

# LEADERSHIP CIRCLE<sup>®</sup>



PROJECT  
**CENTER**  
USER GUIDES

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## Your TLC Client Services Contact Details

Region	Email
APAC	projectsupport@theleadershipcircle.com.au
China	dirui@theleadershipcircle.com
Europe	clientservices@theleadershipcircle.eu
Japan	miki.alsabouni@theleadershipcircle.com
LATAM	martha.marin@theleadershipcircle.com
MENA	admin.mena@theleadershipcircle.com
New Zealand	brad.stringer@nzcer.org.nz
North America	alittletlc@theleadershipcircle.com
South Africa	support@theleadershipcircle.co.za

## CREATING A PASSWORD

### Accessing the Project Centre

To access Project Centre, visit:

**URL:** <https://project-center.theleadershipcircle.com>

If password has been forgotten or a password is to be created for first time users:

**CLICK:** 'Forgot/Create password?'

**ENTER:** Your email address

**CLICK:** 'Send me reset password instructions'

Watch for an email titled '**Access to TLC Project Centre**' in your inbox or spam/junk folder. Note, the password instructions email is only valid for 4 hours.

Click the link within the email and you will be taken to the Project Centre to enter your new password. The password requires:

- **9** characters minimum
- At least one number (**0-9**)
- One uppercase letter (**A-Z**)
- You cannot use any previous passwords

If your email does not exist within the Project Centre, you will receive an error message and will be asked to complete a CAPTCHA. CAPTCHA determines if you are human.

Your email will not exist within Project Centre, if you have not previously been invited to participate in a survey or you are not a TLC Certified Consultant.

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


## CREATING A PROJECT: LCP OR LCP-ME

### Setting Up Your Project

Once logged into the Project Centre, from the Dashboard, select:

[+ Create new Project](#)

**SETUP – Enter the following details:**



Project Details

Project Name  Client

Choose a name that will help you identify the participants or create a new client

Consulting Company  Consultant

Leadership Circle Profile ⓘ


Leadership Circle Profile Manager Edition ⓘ [Comparison between LCP and ME](#)


Collective Leadership Assessment ⓘ

- **Project Name:** **Name** your project accordingly for identification.
- **Select Client:** Select an existing **client** company name; or Click “create a new client” to enter a new client company name and select their industry.
- **Consulting Company:** Start typing your **name/company** and click to select.
- **Select Product:** Leadership Circle Profile (**LCP**); or Leadership Circle Profile – Manager Edition (**LCP-ME**).
- **Project Time Zone** This is normally based on location of the survey takers. For eg, if they are located across the country, select the latest time zone.
- **Set Timeline:** Click the calendar icon and click on a date and a time for the Completion Date, click Save Selected. Run Report Date will autopopulate to next day.

Specify A Timeline For The Project

Project Time Zone

Completion Date   All surveys should be completed by this date.

Run Report Date   Date reports are available.

- **Comments For Printer:** Enter addresses if reports/binders are shipping to multiple addresses or for **any special Project notations**.
- **Schedule Sending Of Invitation Emails:** This optional feature may be used to auto send emails. Select the timezone, click on the calendar and select the date and time. The system will send the invitation emails based on your selections.

- Comment Questions In Survey:** Select **Option 1** or **Option 2** Comments. Only one option may be selected. What set of questions will provide you with the best responses from your client? Long comments tend to elicit a longer, detailed response.
- How Evaluators Are Invited to Participate:** **"I will invite the evaluators..."** means you enter the evaluators and the participant will only see the "Take the survey" button; OR **"My participant can invite..."** means both yourself and the participant are able to 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. At least, 5 evaluators need to complete the survey before the report will process. However, we recommend 10 to 15 evaluators complete feedback.
- Promo Code:** Enter a promo code if you have been provided with one.
- Need Help Email:** The email is defaulted to support@theleadershipcircle.com who will forward any email onto the regional Client Services Team. This email address can be amended to suit and will be added to the survey invitations.
- Deliverables and Printing Options:** PDF reports and manuals are available with either option you select. Click My Reports, click the order number, click Download Reports (ZIP).

I want the PDF copies only.

You will get only the digital (e-copies) version of the Profile Interpretation Manual and the following reports:

- Participant Report
- Participant Graph
- Coach Report
- PDF file that consultant emails to participant

I want PDF and Printed copies of the reports.

You will get the digital version of the Profile Interpretation Manual and all the reports. Please choose below which ones you would like to have printed:

Profile Interpretation Manual

Binder with profile interpretation manual

Reports:

<input checked="" type="checkbox"/> Participant report	How many copies per participant?	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Participant graph	How many copies per participant?	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Coach report	How many copies per participant?	<input type="text" value="1"/>

- Billing Address:** This is the address where the Invoice for this Project are sent to. The Invoice will be issued once report/s have reached the Run Report Date. **Please Note: TLC do NOT bill third parties.**
- Report Address:** *If printed copies are requested* This is the address where the printed Reports are sent to. 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.
- Binder Address:** *If printed copies are requested* This is the address where Binders containing the generic Interpretation Guide will be sent. You can click "Same as the Billing Address" or "Same 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.


## CREATING A PROJECT: Collective Leadership Assessment (CLA)

### Setting Up Your Project

Once logged into the Project Centre, from the Dashboard, select:

[+ Create new Project](#)

**SETUP – Enter the following details:**



Project Details

---

Project Name Client

Choose a name that will help you identify the participants or create a new client

Consulting Company Consultant

Leadership Circle Profile ?

