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This chapter introduces you to the Drexler/Sibbet/Forrester Team Performance Model® and the Team Performance Online Survey™ (TPOS) web application. The TPOS is a tool for assessing a team's perceptions about itself. The survey consists of statements that define critical aspects of team performance and results in a customized report that helps identify a team's special strengths and opportunities for growth.
The Team Performance Model

Allen Drexler and Grove founder David Sibbet spent more than 10 years refining a comprehensive model of team performance that shows the predictable stages involved in both creating and sustaining teams. The Team Performance Model illustrates team development as seven stages, four to create the team and three to describe increasing levels of sustained performance. The Model serves as a road map to:

- Depict what a team must do in order to be aligned and, thus, successful
- Help teams identify and prepare for challenges
- Provide a common and productive language, especially when problems arise.
The newest offering in the Drexler/Sibbet/Forrester Team Performance™ System, The Grove Team Performance Online Survey™ (TPOS) is a streamlined tool for assessing a team’s perceptions about itself. The survey consists of two sets of statements that define critical aspects of team performance and results in a customized report that helps identify a team’s special strengths and opportunities for growth. Use the report to spark rich discussions among team members and plan a path for developing team effectiveness, building leadership skills, and implementing practices that lead to high performance among teams of all kinds.

The web-based survey takes just a few minutes to complete. Past surveys are always available to team members, and team leaders may choose whether to share the online report with team members.

The highly visual report is available both online and as a downloadable PDF file. Graphs show overall team scores, clearly indicating both areas of strength and unresolved areas that present opportunities for exploration and improvement. Reports are saved in the system and can be compared over time to engage teams in conversations about the results of their investment in best practices that address unresolved areas.
System Requirements

For best results, the TPOS should be accessed via computers that meet or exceed the following minimum requirements:

- **Screen resolution**: 1280x768.
- **For MAC OSX systems**: Safari 5.0.5, Chrome 16, or Firefox 9 (Mac OSX) or later
- **For Linux systems**: Chrome 16, Firefox 10 or later
- **For Windows systems**: Windows XP or later running Internet Explorer 7, Chrome 13, or Firefox 13 or later.

**TIP:**
Your browser must have JavaScript enabled in order to successfully run the TPOS.
About This Manual

This section describes the formatting conventions and information contained in this manual.

Formatting Conventions

This manual uses several formatting conventions to present information of special importance. Lists of items, points to consider, or procedures that do not need to be performed in a specific order appear in bullet format:

• Item 1
• Item 2

Procedures that must be followed in a specific order appear in numbered steps:

1. Perform this step first.
2. Perform this step second.

Specific keyboard keys are depicted in square brackets and are capitalized, for example: [ESC]. If more than one key should be pressed simultaneously, the notation will appear as [KEY1]+[KEY 2], for example [ALT]+[F4].

Interface elements such as document titles, fields, windows, tabs, buttons, commands, options, and icons appear in bold text.

Pages, menus and submenus have the notation Menu>Submenu. For example, “Select Teams>Create Team” means that you should first open the Teams page, and then select the Create Team option.

This manual also contains tips with additional helpful information where appropriate. Tips appear in blue text in the inside margins, as shown here.
This page intentionally left blank.
Taking a Survey

This chapter guides you through taking the Team Performance Survey. The survey asks you to rate your level of agreement or disagreement with statements about your team. These statements cover topics such as orientation, trust building, goal clarification, commitment, implementation, and performance. The results will help your team identify its strengths and weaknesses, which will ultimately improve your ability to overcome challenges, work together effectively, and maintain a high level of performance.
Accessing the TPOS

You will usually receive an invitation email from the TPOS when your team administrator launches a new survey for your team. The email contains your TPOS user name (your email address) and a link to access the survey.

- If this is your first time using the TPOS, you will need to create a password.
- If you have used the TPOS before, you can log in using your existing password.

Creating or Resetting a Password

You will need to create a password if this is your first time using the TPOS. If you have used the TPOS before but don’t remember your password, this procedure will reset your password so you can login. To create or reset your TPOS password:

1. Access the TPOS by clicking the link in the invitation email you received. If you did not receive an invitation email, your team administrator will provide the link for you. Clicking the link opens the TPOS WELCOME page.

TIP: Be sure to check your spam folder if you do not receive the email notification.

TIP: Bookmark the TPOS Login page URL for easy future access.
2. Click the **Forgot password?** link to access the **Request reset password** page.

