Project Center

Tutorials

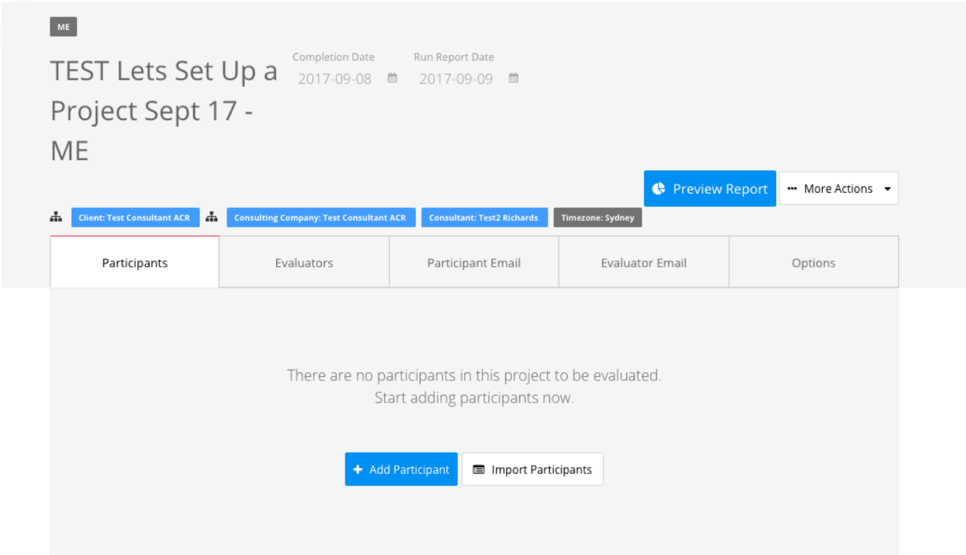
The Leadership Circle®

Contents

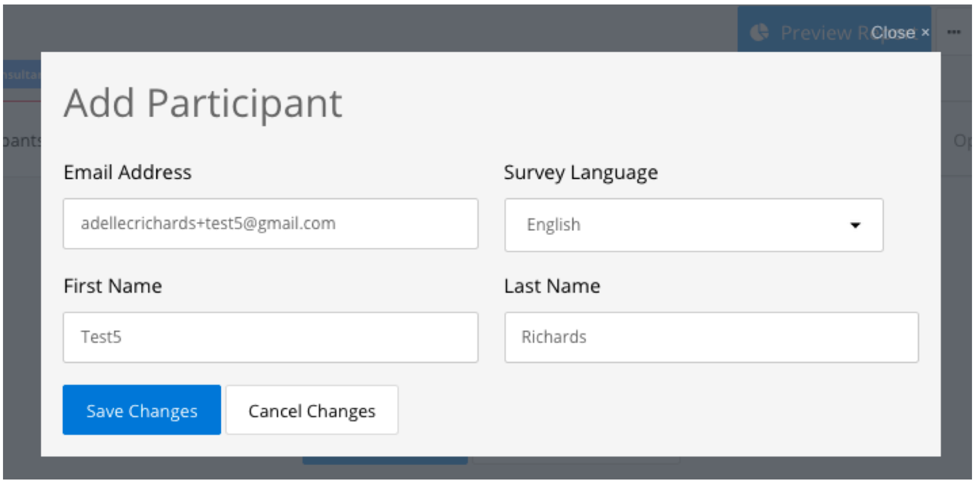
Add a Participant to a Project

Web address is https://project-center.theleadershipcircle.com

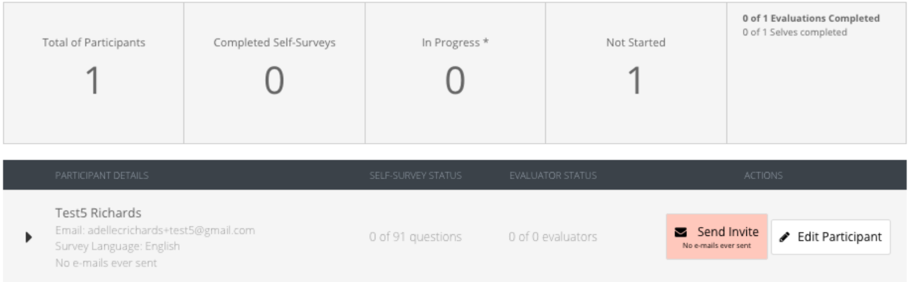
You have just created a new Project and you are now ready to add your Participants.



Click the Blue "+ Add Participant" button.
Enter the details of your Participant.
Click Save Changes.



Your Participant is now setup.



Creating a password

Web address is https://project-center.theleadershipcircle.com

To create a password, click "Forgot/Create password?", enter your email address and click "Send me reset password instructions."

Watch for the "Reset password instructions" email in your in box or junk folder.

Click the "Create Password" link in the email and you'll be taken to a page where you enter a "New Password."

If you need assistance, please contact aLittleTLC@theleadershipcircle.com.

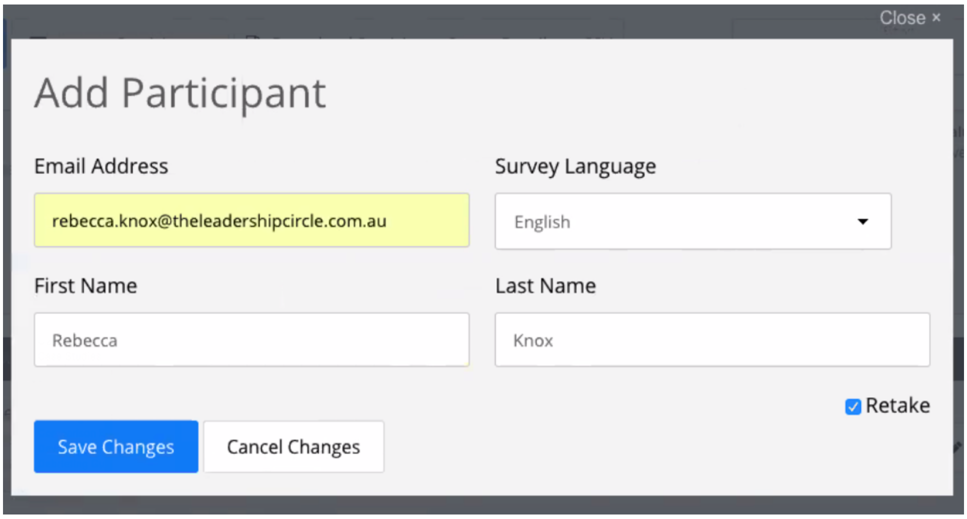
Mark a Profile as a Retake

Goto the Project Screen

When you add a Participant to a Project, and they have already undertaken a LCP – the Retake box will appear.

Tick the box.

This then marks the LCP as a Retake.



How to share a Client

Sharing is at the CLIENT level. All projects under the client are shared.
Create the client if needed. To share:

- Click “My Clients”
- Click the Client Name
- Click “More Actions”
- Select “Shared Settings”
- Click “invite more people”
- Type the name or email address of the consultant you want to share
- When the Consultant name appears, click to select
- Click “Send Invitations”

Here is the invitation email they receive from notifications@theleadershipcircle.com.

```
Subject: Organization Shared!
Welcome, First Name Last Name
Organization Client Name have been shared with you.
To visit organization's page, just follow: this link.
Thanks and have a great day!
```

Clicking the link takes them to the login page. They will need to create a password if they don’t have one.

Web address is https://project-center.theleadershipcircle.com
To create a password, click “Forgot/Create password?”, enter your email address and click “Send me reset password instructions.” Watch for the “Reset password instructions” email in your in box or junk folder. Click the “Create Password” link in the email and you’ll be taken to a page where you enter a “New Password.” If you need assistance, please contact aLittleTLC@theleadershipcircle.com.

When you share as above, you give them the “Consultant” role which allows them to see the Client and projects but when they click “Manage Project,” they receive a “Forbidden” message. To give them the CSR role so the Consultant can track progress, send emails, etc. take these additional steps:

- Click “My Clients”
- Click the Client Name
- Click “More Actions”
- Click “Manage Users”
- Click “Manage User” beside the Consultant name
- Click “Shared Organizations”
- Find the client name and click “Edit User Role”
- Click “Consultant” in the drop down and select “CSR”
- Click Save

When the shared Consultant logs in:
- Click “My Clients.”
- Click the client name.
- Find the Project
- Click “Manage Project”

How to extend the completion date on a Project

To extend the completion date, you need to do so by before your Current Completion Date expires

- Log into the Project Centre
- Click on **Active Projects**, and select your project
- Click on **Run Report Date**, choose your new date from the calendar
- Click on the **Completion Date**, choose your new date from the calendar

NB The system does not automatically advise survey takers that they date has been extended, you may wish to send new emails to let them know.

How to Order a Group Report

NB To add Participants to a group report they must have at least one complete evaluator and their self survey must be completed.

- Log into the Project CentreGoto **My Clients**, find the client you want to create a group report for and click
- **Create group** report.

OR

- Goto your Project Screen: click **More Actions**, and select **Create Group Report**
- Make your selections.
  - You can enter multiple clients in the “Client’ field.
  - You can Select the specific participants from these selected Client’s Projects on the “Select Participants” screen
- The report will run automatically as part of this order process, and will be available to download on the “Thank you for your order” screen.

Ordering product

To start your TLC Project, log into the TLC Project Centre at:

https://project-center.theleadershipcircle.com (this is a unique site used by Certified Consultants only).

Email: <your email address>
Password: <created by your when you first logged into the Project Centre)

Forgotten your Password?

Click the **Forgot/Create Password**? link if you need to reset you Password. Once logged in, you can change your password through **My Account**.

On the home page

- Click the + Create new Project blue button
- Enter your Consulting Company Name (this is your own name if you do not have a Company Name)
  - To verify this, please click Consulting Companies located in the Left Hand listing on the home page.
  - If this is not how you would like your account setup, please contact the Client Services Team
- Your name as the Consultant, should automatically populate (if it does not, please enter your name)
- For your first order with a new client, click the Create new client link
  - Enter the Client Name and Industry
- Type in your Project Name (this does not appear on the Report)
- Choose the Product that you are ordering (LCP or LCP-ME)
- Enter all other Project details as required
- Note that the Welcome to TLC Emails go either -
  - When you click Send Invite found to the right of each Participant's Name;
  - To send to all Participants at once click Send new Emails (found in the More Actions dropdown); or
  - At the Scheduled time that you setup in your Project (you can reach this via the Options Tab)
- You are billed by TLC Asia Pacific for completed Projects, up to 7 days after the Completion Date.
- Your printed Profile report and Binder will be delivered to you within 3-5 working days after the Completion Date.

TLCGo! app, provides useful How To Videos and User Guides that walk you through how to get around the site and how to take the Actions that you need to.

The information you will need when Ordering a Profile

1. Name of (Participant's) Company or Organisation (called a Client in the PC)
2. Type of Industry (Participant's)
3. Group or title of Participant (Leadership Team, CEO, etc)
4. Do you want to include Short or Long Comments (refer below)
5. Completion Date for self-survey and receiving evaluator feedback
6. Run Report Date - this is usually the same business day as the Completion Date, with delivery usually within 3-5 days.
7. Participant name and email address
8. Evaluator name and email address if you are setting up for your Participants

You have an option for selecting Long or Short Write-in comments (included in the cost of the Profile). TLC highly recommends that you select the Long Comments to achieve more in-depth qualitative feedback.

SHORT COMMENTS:

1. What should he/she stop doing?
2. What should he/she start doing?
3. What should he/she keep doing?

LONG COMMENTS:

1. In your opinion, what is this person’s greatest leadership asset, skill or talent, and what suggestions do you have for leveraging this?
2. In your opinion, what is this person’s greatest leadership challenge or area for development, and what suggestions do you have for handling this?
3. What have you observed about this person about which you would like to provide additional feedback to him/her that may not have been previously addressed in this assessment?

N.B. Payment is required for profiles that are cancelled or not completed.

You are billed for the profile when the reports are run and the order completed. In the event that you cancel the profile order after it has gone live, you will be billed 50% of the price, provided that the report has not been printed. You are responsible for the full price when the report has been printed. For this reason we encourage you to obtain a financial commitment from your client before ordering your LCP or LCP-ME.

For further assistance, please contact your local Client Services Team

How to send Reminders

The system does not automatically send email reminders to incomplete survey takers. The date that a reminder was last sent, is shown on the Send Invite button.

- Login to the Project Centre
- Go to your Project by clicking **Active Projects** (if the Completion Date has passed and your Project is no longer active, you will need to contact your Client Services Team and request that the Project Completion Date be extended).
- To send reminders to all incomplete survey takers:
  - click **More Actions** and select **Send All Reminders**
- To send reminders to specific individuals:
  - Using either the **Participant Tab** or the **Evaluator Tab**, find the person you want to remind, and click the **Send Invite** button to the right of their name.

The content of all system emails can be edited. Go to the **Participant Email** or **Evaluator Email** tabs to make changes to these emails.

Emails can be scheduled to be sent. Got the **Options** tab, and set the day and time that you want the emails to go under the "Schedule sending of invitation emails" section. This will send an email to all incomplete survey takers.