Leadership Circle Profile Manager Edition ? [Comparison between LCP and ME](#)

Collective Leadership Assessment ?

- **Project Name:** **Name** your project accordingly for identification.
- **Select Client:** Select an existing **client** company name; or Click “create a new client” to enter a new client company name and select their industry.
- **Consulting Company:** Start typing your **name/company** and click to select.
- **Select Product:** Collective Leadership Assessment (**CLA**)
- **Project Time Zone** This is normally based on location of the survey takers. For eg, if they are located across the country, select the latest timezone.
- **Set Timeline:** Click the calendar icon and click on a date and a time for the Completion Date and click Save Selected.

Specify A Timeline For The Project


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Project Time Zone

---

Completion Date

All surveys should be completed by this date.



- **Schedule Sending Of Invitation Emails:** This optional feature may be used to auto send emails. Select the timezone, click on the calendar, select the date and time. The system will send the invitation emails based on your selections.

- **Survey FOCUS:** Prior to setting up the CLA, **determine** the focus **Organisation** or **Team**. Is the focus on the organisation as a whole or on a specific group or team?
- **Survey FOCUS Descriptor:** Enter the focus descriptor. This will be how participants will view the survey instructions and who is to be evaluated.

Eg: In this Section, you will be evaluating the **ABC Leadership Team**.

Survey Focus  
Indicate if the survey will be focused on the Organization as a whole, or a group of team members.

Organization  
/ Team

Survey Focus Description  
Participants will see the focus definition in the survey instructions as shown in the box on the right

Survey Instructions:  
In this section you will be evaluating The

- **Promo Code:** Enter a promo code if you have been provided with one.
- **Need Help Email:** The email is defaulted to support@theleadershipcircle.com who will forward any email onto the regional Client Services Team. This email address can be amended to suit and will be added to the survey invitations.
- **Deliverables:** CLAs are only available as PDF reports only.

I want the PDF copies only.

You will get only the digital (e-copies) version of the Profile Interpretation Manual and the following reports:

- Participant Report
- Participant Graph
- Coach Report
- PDF file that consultant emails to participant

- **Billing Address:** This is the address where the Invoice for this Project are sent to. The Invoice will be issued once report/s have reached the Run Report Date.
- **Add Participants:** CLAs must contain 3 or more participants for reports to run. Click the **blue Add participant** button and enter:

- Email address
- First and Last Name
- Select Survey Language

**+ ADD PARTICIPANT**

If the system finds the participant in the database as a previous participant, details will be autopopulated.

Add a New Participant

Email Address

Survey Language

First Name

Last Name

## DOWNLOADING REPORTS

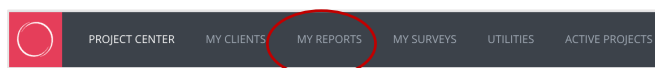
### Accessing and Downloading Reports – LCP, LCP-ME and CLA

Once your project has passed the Completion and Run Report Dates, the Reports are available to access and download.

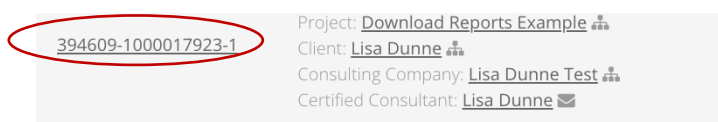
There are two options to access and download reports.

#### OPTION 1

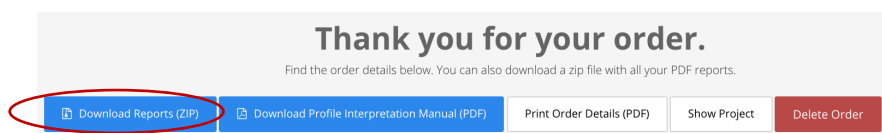
- From the Home Screen, click on '**My Reports**'.




- Look for your Project name, or use the available filters to find the Project reports you are looking for
- Click on the left hand order number to access your reports



- Click on the left hand **blue Download Reports (ZIP)** button ... **the reports will prepare for download**

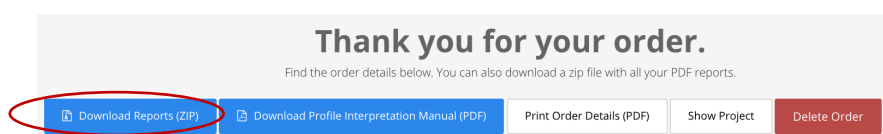
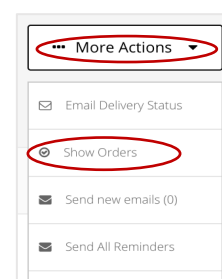



- When Done, click the **Download Reports (ZIP)** button, this will download zipped file of the 3 report files to your computer hard drive.
- Click the **Close x** button to get back to the Order screen
- Click the Red Logo or the Project Centre to return to the home screen. 

#### OPTION 2

From within the Project, click '**More Actions**' and select '**Show Orders**'.

- Click on the left hand **blue Download Reports (ZIP)** button ... **the reports will prepare for download**



- When Done, click the **Download Reports (ZIP)** button, this will download zipped file of the 3 report files to your computer hard drive.
- Click the **Close x** button to get back to the Order screen
- Click the Red Logo or the Project Centre to return to the home screen. 



