Quick Start: Team Flow Metrics

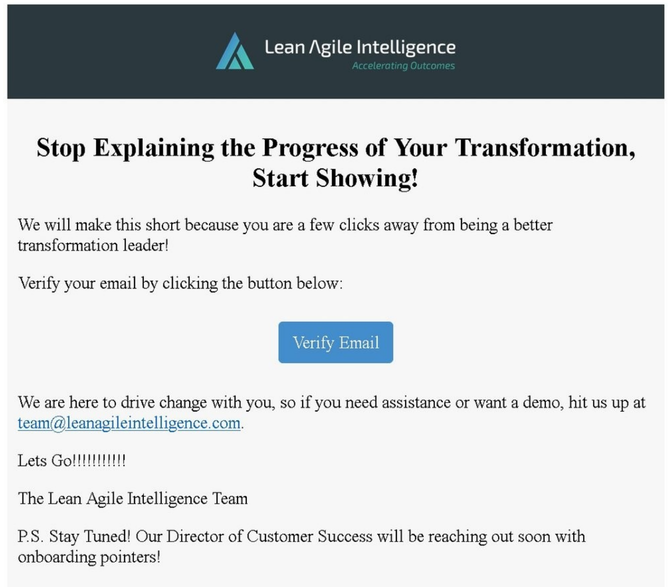
This guide is meant to quickly onboard you using Lean Agile Intelligence's Team Flow Metrics assessment template.

1. Register

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

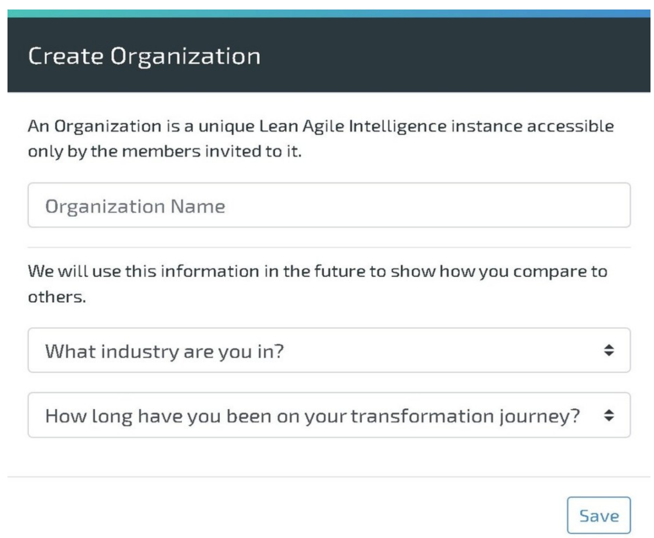
Click *Sign Up* and an email will be sent to your account.

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

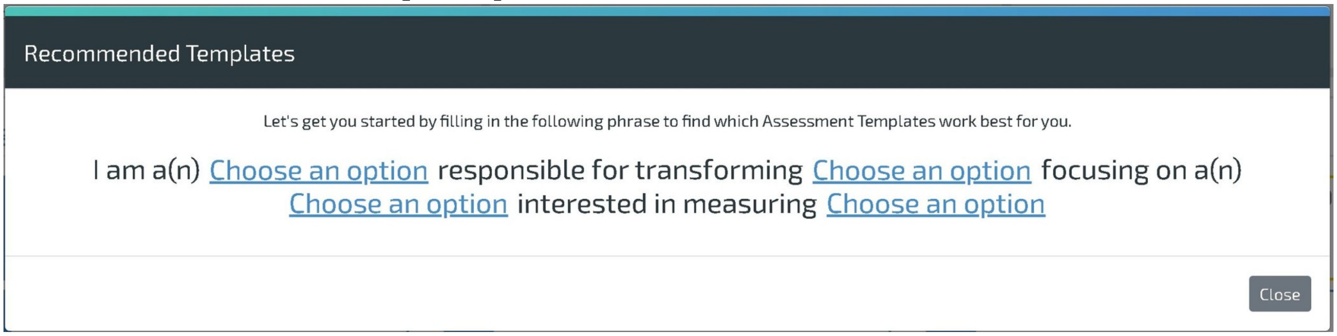


After confirming your email, you need to create an Organization. An Organization is a unique Lean Agile Intelligence instance accessible only by the members invited to it.

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



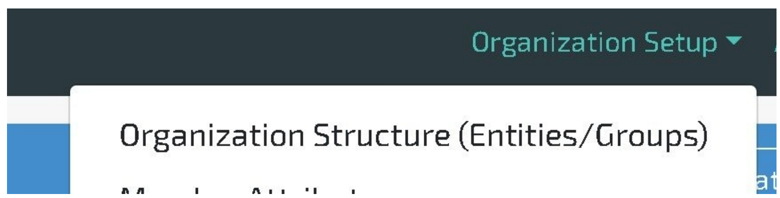
Answer the recommended templates question.



