Project Center

User Guides

The Leadership Circle®

Contents

Creating a Password

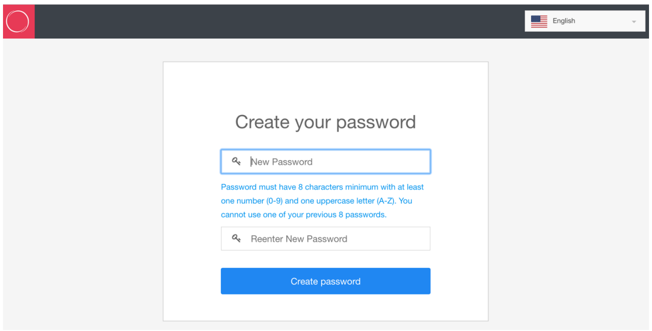
Web address is https://project-center.theleadershipcircle.com

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 the new password twice and then click "Save Password."

The password requires 8 characters minimum with at least one number (0-9) and one uppercase letter (A-Z). You cannot use one of your previous 8 passwords.



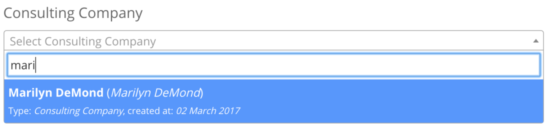
If you need assistance, please contact your Client Services Team.

Creating a Leadership Circle Profile or Manager Edition Project

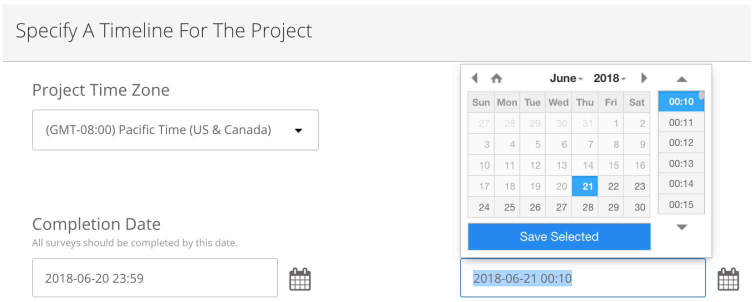
Log into the TLC Project Centre at:
https://project-center.theleadershipcircle.com

On the dashboard, click + Create new Project

- Start typing your name as the Consulting Company name and click to select. If you changed the name of your Consulting Company, type that name and click to select.



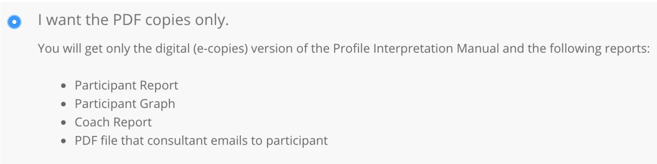
- Confirm that Consultant name is your name.
- Click Select Client to select an existing client company name or click "create a new client" to enter a new client company name and select their industry.
- Type in your Project Name (this helps you know who is in the project)
- Click Select Product for LCP or LCP-ME
- Specify A Timeline For The Project. Click the calendar and click on a date and click on a time for the Completion Date and click Save Selected. Repeat for the Run Report Date.



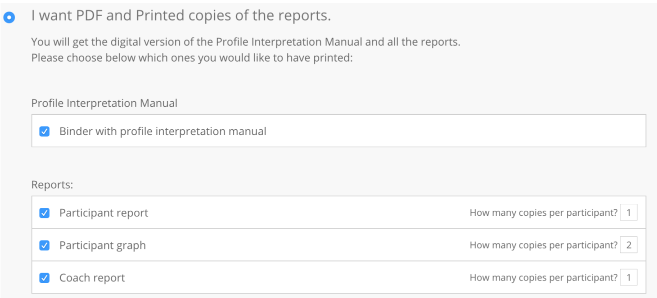
- Comments For The Printer. Ex: Enter addresses if reports/binders are shipping to multiple addresses.
- Select Project Time Zone based on location of the survey takers. For example, if they are located across the country, select the latest time zone.
- Schedule Sending Of Invitation Emails. This feature may be used to auto send emails. Select the Time Zone. Click on the calendar then click on a date and click on a time. The system will send the invitation emails on the date/time that you select based on the time zone you selected. After the invitation emails are sent, you may click the Options tab and click on a new date/time to re-send emails. Click "Save Changes" at the bottom of the page.
- Comment Questions To Be Included In The Survey. Select Option 1 or 2. Only one option may be selected. What set of questions will provide you with the best responses from your client company?
- How Evaluators Are Invited To Participate. If you select "I will invite the evaluators..." then you will enter the evaluator information and the participant will only see the "Take the survey" button. If you select "My participant can invite..." then the participant will invite the evaluators and the invitation email will be sent immediately.
- Minimum Evaluations Per Participant. The default is set to 5. This means the participant needs to invite at least 5 evaluators before the "Take the survey" button becomes active and at least 5 evaluators need to complete the survey before the report will process.
- Promo Code. Enter a free Profile code if you have one you'd like to use for this project.

- Deliverables And Printing Options. PDF reports and manuals are available with either option you select.

- This option provides you only with PDF reports and manual available for download after the run report date.



- This option provides you with printed reports and/or binder plus the PDF reports and manual. You may unselect the binder if you don't want the binder for this project but still receive printed reports. You may change the default "1" for copies per participant to "2" if you want an extra print of a report or graph. There is a charge for extra prints of the report or graph.

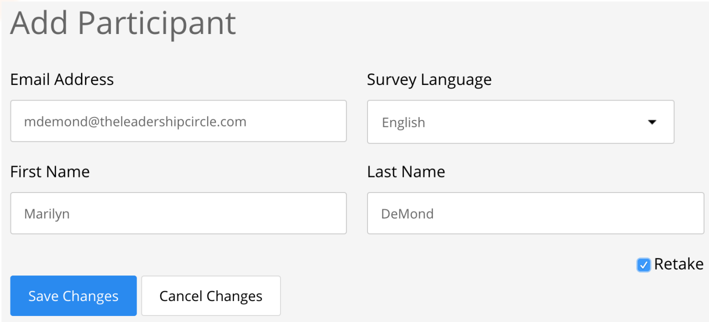


- Enter the Billing Address. This is the person that we will send the Bill/Invoice to for this Project. TLC will issue this Bill/Invoice once the reports have been run and the Project has reached the Run Report Date.

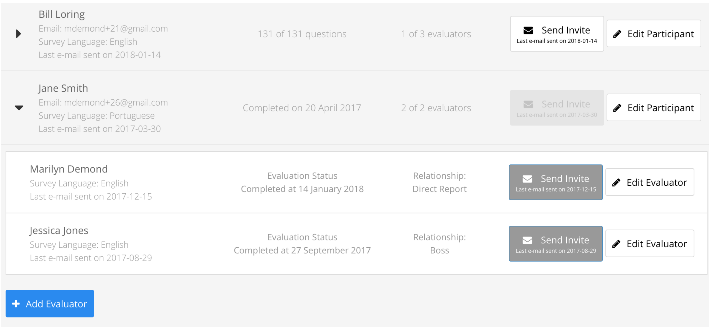
- Enter the Report Address. This is the address where we will ship the printed Profile Reports and Coaches Report. You can click "Same as the Billing Address" to use the address entered above, or you can click "Select an address from My Account" to use a different address, or type in a new address.

- Enter the Binder Address. This is the address where we will ship the binders containing the generic Interpretation Guide. You can click "Same as the Billing Address" or "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.

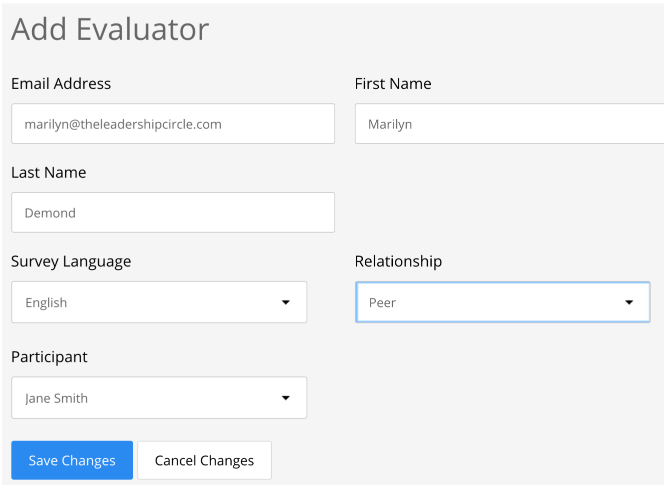
- Click “Add Participant.” Fill in Email Address, First Name, Last Name, and select Survey Language. If the system finds the participant in the database as a previous participant, a “Retake” button will appear. Click the Retake button. Click Save Changes.