![Request reset password form]

3. Enter your email address and then click the **Request reset password** button. You will soon receive an email with instructions for resetting your password. The subject line of this email will read “Team Performance Survey: Team Performance Online Survey - ResetPassword Request.”

![Email with reset password instructions]

**TIP:**
The password and verification are case-sensitive and must match exactly.

4. Click the password reset link in the body of the email to access the **Reset password** page.

![Reset password form]
Accessing the TPOS

5. Enter your new password in the **Create new password field**, and then retype the password in the **Verify password** field.

6. Click the **Request reset password** button. The TPOS WELCOME page appears with the message **Password confirmed**.

You may now login to the TPOS using your email address and password.

**TIP:**
Checking the **Remember me** checkbox when logging in stores your password in your browser so you don’t need to enter your login information every time you access the TPOS.
To log into the TPOS once you have a username and password:

1. Access the TPOS by entering the correct URL into your web browser. The TPOS WELCOME page appears.

2. Enter your email address in the E-mail field.

3. Enter your password in the Password field.

4. Click the Login button. The TEAMS page appears (see next page).
The **TEAMS** page appears when you log into the TPOS and when you click the **Teams** link in the menu bar.

This page allows you to:

- Switch companies by using the **Company** pull-down menu and then clicking the **Select** button.
- Start taking a new survey
- Resume taking an incomplete survey
- View your responses to prior completed surveys
- View a report or PDF for a completed survey (if allowed by the team administrator)

The **TEAMS** page presents these options in a table that displays the following information/links:

- Each team you are currently a member of within the selected company (**TEAM NAME** column).
- For each team, a list of surveys by date (**SURVEY DATE** column).
- For each current and prior survey, you may do one of the following (**ACTIONS** column):
  - Begin a new survey by clicking the **Start Survey** link next to the red star for the survey you want to take. See “Starting a New Survey” on page 14 for more information.

**TIP:**
Selecting a different company updates the table to display the team(s) you belong to within the selected company.
- Continue a survey you began but did not finish by clicking the **Continue Survey** link for the survey you want to keep working on. See “Continuing a Saved Survey” on page 17 for more information.

- View your responses to a previously completed survey by clicking the **View my Responses** link for the survey you want to review. See “Viewing Your Survey Responses” on page 18 for more information.

- If allowed by your team administrator, you may be able to view the report for a prior survey either directly within the TPOS or by downloading a PDF of that report by clicking the appropriate link (**REPORT** column). See “Viewing a Team Report” on page 19 and “Downloading a Team Report” on page 20 for more information.

- For each survey, the current status appears in the **STATUS** column.
  - Open surveys are currently in progress and accepting responses.
  - Closed surveys are no longer accepting responses.

**TIP:**
The **View Report** and **PDF** links do not appear if your team administrator has disabled report viewing for your team.

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Starting a New Survey

To begin a new survey:

1. Access the TEAMS page by logging into the TPOS.
2. In the ACTIONS column, click the Start Survey link for the survey you wish to begin. The Instructions page appears.
3. Review the survey instructions, paying particular attention to the survey launch and close dates at the top of the page.
4. Click the Begin Survey button when you are ready to start taking the survey.
Responding to Statements

The survey appears as a series of pages that each contain several statements.

For each statement, select the rating that most closely matches your level of agreement by checking the corresponding radio button. If you make a mistake, simply change your response by checking the correct radio button. You may only select one rating per statement.

Keep going until you reach the end of the page, and then click the Next button to open the next page of the survey. You must rate every statement before advancing to the next page.

Want to check your survey progress? The upper right corner of each page shows you how many statements you have rated and how many are left. You can also see roughly how far along you are by looking at the Progress bar in the lower left of the page.

Navigating the Survey

Each survey page contains navigation buttons that let you skip ahead to the next page or return to the previous page.

- To go to the next page, click the Next button at the bottom right of the page. You must have already rated all of the statements on the current page to continue to the next page.
- To return to the previous page, click the Back button at the bottom left of the page.

TIP:
An error message displays if you click the Next button before rating all of the statements on the current page.

TIP:
You will lose any changes if you click the Back or Next button without saving and continuing first.

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Saving and Continuing Later

To save your responses and continue the survey later, click the **Save and Continue Later** link at the bottom right of the page. The TPOS will save your responses thus far and return you to the **TEAMS** page.

