

Quick Start: Team Flow Metrics

This guide is meant to quickly onboard you using Lean Agile Intelligence’s Team Flow Metrics assessment template.

1. Register

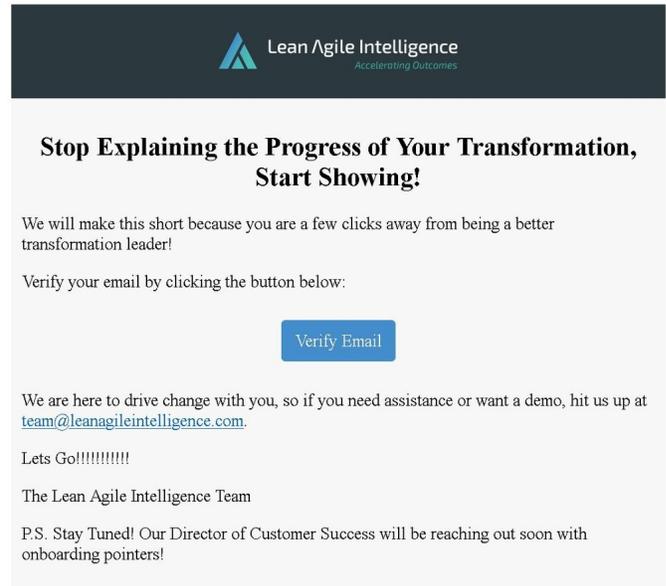
First [register](#) for the platform by entering a display name, email, and creating a password. Optionally, enter a promo code.

Click *Sign Up* and an email will be sent to your account.

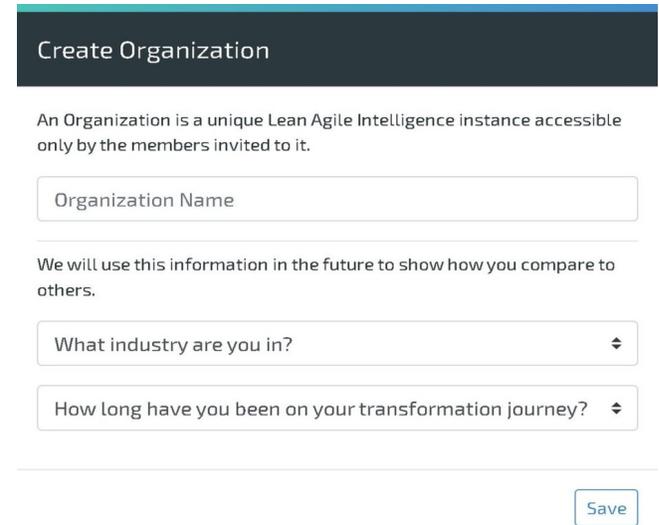
Click the *Verify Email* button to confirm your account and automatically login to the platform.

After confirming your email, you need to create an Organization. An Organization is a unique Lean Agile Intelligence instance accessible only by the members invited to it.

Give the Organization a unique name, and answer the industry and agile journey questions and then click *Save*.

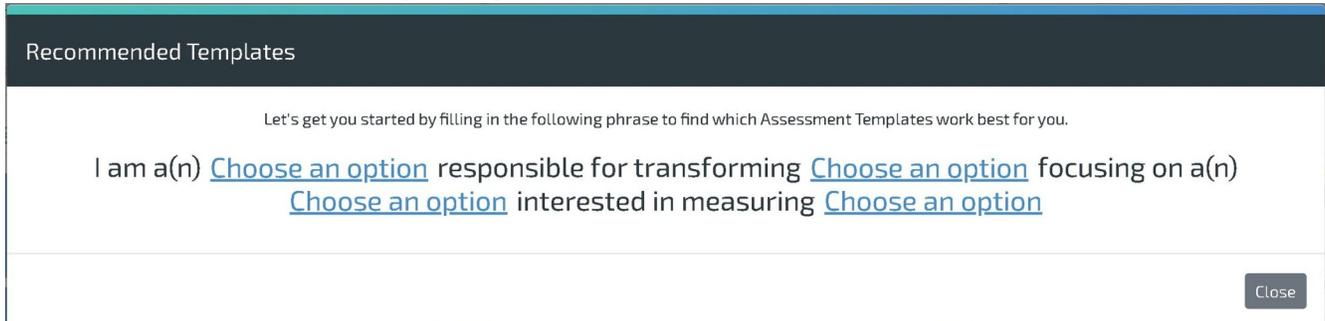


The screenshot shows an email from Lean Agile Intelligence. The header includes the company logo and name. The main heading is "Stop Explaining the Progress of Your Transformation, Start Showing!". The body text says: "We will make this short because you are a few clicks away from being a better transformation leader! Verify your email by clicking the button below:". There is a blue button labeled "Verify Email". Below the button, it says: "We are here to drive change with you, so if you need assistance or want a demo, hit us up at team@leanagileintelligence.com. Lets Go!!!!!!!!!!!!!! The Lean Agile Intelligence Team P.S. Stay Tuned! Our Director of Customer Success will be reaching out soon with onboarding pointers!"