How to View/Download your Reports

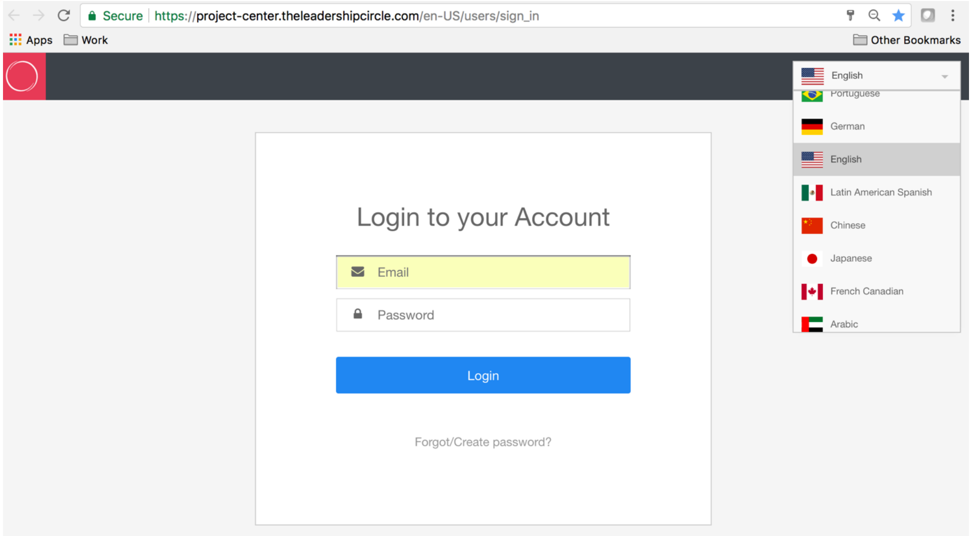
- Click on **My Reports** (top bar of the screen)
- Look for your Project name, or use the available filters to find the Project reports you are looking for.
- Click on the left hand order number to access your reports
- Click the left hand blue **Download Reports (ZIP)** button
  - The reports will prepare for download
- When Done, click the **Download Reports (ZIP)** button, this will download zipped file of the 3 report files to your computer/device.
- Click the **Close x** button to get back to the Order screen
- Click the Red Logo or the Project Centre to return to the home screen

Create a Project

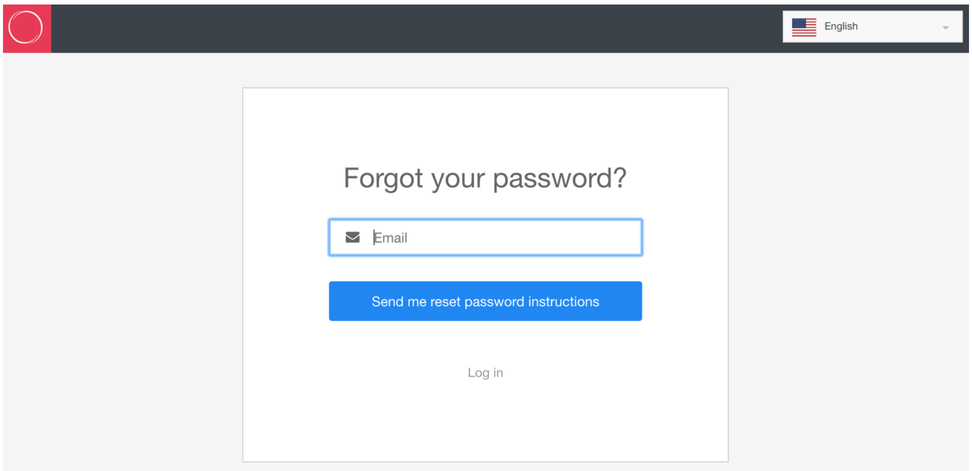
Web address is https://project-center.theleadershipcircle.com

Language dropdown menu is available on the login screen.

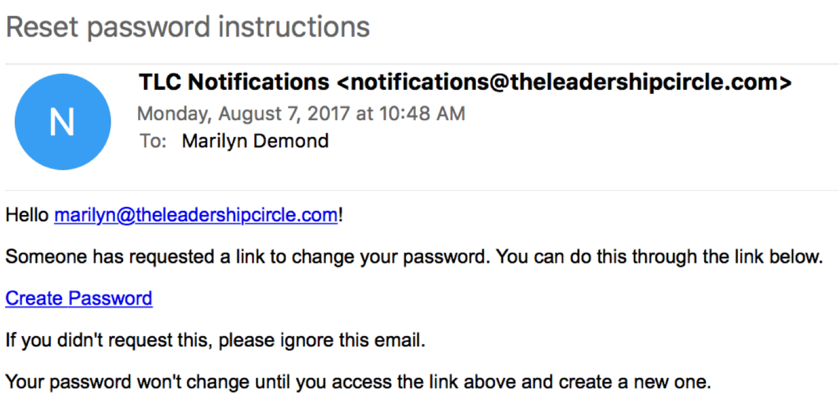
Use the “Forgot/Create password?” feature to create a password if needed.



Enter your email address and click “Send me reset password instructions.”



Click “Create Password” in the email.



Reset password instructions

TLC Notifications <notifications@theleadershipcircle.com>
Monday, August 7, 2017 at 10:48 AM
To: Marilyn Demond

Hello marilyn@theleadershipcircle.com!

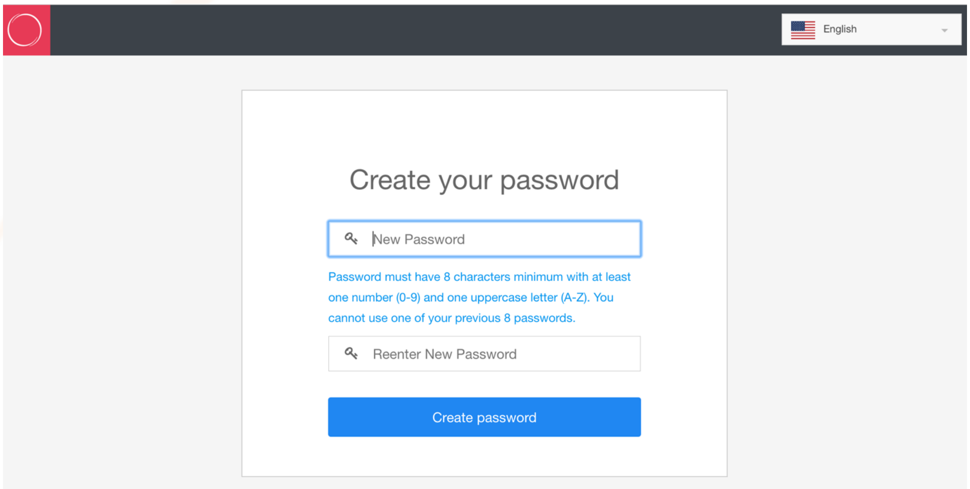
Someone has requested a link to change your password. You can do this through the link below.

Create Password

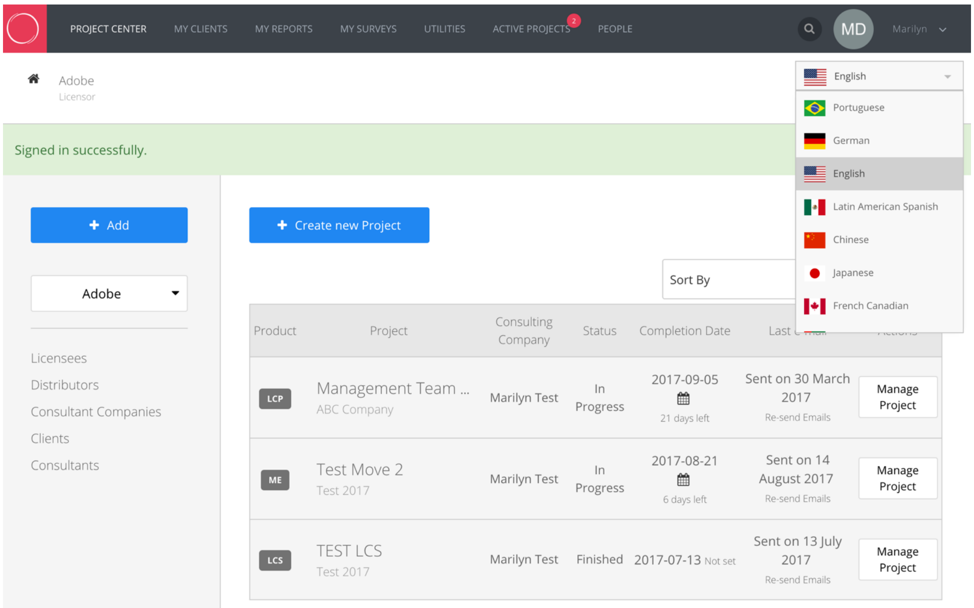
If you didn't request this, please ignore this email.

Your password won't change until you access the link above and create a new one.

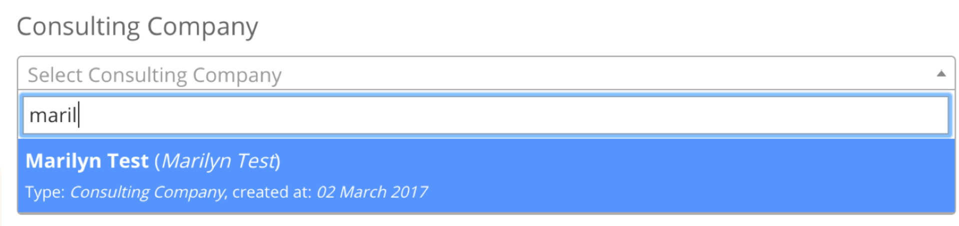
Enter your new password. Reenter your new password. Click “Create Password.”



After logging in, language dropdown menu is available. Click “+ Create new Project” button.

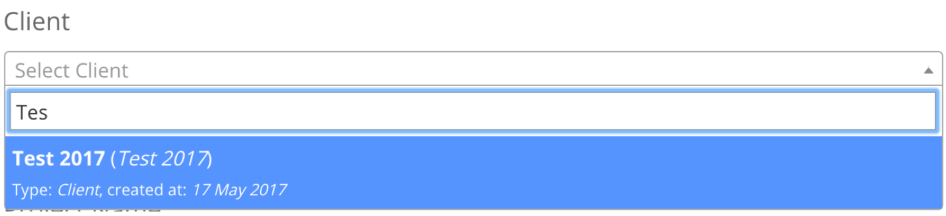


Click on Consulting Company and begin typing your name. If the system doesn’t find you, try typing your consulting company name. When the system finds you, click on the name.

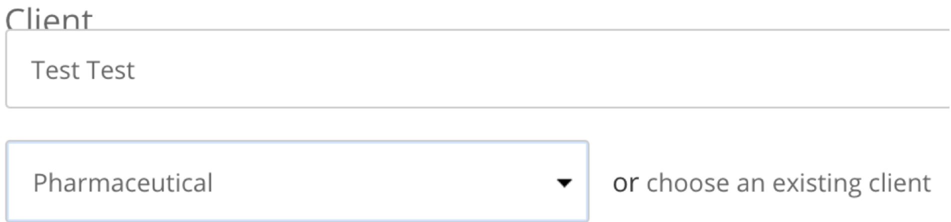


The system will autofill the Consultant name. If you are an administrator managing projects for multiple consultants, click the dropdown arrow on the right to select the correct consultant.

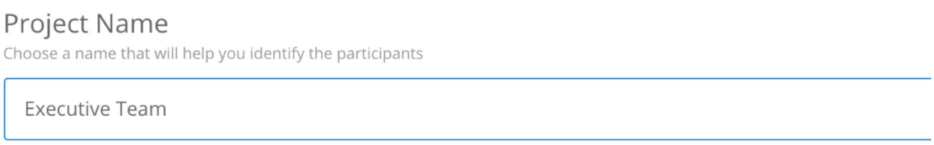
The “client name” is your client’s company name. If the client company name already exists, start typing the client company name and click on the name when the system finds it.



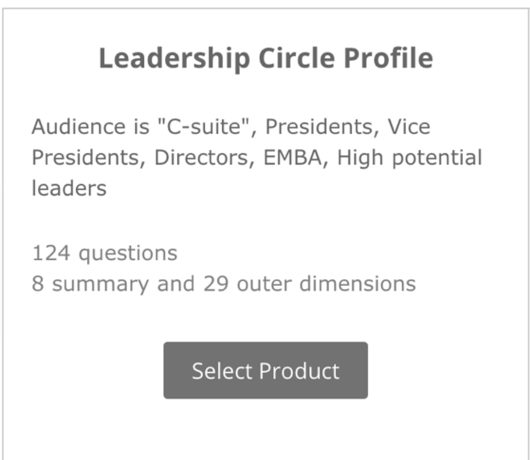
If the client company name doesn’t exist, click on “create a new client.” Type the client company name and select an industry for the client company from the dropdown menu.



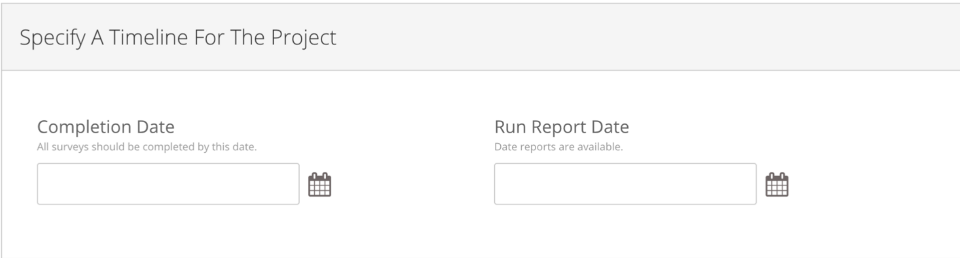
Enter a Project Name that when you see it, you will remember the project and participants.



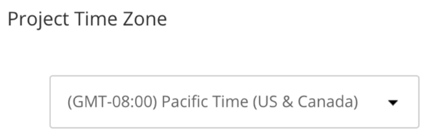
Click “Select Product” for Leadership Circle Profile or Leadership Circle Profile Manager Edition. We are selecting Leadership Circle Profile.



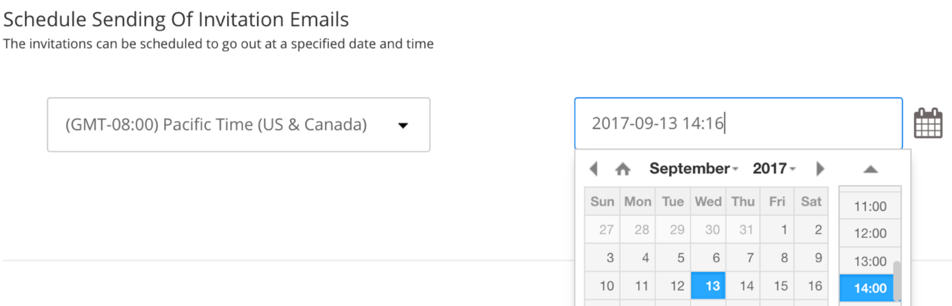
Click in the text box or on the calendar to select a Completion Date and Run Report Date. We recommend you give survey takers three to four weeks to complete their surveys and you have the ability to edit the dates. Surveys close at 11:59pm on the Completion Date. Reports automatically process at 00:01am on the Run Report Date.



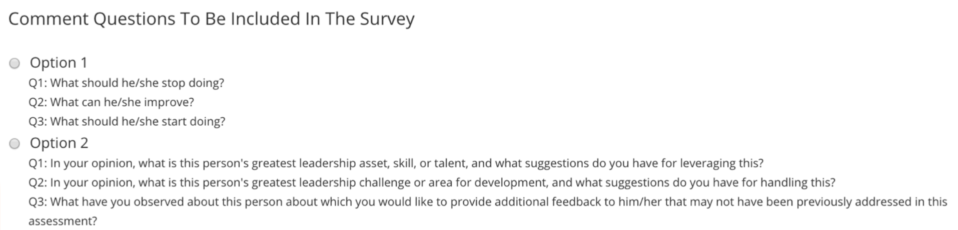
Select the latest time zone where the survey takers are located. For example, if they are located across the United States, select the Pacific time zone.