Completing a Survey

Once you have responded to the last survey statement, click the **Submit Survey** button. The TPOS will save your responses and return you to the **TEAMS** page, where you can:

- View your responses to completed surveys
- View reports for completed surveys (if allowed by the team administrator)
- Download reports in PDF format (if allowed by the team administrator)

You will also receive an email listing your survey responses shortly after completing the survey.
Continuing a Saved Survey

You can continue taking a survey as long as it is still open. Check the STATUS column on the far right of the table on the TEAMS page to see if the survey is open or closed. If a survey has ended before you were able to complete it, notify the survey administrator.

To continue taking a previous survey:

1. In the table on the TEAMS page, locate the survey you wish to continue.

2. In the ACTIONS column, click the Continue Survey link for the survey you want to keep working on. The TPOS will return you to the last page you were working on.
Accessing Survey Responses and Team Reports

When you complete a survey, the TPOS generates both a copy of your responses and a report that summarizes and analyzes the collective responses from your fellow team members who have also completed that survey. You may access your own survey responses any time after completing a survey. The team report becomes available once the survey is closed if your team administrator has enabled this option for team members.

Viewing Your Survey Responses

To access your survey responses:

1. Access the TPOS TEAMS page.
2. Locate the desired survey in the table on the Teams page.
3. In the ACTIONS column, click the View My Responses link for the survey you want to review. The ONLINE SCORABLE FORM page appears with your survey responses.

Click a link in the menu bar (Teams, TP Model, or Downloads) when you are finished here.

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Viewing a Team Report

To access a team report (if your team administrator has allowed access):

1. Access the TPOS TEAMS page.
2. Locate the desired survey in the table on the TEAMS page.
3. In the REPORT column, click the View Report link for the survey you want to review. The TEAM REPORT OVERVIEW page appears for your selected survey.

The TEAM REPORT OVERVIEW page allows you to:

- View a graphical summary of scores for all TPOS stages by clicking the Scores by Stage link.
- View detailed scores for an individual stage by clicking the appropriate link (Orientation, Trust Building, etc.) for the stage you want to see.
- View overall Interdependence and Leadership scores by clicking the appropriate link.
- Download the report in PDF format by clicking the PDF Report link.
- Return to the TEAMS page by clicking the Back to Teams link.
Accessing Survey Responses and Team Reports

See “The TPOS Report” on page 25 for more information about understanding survey results.

Downloading a Team Report

To download a team report in PDF format (if your team administrator has allowed access):

1. Access the TPOS TEAMS page.
2. Locate the desired survey in the table on the TEAMS page.
3. In the REPORT column, click the PDF link for the survey you want to review.

The selected report will either open in your browser or be saved to your computer, depending on your individual computer settings.

See “The TPOS Report” on page 25 for more information about understanding survey results.
Resources

This TPOS application includes downloadable resources to help you and your team get the most from the survey responses and the Team Performance Model itself. Resources are available as downloadable PDF files. This chapter lists the available resources and describes how to access them.
The TEAM PERFORMANCE MODEL page includes a high-level summary of the Team Performance Model and a link to download the full Team Performance Model in PDF format. To access this page and download:

1. Log into the TPOS.

2. Click the TP Model link in the blue menu bar. The TEAM PERFORMANCE MODEL page appears.

3. Download the Team Performance Model PDF by clicking the Download the full Team Performance Model link.
The Downloads Page

The Downloads page contains several links that allow you to download additional information about the Team Performance Model in PDF format. To access this page and download:

1. Log into the TPOS.
2. Click the Downloads link in the blue menu bar. The Downloads page appears.
3. Download your selected PDF by clicking the corresponding link.

The Downloads page includes links to the following resources:

- **TPOS Fieldbook**: The Fieldbook contains detailed information about the Team Performance Model, survey scoring, and next steps, everything you need to get the most from your team’s survey results.
- **TP Model Overview**: The Overview introduces you to the Team Performance Model.
- **TP Model Abstract**: This article provides useful background information about the seven stages of the Team Performance Model.
- **TP Brochure**: This marketing brochure describes the team performance products and services offered by The Grove Consultants International.
- **Help System**: This link accesses the TPOS User and Administrator Manual (this document), which contains FAQs and other help supports for the TPOS.