- Click the icon in front of the participant name to open the evaluator list.



- Click “Add Evaluator” button. Fill in Email Address, First Name, Last Name, Survey Language, and Relationship. Click Save Changes.



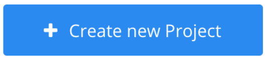
- Click “More Actions” and select “Send new emails” or send emails by completing “Schedule Sending Of Invitation Emails.” You may also click the “Send Invite” button to the right of the name.

- You may change any of the project options that you selected when creating your project by clicking the “Options” tab, making your changes, then clicking “Save Changes” at the bottom of the page.

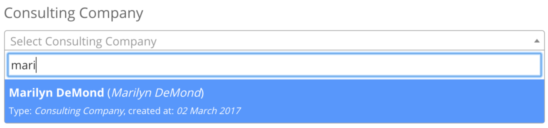
- You will be invoiced when the project is finished. Cancellation fees may apply.

Creating a Leadership Culture Survey Project

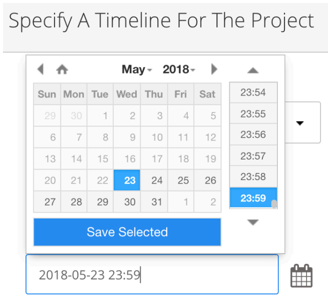
Log into the TLC Project Centre at:
https://project-center.theleadershipcircle.com

On the dashboard, click 

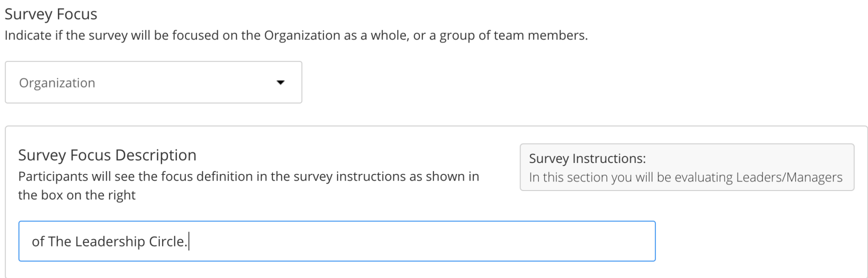
- Start typing your name as the Consulting Company name and click to select. If you changed the name of your Consulting Company, type that name and click to select.

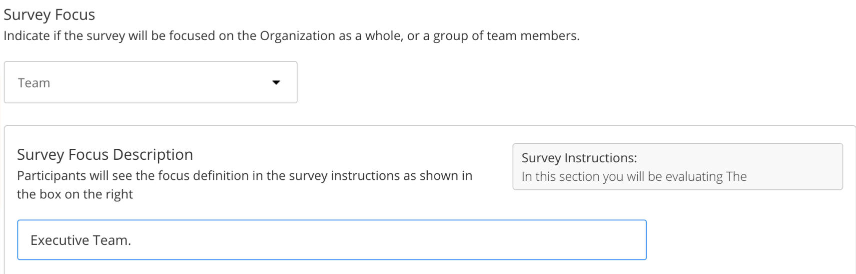


- Confirm that Consultant name is your name.
- Click Select Client to select an existing client company name or click "create a new client" to enter a new company client name and select their industry.
- Type in your Project Name (this helps you know who is in the project)
- Click Select Product for Leadership Culture Survey.
- Specify A Timeline For The Project. Click the calendar then click on a date and click on a time then click Save Selected for the Completion Date.

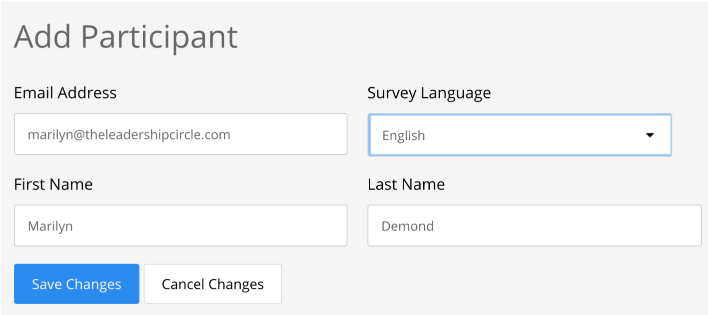


- Comments For The Printer. Leadership Culture Survey reports are available as PDF only. No printer comments are needed.
- Select Project Time Zone based on location of the survey takers. For example, if they are located across the country, select the latest time zone.
- Schedule Sending Of Invitation Emails. This feature may be used to auto send emails. Select the Time Zone. Click on the calendar to click on a date and click on a time. The system will send the invitation emails on the date/time that you select based on the time zone you selected. After the invitation emails are sent, you may click the Options tab and click on a new date/time to re-send emails. Click "Save Changes" at the bottom of the page.
- Survey Focus. Select Organization and fill in the company name or select Team and fill in the team name.





- Promo Code. Enter a free Profile code if you have one you'd like to use for this project.
- Need Help Email. This email address is used when a user clicks the "Need Help?" link in the survey taker. The email will be sent to the Client Services Team who will answer the question or forward the email to the consultant.
- Deliverables And Printing Options default to digital graph and digital report.
- Enter Billing Address information.
- Click "Add Participant." Fill in Email Address, First Name, Last Name, and select Survey Language. Click Save Changes. The LCS uses participants only, no evaluators.



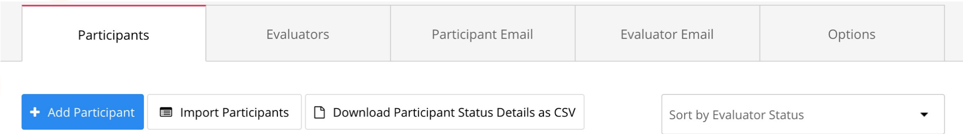
- Click "More Actions" and select "Send new emails" or send emails by completing "Schedule Sending Of Invitation Emails." You may also click the "Send Invite" button to the right of the name.

- You may change any of the project options that you selected when creating your project by clicking the "Options" tab, making your changes, then clicking "Save Changes" at the bottom of the page.

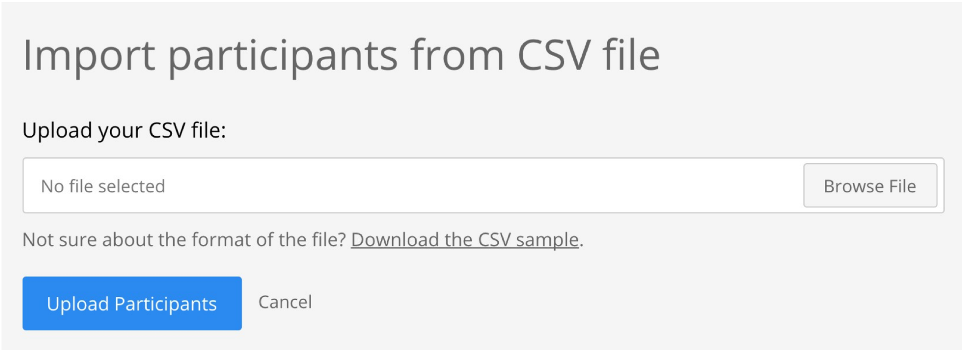
- You will be invoiced when the project is finished. Cancellation fees may apply.

Uploading Participant / Evaluator CSV File

If you have several survey takers to enter, you have the option to upload a CSV file instead of entering them individually. Find your project and click “Manage Project.” Under the “Participants” tab click “Import Participants.”



