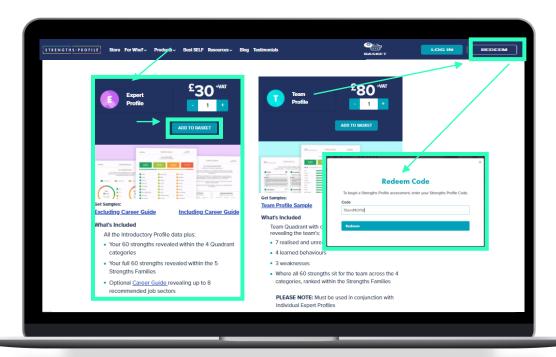
## Step 1

Please purchase one <u>Expert Profile</u> per team member and one <u>Team Profile</u> per team.

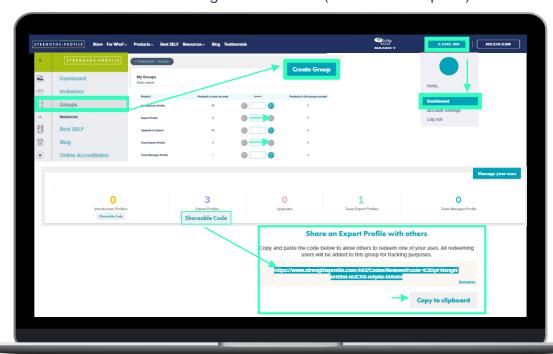
 Top tip: Each team member must complete an individual Expert Profile, e.g. 10 team members = 10 Expert Profiles. If you have unused profiles in your Dashboard or if your team members have recently completed an Expert Profile, there is no need to purchase extra Expert Profiles.



### Step 2

For a new team: Set up a group and transfer the Expert Profiles and Team Profile, then invite your team members to complete their strengths assessment:

- Top Tip: You can invite each team members in two ways:
  - 1) Manually enter their email addresses whilst you set up the group, or once you have set up the group.
  - 2) Copy and paste the 'Shareable code' URL link into separate team communications e.g. a team email (our favourite option)



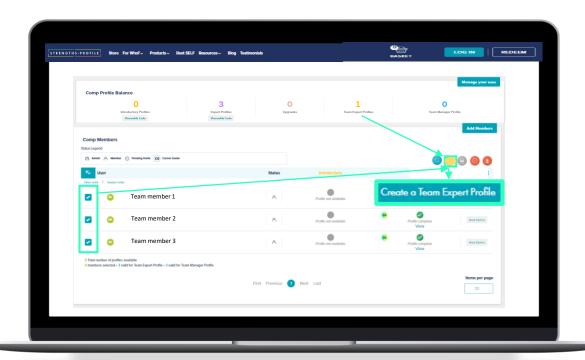
#### Inviting Team Members who already have an Expert Strengths Profile

- Top Tip: If you wish to add members that already have an Expert Profile, follow the similar process previously on sending a Group invitation.
  - If you have sent the team member an invitation before, you can quickly add them from your existing contacts. If not, continue below.
  - Click on the group and then 'Send an Invitation'.
  - Enter the email address of your team member, then click 'add'.
  - · Click 'None' if they already have a profile, then click send.
  - Participants will receive an email from <a href="mailto:noreply@strengthsprofile.com">noreply@strengthsprofile.com</a> containing the invitation to this group you have set up. They must sign in with the <a href="mailto:same email address">same email address</a> that you entered in the invitation field.

### Step 3

# Once your team members have completed their profiles, you can then create the Team Profile:

- Select the people you wish to include.
- · Click 'create team' profile, wait a few seconds and download it.
- To find it again, click 'View' into the relevant group and scroll to the bottom to view all team reports.
- **PLEASE NOTE** You cannot edit or amend the team report after it has been generated, so please ensure everyone who is supposed to be included in the report has a completed profile. You won't be able to add them in later.



#### Further useful tips

- Completion Report You can download a completion status report for your team to reflect those you have started and completed a profile. Simply click the 'CSV' or the 'Excel' button depending on the format you require.
- **Downloading all Expert Profiles** Click the far-left button underneath the 'Add members' button. This can several minutes depending on how many profiles are in the group.
- Editing Group Details If you have many groups, you may want to add notes and descriptions or even change the name so that they are easier to locate. Where it states '<group name> in detail', click Edit. Fill in the fields and click Save.
- **Searching members** If your group is particularly large, you can search for members to locate them faster. Click the blue circular button underneath the 'Add members' button.
- Removing Members You might want to remove members from a group. Simply select the person you wish to remove, then click the red circular button below 'Add Members'
- **Sorting Members** You can sort all members alphabetically or as and when they have been added to the group. Simply click 'User' or 'Status'.
- **Items per page** Change the number of members you can see by scrolling down and editing the number of items per page.

#### **Contact us**

For any further queries, please email: enquiries@strengthsprofile.com