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The TPOS Report

This chapter presents a high-level overview of how to interpret and make sense of your team’s TPOS report and the results it contains. For complete information and instructions, please refer to the separate Team Performance Online Survey Fieldbook. You can download the Fieldbook directly from the TPOS DOWNLOADS page.
Contents of the TPOS Team Report

The TPOS Team Report reflects the responses you and your teammates provided relative to the Team Performance Model. Each report includes the following:

- Graphical depiction of overall team scores, with one bar for each stage of the Team Performance Model,
- Detailed breakdowns of scores by stage, including scatter plots showing individual responses plotted against agreement and resolution.
- Interdependence score that shows individual and collective team ratings of the amount of cooperation required to perform its work.
- Leadership score that shows individual and collective team ratings of the quality of its individual or collective leader(s) and manager(s).

Overall Team Rating

The front of the Team Report shows a bar graph combining the team results of the TPOS Survey with the Team Performance Model, as shown here:

In this graph:

- Combined scores that indicate key characteristics of a high-performing team appear as bars in the RESOLVED section above the line. These generally indicate areas where your team is succeeding.
- Combined scores that indicate a gap or issue appear as bars in the UNRESOLVED section below the line. These generally indicate areas where your team could improve.

TIP:
This chapter provides a high-level overview of interpreting survey results for your convenience. See the TPOS Fieldbook for complete information and instructions.
The longer the bar for each stage, the more resolved (or unresolved) your team is for the indicated area.

On the TEAM REPORT OVERVIEW page, click the Scores by Stage link to view the overall scores.

Scores by Stage

The TPOS Team Report reviews the survey statements that pertain to each stage and charts the ratings given by team members. The bottom of each section also includes reflection questions designed to help you and your team identify and discuss important issues specific to your team.

The TPOS Stages

The seven stages of the Team Performance Model are:

- **Orientation:** This stage focuses on why your team is together, what you are going to create, and getting clear about your purpose as a team. Each individual needs to be able to imagine being full members of the team and identify enough of its reason for being to enter into the process with full participation.

- **Trust Building:** Trust begins when a team is formed and either grows or falls over time. This stage is critical to high performance because it provides a foundation for all subsequent stages. Everyone on a team wants to know “who” they are working with and to trust the implications of getting involved. Teams with high levels of trust respect and rely on one another and feel secure in one another’s confidence.

- **Goal Clarification:** Teams must be clear about goals as they focus in on “What are we doing?” Purpose provides direction, and goal clarification focuses on clarity about assumptions and background information, specific objectives and measures, and a shared vision about what success looks like. Clear goals provide a contract with your larger organization and are the basis for team accountability.

- **Commitment:** A team only functions as a true team when its members are committed to working together. At this stage, the team understands “how” you will work in terms of roles, resources, and decision-making. You can make the necessary choices, let go of differences among team members, and find the resolve you need to carry everyone to success.

- **Implementation:** Teams turn a corner and move fully to action when they know “who does what when and where.” Implementation requires clear work processes, including defining each task that must be performed, the task sequence, and who is responsible for which task(s). Individual work processes have to be clear, and all of the activities must fit together into a coherent, aligned whole.

- **High Performance:** High-performance team members outdo themselves and accomplish more than the sum of their individual talents. Members of such teams interact easily, with little defensiveness. They have an intuitive sense of how to be supportive of their teammates. When challenges arise they can make changes and improvise, and bring out the best in one another.
• **Renewal**: Change is the one constant in work and life. Team members come and go. Those who stay change and grow as their needs, hopes and goals evolve. The task or the circumstances in which the team works may also change. A high-performance organization will encourage teams to spend time nourishing and renewing themselves.

On the **TEAM REPORT OVERVIEW** page, click the link corresponding to the stage you want to review (such as **Orientation** or **Trust Building**) to view the scores for the selected stage.

### Scoring Each Stage

For each stage, the TPOS presents scores as follows:

- A bar graph with one bar for each team member showing that member’s overall level of resolution or lack of resolution with that stage. An average score indicating key characteristics of a high-performing team appears as a bar in the **RESOLVED** section above the line. An average score indicating a gap or issue appear as bars in the **UNRESOLVED** section below the line. These generally indicate areas in which the team member needs improvement.

![Average for All Orientation Items by Individual](chart)

- A bar graph showing the the responses of each team member as a dot, which indicates the overall level of agreement within the team for each response related to the current stage. In general, the more tightly grouped the dots, the more the group is in general agreement. Scattered dots represent a range of opinion within the team. Tight groups with only a few outlying dots may indicate team member(s) who either need special attention regarding the issue addressed by the statement or who have found a way of surmounting the obstacle faced by the team in this area.