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	bettydavis@tlctestmail.com	self	Betty	Davis	english
3	group1	bobbarker@tlctestmail.com	boss boss	Bob	Barker	french canadian
4	group1	henryfonda@tlctestmail.com	boss	Henry	Fonda	chinese
5	group1	katherinehepburn@tlctestmail.com	peer	Katherine	Hepburn	spanish
6	group1	jasonrobards@tlctestmail.com	direct report	Jason	Robards	german
7	group1	audreyhepburn@tlctestmail.com	other	Audrey	Hepburn	swedish
8	group2	marlonbrando@tlctestmail.com	self	Marlon	Brando	turkish
9	group2	ingredbergman@tlctestmail.com	boss	Ingred	Bergman	swedish
10	group2	humphrey.bogart@tlctestmail.com	direct report	Humphrey	Bogart	polish
11	group2	gracekelly@tlctestmail.com	peer	Grace	Kelly	japanese
12	group3	patrickswayze@tlctestmail.com	self	Patrick	Swayze	portuguese
13	group3	elizabethtaylor@tlctestmailmail.com	boss	Elizabeth	Taylor	portuguese (eu)
14	group3	jamescoburn@tlctestmail.com	direct report	James	Coburn	french canadian
15	group3	gretagarbo@tlctestmail.com	peer	Greta	Garbo	latin american spanish
16	group4	charlesechaplin@tlctestmail.com	self	Charles	Chaplin	russian
17	group4	judygarland@tlctestmail.com	boss	Judy	Garland	dutch
18	group4	clarkgable@tlctestmail.com	direct report	Clark	Gable	czech
19	group4	bettywhite@tlctestmail.com	peer	Betty	White	arabic
20	group4	jamesdean@tlctestmail.com	peer	James	Dean	korean

Each group (group1, group2, group3) begins with the participant (completing self-survey) information. See yellow highlight. The CSV for the Leadership Culture Survey would only have the highlighted self relationship as no evaluators are used for the LCS. Each self is a new group. See example on next page.

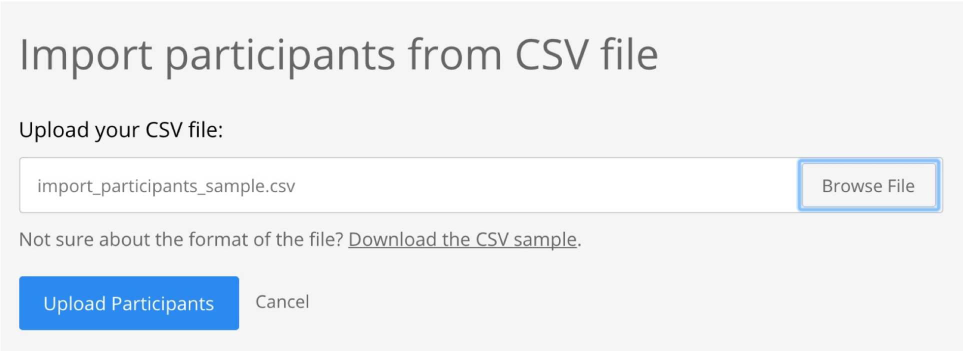
For the Profile, the evaluator information is added for each participant. The group (group1, group2, group3, etc.) tells the system which participant the evaluators belong to. To add more evaluators, insert additional rows.

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	bettydavis@tlctestmail.com	self	Betty	Davis	english
3	group2	marlonbrando@tlctestmail.com	self	Marlon	Brando	turkish
4	group3	patrickswayze@tlctestmail.com	self	Patrick	Swayze	portuguese
5	group4	charlesechaplin@tlctestmail.com	self	Charles	Chaplin	russian

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.

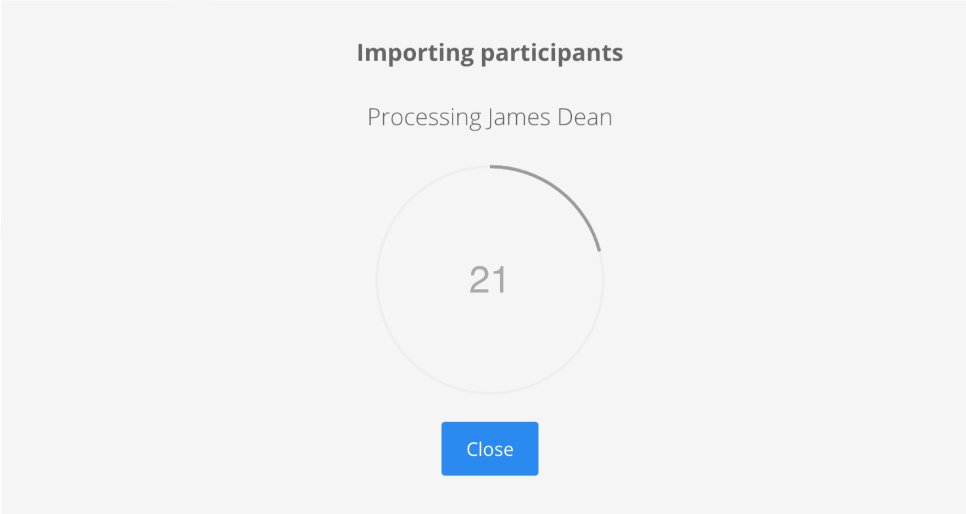
We’re almost there...
19 participants were found. Please confirm the match is right:

First Name	Last Name	Email Address
Betty Existing first name: **Betty**	Davis Existing last name: **Davis**	bettydavis@tlctestmail.com **User with this email already exists**
Bob Existing first name: **Bob**	Barker Existing last name: **Barker**	bobbarker@tlctestmail.com **User with this email already exists**
Henry Existing first name: **Henry**	Fonda Existing last name: **Fonda**	henryfonda@tlctestmail.com **User with this email already exists**
Katherine Existing first name: **Katherine**	Hepburn Existing last name: **Hepburn**	katherinehepburn@tlctestmail.com **User with this email already exists**
Jason Existing first name: **Jason**	Robards Existing last name: **Robards**	jasonrobards@tlctestmail.com **User with this email already exists**
Audrey	Hepburn	audreyhepburn@tlctestmail.com
Marlon Existing first name: **Marlon**	Brando Existing last name: **Brando**	marlonbrando@tlctestmail.com **User with this email already exists**
Ingred Existing first name: **Ingred**	Bergman Existing last name: **Bergman**	ingredbergman@tlctestmail.com **User with this email already exists**
Humphrey Existing first name: **Humphrey**	Bogart Existing last name: **Bogart**	humphrey.bogart@tlctestmail.com **User with this email already exists**
Grace Existing first name: **Grace**	Kelly Existing last name: **Kelly**	gracekelly@tlctestmail.com **User with this email already exists**
Patrick Existing first name: **Patrick**	Swayze Existing last name: **Swayze**	patrickswayze@tlctestmail.com **User with this email already exists**
Elizabeth Existing first name: **Elizabeth**	Taylor Existing last name: **Taylor**	elizabethtaylor@tlctestmailmail.com **User with this email already exists**
James Existing first name: **James**	Coburn Existing last name: **Coburn**	jamescoburn@tlctestmail.com **User with this email already exists**
Greta Existing first name: **Greta**	Garbo Existing last name: **Garbo**	gretagarbo@tlctestmail.com **User with this email already exists**
Charles Existing first name: **Charles**	Chaplin Existing last name: **Chaplin**	charlesechaplin@tlctestmail.com **User with this email already exists**
Judy Existing first name: **Judy**	Garland Existing last name: **Garland**	judygarland@tlctestmail.com **User with this email already exists**
Clark Existing first name: **Clark**	Gable Existing last name: **Gable**	clarkgable@tlctestmail.com **User with this email already exists**
Betty Existing first name: **Betty**	White Existing last name: **White**	bettywhite@tlctestmail.com **User with this email already exists**
James Existing first name: **James**	Dean Existing last name: **Dean**	jamesdean@tlctestmail.com **User with this email already exists**

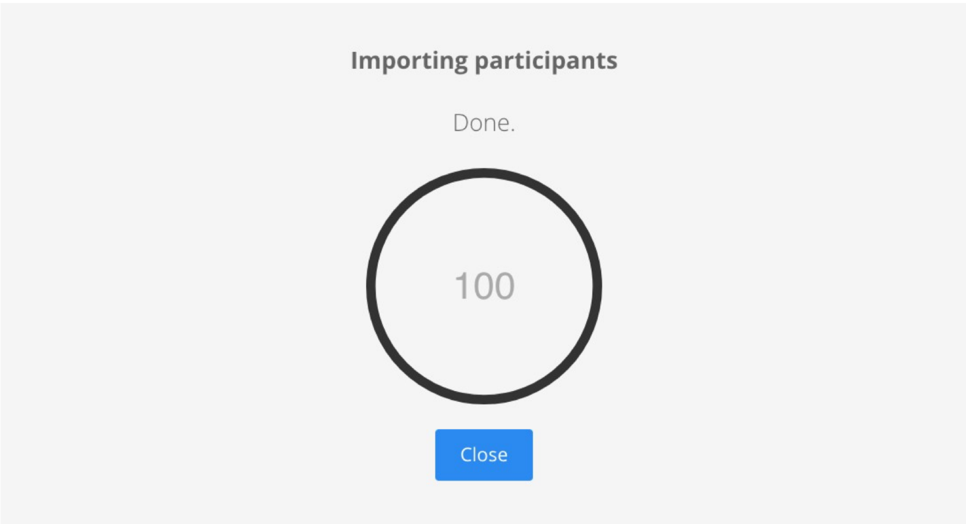
It's right! Complete import | Is there something wrong? Upload a new file

If the list is correct, click “It’s right! Complete import.”