## BULK UPLOAD - ADDING PARTICIPANTS AND/OR EVALUATORS

### Uploading a Participant csv file for LCP, LCP-ME or CLA Projects

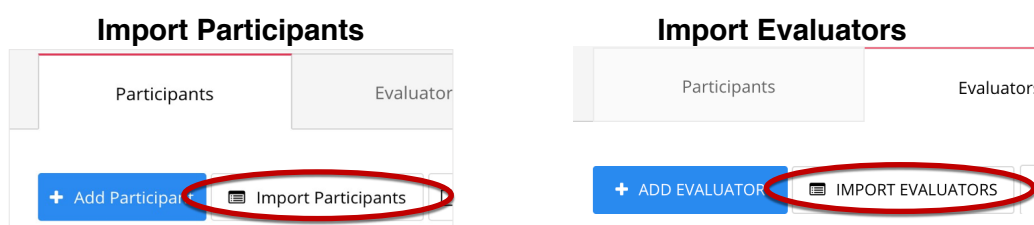
If you have a number of participants to add to a project, there is an ability to bulk upload using a csv template.

#### LCPs and LCP-MEs

- From the **Participant** tab, select Import Participant button to upload either: **a)** participants only or **b)** participants and their evaluators.
- From the **Evaluators** tab, select Import Evaluators button to upload evaluators only.

#### CLAs

CLAs include **Participants only** and the Import Participant feature allows you to upload participants.



From within the Project, from the Participant tab select Import Participants and click '**Download the CSV Sample**' to populate with details.

Locate on your hard drive or downloads folder and open the csv file called '**import\_participants\_sample.csv**'. The sample file will contain data to show you how it is to appear.

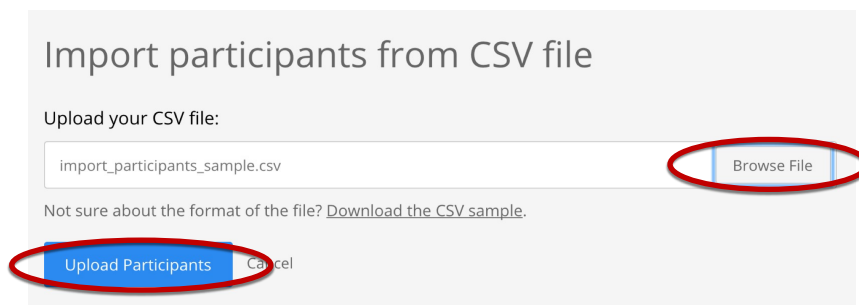
	A	B	C	D	E	F
1	participant group	email	relationship to participant	first name	last name	language
2	group1	bettydavis@tlctestmail.com	self	Betty	Davis	english
3	group1	bobbarker@tlctestmail.com	boss boss	Bob	Barker	french canadian
4	group1	henryfonda@tlctestmail.com	boss	Henry	Fonda	chinese
5	group1	katherinehepburn@tlctestmail.com	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	humphreybogart@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@tlctestmail.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

Each group (group1, group2, group3 etc) begins with and is dedicated to each participant. The relationship for the participant is **self**. See **yellow highlight**. Note, each participant in a CLA will be dedicated their own group number and the relationship will always be **self**.

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.

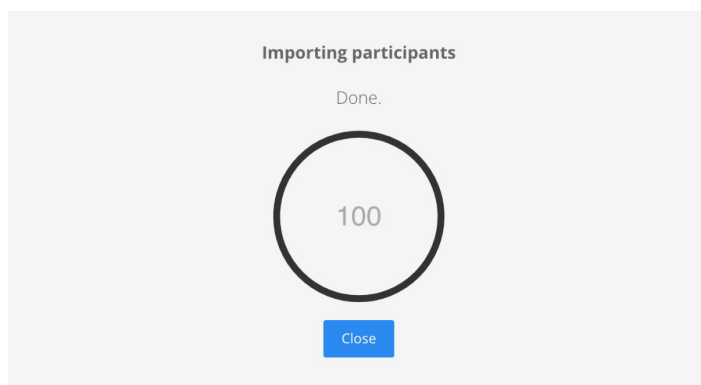
The format of the information such as column order, group1, direct report, english etc, must remain as is for the file to import. There can be no extra spaces when copying email addresses or names. The file needs to be saved as a CSV file in order to upload.

When the file is ready, click 'Browse File' and select the CSV file from your hard drive. Click **blue 'Upload Participants'**.



You will see a review page of the participants and/or evaluators to be uploaded.

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 Participants and/or Evaluators added to the project. Sample below shows an LCP with uploaded participants and evaluators.

TOTAL OF PARTICIPANTS	COMPLETED SELF-SURVEYS	IN PROGRESS *	NOT STARTED	<b>0 of 29 Evaluations Completed</b> 0 of 4 Self completed 0 of 1 Boss completed 0 of 13 Direct Report completed 0 of 9 Peer completed 0 of 1 Boss's Boss completed 0 of 1 Other completed
<b>4</b>	<b>0</b>	<b>0</b>	<b>4</b>	