The screenshot shows a "Create Organization" form. The title is "Create Organization". Below the title is the text: "An Organization is a unique Lean Agile Intelligence instance accessible only by the members invited to it." There is a text input field for "Organization Name". Below that is the text: "We will use this information in the future to show how you compare to others." There are two dropdown menus: "What industry are you in?" and "How long have you been on your transformation journey?". At the bottom right is a "Save" button.

Answer the recommended templates question.



Recommended Templates

Let's get you started by filling in the following phrase to find which Assessment Templates work best for you.

I am a(n) [Choose an option](#) responsible for transforming [Choose an option](#) focusing on a(n) [Choose an option](#) interested in measuring [Choose an option](#)

Close

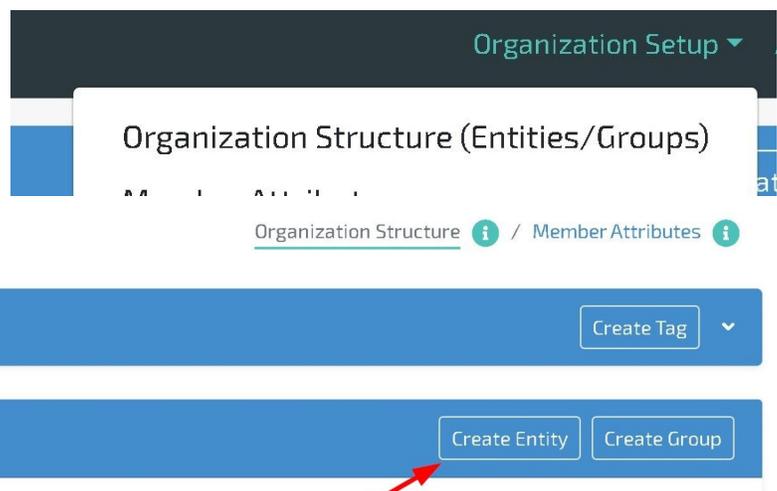
After answering the question, you can close the popup, as we will be focusing on setting up for *Team Flow Metrics* and not any of Lean Agile Intelligence's other assessments.

2. Setup Organization Structure

Go up to the *Organization Setup* menu and select the *Organization Structure (Entities/Groups)* menu item.

Click *Create Group*.

Organization Setup Page 



Organization Setup ▾

Organization Structure (Entities/Groups)

Organization Structure ⓘ / Member Attributes ⓘ

Tags Create Tag ▾

Organization Structure Create Entity Create Group

Give your Group a name - it should be the name of a department or group of teams such as Operations, Business, or Finance. For this example, we will use *Business*.

When it asks to *Assign a Parent Group*, you can skip and just click *Save* to create the Group.

Next, create a team (called an Entity in the platform) that will be part of that group.

Give your team a name. We will use *Flow Metrics Team*.

Click *Next* and select *Team* for the Entity type - we need *Team* so that Entity can take the *Team Flow Metrics* template later. Click *Next*.