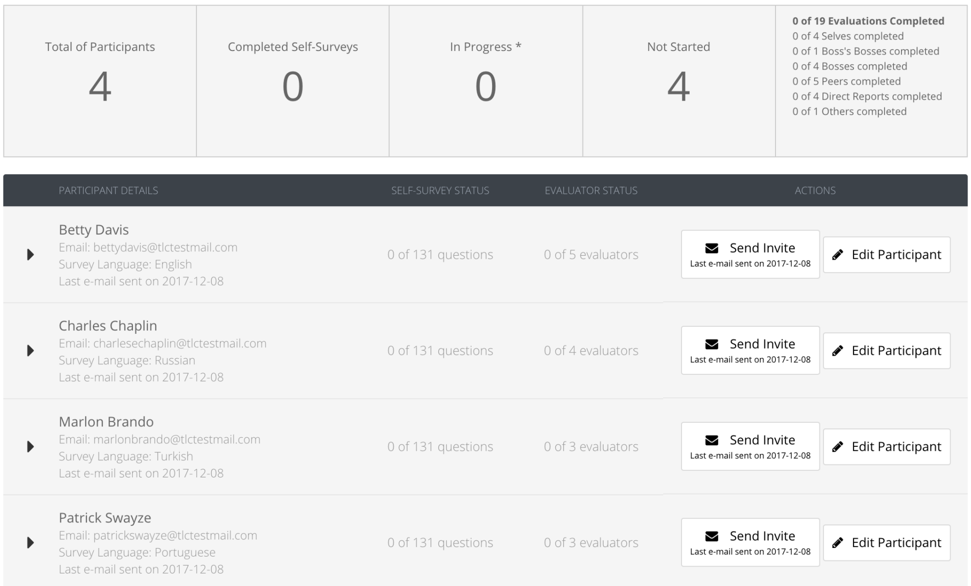
You will see a visual of the import status.



Click "Close" when the import is complete.



You will see the participants (and evaluators) added to the project.



Editing Invitation and Reminder Emails

You may edit invitation and reminder emails for the participant and the evaluator. The same emails are sent to all participants and all evaluators. Click Active Projects. Click Manage Project.

- Click "Participant Email" tab.
- Click on the language for the "INVITATIONS" email. Scroll down the page and edit the text.
- The information in *| |* should not be edited or deleted. This information will be auto filled by the system.
- Click "Save Message"

- Click "Participant Email" tab.
- Click on the language for the "REMINDERS" email. Scroll down the page and edit the text.
- The information in *| |* should not be edited or deleted. This information will be auto filled by the system.
- Click "Save Message"

- Click "Evaluator Email" tab.
- Click on the language for the "INVITATIONS" email. Scroll down the page and edit the text.
- The information in *| |* should not be edited or deleted. This information will be auto filled by the system.
- Click "Save Message"

- Click "Evaluator Email" tab.
- Click on the language for the "REMINDERS" email. Scroll down the page and edit the text.
- The information in *| |* should not be edited or deleted. This information will be auto filled by the system.
- Click "Save Message"

Resending Emails and Checking Email Status

You will need to manually send or schedule emails to be sent to survey takers who haven't completed the survey. Click Active Projects. Click Manage Project.

- Click "More Actions" and select "Send All Reminders"
- Click the "Send Invite" button to the right of the participant name.
- Click the icon to the left of the participant name to open the evaluator list and click the "Send Invite" button to the right of the evaluator name.
- Click "Options" tab and schedule re-sending emails by completing "Schedule Sending Of Invitation Emails." Select a time zone. Click the calendar then click on a date and click on a time. Click "Save Changes." The system will re-send the emails on the selected date and time in the time zone selected.

The "Send Invite" button will show the date the last invitation email was sent. The "Send Reminder" button will show the date the last reminder email was sent.

To check email status:

Open your project, click "More Actions" and select "Email Delivery Status." You will see email addresses with statuses of "Delivered" or "Failed" or "Queued. Thank you." (initial status. Click Refresh to update). Click the arrow to the right to sort the list. There are three failed delivery statuses:

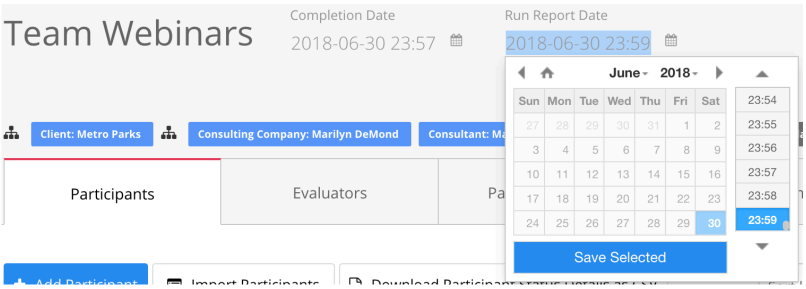
- "Failed. Unable to connect to MX servers" (domain name after @ is incorrect)
- "Failed. (email address) User unknown" (name before @ is incorrect)
- "Failed." Error 451 or 421 (correct domain name and correct name) Client's server rejected suspecting SPAM. Client needs to white list. See instructions below.
- Click the Failed message to highlight and click Resend. Edit the email address and click Save Changes. The email will be sent. If you receive the message, "Email has already been taken," find the evaluator under the participant being evaluated, check the relationship, delete the evaluator then add the evaluator with the correct email address and relationship.

Please ask your client's IT department to white list or approve emails from notifications@theleadershipcircle.com. Emails may also come from notifications@mg-prod.theleadershipcircle.com. The domain we're emailing from is mg-prod.theleadershipcircle.com. Our sending IP address is 166.78.71.84. If the client has a corporate network with an Internet filter, please ask the client's IT department to list https://project-center.theleadershipcircle.com as an approved website.

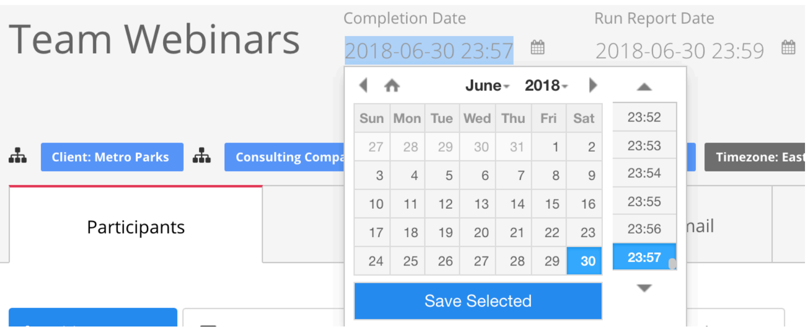
Extending the LCP or ME Completion Date and Run Report Date

You need to manually extend the Completion Date and Run Report Date if you aren't receiving the number of completed surveys that you want for your project. Click Active Projects. Click Manage Project. The Completion Date and Run Report Date are at the top of your project.

- Begin by clicking the calendar for the Run Report Date. Click on a date and click on a time then click Save Selected. Watch for a green "Data Saved" message on the bottom right.



- Next click on the calendar for the Completion Date. Click on a date and click on a time then click Save Selected. Watch for a green "Data Saved" message on the bottom right.