▼

Filter

PARTICIPANT DETAILS	SELF-SURVEY STATUS	EVALUATOR STATUS	ACTIONS
<b>Betty Davis</b> Email: bettydavis@tlctestmail.com Survey Language: English No e-mails ever sent	0 of 124 questions	0 of 7 evaluators	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Invite</span>  <small>No e-mails ever sent</small> </div> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Reminder</span>  <small>No e-mails ever sent</small> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span style="font-size: 10px;">✎ Edit</span> <span style="font-size: 10px;">↔ Move</span> </div>
<b>Charles Chaplin</b> Email: charleschaplin@tlctestmail.com Survey Language: English No e-mails ever sent	0 of 124 questions	0 of 6 evaluators	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Invite</span>  <small>No e-mails ever sent</small> </div> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Reminder</span>  <small>No e-mails ever sent</small> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span style="font-size: 10px;">✎ Edit</span> <span style="font-size: 10px;">↔ Move</span> </div>
<b>Marlon Brando</b> Email: marlonbrando@tlctestmail.com Survey Language: English No e-mails ever sent	0 of 124 questions	0 of 7 evaluators	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Invite</span>  <small>No e-mails ever sent</small> </div> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Reminder</span>  <small>No e-mails ever sent</small> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span style="font-size: 10px;">✎ Edit</span> <span style="font-size: 10px;">↔ Move</span> </div>
<b>Patrick Swayze</b> Email: patrickswayze@tlctestmail.com Survey Language: English No e-mails ever sent	0 of 124 questions	0 of 5 evaluators	<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Invite</span>  <small>No e-mails ever sent</small> </div> <div style="text-align: center;"> <span style="background-color: #f1c40f; padding: 2px 5px; border-radius: 3px;">✉ Send Reminder</span>  <small>No e-mails ever sent</small> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span style="font-size: 10px;">✎ Edit</span> <span style="font-size: 10px;">↔ Move</span> </div>

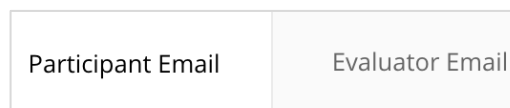
## EDITING & SENDING SURVEY INVITATIONS AND REMINDERS

### Setting Up Your Project

#### TO **EDIT** SURVEY INVITATIONS and REMINDERS

- **EDIT/VIEW Survey Invitations:**  
*If required*

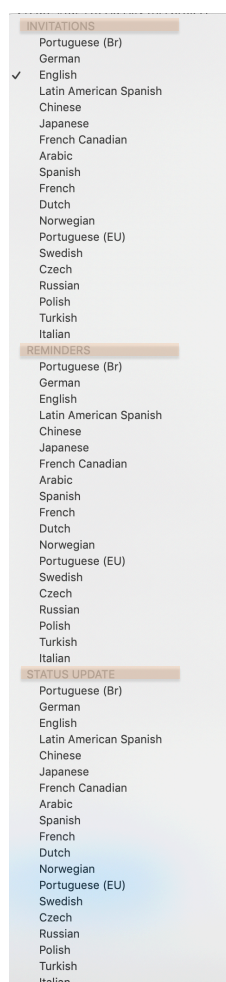
If you wish to amend any details in the Survey or Reminder emails sent from the Project Centre click on the **Participant Email** or **Evaluator Email** tab.



Please note that anything found within the star and line \*| |\* parenthesis is a data field. This information is auto populated by the system based on the information entered during project setup. **Please do not make any changes to these data fields.**

- **Email Type & Language:**

When clicking on either the Participant Email or Evaluator Email tab you will see a dropdown box under Email Type and Language. From this dropdown list, you are able to pick whether you want to amend/send the Invitation email or the Reminder email and the language that you want to communicate those emails in. Once changes have been made, ensure you click **Save Changes!**



## TO SEND SURVEY INVITATIONS and REMINDERS

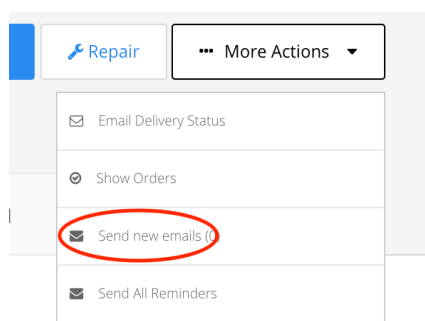
Survey invitations and reminders are sent from within the Project to Participants and/or Evaluators. There are 2 options available to send survey invitations and reminders:

### Option 1 (Automatic):

Survey invitations and reminders are sent automatically in bulk.

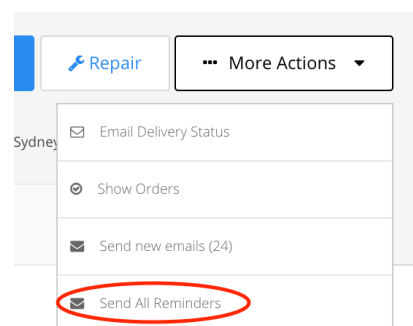
#### SURVEY INVITATIONS

Select **More Actions > Send New Emails**



#### SURVEY REMINDERS

Select **More Actions > Send All Reminders**



### Survey Invitations:

Emails are sent to participants and evaluators who have not already received an invitation. Should you add further participants and/or evaluators during the lifespan of project and use Option 1, only those yet to be sent invitation will receive.

### Survey Reminders:

Emails are sent only to those participants and evaluators who have not completed their surveys. This can be used to send reminders during the lifespan of the project.



### Recommendation

This is a great feature to use as it saves time and can be assured all survey invitations have been sent at the same time.

### Option 2 (Manual):

Survey invitations and reminders are sent manually and individually. To send the survey invitations or reminders to select individuals, click on the salmon coloured Send Invite or Send Reminder button next to each name.

PARTICIPANT DETAILS	SELF-SURVEY STATUS	EVALUATOR STATUS	ACTIONS
Jane Doe Email: imp002@fcgtest.com Survey Language: English No e-mails ever sent	0 of 124 questions	0 of 0 evaluators	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f8d7da;">             Send Invite  <small>No e-mails ever sent</small> </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f8d7da;">             Send Reminder  <small>No e-mails ever sent</small> </div> </div> <div style="display: flex; justify-content: flex-end; margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Edit</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">Move</div> </div>



### Recommendation

If you have a large number of participants and or evaluators, this can be quite time consuming! This is a great feature to use if you are looking to send invitations or reminders at different times and dates.