You have the option to manually send emails or have the system send the emails for you. Please remember to have all survey takers entered prior to the date/time you select for automatically sending the emails. If you enter any survey takers after this date/time, you will need to manually send the emails.



Comment Questions are served to Evaluators. You select Option 1 or Option 2. Both options are equally used. Which comment questions will elicit the best responses from the evaluators? Which comment questions do you want to debrief with your client?



Most often used is “My participant can invite the evaluators.” This is an easy process for the participant. However, you have the option, “I will invite the evaluators for my participant.” If you invite the evaluators, you will need their email address, name, relationship, and survey language. We have an optional csv file that you may fill in and upload.

How Evaluators Are Invited To Participate

Evaluators are bosses, peers, direct reports, and others who are invited to provide input about the participant.
Regardless of who invites evaluators, the consultant will always be able to see the list of evaluators in the Project Dashboard

- I will invite the evaluators for my participant
- My participant can invite the evaluators

The number entered here is the number of evaluators your participant is required to invite before the self-survey button becomes active.

Minimum Evaluations Per Participant?

This is the minimum number of complete evaluations a participant has to have to be included in the report. The minimum eligible is 5 evaluations.
If the participant is responsible for inviting his/her evaluators, he/she will have to invite this minimum evaluators before starting the self-survey.

Minimum evaluations per participant? 5

We recommend “Default demographics.” “Custom demographics” are currently unavailable.

Report Demographics

- Default demographics
- Custom demographics

If you received a promotional code, please enter it here.

Promo Code

If any survey taker clicks the Need Help link when taking a survey, you may select the default email address (support@theleadershipcircle.com) or enter another email address to receive the Need Help emails.

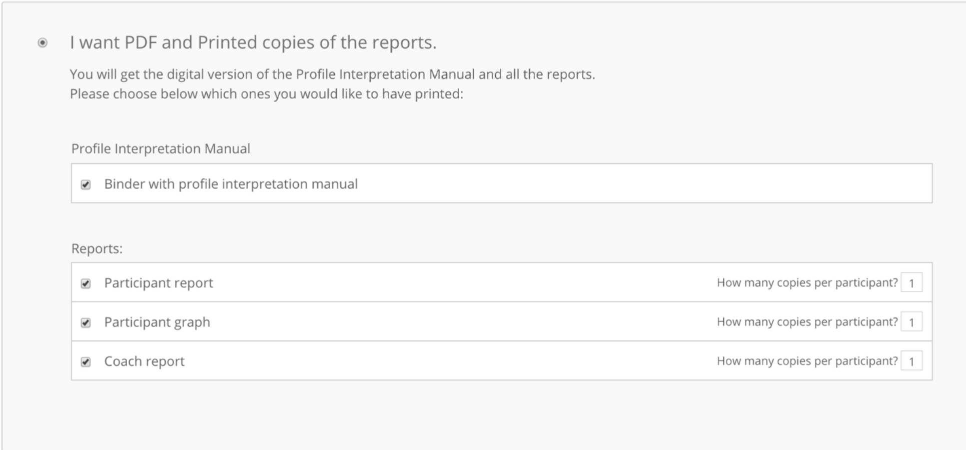
Need Help Email

support@theleadershipcircle.com

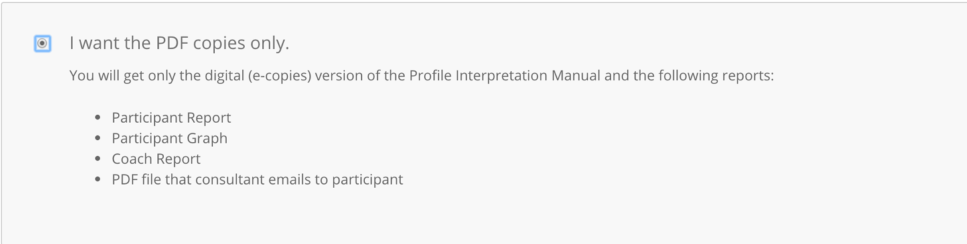
Click Next button

You may order any combination of printed and PDF manual and reports. PDF manual and reports are available online with any order. The default option is:

- Binder with printed Profile interpretation manual
- One print of the participant report for the participant
- One print of the participant graph for the participant
- One print of the coach report for the coach

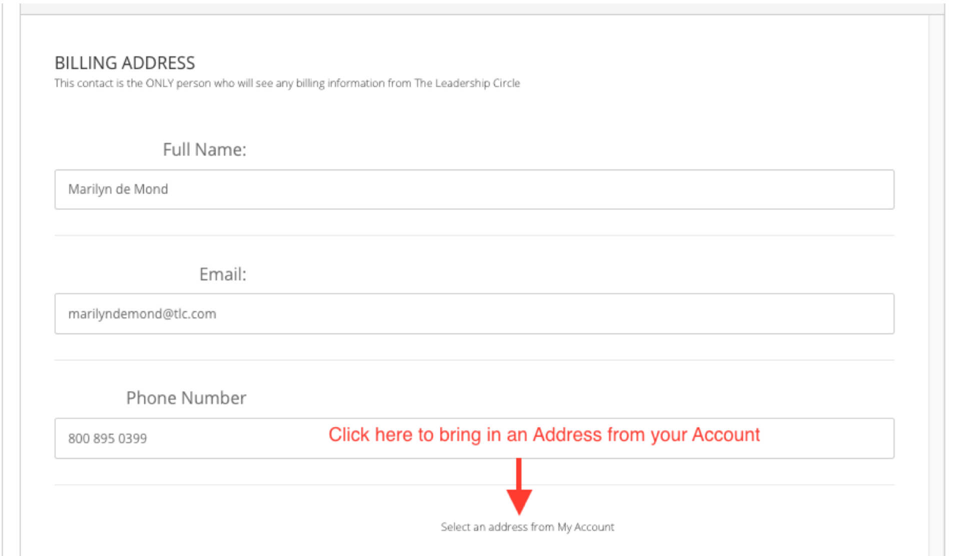


You may order PDF manual and PDF reports.

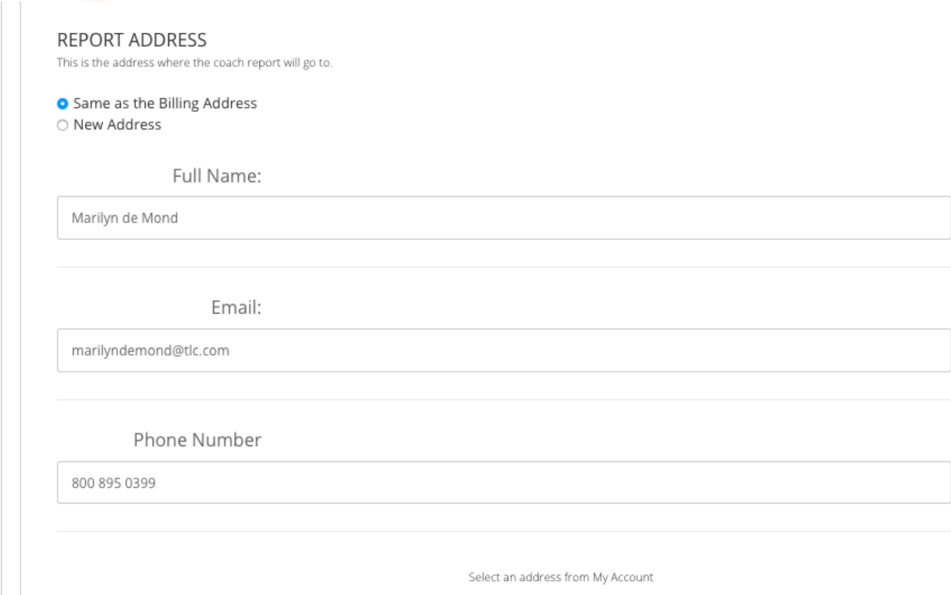


Once you have made your selection client Next

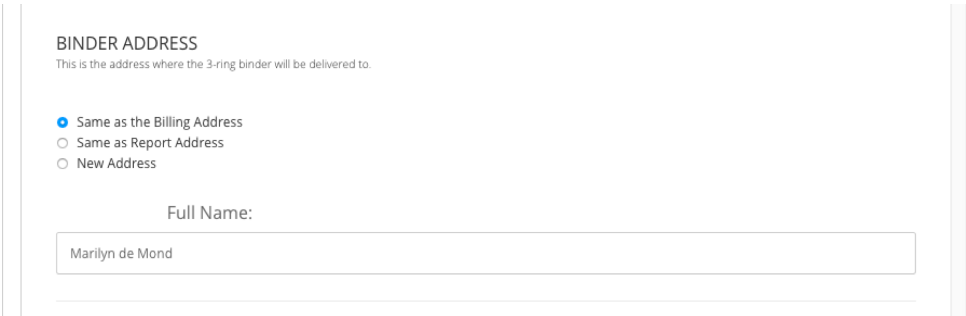
Now enter the Billing Address –this is the person that we will send the Bill/Invoice too for this Project. TLC will issue this Bill/Invoice once the reports have been run and the Project has reached Run Report Date.



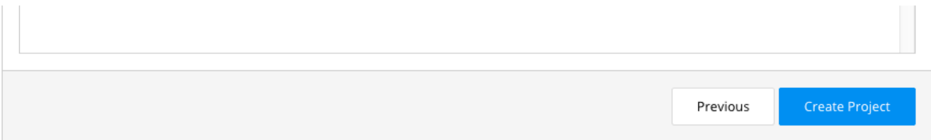
Then enter the Report address – this is the address where we will ship the printed Profile Reports and Coaches Report. You can click "Same as the Billing Address" to use the address entered above, or you can click "Select an address from My Account" to use a different address, or type in a new address.



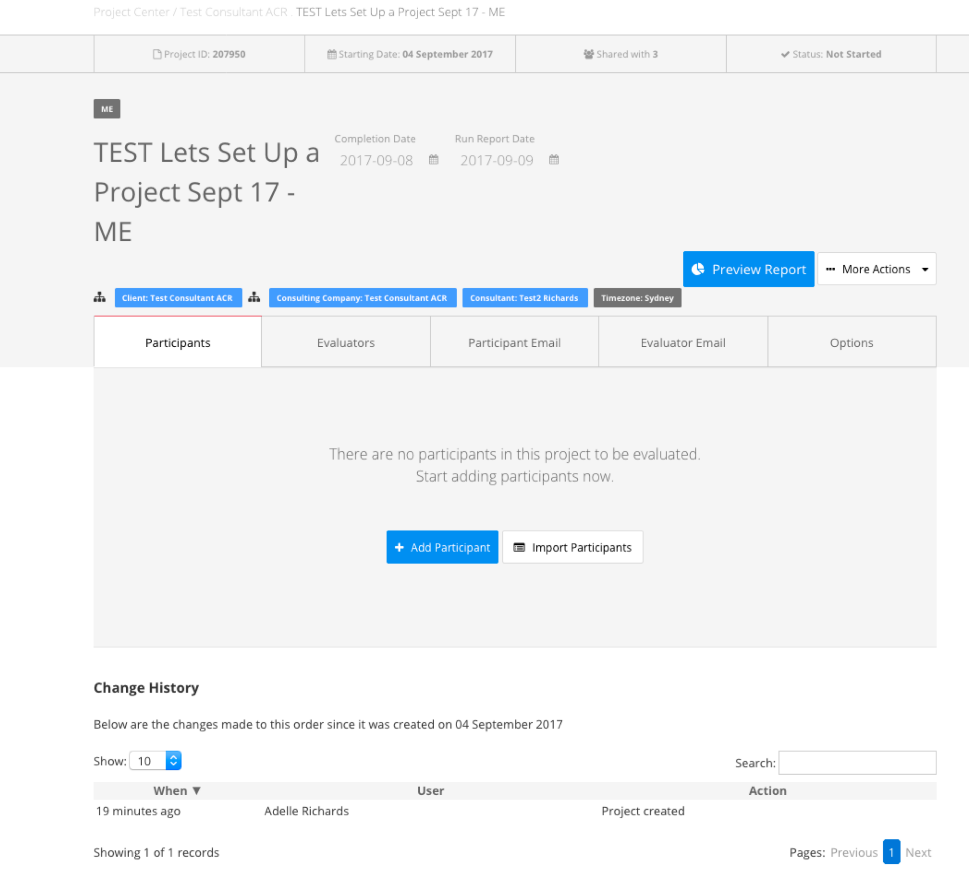
Next is the Binder address - this is the address where we will ship the Report Binders too (note that a LCS does not include a Binder). You can click "Same as the Billing Address" or the "Same as Report Address" to use either of the addresses entered above, or you can click "Select an address from My Account" to use a different address, or type in a new address.



You are done - click the blue Create Project button in the bottom right hand corner.



You have now arrived at the Project Screen and are ready to start adding your Participants (and Evaluators if you choose to do that for your Participants). Please refer to “How to add a Participant” and “How to add an Evaluator” to take these next steps.



Evaluator Survey Process

The evaluator receives the email below from notifications@theleadershipcircle.com if this is their first survey in the Project Center. The link in the email is unique and should only be used by the evaluator.

****

SUBJECT: Welcome to The Leadership Circle

Dear [first name, last name],

You have been asked to complete a Leadership Circle survey for yourself or an associate. To begin using the survey-system, click the link below, and create a password.

[LINK]

If your link is not active; copy/paste it into your Internet Browser.

After creating your password, you'll be taken to the "My Surveys" page.