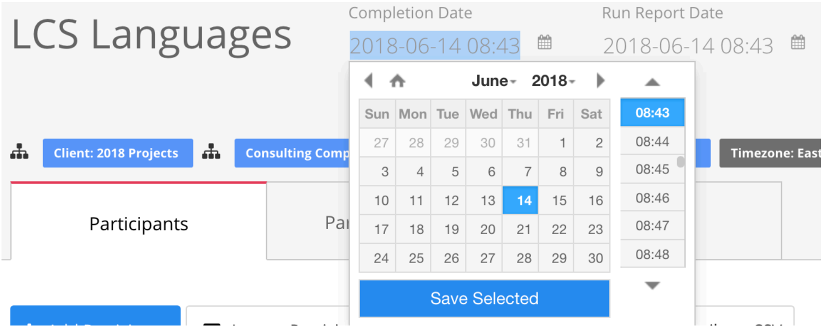


If you don't see a calendar beside the Completion Date or Run Report Date, please contact your Client Services Team for assistance to re-open your project.

Extending the Leadership Culture Survey Completion Date

You need to manually extend the Completion Date if you aren't receiving the number of completed surveys that you want for your project. Click Active Projects. Click Manage Project. The Completion Date and Run Report Date are at the top of your project.

- Begin by clicking the calendar for the Completion Date. Click on a date and click on a time then click Save Selected. Watch for a green "Data Saved" message on the bottom right. The Run Report Date will default to the date and time you selected for the Completion Date. You can extend the Run Report if you'd like.



Editing or Deleting a Participant or Evaluator

Navigate to your project by clicking Active Projects then Manage Project.

To edit a participant email address or name, click the "Edit Participant" button to the far right of the participant name.

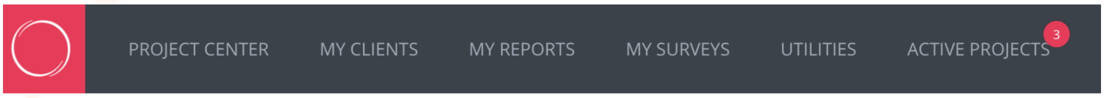
- Do not replace a participant with another participant's information. Instead, click "Delete Participant" then add a new participant. All survey answers are deleted when you click "Delete Participant."
- Edit the First Name or Last Name and click "Save Changes"
- Edit the email address and click "Save Changes"
- If you receive the message "Email address is already in use," please contact your Client Services Team for assistance.
- If the participant completes the survey in one language and you want the report in a different language, change the participant language prior to the completion date.

To edit an evaluator email address or name, click the icon beside the participant name to open the evaluator list. Click the "Edit Evaluator" button to the far right of the evaluator name.

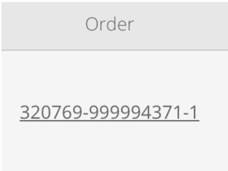
- Do not replace an evaluator with another evaluator's information. Instead, click "Delete Evaluator" then add as a new evaluator. Note relationship before you delete. All survey answers are deleted when you click "Delete Evaluator."
- Edit the First Name or Last Name and click "Save Changes"
- Edit the email address and click "Save Changes"
- If you receive the message "Email address is already in use," please click "Delete Evaluator" then add as a new evaluator. Note relationship before you delete.

Downloading Reports

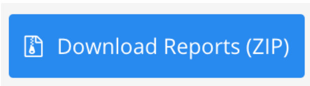
On your Dashboard, click My Reports.



Click the Order Number.



Click Download Reports (ZIP), wait for the Preparing reports for download to show Done and click Download Reports (ZIP). The report ZIP file will download to your computer.



If the Download Reports (ZIP) button is inactive, contact your Client Services Team.

If a report is missing, check to see if the self-survey was completed and if the minimum number of evaluators per participant was met.

Ordering a Profile Group Report

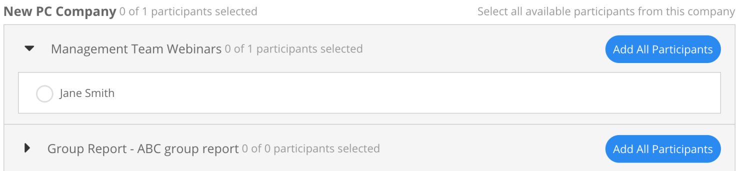
Group reports should be ordered after the Run Report Date as participants are required to have a participant report to be included in the group report.

To select a Participant for a **Profile group report**, there must be a completed self-survey and the minimum number of completed evaluator surveys set for the project.

To create a Profile group report

- Click "Manage Project"
- Click "More Actions" and select "Create Group Report"
- One Client name is listed in the Client text box. If you need to add more client names, click in the text box beside the first client name and type another client name then click on the name to add. Repeat until all client names for the group report are added.

- Click Next
- Click Add All Participants for each client listed or click the icon beside the client name to show the list of participants and select specific participants.

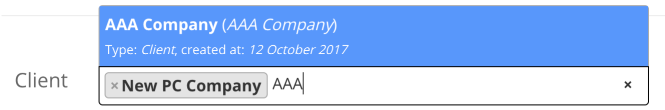


- Click Next
- Type Report Name
- Select Report Language
- Click Next
- Select Printed/PDF reports or only PDF reports
- Click Next
- Fill in Billing Address
- Fill in Report Address if you ordered printed reports
- Click Create Report
- The report will process automatically within a few minutes
- Click My Reports
- Click the order number
- Click Download Reports. If the Download Reports button isn't active within 30 minutes, please contact your Client Services Team.

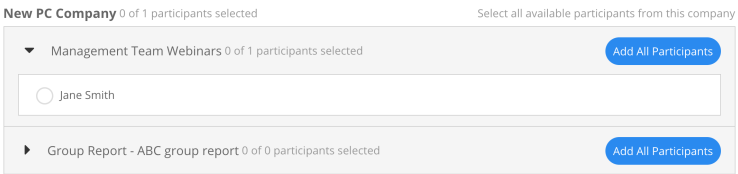
Ordering a Leadership Culture Survey Group Report

To select a Participant for a **Leadership Culture Survey group report**, there must be a completed self-survey.

To create a Leadership Culture Survey group report
- Click "Manage Project"
- Click "More Actions" and select "Create Group Report"
- Change Product to Leadership Culture Survey
- One Client name is listed in the Client text box. If you need to add more client names, click in the text box beside the first client name and type another client name then click on the name to add. Repeat until all client names for the group report are added.



- Click Next
- Click Add All Participants for each client listed or click the icon beside the client name to show the list of participants and select specific participants.



- Click Next
- Type Report Name
- Select Report Language
- Click Next
- Reports default to digital as printed reports aren't available
- Click Next
- Fill in Billing Address
- Click Create Report
- The report will process automatically within a few minutes
- Click My Reports
- Click the order number
- Click Download Reports. If the Download Reports button isn't active within 30 minutes, please contact your Client Services Team.

Sharing a Client

Sharing is at the CLIENT company 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.

When you share, you give them the “Consultant” role which allows them to see the Client company 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., contact your Client Service Team. The “Consultant” and “CSR” roles do not allow shared practitioners to download reports.

Quick Tips for Managing Your Project

Here are a few quick tips to manage your project.

To view survey progress:

- Click “Active Projects”
- Click “Manage Project”
- Hover your mouse over a participant name to view a pop up status
- Click the triangle icon to the left of the participant name to open the evaluator list
- Look to the right of the name for survey status such as “Completed” or “0 of 134 questions”

To resend emails to unfinished survey takers:

- Only the consultant can re-send emails. Participants aren’t able to re-send emails.
- Click “More Actions”
- Click “Send All Reminders” and the system will send emails to unfinished survey takers
- To re-send a single email, click “Send Invite” to the far right of the name

If emails are not being delivered:

- To view bounced emails, open your project, click “More Actions” and select “Email Delivery Status.” You will see email addresses with statuses of “Delivered” or “Failed” or “Queued. Thank you.” (initial status. Click Refresh to update). Click the arrow to the right to sort the list. There are three failed delivery statuses:
    - “Failed. Unable to connect to MX servers” (domain name after @ is incorrect)
    - “Failed. (email address) User unknown” (name before @ is incorrect)
    - “Failed.” Error 451 or 421 (correct domain name and correct name) Client’s server rejected suspecting SPAM. Client needs to white list. See instructions below.
    - Click the Failed message to select and click Resend. Edit the email address and click Save Changes. The email will be sent. If you receive the message, “Email has already been taken,” find the evaluator under the participant being evaluated, check the relationship, delete the evaluator then add the evaluator with the correct email address and relationship.
- Please ask your client’s IT department to white list or approve emails from notifications@theleadershipcircle.com. Emails may also come from notifications@mg-prod.theleadershipcircle.com. The domain we're emailing from is mg-prod.theleadershipcircle.com. Our sending IP address is 166.78.71.84. If the client has a corporate network with an Internet filter, please ask the client’s IT department to list https://project-center.theleadershipcircle.com as an approved website.