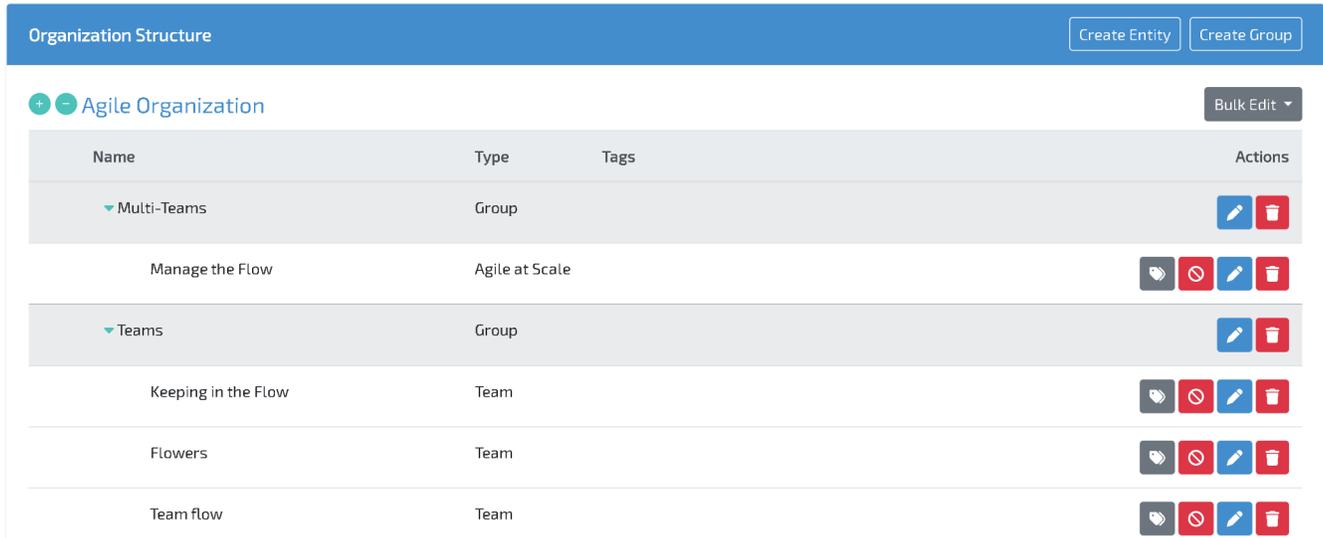
Assign Group to the Group you created above: *Business*.

For *Enable Assessment Reminders*, you can leave unchecked for now. Click *Save*.

Congratulations, you have created your first Entity.

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You can repeat creating Entities to have all Entities that are part of the Group.
And you can continue Creating Groups to cover your entire organization.
The image below is an example of a simple organization structure



The screenshot shows a web interface titled "Organization Structure". At the top right, there are buttons for "Create Entity" and "Create Group". Below the title bar, there is a header for "Agile Organization" with expand/collapse icons and a "Bulk Edit" dropdown. The main content is a table with the following structure:

Name	Type	Tags	Actions
Multi-Teams	Group		[Edit] [Delete]
Manage the Flow	Agile at Scale		[Share] [Disable] [Edit] [Delete]
Teams	Group		[Edit] [Delete]
Keeping in the Flow	Team		[Share] [Disable] [Edit] [Delete]
Flowers	Team		[Share] [Disable] [Edit] [Delete]
Team flow	Team		[Share] [Disable] [Edit] [Delete]

To take it another step further - create a complex organization structure with Groups that have subgroups (think departments, chapters, teams, etc) and view roll-ups at all levels of your Organization.

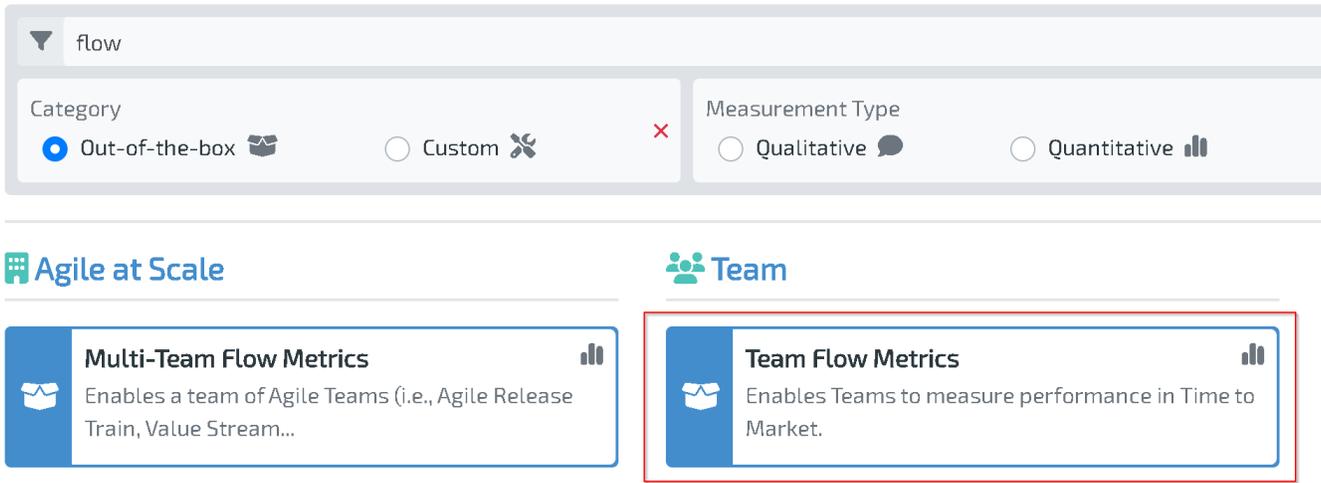
3. Take First Assessment

Now that you have an Entity, let's take an assessment for the Entity you created.

