORK THROUGH GOOGLE DOCS

Before you get started, you will need a Google Drive Account. This account is free and provided by Google. Sign up here to create your free Google Account.

If you already have a Gmail account, you automatically have access to Google Drive. You can access your drive from your Gmail Inbox.
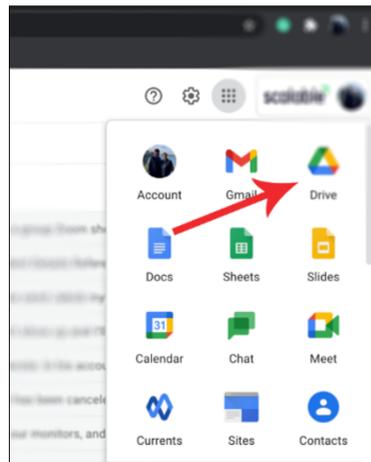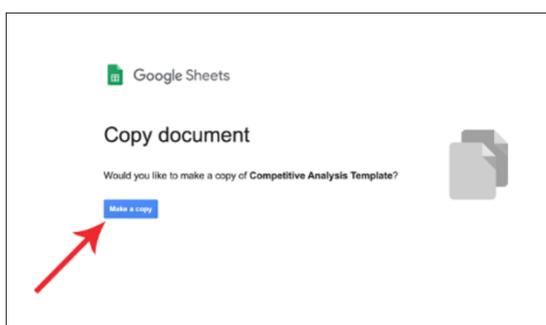

Figure 1 - Google Drive Icon

Figure 2- Make a Copy

To get your copy of The Decision Making Framework click here.

Once you click the link, you should see the following screen.

Click the blue "Make a copy" button and a copy of the Google Doc/Sheet will automatically be created in your drive.

After you click the button, a Google Doc/Sheet should open up in a new tab. At the top you should see the title of Document preceded with the word "Copy." This indicates that the copy process worked and is in your drive.
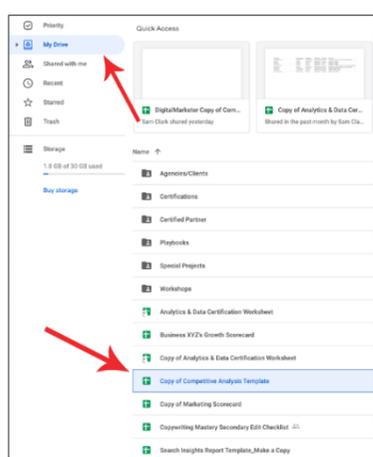

Figure 3- Copy of [DOCUMENT TITLE]

Figure 4 - File Location on Main Drive Page

From here this officially becomes your document and will stay in your Google Drive as long as you have your Google account or delete the document from your drive. You will find the Doc/Sheet listed on the main page of your drive, usually after any folders, in alphabetical order.

From here you can rename the Doc/Sheet to anything you choose by right clicking on the Doc/Sheet and selecting "rename." After you rename the document, we recommend adding it to a Google Folder so you can readily find it.
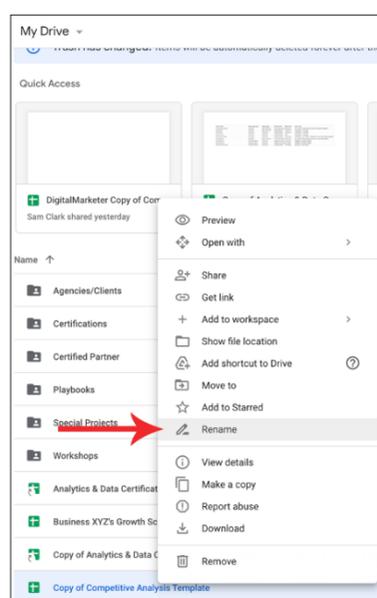

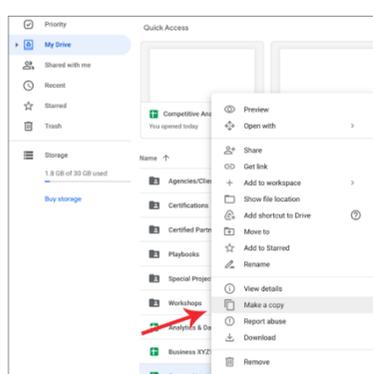Figure 5 - Rename Your Doc/Sheet

Figure 6 - Make A Copy

Our last thing we would like to recommend is that if you are using this tool multiple times, for instance if you will use a tool with each of your individual clients – that you make a copy as a "template" version. To do this, right click on the Doc/Sheet and select "Make a copy."

NOTE: This is different than the copy you created initially. These copies will automatically live in your drive!

Then when you rename the Doc/Sheet add [TEMPLATE] in front of the document name. For each new client, simply right click and select "Make a copy" from this template and you'll never have to worry about clearing out data each time you need to make a copy. This way you'll always start each new client with a clean template of the tool.
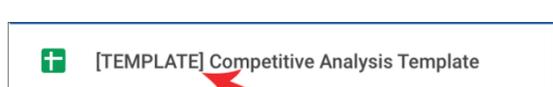

Figure 7 - [TEMPLATE] Rename

We hope you enjoy this tool. If you have any issues with your tool or can't access the original via the link above, please reach out to your Account Manager and we will get you a new link.

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