To edit a Participant or Evaluator name, email address, language or relationship:

- Click "Active Projects"
- Click "Manage Project"
- Click "Edit Participant." Make the edits. Click "Save Changes."
- Click the triangle icon to the left of the participant name to open the evaluator list.
- Click "Edit Evaluator." Make the edits. Click "Save changes."
- Contact your Client Services Team if you receive the message, "Email address already in use."
- Do not replace a participant with another participant. Delete the participant only if there are no evaluator survey answers then add the correct participant.
- Do not replace an evaluator with another evaluator. Delete the evaluator then add the correct evaluator.
- Contact your Client Services Team if the survey is completed and you need the Relationship or language changed.

To extend the completion deadline:

- Click on the date or calendar icon for the "Run Report Date"
- Click on the new date and click on the time then click Save Selected. Watch for the green "Data Saved" message to appear bottom right.
- Click on the date or calendar icon for the "Completion Date"
- Click on the new date and click on the time then click Save Selected. Watch for the green "Data Saved" message to appear bottom right.

Reports Process Automatically:

- Profile reports automatically process on the Run Report Date and time with completed self-survey and the minimum number of evaluations per participant that you selected.
- Printed reports and binders should arrive in 3-5 business days.

To view reports:

- Click "My Reports"
- Click the Order Number
- Click "Download Reports (ZIP)"
- If a report is missing, check to see if the self-survey was completed and if the minimum number of evaluators per participant was met.
- If the "Download Reports" button is inactive, contact your Client Services Team.

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 Option 1 or Option 2 Comments (refer below)
5. Completion Date for self-survey and receiving evaluator feedback
6. Run Report Date - this can be the same business day as the Completion Date, with delivery usually within 3-5 business days. Reports are available a few minutes after the Run Report date and time. If the Download Reports button isn't active, please contact your Client Services Team.
7. Participant name and email address
8. Evaluator name and email address if you are entering for your Participants
9. Send your participants the pre-survey email that includes an email for them to send to their evaluators
10. Please ask your client's IT department to whitelist or approve emails from notifications@theleadershipcircle.com. The domain we're emailing from is mg-prod.theleadershipcircle.com. Our sending IP address is 166.78.71.84. If the client has a proxy server or uses URL blocking software, please ask the client's IT department to list https://project-center.theleadershipcircle.com as an approved website. This is an important step, to ensure your client and their evaluators receive the login emails and can access the surveys.

OPTION 1 COMMENTS:

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

OPTION 2 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 Client Services Team

Participant Pre-Survey Email with Participant Inviting Evaluators

THE LEADERSHIP CIRCLE PROFILE

The Leadership Circle Profile is a 360-degree assessment tool designed to measure your current leadership skills and offer suggestions for developing your leadership potential. There are three important steps in the process.

STEP 1: IDENTIFY YOUR EVALUATORS AND ASK THEM TO PROVIDE FEEDBACK

It is recommended that you identify 10 evaluators or more, as you'll need feedback from at least five evaluators for a statistically-valid report.

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.

Evaluator Categories:

Boss's Boss – Optional. One (or more) completed feedback survey needed to view breakout data on report.

Boss - This is the person who gives you your performance appraisal. One (or more) completed feedback survey needed to view breakout data on report.

Peer - These are people who know your work as a leader, but don't report to you or have input into your evaluation. Three or more completed surveys needed to view breakout data on report.

Direct Report - These are people with whom you have input into their performance evaluations. Three or more completed surveys needed to view breakout data on report.

Other - These may be vendors, customers, partners, or people with whom you've worked on volunteer projects. Three or more completed surveys needed to view breakout data on report.

Be sure to contact the individuals you are requesting feedback from ahead of time by email and/or phone. ***A sample letter to send to your evaluators is at the very bottom of this email for you to modify and send to your evaluators.*** If you choose not to send a pre-survey email, it is important you inform your evaluators they will be receiving an email containing the survey link from notifications@theleadershipcircle.com.

STEP 2: RECEIVE YOUR LOGIN INFORMATION AND ENTER YOUR EVALUATORS

You will receive an email with your login link or create a password link from The Leadership Circle. The email arrives from notifications@theleadershipcircle.com. If the email doesn't appear in your in-box, please check your SPAM/JUNK folder.

- Click on the link within the email. (If your link is not active, copy/paste it into your Internet Browser, and click "Enter.")
- If you haven't previously created a password in our system, you'll be asked to create a password. After creating your password, you will be taken to the Active Survey page. If you are not a first-time user, you'll be asked to enter your email address and password. If you have forgotten your password, use the "Forgot/Create Password" feature to create a new one.
- Upon logging in, you will see a button title, "EVALUATOR SETUP." Click this button to begin adding your evaluators.
- Click "Add Evaluator"
- Enter the email address, last name, and first name. Select the language you want them to receive the survey in (defaults to English), and select the relationship to you, by clicking the dropdown boxes.
- Click "Add Evaluator." The email is immediately sent to your evaluator.
- Repeat the steps for each Evaluator you want to add. Remember you want to add at least 10 evaluators, as 5 evaluators need to complete the survey for your report to be generated.

STEP 3: COMPLETE THE SELF-SURVEY (estimated time to complete is 20 minutes)

After entering your evaluators, the "Take the survey" button becomes active. THE SELF-SURVEY DOES NOT BECOME ACTIVE UNTIL YOU ADD EVALUATORS. Click on the button and follow the directions for taking your self-survey. If you have to step away before completing the survey, click Log-Out. If you are interrupted, refresh the browser to see if you are still logged in. You can log back into the survey at any time and be taken right back to the place you left off.

Contact notifications@theleadershipcircle.com for assistance.

Pre-Survey Email for Participant to Send to Evaluators

Please customize and send to each of your evaluators BEFORE setting them up in The Leadership Circle system.

Dear **ENTER NAME**,

I am participating in The Leadership Circle Profile, a 360-degree assessment tool designed to measure my current leadership skills and develop my leadership potential. I am asking for your feedback because I value our relationship and your perspective.

I'm asking you to participate in this process, because I feel you know me well, and will give me honest feedback. Providing feedback for me, involves you completing an online survey. Your feedback is entirely confidential, and I will not know who has or has not completed the survey for me.

You will receive an email from notifications@theleadershipcircle.com that provides you with a link to create a password and complete the survey. The website address is https://project-center.theleadershipcircle.com.

Completing the entire survey takes approximately 25 minutes of your time. If you have to step away before completing the survey, click Logout. If you are interrupted, refresh the browser to see if you are still logged in. You can log back into the survey at any time and be taken right back to the place you left off.

The survey needs to be completed by **ENTER DATE (completion deadline listed in your login email).**

Thank you for your willingness to participate and contribute to my development as a leader.

If you have any questions or experience technical difficulty with the survey, please contact notifications@theleadershipcircle.com.

Kind regards,

YOUR NAME

Participant Pre-Survey Email with Consultant Inviting Evaluators

THE LEADERSHIP CIRCLE PROFILE

The Leadership Circle Profile is a 360-degree assessment tool designed to measure your current leadership skills and offer suggestions for developing your leadership potential.

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- Can describe you in relation to the many roles you play on the job.

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Other - These may be vendors, customers, partners, or people with whom you've worked on volunteer projects. Three or more completed surveys needed to view breakout data on report.

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- If you haven't previously created a password in our system, you'll be asked to create a password. After creating your password, you will be taken to the Active Survey page. If you are not a first-time user, you'll be asked to enter your email address and password. If you have forgotten your password, use the "Forgot/Create Password" feature to create a new one.
- Upon logging in, you will see a button title, "Take the survey." Click on the button and follow the directions for taking your self-survey.
- If you have to step away before completing the survey, click Log-Out. If you are interrupted, refresh the browser to see if you are still logged in. You can log back into the survey at any time and be taken right back to the place you left off.

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I'm asking you to participate in this process, because I feel you know me well, and will give me honest feedback. Providing feedback for me, involves you completing an online survey. Your feedback is entirely confidential, and I will not know who has or has not completed the survey for me.