![Bar Graph of Responses](chart2)
Interdependence

The Interdependence rating displays how members rated the team on the level of cooperation required by its work. This information appears on a scale from 1 (lowest) to 10 (highest) for both the entire team (Team Average) and a scatter plot of dots, one for each team member. Here again, the tightness and scattering of the dots can provide crucial insight.

Leadership

Trusted leadership is critical to good teamwork. The survey’s leadership statements were written primarily for teams with individual leaders. However, the statements also can apply to self-managed teams if you substitute “process” or “leadership team” for an individual leader.

On the TEAM REPORT OVERVIEW page, click the Leadership link to view the Leadership scores. Leadership scores are displayed in the same way as scores for each stage of the Team Performance Model. See “Scores by Stage” on page 27 for more information.
Administration

This chapter guides TPOS administrators through setting up and maintaining the TPOS. Covered subjects include creating and editing teams and members, team leader options, working with surveys (launching, closing, reopening), and viewing/responding to alerts. Team leaders who are designated administrators for a team should also read this chapter.
A TPOS administrator can manage teams within TPOS, and launch and manage surveys. As an administrator, you will need to work with team leaders to create teams and launch surveys according to team needs. Here is some of the information you will need from the team leader:

- What is the team name?
- Who is the team leader?
- What is the name and email address of each team member?
- When should the survey start (date?)
- Should the survey end on a certain date, or only when all team members have completed it?
- Will the team benefit more from a short (25 statements) or long (50 statements) survey?
- Do the team leader and members need access to test reports?

You will also need to discuss whether or not the team leader needs administrator privileges for that survey. These include the ability to:

- Add, edit, or delete team members
- Create surveys
- Assign report-viewing privileges to other team members

You may set these options when creating a team and launching a survey. You can also make changes to a team or survey later using the Administrator TEAMS page.

**TIP:**
A TPOS administrator is someone who manages the TPOS application for one or more companies. A team leader is usually the manager requesting the survey. A team leader can administer individual surveys if the TPOS administrator grants those privileges.
The Administrator TEAMS page appears when you log into the TPOS and when you click the Teams link in the menu bar.

This page allows you to:

- Select your company
- Create a team
- Launch a survey
- Access a TEAM OVERVIEW page that lets you edit a team
- Access a SURVEY DETAIL page that lets you change survey settings
- Perform all user functions described in “The Teams Page” on page 12, if you are a team member

The Administrator TEAMS page includes a table that displays the following information/links:

- Each team in the currently selected company (TEAM NAME column).
- For each team, a list of surveys by date (SURVEY DATE column). Open surveys appear as clickable hyperlinks that access the SURVEY DETAIL page for the selected survey. See “The Teams Page” on page 12 for more detail.
- For each current and prior survey, you may do one of the following (ACTIONS column), if you are a team member:

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- Begin a new survey by clicking the **Start Survey** link next to the red star for the survey you want to take. See “Starting a New Survey” on page 14 for more information.

- Continue a survey you began but did not finish by clicking the **Continue Survey** link for the survey you want to keep working on. See “Continuing a Saved Survey” on page 17 for more information.

- View your responses to a previously completed survey by clicking the **View my Responses** link for the survey you want to review. See “Viewing Your Survey Responses” on page 18 for more information.

- For each prior survey, if allowed by your team administrator, you may be able to view the report for a prior survey either directly within the TPOS or by downloading a PDF of that report by clicking the appropriate link (**REPORT** column). See “Viewing a Team Report” on page 19 and “Downloading a Team Report” on page 20 for more information.

- For each survey, the current status appears in the **STATUS** column.
  - Open surveys are currently in progress and accepting responses.
  - Closed surveys are no longer accepting responses.
Creating a Team

You must create a team before launching a survey for that team. Make sure that you have obtained all of the information covered in “Working with the Team Leader” on page 32 from the team leader. Creating a team consists of the following steps:

1. Entering basic team membership Information.
   - Selecting the company
   - Entering a team name

2. Adding team members and email addresses.

3. Designating the team leader and specifying whether or not they can add team members, create surveys, and assign report-viewing privileges to other team members.

If the team already exists in the TPOS, you may skip ahead to launch a new survey for that team.