## CONFIRMATION SURVEY INVITATIONS and REMINDERS HAVE BEEN SENT

When a survey invitation or reminder has been sent, the salmon Send Invite &/or Send Reminder buttons change to white and include the date and time sent. The update will also show in the Change History at the bottom of project.

## BOUNCED EMAILS

### How to Check Bounced Emails

Survey invitations or reminders may bounce and is usually because:

- Incorrect email address
- Spelling errors in email address
- Commas (,) used in place of fullstop aka period (.)
- Client's IT firewall reviewing communications being received from our Project Centre

Survey invitations come from [notifications@theleadershipcircle.com](mailto:notifications@theleadershipcircle.com) and the firewall review period generally takes longer when the communication is coming from a generic email, such as ours. This is to ensure the communication being received is not malicious or phishing.

After you launch your project, it is recommend waiting up to 30 minutes before you check the delivery status of your survey invitations.

#### To Check the Email Delivery Status:

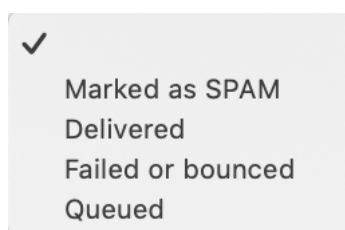
Wait up to 30 minutes post launching of surveys before checking the Status.

Within the project, click '**More Actions**' and from the drop down list select '**Email Delivery Status**'.

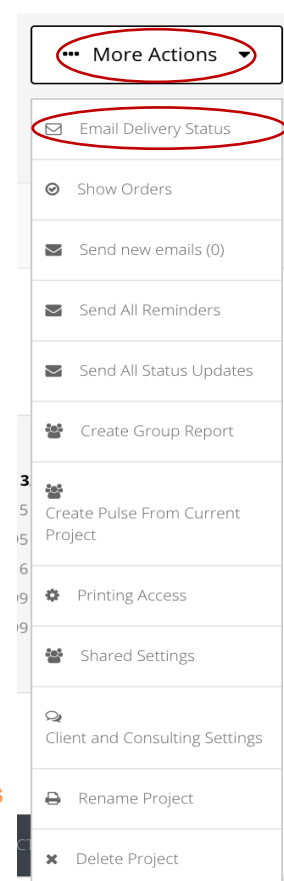
The list will show the recipient list of emails sent and include status.

The emails can be filtered and sorted.

Click the drop down arrow in the Sort by Mailgun Status field and select one of:



If the error is not obvious, check back with the participant to confirm their correct email address or that of their evaluators. Refer to instructions on the [Editing Details](#) page on how to amend or delete participant and evaluator details.



## EXTEND DATES ON PROJECTS

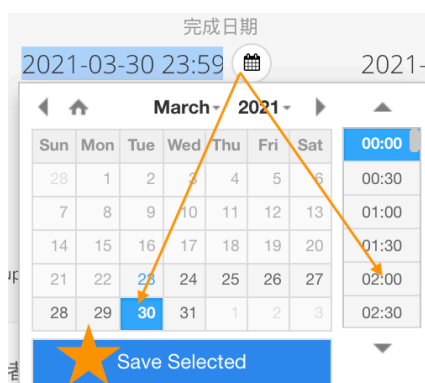
### How to Extend Completion and Run Report Dates

Dates will need to be extended for the following reasons:

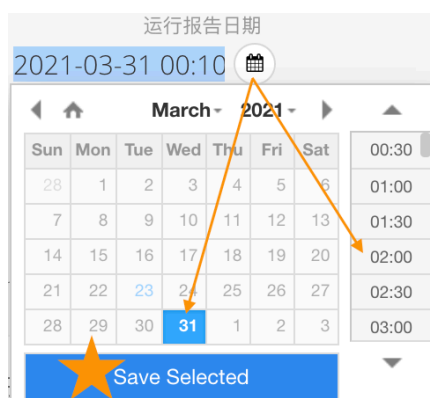
- Self Survey not complete
- Sufficient evaluators not provided to achieve breakout category reporting
- Minimum evaluator responses not received

To extend the Project Dates, you need to first extend the **Run Report Date** before your current **Completion Date** expires.

- Log into the Project Centre
- Click on **Active Projects**, and select your project
- Click on **Run Report Date**, select your new date and time from the calendar
- Click on the **Save Selected** bar
- When successfully saved, you will see a green “**Data Saved**” flag across the bottom right of your screen on each save



- Click on the **Completion Date**, select your new date and time from the calendar
- Click on the **Save Selected** bar under the calendar
- When successfully saved, you will see a green “**Data Saved**” flag across the bottom right of your screen on each save



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

## EDIT OR DELETE DETAILS

### How to Edit or Delete a Participant or Evaluator

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

#### EDITING – Participant OR Evaluator Details

- To edit the details of a participant, click the Participant tab.
- To edit the details of an evaluator, click the Evaluator tab.
- Locate User and click the 'Edit' button the far right of the User's name.