You will receive an email from notifications@theleadershipcircle.com that provides you with a link to create a password and complete the survey. The website address is https://project-center.theleadershipcircle.com.

Completing the entire survey takes approximately 25 minutes of your time. If you have to step away before completing the survey, click Logout. If you are interrupted, refresh the browser to see if you are still logged in. You can log back into the survey at any time and be taken right back to the place you left off.

The survey needs to be completed by **ENTER DATE (completion deadline listed in your login email).**

Thank you for your willingness to participate and contribute to my development as a leader.

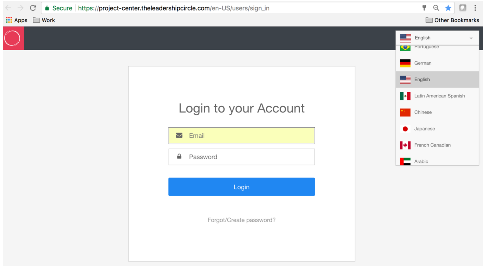
If you have any questions or experience technical difficulty with the survey, please contact notifications@theleadershipcircle.com.

Kind regards,

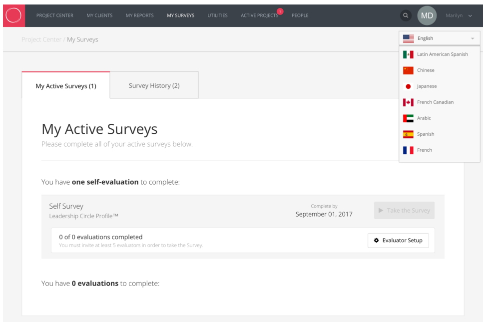
YOUR NAME

Leadership Circle Profile PARTICIPANT Survey Experience

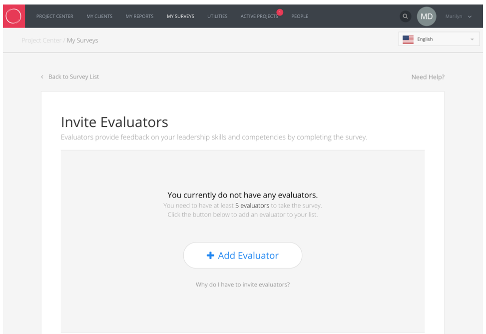
You will receive an email from notifications@theleadershipcircle.com to create a password. The password needs to be a minimum of 8 characters and include a capital letter, lower case letter and number. If you're unable to create a password from the email, please use the "Forgot/Create password?" feature.



After you create your password, you will be taken to the "My Active Surveys" tab. 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.

Evaluator Categories:

Boss's Boss – Optional. One (or more) completed feedback survey needed to view breakout data on report.

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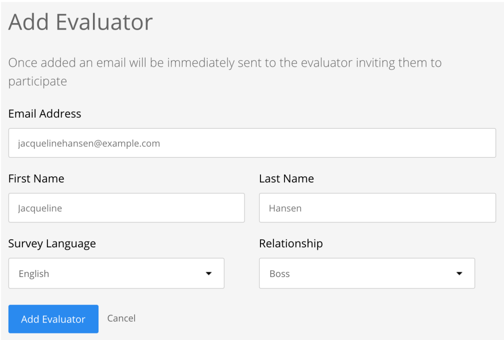
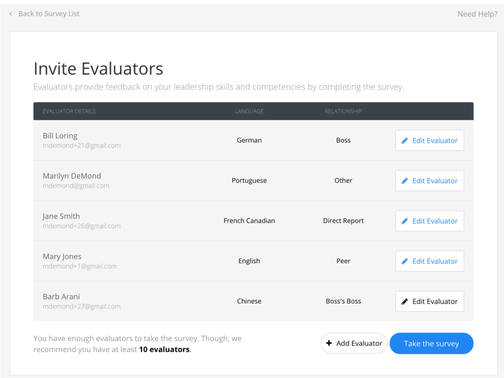
Direct Report - These are people with whom you have input into their performance evaluations. Three or more completed surveys needed to view breakout data on report.

Other - These may be vendors, customers, partners, or people with whom you've worked on volunteer projects. Three or more completed surveys needed to view breakout data on report.

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

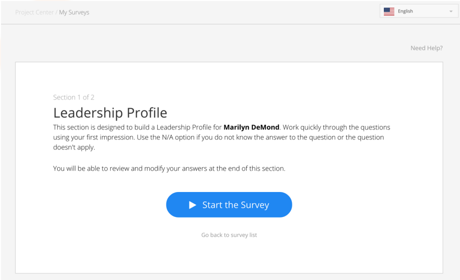


The "Take the survey" button becomes active after you invite the minimum number of evaluators listed. You may invite as many evaluators as you'd like to reach the goal of at least 10 completed evaluator surveys.

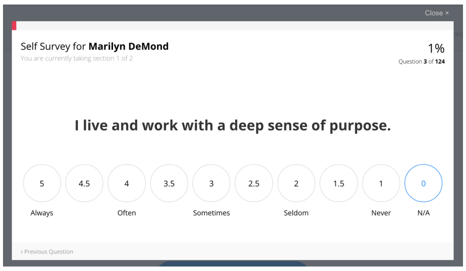


You may log out and log in as many times as needed to invite evaluators and complete the survey.

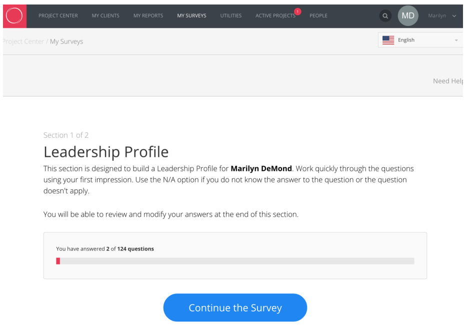
Click the “Start the Survey” button. You will be asked to answer demographic questions for research purposes.



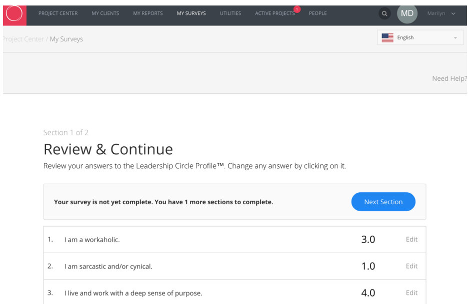
Questions appear one at a time as you select each answer.



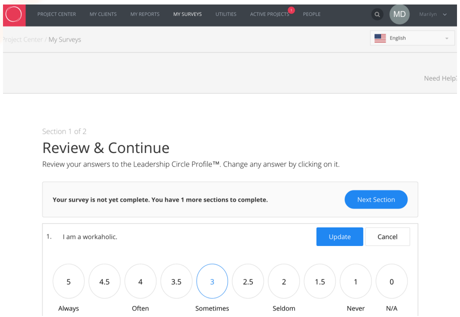
You may log out and log in as many times as needed to complete the survey. The system will serve you the next survey question and track your survey progress. Click “Continue the Survey.”



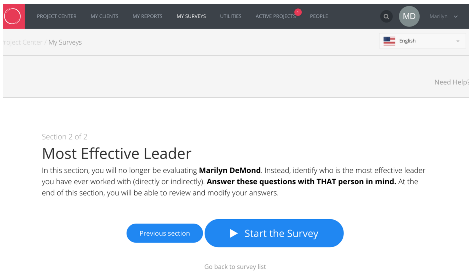
After you answer all questions in Section 1, click the “Review your Answers” button. On the next screen, click “Edit” to change any of your survey answers.



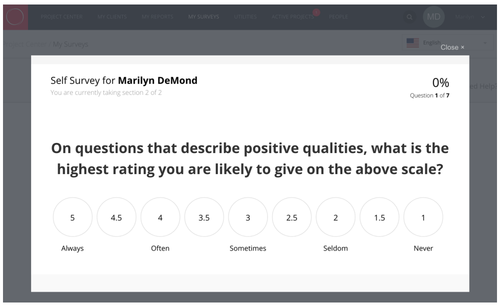
Click “Update” to save your new answer. You may want to print this page for future reference. When you complete your edits, click “Next Section” to proceed with the survey.