Company Name

As a TPOS administrator, you may have the ability to manage teams and surveys for multiple companies. Thus, the first step in creating a new team is to select the correct company. To do this:

1. On the Administrator TEAMS page, select the correct company using the Company pull-down menu. The Administrator TEAMS page refreshes to display the teams assigned to the currently selected company.

2. Click the Select button next to the pull-down menu.
Team Membership

Clicking the Create Team button in the Administrator TEAMS page opens the CREATE NEW TEAM (1 of 2): MEMBERSHIP page.

To create the team:

1. Enter the team name in the Team Name field.

2. Add team members. You may do this one of two ways:
   - Manually: Entering each team member's first name, last name, and email address in a single row of First Name, Last Name, and Email Address fields, respectively. (Click the Add More link to add up to 99 team members. See “Manually Entering Team Member Information” on page 42 for more information.
   - Automatically: Upload a comma-delimited file containing team member first names, last names, and email addresses. Valid upload formats are .CSV, .TXT, .XLS, and .XLSX. Either enter the complete path to the desired file in the Upload Member List field or click the Browse button to navigate to that file. Once you have selected the file, click the Upload button to upload the file and create your team. See “Uploading a Member List File” on page 42 for more information.

3. Click the Next button at the bottom of the page to continue to the CREATE NEW TEAM (2 of 2): LEADER OPTIONS page.

TIP: You must enter a team name before uploading a member list file.

TIP: The comma-delimited member file must only include the first name, last name, and email address for each member. Any headings or additional information may cause errors.

TIP: Uploading a member list file overrides any manually entered team members. You can, however, upload a file and then manually add more team members.
Leader Options

Clicking the **Next** button at the bottom of the **CREATE NEW TEAM (1 of 2): MEMBERSHIP** page opens the **CREATE NEW TEAM (2 of 2): LEADER OPTIONS** page.

This page allows you to:

- Select the team leader (yourself or someone else)
- Set team leader privileges for that team.

By default, you are the designated team leader and have full administrative privileges. To select a different team leader and assign privileges to that person:

1. Click the radio button next to the team member you want to designate as the leader.
2. In the **Options** section at right, click the appropriate radio button to assign privileges to the team leader. See “Leader Options” on page 37 for more information.
   - Checking the **Just list the team leader on the survey page** radio button grants the team leader standard user privileges.
   - Checking the **List the team leader on the survey page, and...** radio button grants the team leader administrative privileges for that team.

**TIP:** You retain full administrator privileges whether or not you are the team leader.
3. If you would like to participate in surveys taken by this team, check the **Send me a survey also** checkbox. Clearing this checkbox excludes you from surveys taken by this team.

4. Click the **Create Team** button to finish creating the team and return to the Administrator **TEAMS** page.

   If needed, you may click the **Previous** button to return to the **CREATE NEW TEAM (1 of 2): MEMBERSHIP** page and make changes to the team member roster and/or team name. See “Team Membership” on page 36 for more information.
Editing a Team

Clicking a team name in the TEAM NAME column of the table in the Administrator TEAMS page opens the TEAM OVERVIEW page.

This page allows you to edit a team by:
- Renaming the team
- Adding or removing members
- Updating member information
- Changing leader options

Renaming the Team

To edit the team name:
1. Click the blue team name at the top of the TEAM OVERVIEW page to open the EDIT TEAM NAME page.
2. Enter the new team name in the Team Name field.
3. Click the Submit button. The TEAM OVERVIEW page appears with the team renamed.
Viewing the Team

Clicking View Team in the menu at the top right of the TEAM pages described below returns you to the TEAM OVERVIEW page.

Editing and Deleting Members

Clicking Edit Members in the menu at the top right of the TEAM pages opens the EDIT TEAM MEMBERS page.

This page displays current team member information in a table with the following columns:

- **Last Name**: Team member’s last name
- **First Name**: Team member’s first name
- **Email Address**: Team member’s email address
- **Team Role**: Whether the person is a team member or the designated team leader
- **Survey Admin**: Whether the member is (yes) or is not (no) a survey administrator.
- **Delete**: Link that allows you to delete the selected member from the current team

Editing Team Members

To edit a current team member, simply click inside the appropriate field(s) and make the change(s).

TIP:
Make sure to click the Save Changes button when you have finished making changes.
Deleting a Team Member

To delete a team member, click the Delete link that corresponds to the member you wish to delete.