Note - If you need to login again after creating your password, your account login ID is: [evaluator email address]

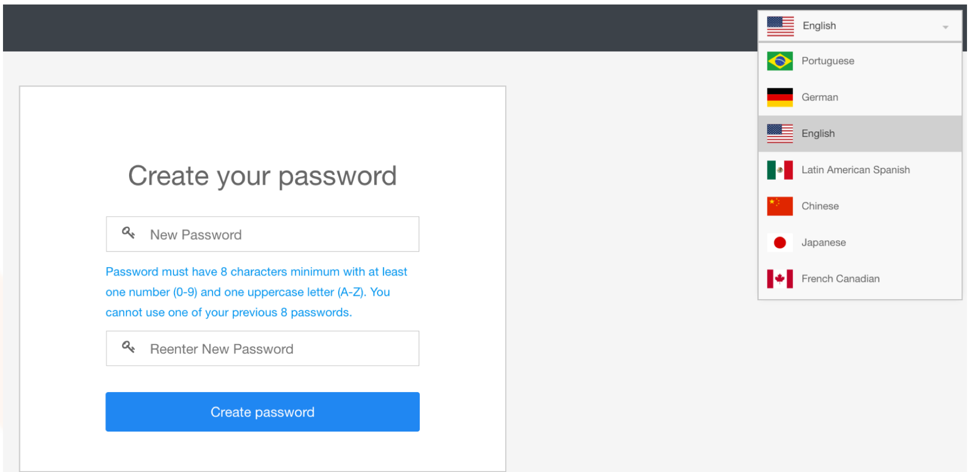
If you have any problems logging in please contact us at support@theleadershipcircle.com

Warm Regards,

The Leadership Circle

****

When the evaluator clicks the web address link in the email they will be taken to the page below. A different language may be selected using the dropdown menu on the right. The evaluator needs to create a password with 8 characters minimum including at least one number (0-9) and one uppercase letter (A-Z). The password needs to be reentered. Click blue "Create password" button. Passwords are good for six months.



If the evaluator has previously been invited to complete a survey, they will receive the Evaluator Invitation email.

****

SUBJECT: [Participant Full Name] requesting feedback

Dear [Evaluator Full Name],

I'm using Leadership Circle Profile™ to gain insight into how I lead and interact with others. I'm asking you to take about 20 minutes to complete an online survey about me. Please respond to each statement to the best of your ability. Your anonymity is assured unless you are my Boss or Boss's Boss, whose responses are reported alone.

Please note that your survey needs to be completed by [example: 23:59, 05 October 2017, Eastern Time (US & Canada)].

To begin, click on the web address below:

http://project-center.theleadershipcircle.com/en-US/surveys/796a74f9c1dfb1f017f3-ad1425bc35

If you don't have a password please use the Forgot/Create Password function on the login page

If the link is not active please copy/paste it into your browser

Thank you, in advance, for completing the survey.

[Participant Full Name]

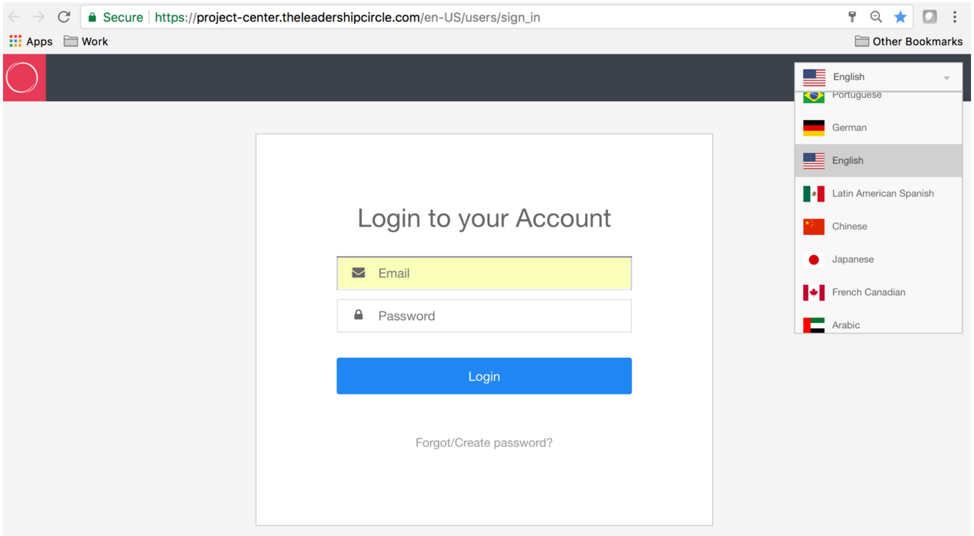
[Participant Email Address]

****

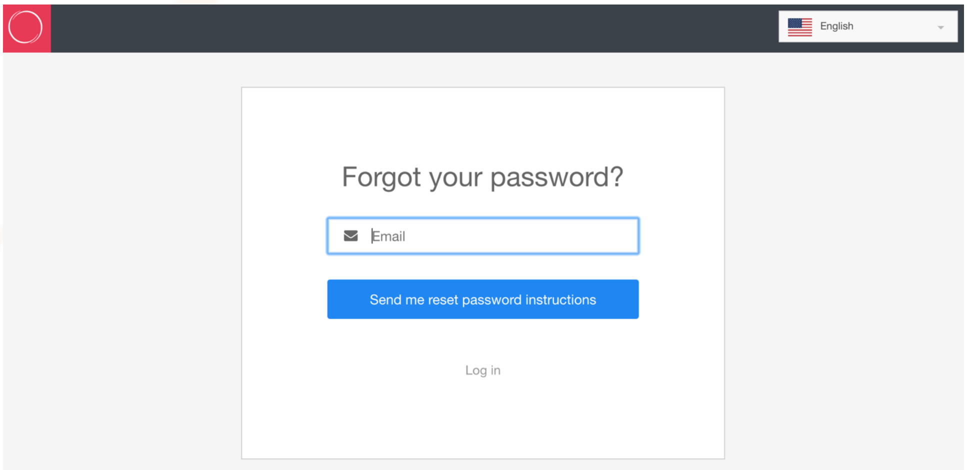
If the evaluator begins the survey and doesn't complete the survey, they will receive the Evaluator Reminder Email.

```
**********

SUBJECT: [Participant Full Name] requesting feedback

Dear tannfamm nov4p1,

This is your friendly reminder that you have an evaluation for
tannfamm nov4p1 that has not been completed. It must be completed by
2017-07-28 05:59:59 UTC.

The evaluation can be found at web address http://project-
center.theleadershipcircle.com/en-US/surveys/
99c9ad0c6d498d72306c-2c7e1696fc.
<image002.gif>


Please contact me at the email address below with any questions.

Warm regards,

Leadership Circle Support
John Tanner
john.tanner@fcg-global.com
```

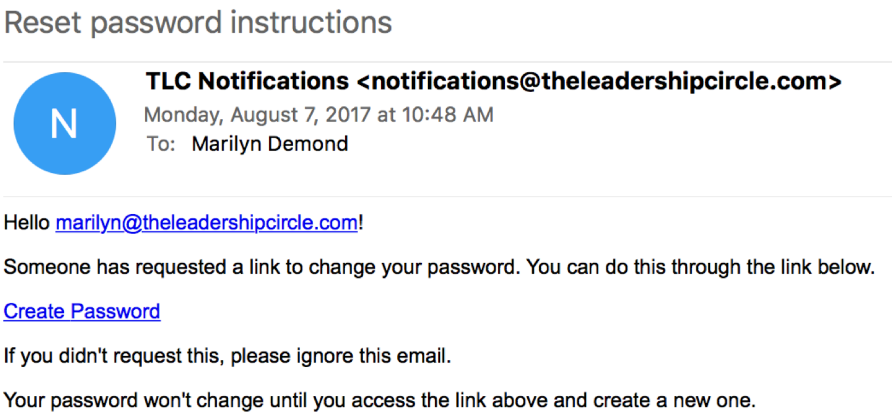
If the link in the email doesn't take you to the Create your password page, go to Web address https://project-center.theleadershipcircle.com and use the "Forgot/Create password?" feature to create a password.



Enter your email address and click “Send me reset password instructions.”



Click “Create Password” in the email.



Reset password instructions

TLC Notifications <notifications@theleadershipcircle.com>
Monday, August 7, 2017 at 10:48 AM
To: Marilyn Demond

Hello marilyn@theleadershipcircle.com!

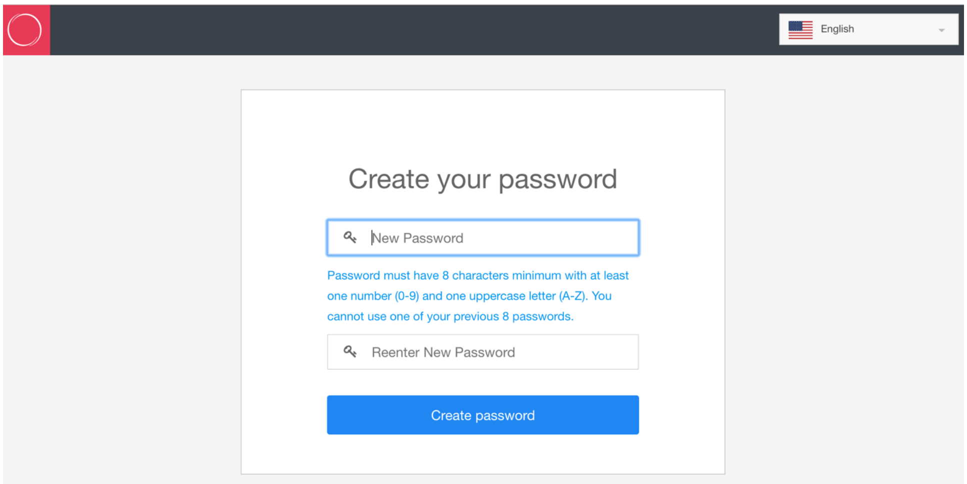
Someone has requested a link to change your password. You can do this through the link below.

Create Password

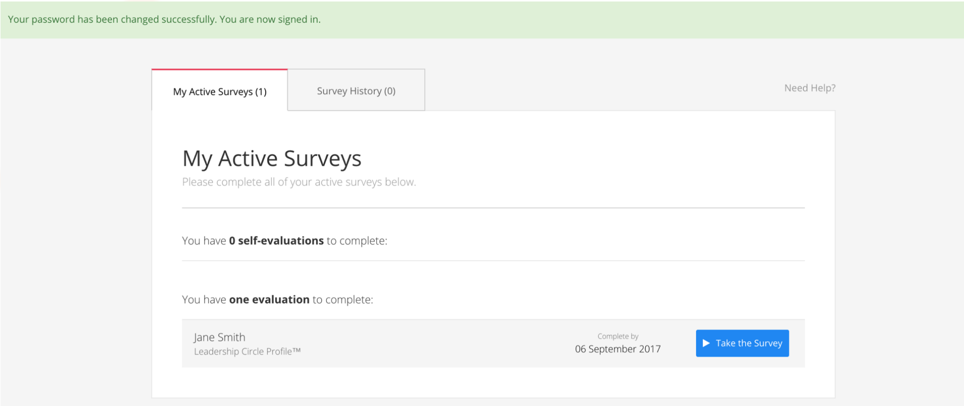
If you didn't request this, please ignore this email.

Your password won't change until you access the link above and create a new one.

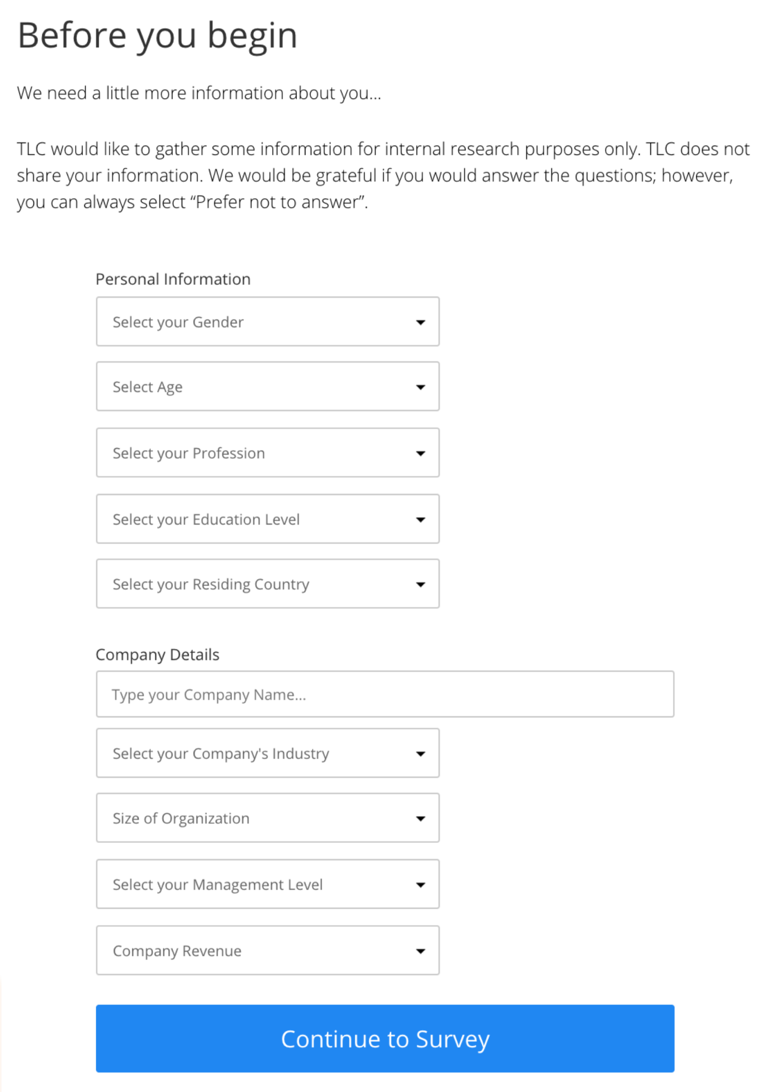
Enter your new password. Reenter your new password. Click “Create Password.”



After successfully creating the password, the evaluator will be taken to the My Active Surveys page. There may be more than one survey on the list.



Click the blue "Take the Survey" button. First time survey takers are asked to answer the following questions one time only. Some of the questions have the option "Prefer not to answer" or "Other" while other questions don't have those options.



Below are demographic options. “Prefer not to answer” and “Other” are highlighted when available.