PARTICIPANT DETAILS	SELF-SURVEY STATUS	EVALUATOR STATUS	ACTIONS
<b>Betty Davis</b> Email: bettydavis@tlctestmail.com Survey Language: English No e-mails ever sent	0 of 124 questions	0 of 7 evaluators	<div style="display: flex; justify-content: space-between;"> <div>  Send Invite No e-mails ever sent           </div> <div>  Send Reminder No e-mails ever sent           </div> </div> <div style="display: flex; justify-content: flex-end; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 4px;">✎ Edit</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 4px;">✎ Move</div> </div>

If you go to amend details and save changes, should the User already exist in the system, you will receive an error message - **User Already Exists in the System**.

- Should the User Already Exist in the System - If there **HAS** been any feedback provided by the evaluator or received for the participant or self survey has been completed, **DO NOT** click the delete button. All data will be deleted and unable to be retrieved. Please refer to your TLC Support Team.
- Should the User Already Exist in the System - If there **HAS NOT** been any feedback provided by the evaluator nor received for the participant or the self survey has not been completed, you can click the delete button if required. All data will be deleted and unable to be retrieved.
- Evaluator categories can be reassigned regardless of feedback being provided.

#### TO EDIT

Click the link - [Email Address - You can change the user's data in his profile](#). You will be taken into the account settings where the email address and/or name can be amended. Click **Save Changes**.

#### Participant

<b>Email Address</b> ⓘ You can change the user's data in his profile. <input type="text" value="bettydavis@tlctestmail.com"/>	<b>Survey Language</b> <input type="text" value="English"/>
<b>First Name</b> <input type="text" value="Betty"/>	<b>Last Name</b> <input type="text" value="Davis"/>
<input type="button" value="Save Changes"/>	<input type="button" value="Cancel Changes"/> <input type="button" value="Delete Participant"/>

#### DELETING – Participants OR Evaluators

- **Participant** – if **no** feedback has been received and no evaluations provided, you **CAN** delete.
- **Evaluator** - if no feedback has been provided, take note of the assigned relationship, click delete and re-enter with correct details.

## RESET SURVEYS

### Review Survey Responses

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The Reset function becomes available to the consultant, if a survey taker has completed their survey and submitted their responses.

If requested, you are able to click on the '**Reset Survey**' button and it will reopen the survey for the participant or evaluators to review their responses.

No data is deleted by actioning a reset survey. It simply allows a review of responses.

To Reset any survey, is done via the Participant tab.

#### Participant Survey

SELF-SURVEY STATUS
Completed on 09 March 2021 <a href="#">Reset Survey</a>

#### Evaluator Survey

Evaluation Status 0 of 127 questions
Evaluation Status Completed at 09 March 2021 <a href="#">Reset Survey</a>

Click the red '**Reset Survey**' link and you will be asked to confirm.



## ORDERING GROUP REPORTS

### How to Run Group Reports for LCPs, LCP-MEs and CLAs

Group reports can only be ordered once the Run Report Date has passed.

#### LCPs and LCP-MEs

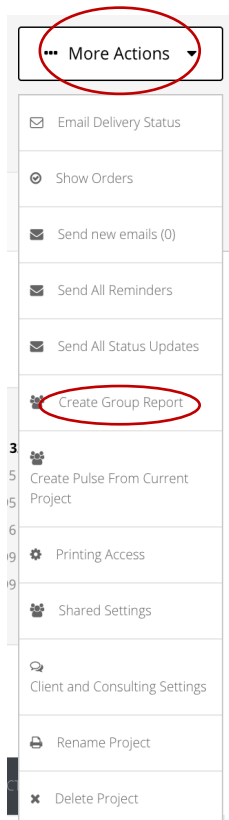
Only participants with a completed self survey and have received the minimum number of set evaluators can be included in the Group LCP Report.

#### CLAs

Only participants with a completed self survey can be included in the Group CLA Report.

#### CREATE a Profile Group Report

- Locate Project:** Open the project you wish to create Group Report for. Click '**More Actions**' and from drop down menu, select '**Create Group Report**'.
- Consulting Company and Consultant:** These fields will be autopopulated with your account details.
- Group Report Type:** Leadership Circle Profile (**LCP**)  
 Leadership Circle Profile – Manager Edition (**LCP-ME**)  
 Collective Leadership Assessment (**CLA**)
- Client:** Client field will be autopopulated based on the Project you are currently in. If you wish to add other clients to include in the Group Report, start typing in the additional client and click to select.




- **Add Participants:** Click the down arrow beside the client / project you wish to select participants from. Click 'Next' when you've finished adding all participants.

New PC Company 0 of 1 participants selected Select all available participants from this company

▼ Management Team Webinars 0 of 1 participants selected Add All Participants

Jane Smith

▶ Group Report - ABC group report 0 of 0 participants selected Add All Participants

- **Name Report:** Name your Group Report accordingly and Select Report Language and click 'Next'.
- **Deliverables:** All Group Reports are only available as PDF reports only.

I want the PDF copies only.

You will get only the digital (e-copies) version of the Profile Interpretation Manual and the following reports:

- Participant Report
- Participant Graph
- Coach Report
- PDF file that consultant emails to participant

- **Billing Address:** This is the address where the Invoice for this Project are sent to. The Invoice will be issued once report/s have reached the Run Report Date.
- **Create:** Click 'Create Report' and allow up to 30 minutes for report to be generated.
- **View Report:** Click My Reports from menu bar and select Project ID. Click '**Download Report**'



## SYSTEM EMAILS FROM THE PROJECT CENTRE

### REFERENCE: Emails sent via the Project Centre

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#### PARTICIPANT INVITATION EMAIL

**Products:** Leadership Circle Profile (LCP)  
 Leadership Circle Profile – Manager Edition (LCP-ME)  
 Collective Leadership Assessment (CLA)

**Purpose:** Email to participants with to commence

**Subject:** Welcome to the **\*IProductDescriptionI\*** Survey

Dear **\*IParticipantFullNameI\***,

Welcome to the **\*IProductDescriptionI\***.

