Team Dashboard Guide

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What is it?

Team Dashboard gives team leaders and the entire team a simple way to learn about their strengths, build stronger relationships, and improve team dynamics. Each team member sets up their own profile, opening a door to explore our unique strengths and communication preferences. Team Dashboard personalizes the development experience by driving relevant insights to each participant. When used in a team context, Team Dashboard creates a team profile so that everyone can learn to best work with every member.

Why does it work?

The most successful teams have people with diverse perspectives and strengths. However, miscommunication, conflict, and problem-relationships can get in the way of getting the best results. Team Dashboard offers a proven approach that starts with building self-awareness and progresses to highly personalized insights and action tips for each team member. Team members learn different perspectives and how to adapt their style based on the situation or people involved. Team dynamics and key success attributes come into focus, ensuring that small issues don't become big problems.

How does it work?

Each invited team member starts with an interactive Discovery where they will learn about important concepts such as interaction, listening, and personality styles. Once Discovery has been completed, participants access their own Personal Insights report with detailed results, points to remember, and suggestions for development.

Each member will also be prompted to join the team. To join, they must agree to share their profile information which contains information about their strengths and personality preferences. Once on a team, members who opt in receive tailored tips, called Insights, for working with other team members based on a unique combination of their profiles.

The most impactful Insights can be set as Action Items, complete with email reminders. To learn and affect behavior change, it is important to be prompted and accountable. Team Dashboard does just that.

And to assure that your team is working on the most important areas for improvement, we created TeamPulse. TeamPulse is an integrated micro-survey tool that will benchmark, track, and report progress over time. It is allows team members to anonymously share their perceptions on how the team is doing in a safe environment.

Team leaders integrate Team Dashboard into daily work to accelerate high performance. There are countless ways to use Team Dashboard creatively:

- Review TeamPulse results monthly with your team and discuss opportunities to improve overall team performance.
- Collaborate with team members one-on-one, using their personalized library of action tips to review progress and plan for the future.
- Refer team members to review Relationship and Team Insights to introduce another perspective or suggestions for working more effectively with someone on the team.
- Weave team activities and discussions into your team building efforts. We have a number of short 5-10 minute activities that you can easily add to your in-person or virtual team meetings.

- And, we have all of the materials you will need to conduct a [1-hour Interaction Styles workshop](#) on your own. Or, contact us at workshop@teamdashboard.com to schedule a deeper dive or a custom workshop using one of our certified facilitators.

How do you do it?

Step 1: **Create Your Account:** Sign up at https://www.teamdashboard.com. You will receive an email with instructions to confirm your account, set your password, and upload your picture.

Step 2: **Set Up a Team and Invite Your Teammates:** Name your team and enter emails for your team. Each member will receive an email to set up their account and join your team.

Step 3: **Complete Discovery:** Completing Discovery will set your profile and unlock your Personal Insights report. As a team administrator, you can also remind others to complete their Discovery.

Step 4: **Team Workshop (Optional):** Use our [workshop materials](#) to facilitate a team building workshop on your own. Or, contact us at workshop@teamdashboard.com to have a certified facilitator work with you and your team.

Step 5: **View Insights:** View perspectives and action tips to adapt your behavior to get the most out of your relationships and build stronger teams. Explore personalized recommendations in Development Insights to improve in areas most crucial to your success.

Step 6: **Develop Your Strategy:** Create Action Items and email reminders to keep action tips top-of-mind.

Step 7: **Periodic TeamPulse Review (Optional):** View weekly or monthly TeamPulse results. Use our [step-by-step guide](#) to facilitate regular discussions and build momentum for continuous improvement.

What else can you do?

Team Workshops: Following your team's enrollment to Team Dashboard, facilitate a team discussion (or ask one of your team members to lead the discussion) using our [workshop materials](#). If you want to take it up a level, contact a certified facilitator at workshop@teamdashboard.com to lead a discussion.

TeamPulse: TeamPulse is included with Team Dashboard, and we urge you to use this highly impactful capability to measure, manage, and promote your team's growth. Our basic subscription level includes 5 pre-selected survey questions, with an email reminder sent to team members on a monthly basis. Our Premium subscriptions bump the TeamPulse capability to a maximum of 19 questions and adds the ability to customize your survey set and timing.