- ✓ Select your Gender
- Female
- Male

- ✓ Select Age
- 20 and under
- 21 - 25
- 26 - 30
- 31 - 35
- 36 - 40
- 41 - 45
- 46 - 50
- 51 - 55
- 56 - 60
- 61 - 65
- 66 - 70
- 71 and above
- Prefer not to answer

- ✓ Select your Profession
- Accounting professional
- Architect
- Armed forces professional
- Arts professional
- Banking professional
- Broadcasting/Media professional
- Business professional
- Coach
- Community health professional
- Computer Science professional
- Consultant
- Criminal justice professional
- Doctor/Physician/Dentist
- Educator/Teacher/Professor
- Engineer
- Entrepreneur
- Environmentalist
- Finance professional
- Health Care Administrator
- Health Care professional
- Human Resource professional
- IT professional
- Insurance professional
- Judge
- Law Enforcement professional
- Lawyer/Solicitor
- Legal professional
- Marketing professional
- Non-Profit professional
- Nurse
- Organizational Development professional
- Other
- Parks and Recreation professional
- Psychiatrist/Psychologist
- Public Administration professional
- Public Health professional

- ✓ Select your Education Level
- Associate Degree
- Doctorate Degree
- High School/Secondary Level
- Honours Degree
- Master's Degree
- Other
- Technical Diploma
- Undergraduate Degree

- ✓ Select your Residing Country
- Afghanistan
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh
- Barbados
- Belarus
- Belgium
- Belize

Enter your Company Name

- ✓ Select your Company's Industry
- Advertising
- Agriculture
- Airlines
- Apparel
- Arts and Cultural
- Automotive
- Banking
- Biotechnology
- Commercial services
- Communication
- Construction
- Defense/Defence
- Education
- Energy
- Engineering
- Entertainment
- Fast Moving Consumer Goods
- Financial
- Fisheries
- Food and beverage
- Forestry
- Government: Federal/National
- Government: Local
- Government: Public Administration
- Government: State
- Healthcare
- Healthcare equipment
- Hotel/Hospitality
- Information Technology: Data storage
- Information Technology: Hardware
- Information Technology: Manufacturing
- Information Technology: Software
- Information services
- Insurance
- Logistics/Transportation
- Manufacturing
- Marketing
- Media
- Mining and quarrying
- Nonprofit/Charity
- Other
- Pharmaceutical
- Prefer not to answer
- Professional Services: Accounting
- Professional Services: Coaching

✓ Size of Organization
10,001 +
101 – 500
2,501 – 5,000
5,001 – 10,000
501 – 2500
51 – 100
Less than 50

✓ Select your Management Level
Board Member
C-suite Other
Chief Executive Officer (CEO)
Chief Financial Officer (CFO)
Chief Operational Officer (COO)
Director
Executive Director
Foreperson/Foreman
General Manager
Manager
Other
President
Senior Vice President
Supervisor
Team Leader
Vice President

✓ Company Revenue
$100M - $500M
$1B - $5B
$25M - $50M
$500M - $1B
$50M - $100M
$5B+
Less than $25M

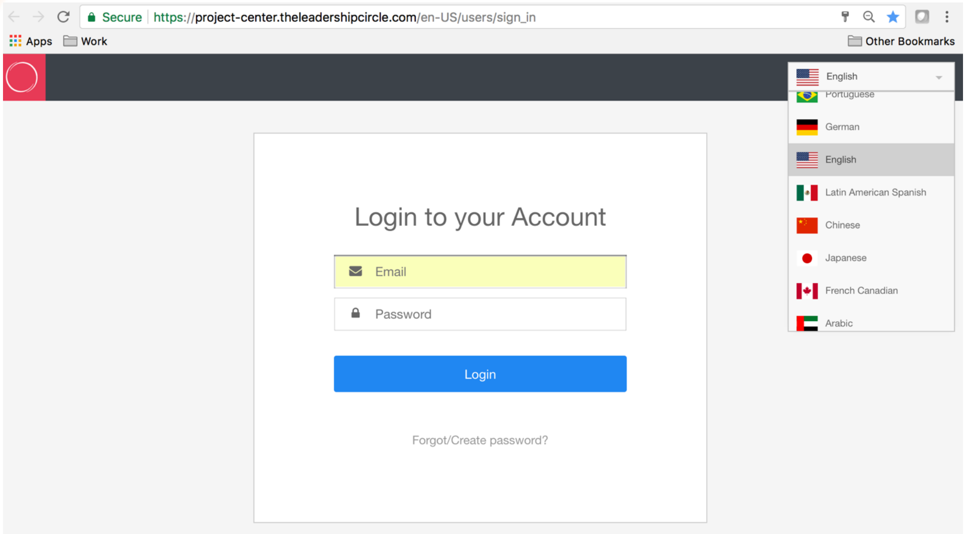
After you make your selections, click blue “Continue to Survey” button.

Participant Survey Process

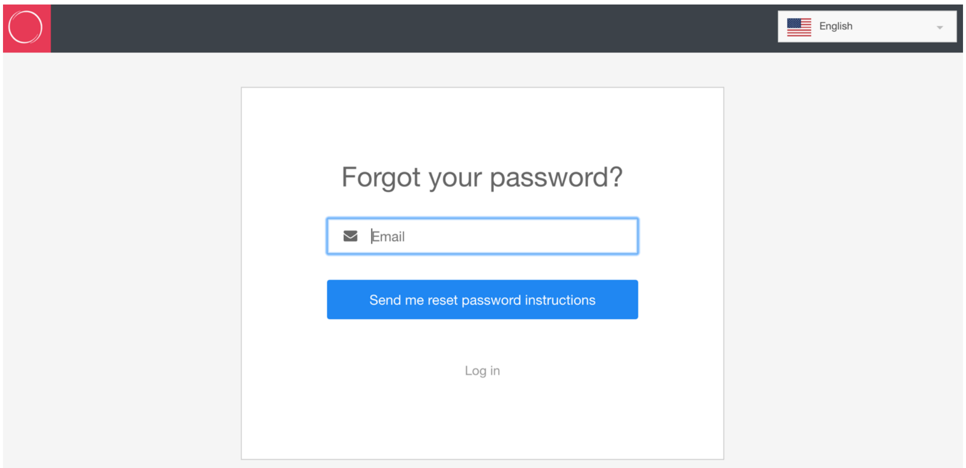
Web address is https://project-center.theleadershipcircle.com

Language dropdown menu is available on the login screen.

Use the “Forgot/Create password?” feature to create a password if needed.



Enter your email address and click “Send me reset password instructions.”



Click “Create Password” in the email.

Reset password instructions

N

TLC Notifications <notifications@theleadershipcircle.com>
Monday, August 7, 2017 at 10:48 AM
To: Marilyn Demond

Hello marilyn@theleadershipcircle.com!

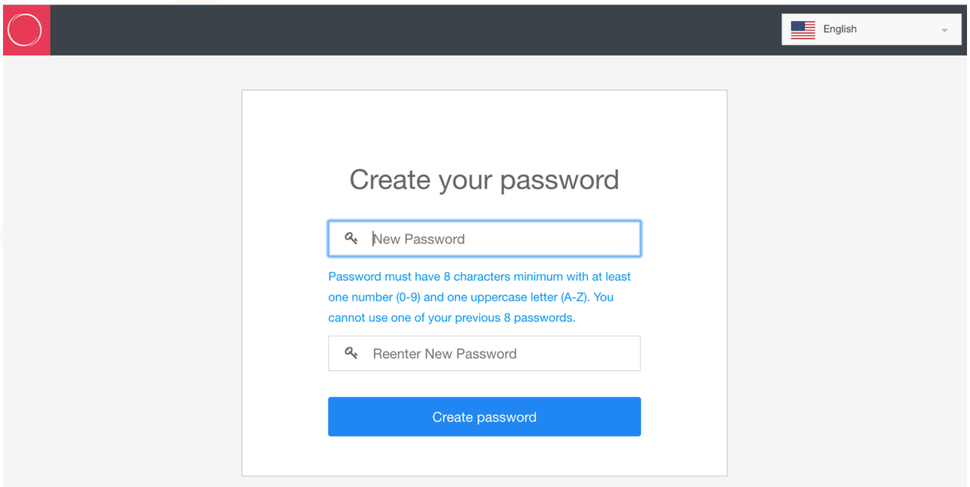
Someone has requested a link to change your password. You can do this through the link below.

Create Password

If you didn't request this, please ignore this email.

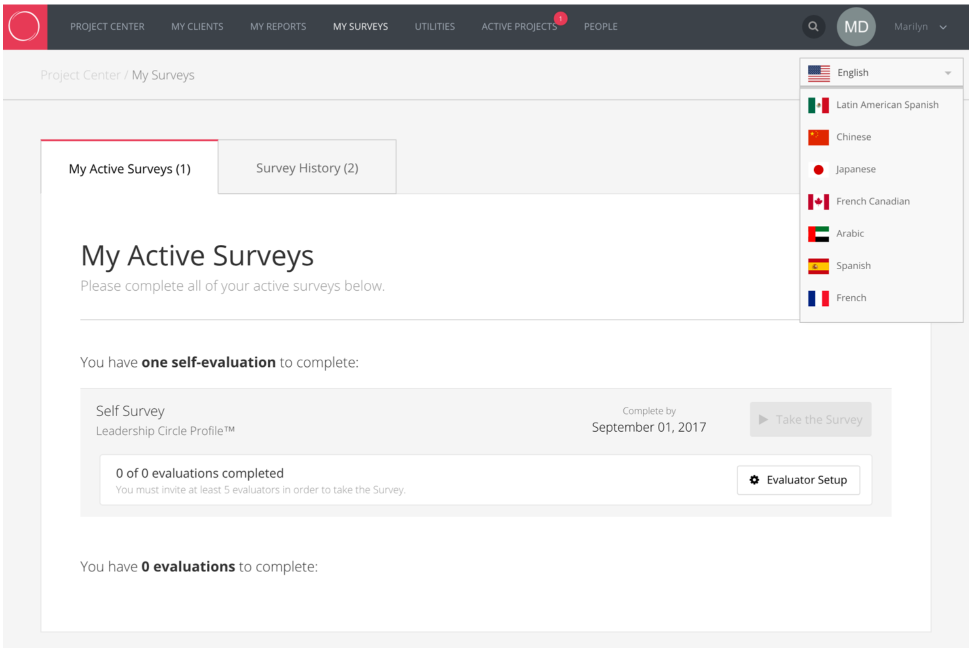
Your password won't change until you access the link above and create a new one.

Enter your new password. Reenter your new password. Click “Create Password.”

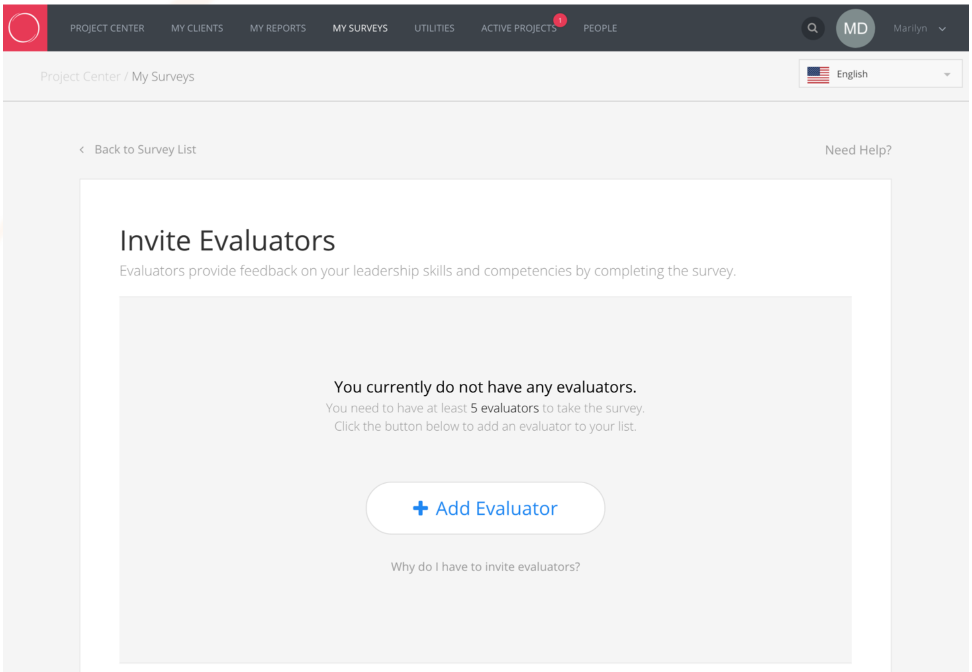


After logging in, language dropdown menu is available.

Click Evaluator Setup to invite evaluators. You must invite the minimum number of evaluators before the “Take the survey” button becomes active for the self-survey.



Click “+ Add Evaluator” button.



Your goal is to receive feedback from at least 10 evaluators. In order to meet this goal, we suggest you invite at least 15 people to evaluate you. You can invite more than 15 people to evaluate you. Criteria for your evaluators are those people who:

Know you well and will provide you with honest feedback.
Have good intentions and sincerely want to help you learn more about yourself.
Understand your job responsibilities and areas of influence.
Can describe you in relation to the many roles you play on the job.

The confidentiality of your evaluators is protected (with the exception of Boss and Boss’s Boss), so you’ll need at least 3 completed evaluations in each category to see the break out data in the category on the report. For example, if only two in the “Peer” category complete the survey, their data is included in the overall results, but not reported in the Peer column on the report. The only exception to this anonymity rule is your Boss, or Boss’ Boss. Their data is not considered anonymous, and will break out in the respective category with just one.

Evaluator Categories:

Boss's Boss (optional) – completes your Boss's job performance appraisal. Invite one or more. This person's quantitative responses will be identifiable (not anonymous) unless more than one boss's boss completes, then the responses will be combined.

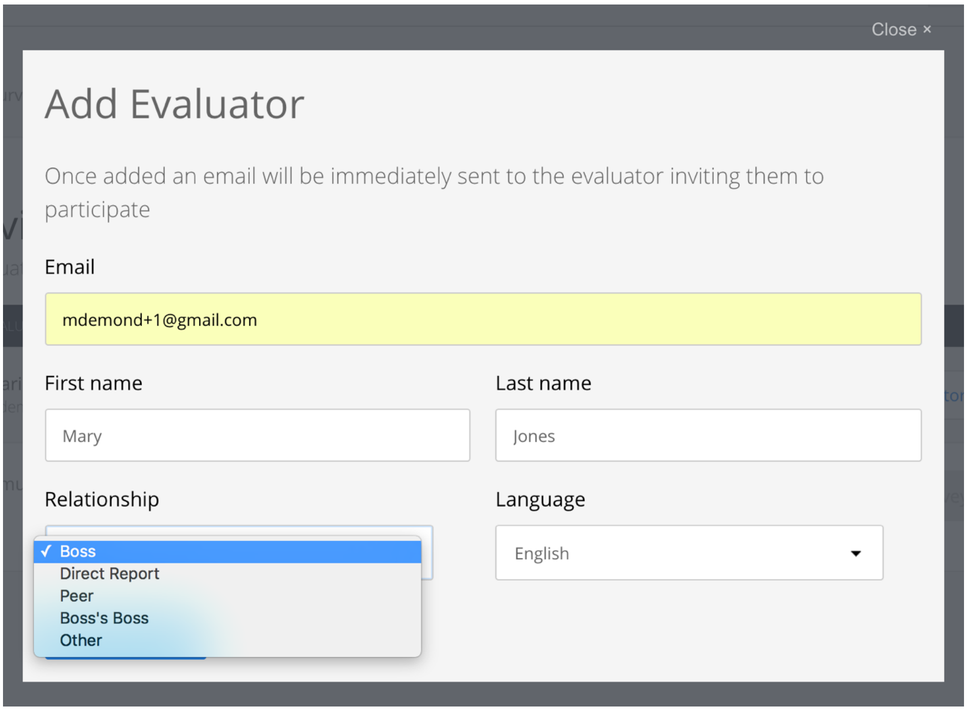
Boss – completes your performance appraisal. This person's quantitative responses will be identifiable (not anonymous) unless more than one boss completes, then the responses will be combined.