Go to the *Assessments* menu item and choose *Assessment Templates*.

Click on *Team Flow Metrics*.

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The screenshot shows a search bar with the text "flow". Below it are two filter sections: "Category" with radio buttons for "Out-of-the-box" (selected) and "Custom", and "Measurement Type" with radio buttons for "Qualitative" and "Quantitative". Below the filters are two cards. The left card is titled "Multi-Team Flow Metrics" and describes enabling a team of Agile Teams. The right card is titled "Team Flow Metrics" and describes enabling Teams to measure performance in Time to Market. The right card is highlighted with a red border.

After clicking on *Team Flow Metrics*, click on the *Launch Assessment* button in the popup that opens.

In the next screen, define the parameters of the assessment. The defaults will work in this case (*Separate Mode* and *Only one member will take this assessment*).

Launch Assessment

Assessment	Team Flow Metrics
Mode	<input type="radio"/> Together: Assessment is conducted in real time with all members present in the Self Assessment Platform. <input checked="" type="radio"/> Separate: Assessment is completed separately by each member. Note that results will not be available until all members have completed the assessment.
Options	<input checked="" type="checkbox"/> Only one member will take the assessment  <input type="checkbox"/> The moderator (you) will NOT be voting 
Team Entity	<input type="text" value="Select Entity"/>  Create Entity
<input type="button" value="Next"/>	

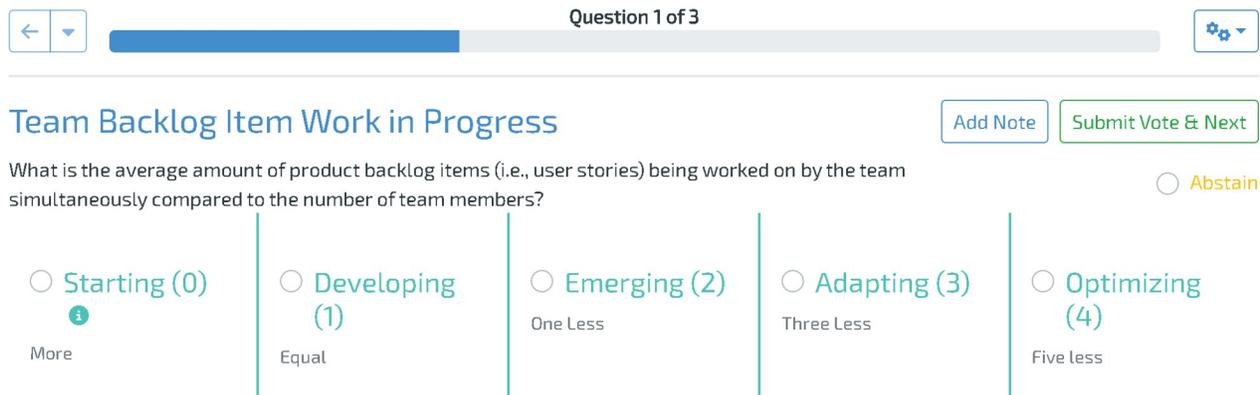
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Click *Next*.

On the next screen, click *Launch Assessment*.

Now you are in the Assessment Platform.

Answer each question and click *Submit Vote & Next*. The questions should be answered from the perspective of the team member - in this case the Entity has your name so you should answer these.