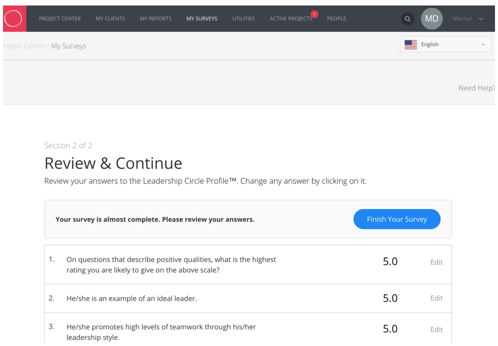
Section 2 is about the “Most Effective Leader” you have ever worked with.



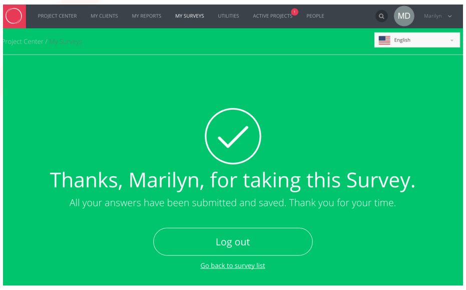
Questions appear one at a time as you select each answer.



After you have answered all questions in Section 2, click the “Review your Answers” button. On the next screen, 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.

Welcome to The Leadership Circle Email

The Welcome email is sent to participants and evaluators who don't have a password saved in the Project Center. They receive this email to create a password in place of the Invitation email. This email will be available to edit within the next few months.

Subject: Welcome to the Leadership Circle

Dear **NAME**,

You are receiving this email because you have been asked to complete a Leadership Circle Profile (either as yourself or as an evaluator for an associate) or a Leadership Culture Survey (as a member of a Team or Organization).

To begin using the survey-system, click the link below, and create a password.
lWebAddressl

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:
lEMAIL ADDRESSl

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

Kind Regards,

Participant Invitation Email

The Participant Invitation email may be edited after the project is created. The information in *| |* should not be edited or deleted as this information will be auto filled by the system.

SUBJECT: Welcome to the *|ProductDescription|* Survey

Dear *|ParticipantFullName|*,

Welcome to the *|ProductDescription|*.

Your account is set up and you can begin at any time. The deadline for completing the survey is *|PlannedCompletionDate|*.

Use this link to access the survey:

|WebAddress|

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

If you don't have a password please use the Forgot Your Password feature on the login page

Please contact me at the e-mail address below with any questions.

Kind Regards,

|CreatedByName|
|CreatedByEmail|

Participant Reminder Email

The Participant Reminder email may be edited after the project is created. The information in *| |* should not be edited or deleted as this information will be auto filled by the system.

SUBJECT: *|ProductDescription|* Reminder

Dear *|ParticipantFullName|*,

This is your friendly reminder that you have a Self Survey that has not been completed. The deadline for completing the self-survey is: *|PlannedCompletionDate|*.

Use this link to access your self-survey:

|WebAddress|

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

If you don't have a password please use the Forgot Your Password feature on the login page to create one.

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

Kind Regards,

Leadership Circle Support
|CreatedByName|
|CreatedByEmail|

Evaluator Invitation Email

The Evaluator Invitation email may be edited after the project is created. The information in *| |* should not be edited or deleted as this information will be auto filled by the system.

SUBJECT: *|ParticipantFullName|* requesting feedback

Dear *|EvaluatorFullName|*,

I'm using *|ProductDescription|* 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 *|PlannedCompletionDate|*.

To begin, click on the web address below:

|WebAddress|

If you don't have a password please use the Forgot Your 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.

|ParticipantFullName|

|ParticipantEmail|

Evaluator Reminder Email

The Evaluator Reminder email may be edited after the project is created. The information in *| |* should not be edited or deleted as this information will be auto filled by the system.

SUBJECT: *|ProductDescription|* Reminder

Dear *|EvaluatorFullName|*,

This is your friendly reminder that you have an evaluation for *|ParticipantFullName|* that has not been completed. It must be completed by *|PlannedCompletionDate|*.

The evaluation can be found at web address

|WebAddress|

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

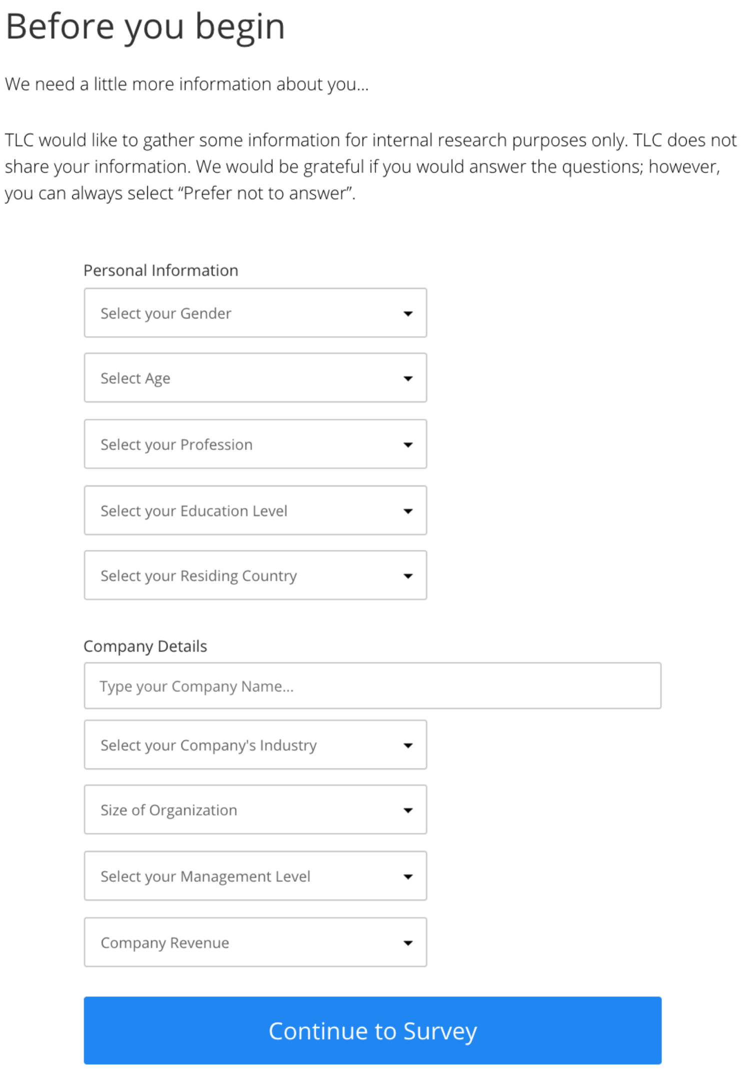
Please contact me at the email address below with any questions.

Kind Regards,

Leadership Circle Support
|CreatedByName|
|CreatedByEmail|

Survey Demographic Information

When a survey taker clicks “Take the Survey” button, they will be asked to answer the following demographic questions. We gather the information for internal research purposes only.



Before you begin

We need a little more information about you...

TLC would like to gather some information for internal research purposes only. TLC does not share your information. We would be grateful if you would answer the questions; however, you can always select “Prefer not to answer”.

Personal Information

Select your Gender

Select Age

Select your Profession

Select your Education Level

Select your Residing Country

Company Details

Type your Company Name...

Select your Company's Industry

Size of Organization

Select your Management Level

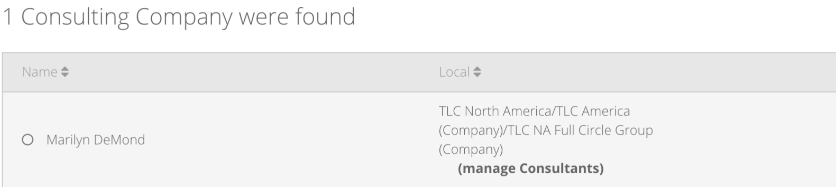
Company Revenue

Continue to Survey

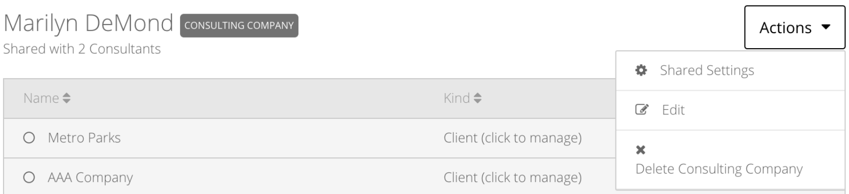
Changing Consultant Company Name

You can easily change your Consultant Company name. Click Consultant Companies.

Click on the name.



Click "Actions" then select "Edit"



Enter the new name and click Save Changes.