Peers – know your work as a leader but doesn't report to you or have input into your performance appraisal. Invite more than three. Three need to complete the survey for you to see the breakout data in this category.

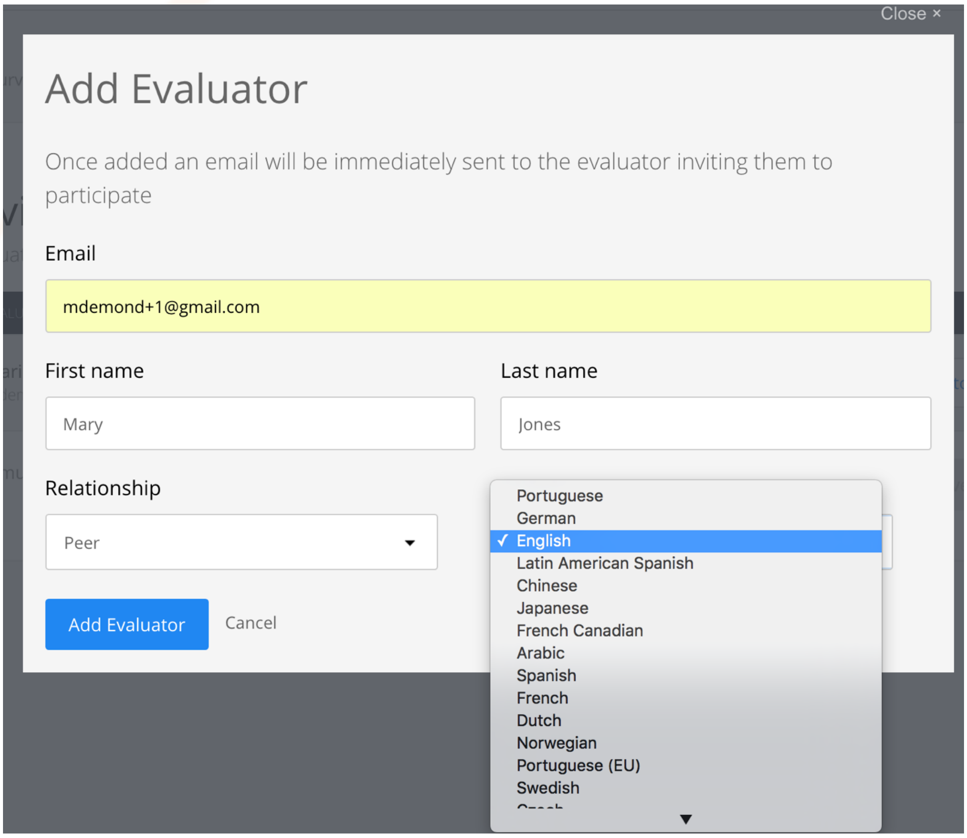
Direct Reports – individuals you supervise and complete job performance appraisals for. We recommend including all. Three need to complete the survey for you to see the breakout data in this category.

Other – Invite at least three in the "Other" category. Others may include those in other organizations; others you've worked with in volunteer organizations; other close associates, constituents, vendors, customers, and/or customers/partners not in the above categories.

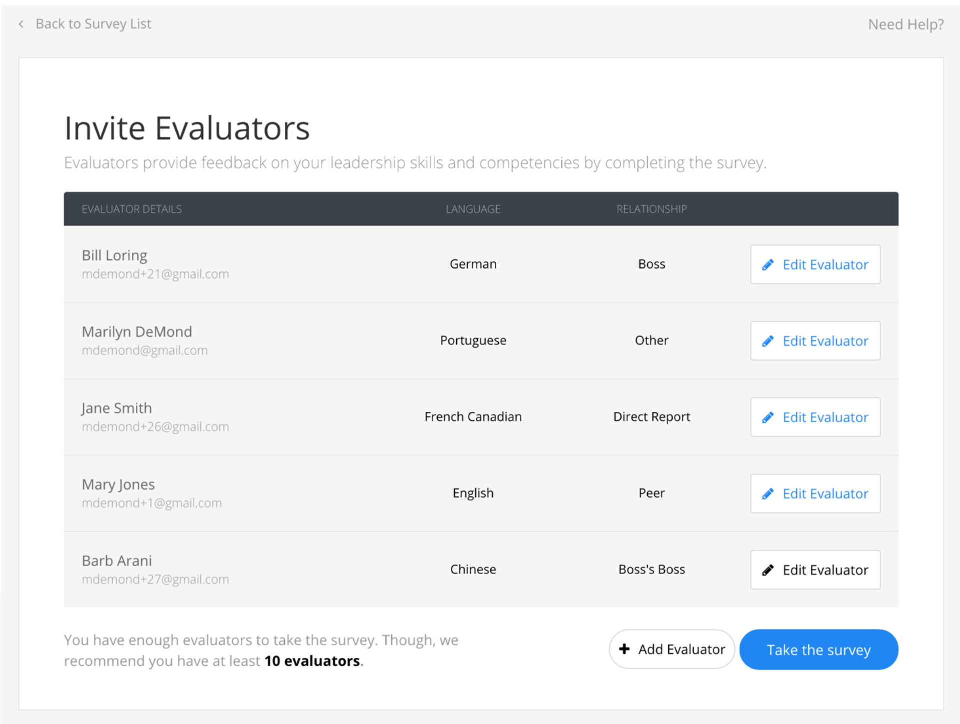
Enter the evaluator's email address, first name, last name, select relationship, and click Add Evaluator. The invitation email is immediately sent to the evaluator.



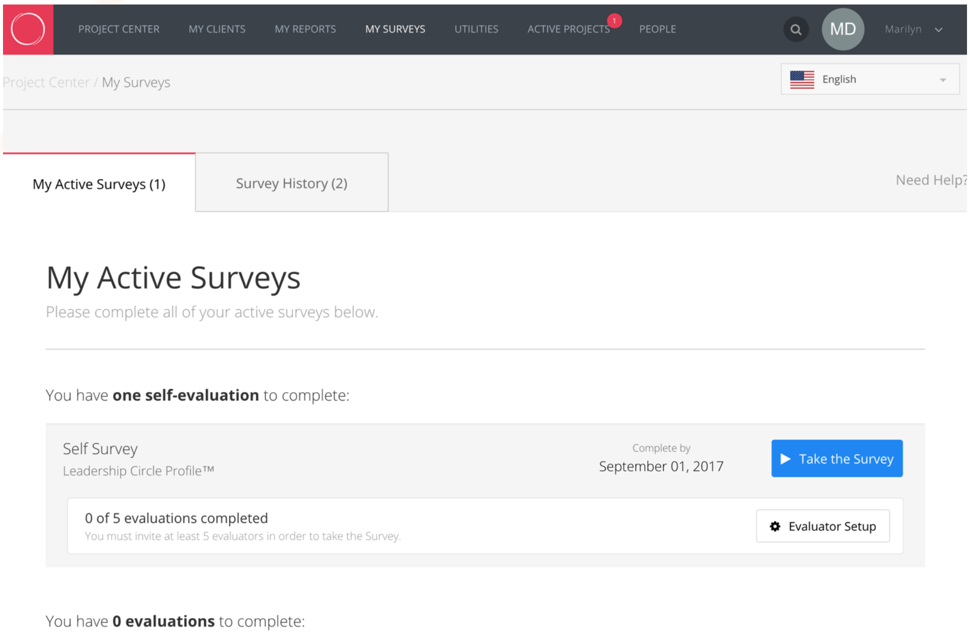
You may select a language for your evaluator using the dropdown menu.



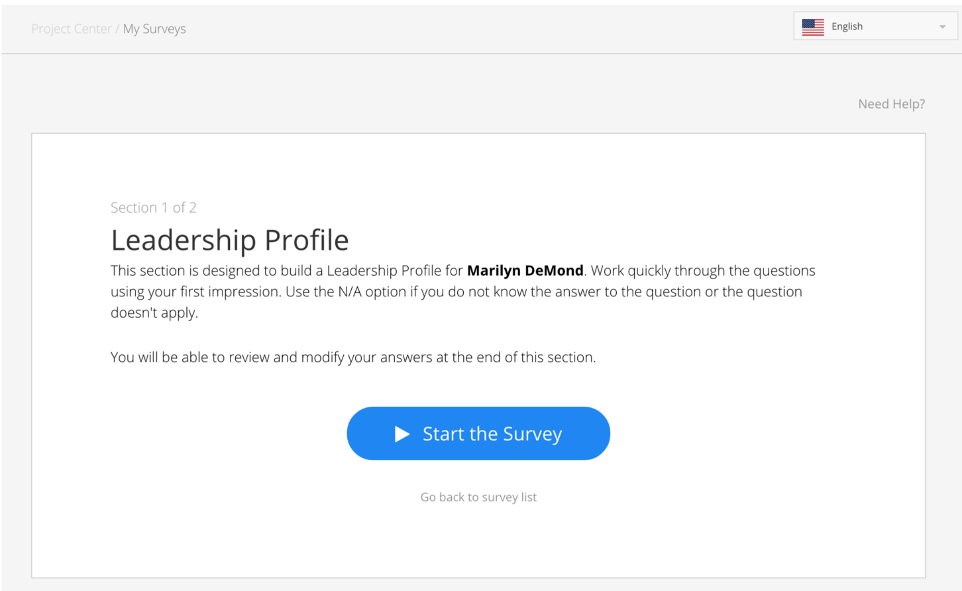
The “Take the survey” button becomes active after you invite the minimum number of evaluators listed. You may invite as many evaluators as you’d like to reach the goal of at least 10 completed evaluator surveys.



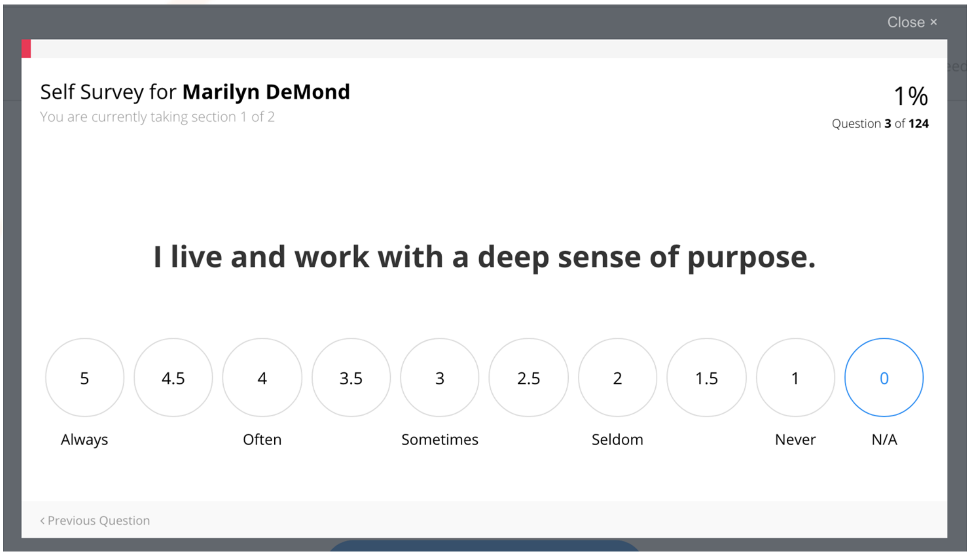
You may log out and log in as many times as needed to invite evaluators and complete the survey. Your home screen will look similar to the screen below. Click the "Take the Survey" button.



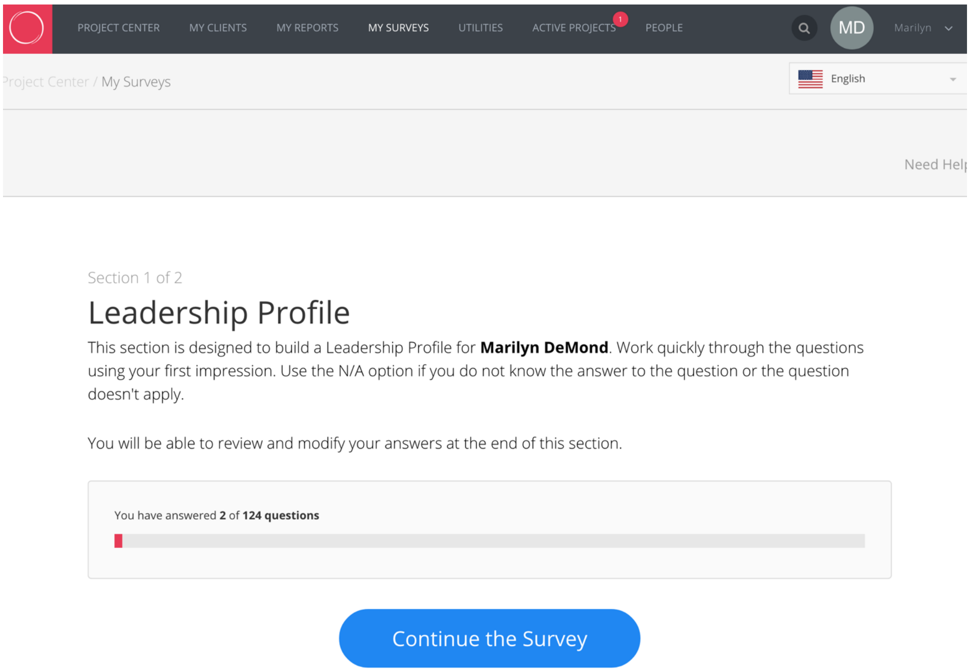
Click the "Start the Survey" button.