Saving or Cancelling Changes

- To restore your previous settings and remain on the EDIT TEAM MEMBERS page, click the Revert button.
- To return to the Administrator TEAMS page without saving your changes, click the Cancel button.
- To save your changes, click the Save Changes button when you are finished. You will be returned to the Administrator TEAMS page.

Adding Members

Clicking Add Members in the menu at the top right of the TEAM pages opens the ADD MEMBERS page.

You may add team members in one of two ways:

- **Manually:** Entering each team member’s first name, last name, and email address in a single row of First Name, Last Name, and Email Address fields, respectively. (Click the Add More link to add up to 99 team members.)

- **Automatically:** Upload a comma-delimited file containing team member first names, last names, and email addresses. Valid upload formats are .CSV, .TXT, .XLS, and .XLSX. Either
enter the complete path to the desired file in the **Upload Member List** field or click the **Browse** button to navigate to that file. Once you have selected the file, click the **Upload** button to upload the file and create your team.

### Uploading a Member List File

This function allows you to upload a .CSV, .TXT, .XLS, or .XLSX file containing a bulk list of team member information that meets the following requirements:

- No header or any extraneous content
- One entry per line
- Each entry consists of: First Name, Last Name, Email Address

To upload a member list file:

1. Either enter the complete path to the file in the **Upload Member List** field, or click the **Browse** button to navigate to and select the file to upload.
2. Select the file you want to upload. The complete file path appears in the **Upload Member List** field.
3. Click the **Upload** button.
4. Click the **Add Members** button to finish adding the uploaded members to the team.

### Manually Entering Team Member Information

You may manually enter team member information in the **First Name**, **Last Name**, and **Email Address** fields under **Add Individual Members**. To add up to 99 more team members, click the **Add more...** link in the lower left corner of the **ADD MEMBERS** page. Click the **Add Members** button to finish adding the uploaded members to the team.
Changing the Team Leader

Clicking **Edit Leader** in the menu at the top right of the TEAM pages opens the **EDIT TEAM LEADER** page.

This page allows you to:

- Change the team leader.
- Enable or disable administrator privileges for the team leader.

### Changing the Team Leader

To change the team leader, check the radio button in the **Leader** column next to the name of the person who is becoming the new team leader.

### Setting Other Leader Options

To set team leader options, check the appropriate radio button in the Options section on the right side of the **EDIT TEAM LEADER** page. The available options are:

- **Just list the team leader on the survey page:** Clicking this radio button designates the team leader but without granting administrative privileges. Selecting this option has the TPOS treat the team leader as an ordinary user.
- **List the team leader on the survey page, and...:** Clicking this radio button designates the team leader and gives that person administrative privileges for that team only.

After you select the team leader, you may:
Editing a Team

• Restore your previous settings by clicking **Revert**.
• Cancel your current changes by clicking **Cancel**.
• Save your changes and return to the Administrator **TEAMS** page by clicking **Save Changes**.
Launching a New Survey

You may launch a survey for a team from the Administrator TEAMS page once you have created that team and designated a team leader as described in “Creating a Team” on page 35 and “Leader Options” on page 37. You can only do this for a team that does not have any open surveys.

To launch a survey:

1. Access the Administrator TEAMS page.
2. Choose the correct company using the Company pull-down menu, and then click the Select button. The Administrator TEAMS page will display the team(s) for the selected company in the table at the bottom of the page.
3. Locate the team for which you want to launch the survey, and then click the Launch New Survey button underneath that team to open the NEW SURVEY SETTINGS page.

**TIP:**
A team may only have one survey open at a time.

This page lets you specify the following survey options:

- Survey start date
- Survey conclusion conditions

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Launching a New Survey

- Type of survey (25-statement Standard Short or 50-statement Standard Long)
- Report options
- Notification options

Setting Survey Start and End Options

To specify the survey start date and ending conditions:

1. Set the survey start date by clicking in the Survey start date field and selecting a date in the pop-up calendar.

2. Set the survey conclusion by selecting one of the following two options:
   - To conclude the survey when all team members have taken the survey (regardless of date), check the When all members complete survey radio button.
   - To conclude the survey on a particular date regardless or how many team members have completed the survey, check the radio button next to the field and then select a date in the popup calendar.

Choosing the Survey Type

The TPOS comes in 25-statement or 50-statement versions. The longer survey has two statements for each of the 21 keys to team performance, while the shorter one has one statement per key. In general, the longer survey provides a more complete picture of team performance. The longer survey also includes more leader statements and will more accurately gauge the performance of a team’s leadership.