Action Planning: Team Dashboard makes it easy for you to be a leader-coach. [Identify and set Action Items](#) with email reminders, and use regular follow-up to track progress.

Add a Lens: Team Dashboard offers multiple Lenses on behavior patterns. Most teams start with the Basic version of Interaction Styles. You may upgrade to a Premium version of Interaction Styles to unlock additional insights and Team Dashboard features. You can also upgrade to add Lenses over time to enrich your team's performance. See https://www.teamdashboard.com/lenses/overview for a description of these enriching Lenses on behavior.

Sharing and Privacy

Team Dashboard builds awareness of differences and provides a constructive, appreciative, and positive approach for recognizing differences and working together effectively. We reinforce this approach through an upfront Discovery

process and personalized insights and action tips. Further, we help build team effectiveness through the presentation and exploration of a team's profile.

To join a team on Team Dashboard, each member agrees to share strengths and profiles with others on the team. Sharing profiles allows members of the team to view Relationship and Team Insights based on the unique combination of profiles, enhancing appreciation and trust. Development Insights and personalized Action Items are never shared with other members of the team.

If a team member feels uncomfortable sharing their profile, they may decline to join the team. As a team leader, consider showing the team member how you use the tool, and highlight the positive, constructive approach. Explain that while they will still have access to their own Personal Insights, Development Insights, and Action Items, declining members will not have access to Relationship and Team Insights. Further, other team members will not be able to see their profile and they will not be able to participate in TeamPulse surveys.

Key Terms and Features of Team Dashboard

Home & Action Items: The Home page is where you begin when logging in, and importantly where you manage your Action Items. The Home page also displays TeamPulse results and has a Quick Links section to allow for easy access to actions such as repeating Discovery and Managing Teams.

Discovery: The Discovery exercise powers awareness of your unique strengths and unlock how you can best contribute to high performance of your team. It also unlocks personalized content helping you develop in areas most critical to your performance and career.

Personal Insights: Personal Insights are available once you have completed Discovery. The section provides you with a detailed and interactive report to help you understand yourself and your strengths.

Relationship Insights: Relationship Insights provides you with personalized recommendations for working more effectively with others and building stronger relationships. You can even pull up teammates to get a side-by-side comparison detailing how to best work together. You must first complete Discovery, and to enjoy side-by-side comparisons, your teammates also need to complete Discovery.

Team Insights: Team Insights gives you a birdseye view of your overall team profile, allowing each member to understand team dynamics and work together effectively. And, you can even drill into the team profile to get detailed explanation of each attribute of teamwork. To use Team Insights, you and your team members must have completed Discovery.

Development Insights: Development Insights is a deep collection of strategies and insights in the development areas, or competencies, recommended for you based on your profile. For personalized recommendations you must first complete Discovery.

TeamPulse: TeamPulse is a periodic micro-survey of team members. TeamPulse provides a simple and ongoing view into important team dynamics such as collaboration and decision making. Ongoing feedback allows teams to benchmark performance over time and creates an early warning system when problems arise. TeamPulse can be started when initially setting up your account, or later using the links from the Home page or Team Insights pages.

Team Management: Team Dashboard is simple to setup, and creating a team is as easy as entering email addresses. Create your team when initially setting up your account or by using the *Create your team* button on the Dashboard. You can add additional teammates later by selecting the *+Teammates* link from the Home page. To remove someone from your team, select the *Team Settings* link from the Home page.

Integrating Team Dashboard Into Your Weekly Routine

To get the greatest impact with Team Dashboard, integrate the resources and Insights into your daily routine. Consider the following best practices to integrate Team Dashboard into your team meetings, individual development plans, performance conversations, and coaching engagements.

Workshop: Use our detailed presentation to run a team-building workshop after each team member completes the Discovery step. The workshop gives everyone on the team an opportunity to start applying what they've learned.

Expert-Facilitated Workshops (Optional): If you want to take it up a notch, use our certified facilitators to run a team workshop. Our designated facilitator will talk with you ahead of time to coordinate logistic, collaborate on overall goals for the workshop, and learn more about your current team structure and challenges. Team-building activities can be fun and educational, and our experts will help your team celebrate strengths, improve harmony, understand conflict, and enhance decision-making. Contact us at workshop@teamdashboard.com for more information.