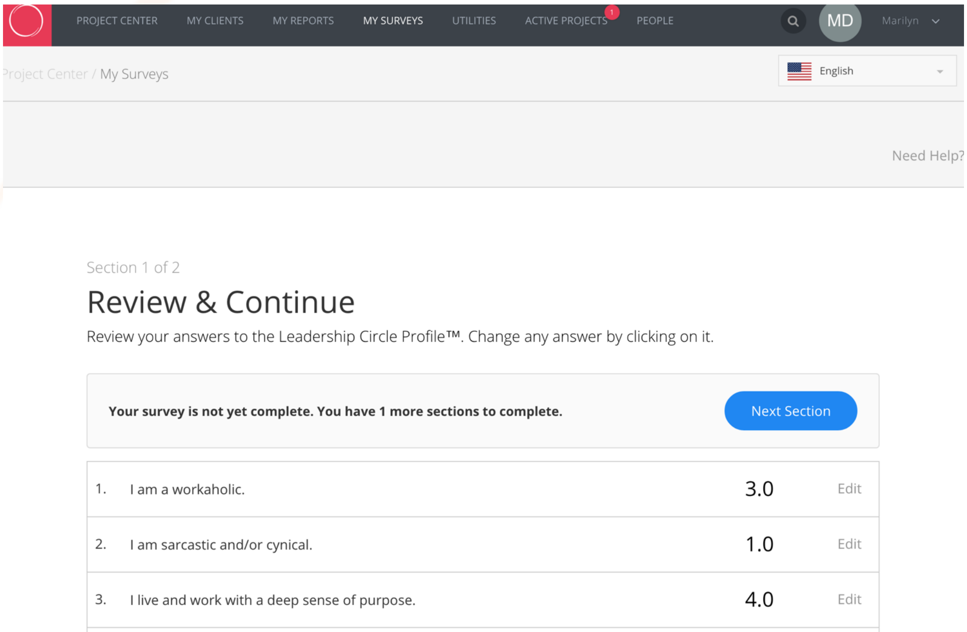
Questions appear one at a time as you select each answer.



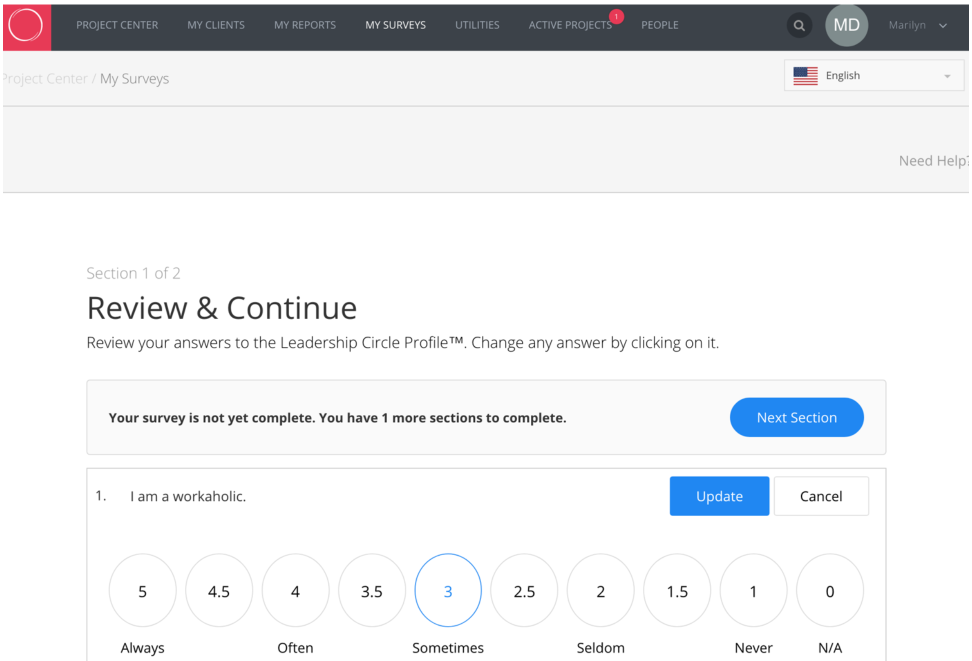
You may log out and log in as many times as needed to complete the survey. Click "Continue the Survey." The system will serve you the next survey question and track your survey progress.



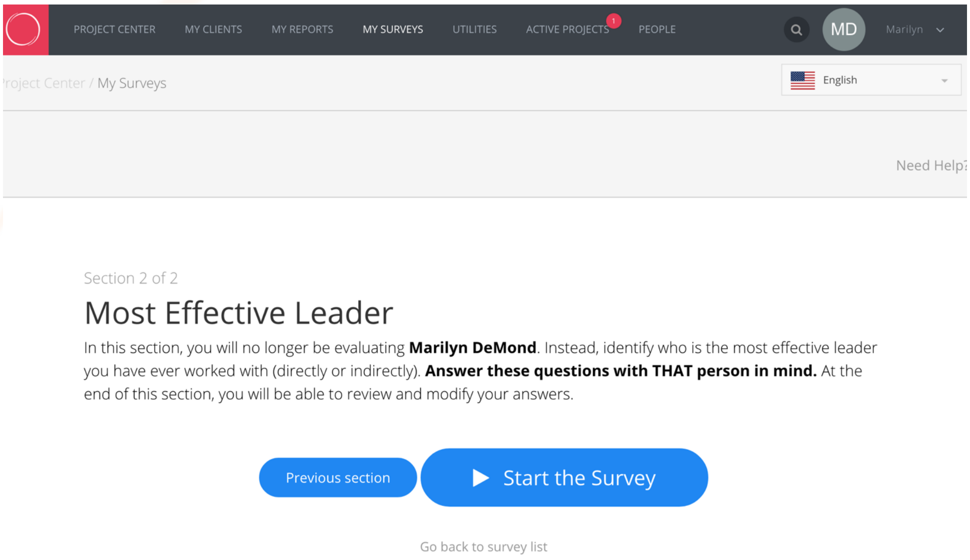
After you answer all questions in Section 1, you will come to a review page where you may click Edit to change any of your survey answers.



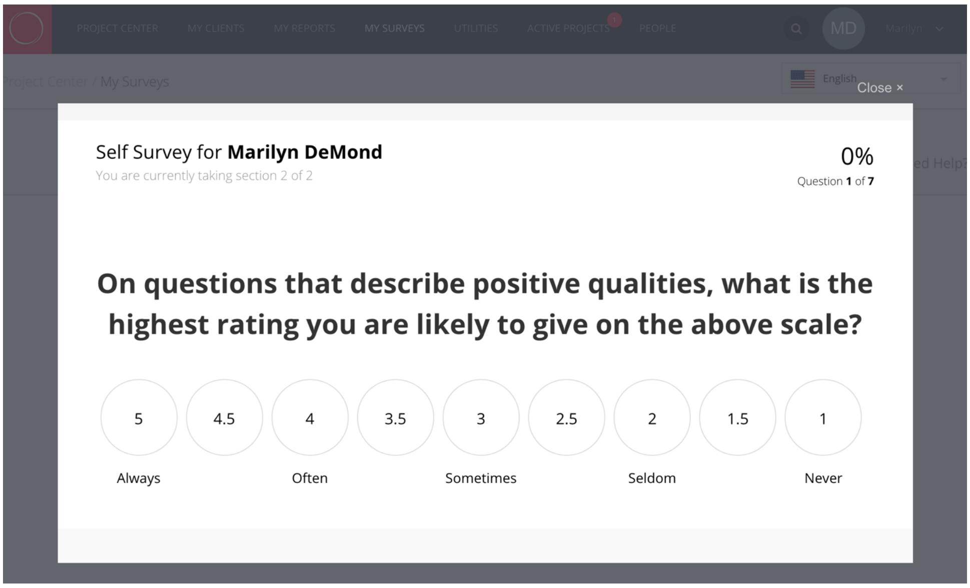
Click “Update” to save your new answer. You may want to print this page for future reference. When you complete your edits, click “Next Section” to proceed with the survey.



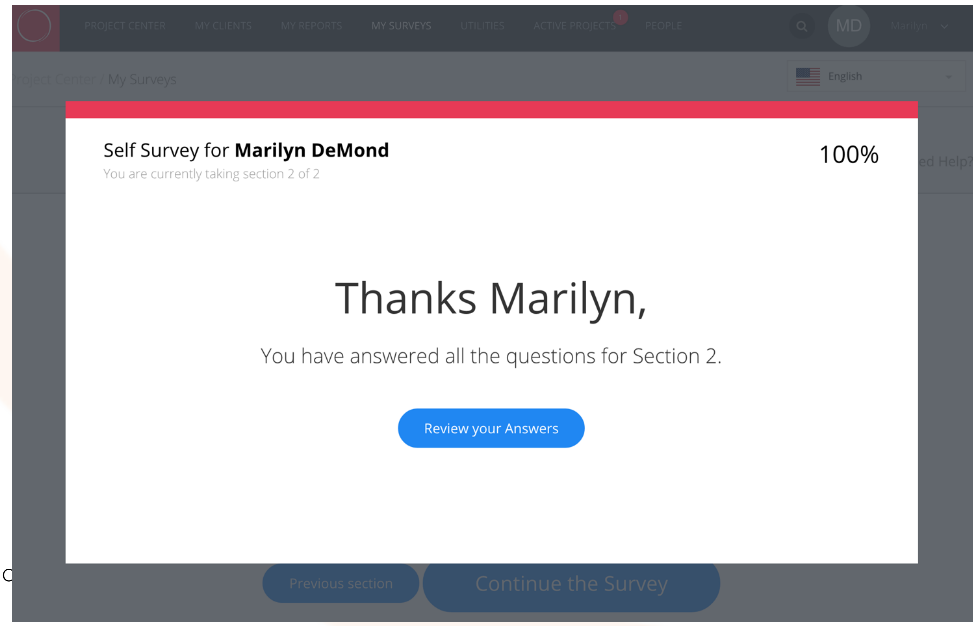
Section 2 is about the “Most Effective Leader” you have ever worked with.



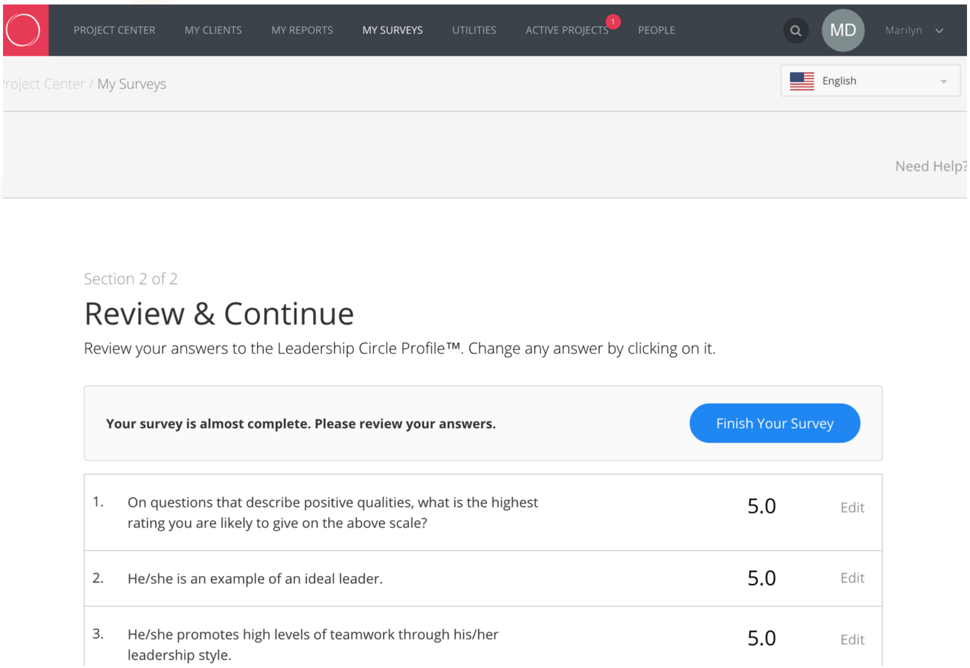
Questions appear one at a time as you select each answer.



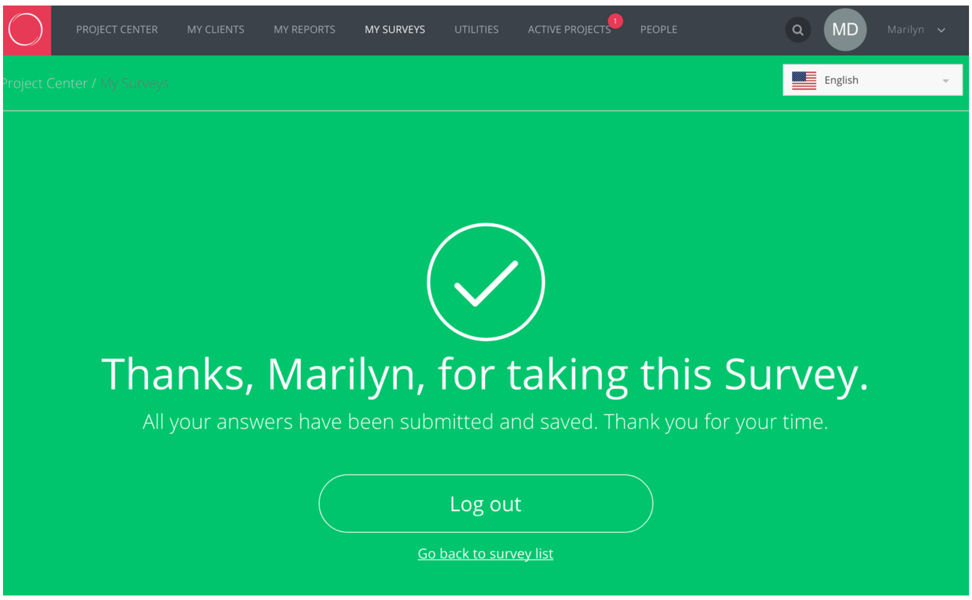
You will see the screen below when you have answered all questions in Section 2.



Click “Edit” to change any of your answers on the Review page. Click “Update” to save your new answer. Click “Finish Your Survey” when you complete your edits.



You will see the screen below after you click “Finish Your Survey.”



We will periodically re-send emails on your behalf to evaluators with unfinished surveys.

How to request a LCP/ME Product

To start your TLC Project, log into the TLC Project Centre at:

https://project-center.theleadershipcircle.com (this is a unique site used by Certified Consultants only).