Choose the survey type using the Use which survey pull-down menu to select either A) Standard short (25 items) or Standard long (50 items).

Report Options

You may choose to share survey reports with the team leader and/or team members.

- Use the Team leaders see which report pull-down menu to select either No Report (team leader will not be able to see the survey report) or Standard Report.
- Use the Team members see which report pull-down menu to select either No Report (team leader will not be able to see the survey report) or Standard Report.
Notification Options

The TPOS can send out email notifications to the administrator (you) and team members when a survey is launched and/or when a team member completes a survey. To select your desired notification options:

- Check the Notify me by email when a team member completes a survey checkbox if you want the TPOS to notify you whenever a team member completes the survey you are creating. Clear this checkbox if you do not want this notification. In general, it is a good idea to keep this option enabled because it helps you keep track of who may need additional reminders to take the survey.

- Check the Notify members by email when a survey is launched checkbox to send an email to all team members when the survey you are launching is open and available for them to start taking. Clear this checkbox if you do not want the TPOS to notify team members when the survey launches. In general, it is a good idea to keep this option enabled to make sure that all team members know when to begin taking the survey.

Launching the Survey

When you have finished setting up the survey, click the Launch New Survey button in the NEW SURVEY SETTINGS page to launch the survey.

Clicking the Launch New Survey button opens the Survey Launched popup to acknowledge that the new survey has been launched. Click the OK button in this popup to return to the Administrator TEAMS page.
Editing an Existing Survey

You may edit an existing survey from the Administrator TEAMS page. To edit a survey:

1. Access the Administrator TEAMS page.

2. Choose the correct company using the Company pull-down menu, and then click the Select button. The Administrator TEAMS page will display the team(s) for the selected company in the table at the bottom of the page.

3. Locate the team for which you want to launch the survey, and then select the survey you want to edit by clicking the appropriate date in the SURVEY DATE column of the table to open the SURVEY DETAIL page for the selected survey.

This page lets you make the following changes to an existing survey:

- Survey start date and end options. See “Setting Survey Start and End Options” on page 46 for more information.

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Survey type (short or long). See “Choosing the Survey Type” on page 46 for more information.

• Report options. See “Report Options” on page 46 for more information.

You may also send a reminder email, view the report for a closed survey, reopen a closed survey, or close an open survey.

Sending a Survey Reminder

The survey reminder function allows you to email a standard or customized reminder to all team members to take the survey.

To send a standard reminder, click the Send Reminder button in the SURVEY DETAIL page.

To send a customized reminder:

1. Click the horizontal arrows (>>) to the right of the Send Reminder button. The CUSTOMIZE EMAIL page appears.

2. Edit the message inside the text box as needed.

3. When you are finished, click the Send Reminder button.

TIP: Be sure to click the Save Changes button after making changes.

TIP: To exit without saving your changes, click the Cancel button.
Viewing Reports

You may access reports for closed surveys from the **SURVEY DETAIL** page by clicking the View Report button. Please see “The TPOS Report” on page 25 for more information about TPOS reports.

Reopening a Closed Survey

You may reopen a closed survey by:

1. Accessing the **SURVEY DETAIL** page for the closed survey you want to reopen.
2. Clicking the **Reopen Survey** button at the bottom right of the page.
3. Editing the survey start date and end options. See “Setting Survey Start and End Options” on page 46 for more information.
4. Clicking the **Save Changes** button.

Closing an Open Survey

You may close an open survey at any time by:

1. Accessing the **SURVEY DETAIL** page for the closed survey you want to reopen.
2. Clicking the **Close Survey** button at the bottom right of the page.
Clicking **Alerts** in the menu bar open the **ALERTS** page.

This page allows a survey administrator to view important events that happened in the system, such as emails sent to team members that failed to arrive. For non-confidential events, the administrator may be able to perform action such as:

- Viewing email invitations sent to team members
- Resending failed emails
- Gathering information in order to obtain technical support

To view an alert, click the appropriate link in the **ALERTS** page to open a detailed view of the selected alert. If you can take an action, such as resending an email, you will see that option in the detailed view.
TEAM PERFORMANCE ONLINE SURVEY (TPOS)
Technical Guide

Published by:
THE GROVE CONSULTANTS INTERNATIONAL
1000 O’Reilly Avenue
San Francisco, CA 94129–1124

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