Supporting Your Team Member Development: Team Dashboard enables you as a leader to provide more effective coaching and development support. You can work with each member of your team to build personalized learning and development plans and review progress regularly:

> **Step 1:** Start by asking each member to review the Development Insights and identify 1 or 2 items that they feel could help them work more effectively. For the select item(s), ask them to create an Action Item.

> **Step 2:** For each team member, you can ask them to identify a working relationship that they would like to improve. Ask them to review the specific Relationship Insights for working with that individual, and identify 1 or 2 Action Items for improving that relationship.

> **Step 3:** For each selected Action Item, your team member will receive reminder emails on the Action Items that includes a question "how are they doing." In your weekly or monthly meetings, ask them to open up Team Dashboard, review their response to "how they are doing," and ask them to give examples of why they feel they are doing well, making progress, or not doing so well.

> **Step 4:** As you complete an Action Item, you can start the process as part of a continuous learning cycle. You may also consider adding a new Lens for the team member and entire team to expand understanding, learning, and team development opportunities.

Conflict Management: As team members encounter relationship challenges, refer them to Team Dashboard to find perspective and insights on how they might adapt their behavior to get better results. Ask them to review the Insights and suggestion how they might approach the situation in a different way.

TeamPulse: We recommend that you incorporate TeamPulse into your regular team meetings to assure visibility and action that will promote important drivers of team effectiveness. Use this review template as a guide:

> **Step 1:** Review TeamPulse results. What attributes are rated the highest? Or the lowest? Why? What attributes have changed over time?

> **Step 2:** Discuss: Ask team members to provide their feedback on what they feel might have caused any changes in ratings? Or why a given attribute may be rated lower than others. Ask the team what they can do to improve performance on that attribute. If you want the team to move forward, creating an open and psychologically safe environment to discuss what need to change is essential. *Warning: Ask questions and do not become defensive. Whether accurate or inaccurate, and whether you agree or don't agree, let team members express how they feel.*

Step 3: Discuss: What should the team start doing?

Step 4: Discuss: What should the team stop doing?

Step 5: Discuss: What should the team continue doing?

Step 6: Set goals and assign action items for the upcoming week or month and remind the team that TeamPulse will be measured by a certain date to monitor progress.

FAQs

How do I upgrade?
From the Home page, select *Upgrade*. You will be presented with the opportunity to upgrade to a Premium account. Upgrading can also be completed from various locations throughout Team Dashboard.

How do I request an expert facilitator for a team building workshop?
You can select this option while you upgrade, or you can contact us at workshop@teamdashboard.com.

How do I change my selected best-fit for a Lens?
If you feel that the best-fit you selected for a Lens is not accurate, you can change to another at any time. One way to make the change is to complete Discovery again. Or, you can edit your profile from the *Account Menu* in the upper right corner. To do so, select *Edit Profile* then *Personality Profile* from the *Account Menu.*

How do I add additional team members?
Be sure you know the email addresses for people you want to add. From the Home page, select the *+Teammates* link and and follow the instructions. There is no limit to the number of teammates you can add.

How do I remove a team member?
From the Home page, select the *Team Settings* link, the select the *X* icon next to the individual you would like to remove from the team. Note that this does not delete that person's account, but only removes them from your team.

How do I add another team?
Each user can only manage 1 team. However, members of your team can create their own teams if they wish. To do so, they use the *+Create your own team* link from the Home page and follow the instructions.

How do I setup TeamPulse?
TeamPulse can be started when initially setting up your account, or later using the link on the Home page. If you skipped setting up TeamPulse and want to do so later, here are the steps:

1. Log into Team Dashboard
2. From the Home page, select *Team Settings*
3. From the Team Settings page, Select *TeamPulse*
4. Select the *Setup TeamPulse* button
5. Select *Finish*

Each member of the team will receive an email invitation to complete the 1st TeamPulse survey, and future email reminders will be sent monthly. By default, TeamPulse is conducted monthly and remains open for responses for 10 days. Once closed, the results will be made available for anyone on the team to view. For additional TeamPulse customization options and periods other than the monthly, upgrade to a Premium subscription.