- Click the **Forgot/Create Password?** link if you need to reset you Password. Once logged in, you can
- change your password through **My Account**.
- Click the **+ Create new Project** blue button on the home page
- Enter your Consulting Company (this is your own name if you have not set up a Company Name) and Consultant Name
- For your first order with a new client, click the **Create new client** link
- Type in your Project Name (this does not appear on the Report). Choose the Product that you are ordering (LCP or LCP-ME) Enter all other Project details as required
- Note that the **Welcome to TLC Emails** go either -
  - When you click **Send Invite** found to the right of each Participant's Name;
  - To send to all Participants at once click **Send new Emails** (found in the More Actions dropdown); or
  - At the Scheduled time that you setup in your Project (you can reach this via the **Options Tab**)
- You are billed by TLC Asia Pacific for completed Projects, up to 7 days after the Completion Date.
- Your printed Profile report and Binder will be delivered to you within 3-5 working days after the Completion Date.

TLCGo! app, provides useful How To Videos and User Guides that walk you through how to get around the site and how to take the Actions that you need to.

THE PROFILE INCLUDES WRITE-IN COMMENTS. YOU HAVE 2 OPTIONS. We highly recommend that you select the **Long Comments** for qualitative feedback.

Short Comments:

- What should he/she stop doing?
- What should he/she start doing?
- What should he/she keep doing?

Long Comments:

- In your opinion, what is this person's greatest leadership asset, skill or talent, and what suggestions do you have for leveraging this?
- In your opinion, what is this person's greatest leadership challenge or area for development, and what suggestions do you have for handling this?
- What have you observed about this person about which you would like to provide additional feedback to him/her that may not have been previously addressed in this assessment?

Payment is required for profiles that are cancelled or not completed.
You are billed for the profile when the reports are run and the order completed. In the event that you cancel the profile order after it has gone live, you will be billed 50% of the price, provided that the report has not been printed. You are responsible for the full price when the report has been printed. For this reason we encourage you to obtain a financial commitment from.

Your Australian TLC Client Services Team is:

Pauline Abel | Client Services Manager
P: +61 (0)2 8001 6570
M: +61 (0)413 197 768
E: pauline.abel@theleadershipcircle.com.au

Clare Walsh | Client Services Manager
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Rebecca Knox | Client Services Manager
P: +61 (0)2 8001 6570
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E: rebecca.knox@theleadershipcircle.com.au

How to send Reminders

The system does not automatically send email reminders to incomplete survey takers. The date that a reminder was last sent, is shown on the Send Invite button.

- Login to the Project Centre
- Goto your Project by clicking Active Projects (if the Completion Date has passed and your Project is no longer active, you will need to contact your Client Services Team and request that the Project Completion Date be extended).

To send reminders to all incomplete survey takers
- click **More Actions** and select **Send All Reminders**

To send reminders to specific individuals
- Using either the **Participant Tab** or the **Evaluator Tab**, find the person you want to remind, and click the **Send Invite** button to the right of their name.

The content of all system emails can be edited. Goto the **Participant Email** or **Evaluator Email** tabs to make changes to these emails.

Emails can be schedule to be sent. Got the **Options** tab, and set the day and time that you want the emails to go under the “Schedule sending of invitation emails section”. This will send an email to all incomplete survey takers.

How to Order a Group Report

- Login to the Project Centre
- Goto **My Clients**, find the client you want to create a group report for and click **Create group report**

Or

- Goto your Project Screen: click **More Actions**, and select **Create Group Report**
- Make your selections.
  - You can enter multiple clients in the “Client’ field.
  - You can select the specific participants from these selected Client’s Projects on the “Select Participants” screen

The report will run automatically as part of this order process, and will be available to download on the “Thank you for your order” screen.

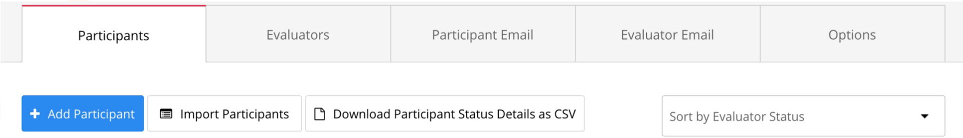
- Click the **Close x** button to get back to the Order screen
- Click the **Red Logo** or the Project Centre to return to the home screen

How to View/Download your Reports

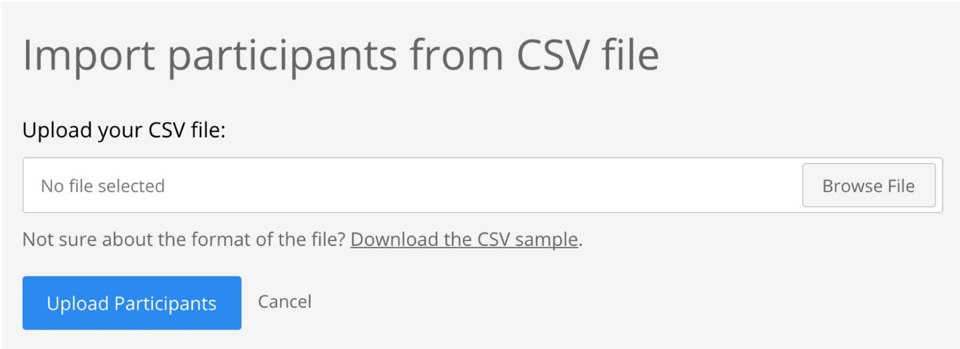
- Click on **My Reports** (top bar of the screen)
- Look for your Project name, or use the available filters to find the Project reports you are looking for.
- Click on the left hand order number to access your reports
- Click the left hand blue **Download Reports (ZIP)** button
- The reports will prepare for download
- When Done, click the **Download Reports (ZIP)** button, this will download zipped file of the 3 report files to your computer/device.
- Click the **Close x** button to get back to the Order screen
- Click the **Red Logo** or the **Project Centre** to return to the home screen

How to Upload Participant / Evaluator CSV File

Find your project and click "Manage Project." Under the "Participants" tab click "Import Participants." Do not use the Import Evaluators file as this file is incorrect.



Click "Download the CSV Sample"



Open the CSV file called "import_participants_sample.csv"

	A	B	C	D	E	F
1	participant group	email	relationship to participant	first name	last name	language
2	group1	imp001@fcgtest.com	self	Jill	Johnson	english
3	group1	imp002@fcgtest.com	boss boss	Jane	Doe	english
4	group1	imp003@fcgtest.com	boss	Jim	Doit	english
5	group1	imp004@fcgtest.com	peer	John	Jameson	english
6	group1	imp005@fcgtest.com	direct report	Jack	Jefferson	english
7	group1	imp006@fcgtest.com	other	Janice	Olson	english
8	group2	imp007@fcgtest.com	self	Randy	Johnson	english
9	group2	imp008@fcgtest.com	boss	Rita	McKay	english
10	group2	imp009@fcgtest.com	direct report	Rizo	Romero	english
11	group2	imp0010@fcgtest.com	peer	Raul	Rodriguez	english
12	group3	imp0011@fcgtest.com	self	Mandy	Johnson	english
13	group3	imp0012@fcgtest.com	boss	Rita	McKay	english
14	group3	imp0013@fcgtest.com	direct report	Martha	Main	english
15	group3	imp0014@fcgtest.com	peer	Raul	Rodriguez	english

Each group (group1, group2, group3) begins with the participant (completing self-survey) information. See yellow highlight.

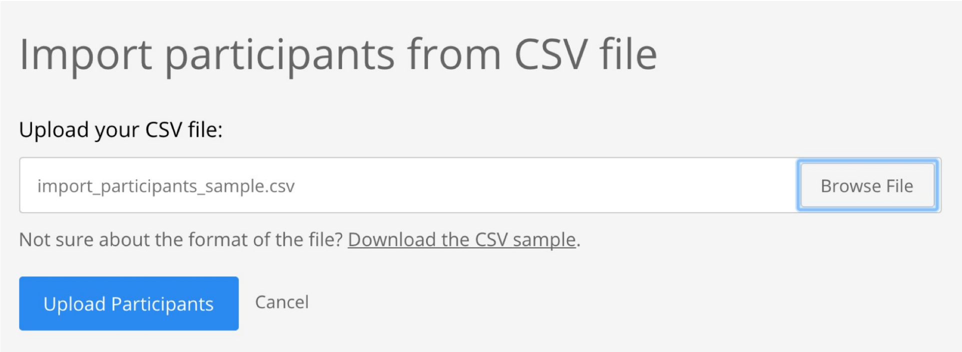
The evaluator information is added for each participant. The group (group1, group2, group3, etc.) tells the system which participant the evaluators belong to. To add more evaluators, insert additional rows.

The format of the information such as column order, group1, direct report, english, etc., must remain as is for the file to import. There can be no extra spaces when copying email addresses or names. The file needs to be saved as a CSV file.

If you are importing participants for a Leadership Culture Survey, the group1, group2, etc. refers to the participant, not to groupings for breakout reports. LCS participant sample file below. The file needs to be saved as a CSV file.

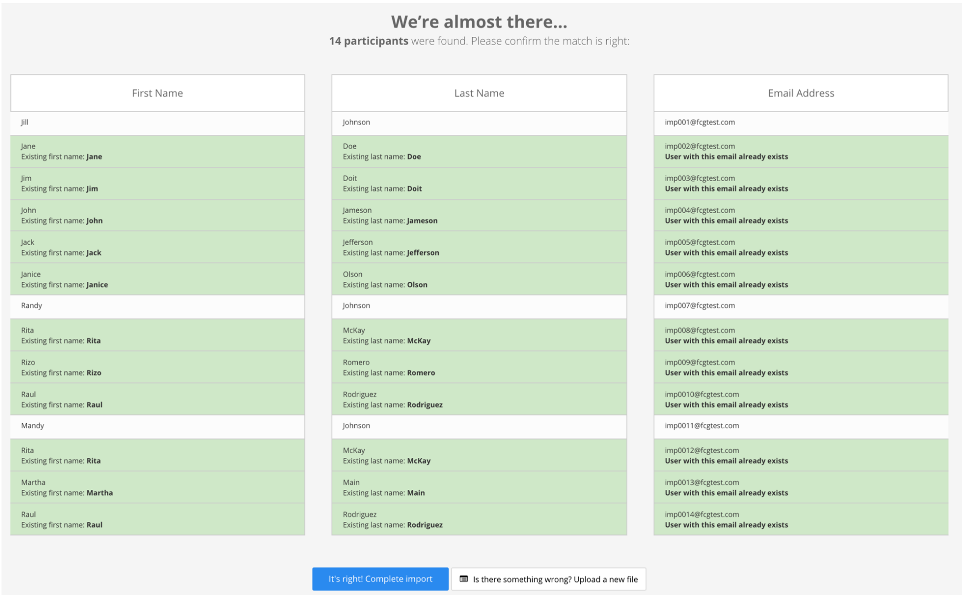
	A	B	C	D	E	F
1	participant group	email	relationship to participant	first name	last name	language
2	group1	imp001@fcgtest.com	self	Jill	Johnson	english
3	group2	imp007@fcgtest.com	self	Randy	Johnson	english
4	group3	imp0011@fcgtest.com	self	Mandy	Johnson	english
5	group4	imp0012@fcgtest.com	self	Rita	McKay	english
6	group5	imp0013@fcgtest.com	self	Martha	Main	english
7	group6	imp0014@fcgtest.com	self	Raul	Rodriguez	english

When the file is ready, click "Browse File" and select the CSV file.



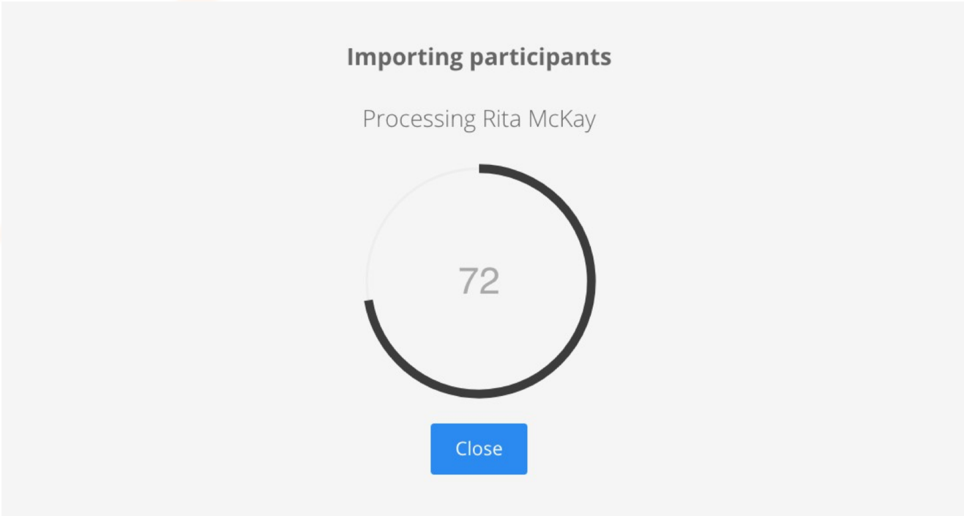
After you select the file, click "Upload Participants."

You will see a review page of the participants and/or evaluators to be uploaded. The message says "participants" even though the list may be a combination of participants and evaluators.

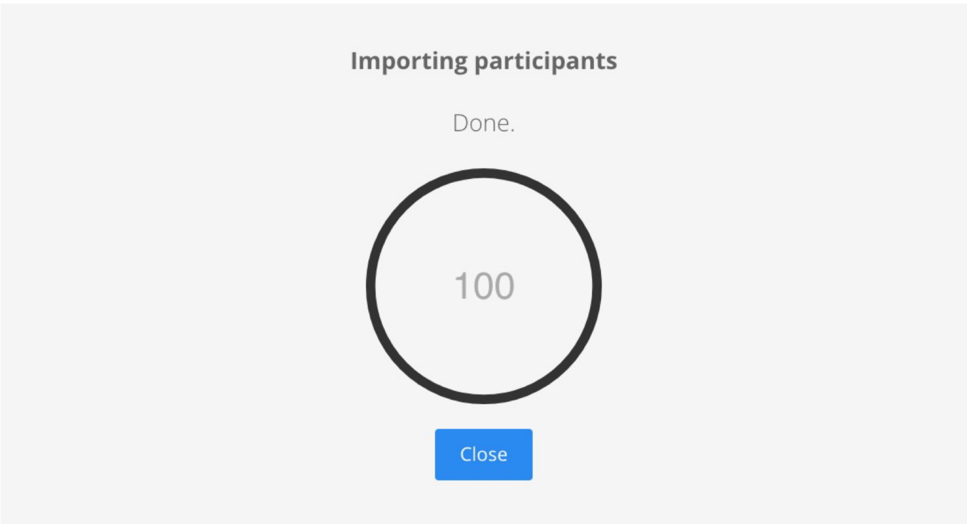


If the list is correct, click "It's right! Complete import."

You will see a visual of the import status.



Click “Close” when the import is complete.



You will see the participants added to the project.