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

Use this link to access the survey. If your link is not active, copy/paste the link into your Internet browser, and click enter. Preferred Internet Browsers are Chrome, Firefox, Safari, or Microsoft Edge, as some versions of Internet Explorer may not interface well.

**\*IActivationLinkI\***

After clicking the link, if you are a new user to our system, you'll be asked to activate your account by establishing a password. If you are a prior user, you'll be asked to enter your email address and password. If you don't remember your password, please click the "Forgot/Create Password" link on the login page to create a new one.

At the beginning of the survey, new users will be asked to answer a few demographic questions. Prior users will not have to answer these questions again.

Please contact **\*INeedHelpEmailI\*** should you experience technical difficulties.

Kind Regards,

**\*ICreatedByNameI\***

**\*ICreatedByEmailI\***



Modifying this message will change the participant's INVITATION email with the selected language. Please do not modify the text within the brackets **\*I I\***. These are fields that will be replaced with the information as per the project setup.

**PARTICIPANT REMINDER EMAIL**

**Product:** Leadership Circle Profile (LCP)  
 Leadership Circle Profile – Manager Edition (LCP-ME)  
 Collective Leadership Assessment (CLA)

**Purpose:** Reminder sent to participants to take action

**Subject:** **\*IProductDescriptionI\* Reminder**

Dear **\*IParticipantFullName\***,

*This is a friendly reminder that your **\*IProductDescriptionI\*** survey is not yet complete. The deadline for completing the survey is: **\*IPlannedCompletionDateI\***.*

*Use this link to access the survey. If your link is not active, copy/paste the link into your Internet browser, and click enter. Preferred Internet Browsers are Chrome, Firefox, Safari, or Microsoft Edge, as some versions of Internet Explorer may not interface well.*

**\*IActivationLinkI\***

*After clicking the link, if you are a new user to our system, you'll be asked to activate your account by establishing a password. If you are a prior user, you'll be asked to enter your email address and password. If you don't remember your password, please click the "Forgot/Create Password" link on the login page to create a new one.*

*Please contact **\*INeedHelpEmailI\*** should you experience technical difficulties.*

Kind Regards,

**\*ICreatedByNameI\***

**\*ICreatedByEmailI\***



Modifying this message will change the participant's REMINDER email with the selected language. Please do not modify the text within the brackets **\*I I\***. These are fields that will be replaced with the information as per the project setup.

**PARTICIPANT STATUS UPDATE EMAIL**

**Product:** Leadership Circle Profile (LCP)  
Leadership Circle Profile – Manager Edition (LCP-ME)

**Purpose:** Email to participants advising of the number of completed evaluations received

**Subject:** **\*IProductDescription!\* Status Update**

Dear *\*IParticipantFullName\**,

*This is a status update regarding the progress of your **\*IProductDescription!\***. Please see below for a detailed status update for your self survey as well as your evaluator feedback.*

***\*IParticipantEvaluationsStats!\****

*The deadline for all surveys to be completed is: **\*IPlannedCompletionDate!\***.*

*At the survey close date, a report will be generated if the following requirements are met: Self Survey is complete and more than **\*IMinimumNumberOfEvaluators!\*** evaluators have provided feedback. If these requirements have not been met, you will not receive a report.*

*Use this link to access your self-survey:*

***\*IActivationLink!\****

*If your link is not active, copy/paste it into your Internet Browser. Preferred Internet Browsers are Chrome, Firefox, Safari, or Microsoft Edge, as some versions of Internet Explorer may not interface well.*

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

*Kind Regards,*

***\*ILeadershipCircleSupport!\****

***\*ICreatedByName!\****

***\*ICreatedByEmail!\****



Modifying this message will change the participant's STATUS UPDATE email with the selected language. Please do not modify the text within the brackets **\*!\***. These are fields that will be replaced with the information as per the project setup.

**EVALUATOR INVITATION EMAIL**

**Product:** Leadership Circle Profile (LCP)  
Leadership Circle Profile – Manager Edition (LCP-ME)

**Purpose:** Email to evaluators requesting feedback on participant's leadership effectiveness

**Subject:** **\*IParticipantFullName\*** requesting feedback

Dear **\*IEvaluatorFullName\***,

*I'm using **\*IProductDescriptionI\*** to gain insight into how I lead and interact with others. To that end, I'm asking you to take about 15 to 25 minutes to complete an online survey about me. As you take the survey 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.*

*The survey completion deadline is: **\*IPlannedCompletionDateI\***.*

*Use this link to access the survey. If your link is not active, copy/paste the link into your Internet browser, and click enter. Preferred Internet Browsers are Chrome, Firefox, Safari, or Microsoft Edge, as some versions of Internet Explorer may not interface well.*

**\*IActivationLinkI\***

*After clicking the link, if you are a new user, you'll be asked to activate your account by establishing a password. If you are a prior user, you'll be asked to enter your email address and password. If you don't remember your password, please click the "Forgot/Create Password" link on the login page to create a new one.*

*New users will also be asked to answer a few demographic questions. Prior users will not have to answer these questions again.*

*You currently have the following evaluations to complete:*

**\*IPendingEvaluationsI\***

*Please contact **\*INeedHelpEmailI\*** should you experience technical difficulties.*

Kind Regards,

**\*IParticipantFullName\***

**\*IParticipantEmailI\***



Modifying this message will change the evaluator's INVITATION email with the selected language. Please do not modify the text within the brackets **\*I I\***. These are fields that will be replaced with the information as per the project setup.