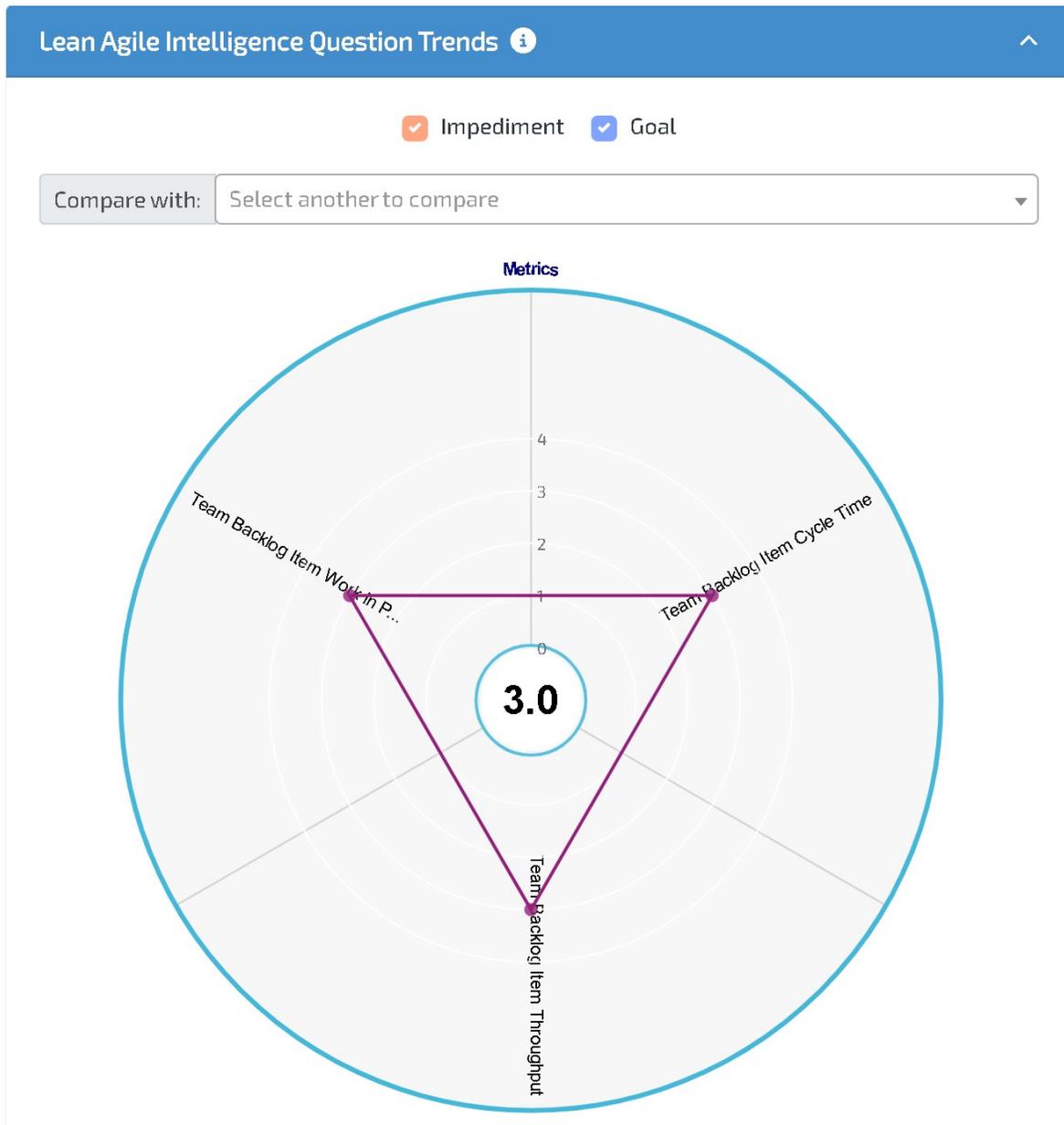


The screenshot shows a question titled "Team Backlog Item Work in Progress" with the text: "What is the average amount of product backlog items (i.e., user stories) being worked on by the team simultaneously compared to the number of team members?". The question is labeled "Question 1 of 3". There are navigation arrows on the left and a settings icon on the right. Two buttons are visible: "Add Note" and "Submit Vote & Next". An "Abstain" option is also present. Five radio button options are listed: "Starting (0) More", "Developing (1) Equal", "Emerging (2) One Less", "Adapting (3) Three Less", and "Optimizing (4) Five less".

After answering all questions, you will be given a *Complete Assessment* popup. Click *Submit Votes* and you will be redirected to Results.

4. View Results

After you complete the assessment, you will be launched into our Results page where you can view the scores of the assessment you just completed.



Take time to explore Results, but the main things you will be interested in are:

- Scoring Summary (Business Outcomes)
 - This will give you a 0-4 score for that tells you how far you are along in “Optimizing” outcomes like Innovation and Reliability.

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- These scores are directly derived from each of the Questions you just answered. Each Question targets one or more Business Outcomes. The average vote of all Questions that target each Business Outcome make up the Business Outcome score.
- Question Trends
 - A graphical version of the Questions you just answered. All Questions are given a pie slice and the score for those Questions are displayed as a colored line that is a distance from the center. In addition, goals/impediments are displayed, as well as trends over time if the same Entity takes the assessment multiple times.

Viewing Results for a single Entity (team) is powerful. But even more powerful is clicking on the Group in the left-hand Organization Structure Tree to see the scores of all teams averaged and get a bird's eye view of how your teams are doing.