**EVALUATOR REMINDER EMAIL**

**Product:** Leadership Circle Profile (LCP)  
Leadership Circle Profile – Manager Edition (LCP-ME)

**For:** Reminder sent to evaluators to complete feedback

**Subject:** **\*IProductDescriptionI\*** Reminder

Dear **\*IEvaluatorFullName\***,

*This is a friendly reminder that your leadership evaluation for **\*IParticipantFullName\*** is not yet complete. The survey completion deadline is: **\*IPlannedCompletionDateI\***.*

*Use this link to access the survey. If your link is not active, copy/paste the link into your Internet browser, and click enter. Preferred Internet Browsers are Chrome, Firefox, Safari, or Microsoft Edge, as some versions of Internet Explorer may not interface well.*

**\*IActivationLinkI\***

*After clicking the link, if you are a new user, you'll be asked to activate your account by establishing a password. If you are a prior user, you'll be asked to enter your email address and password. If you don't remember your password, please click the "Forgot/Create Password" link on the login page to create a new one.*

*You currently have the following evaluations to complete:*

**\*IPendingEvaluationsI\***

*Please contact **\*INeedHelpEmailI\*** should you experience technical difficulties.*

*Kind Regards,*

**\*ICreatedByNameI\***

**\*ICreatedByEmailI\***

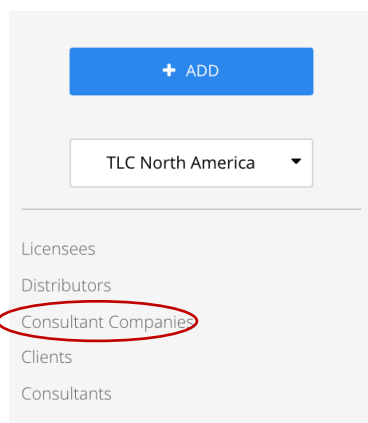


Modifying this message will change the evaluator's REMINDER email with the selected language. Please do not modify the text within the brackets **\*I I\***. These are fields that will be replaced with the information as per the project setup.

## CHANGE YOUR CONSULTING COMPANY NAME

### How to Amend Consulting Company Details

From the TLC Project Centre Home Screen, click Consultant Companies.



From the main screen, select your Consulting Company under the Name column.

1 Consulting Company were found

Name	Local
<input type="radio"/> Marilyn DeMond	TLC North America/TLC America (Company)/TLC NA Full Circle Group (Company) (manage Consultants)

Click the 'Actions' and from the drop down menu, select 'Edit'.

Marilyn DeMond CONSULTING COMPANY  
Shared with 2 Consultants

Name	Kind
<input type="radio"/> Metro Parks	Client (click to manage)
<input type="radio"/> AAA Company	Client (click to manage)

Actions

- Shared Settings
- Edit
- Delete Consulting Company

Enter the new Consulting Company name and click 'Save Changes'.

### Rename Consulting Company

Please enter a new name for the Consulting Company

Marilyn DeMond

Save Changes Cancel



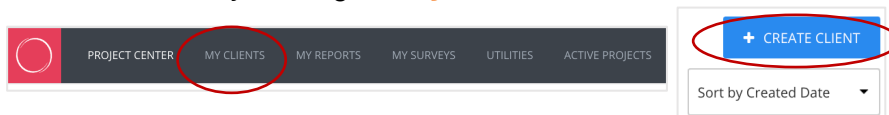
## SHARING CLIENT/S

### Sharing Clients with Other Consultants

If you are collaborating on a Client with another TLC Certified Consultant, there is ability to share the Client.

#### How to Share a Client

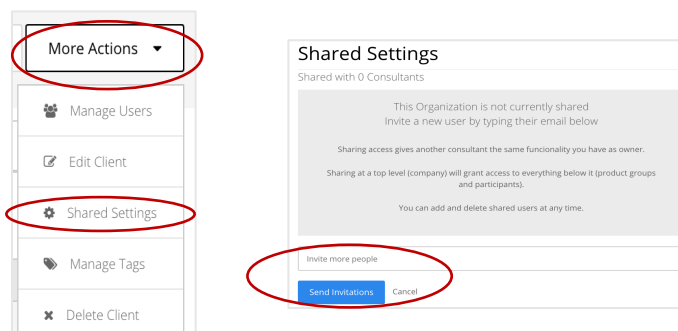
Create the client if needed by clicking on 'My Clients' in the menu, select 'Create Client'.



Clients can also be created whilst setting up your project.

To share the Client:

- Click:** My Clients  
+Client Name  
More Actions  
Shared Settings
- Enter:** In the 'Invite More People' field, type the email address of the TLC Certified Consultant you want to share the Client with
- Select:** Click to select the Consultant Name when it appears
- Send:** Send Invitations to TLC Consultant inviting them to share the Client



An invitation is sent to the TLC Consultant by [notifications@theleadershipcircle.com](mailto:notifications@theleadershipcircle.com). Here is an example of email sent:

**Subject: Organisation Shared!**

Welcome **First Name Last Name**  
**Organisation Client Name** have been shared with you.  
 To visit organisation'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 view all projects and details, contact your Client Services Team.