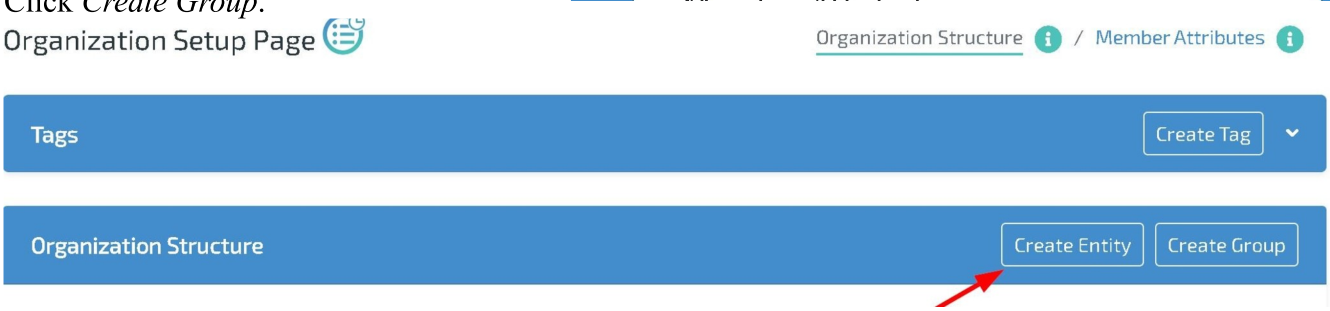
After answering the question, you can close the popup, as we will be focusing on setting up for *Team Flow Metrics* and not any of Lean Agile Intelligence's other assessments.

2. Setup Organization Structure

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



Click *Create Group*.

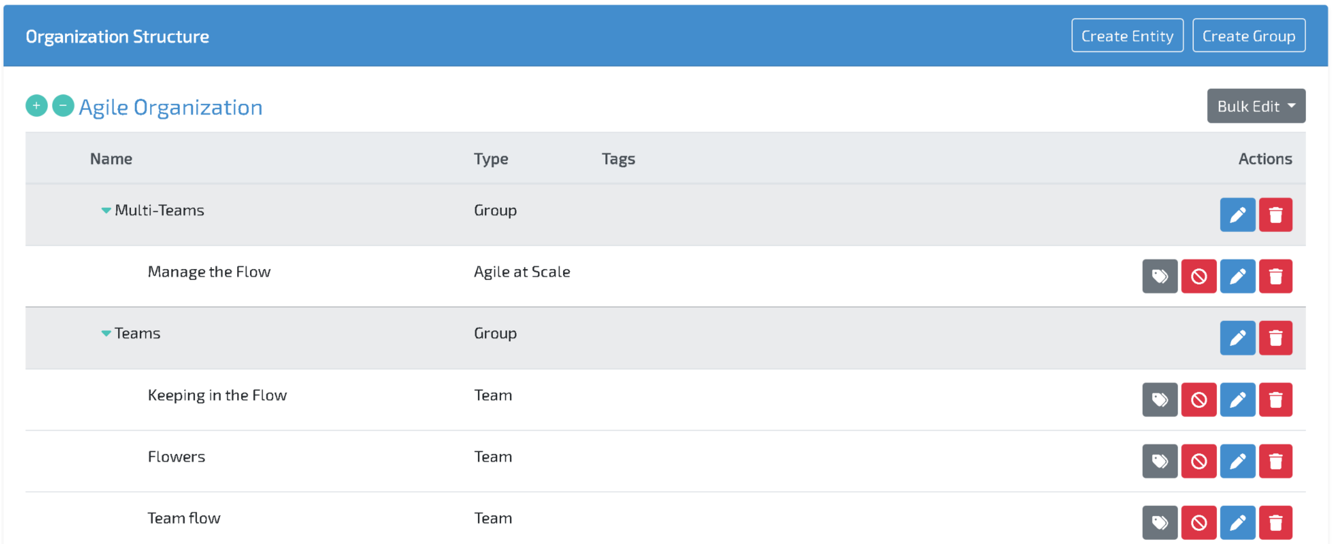


Give your Group a name - it should be the name of a department or group of teams such as Operations, Business, or Finance. For this example, we will use *Business*.
When it asks to *Assign a Parent Group*, you can skip and just click *Save* to create the Group.

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.

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



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.

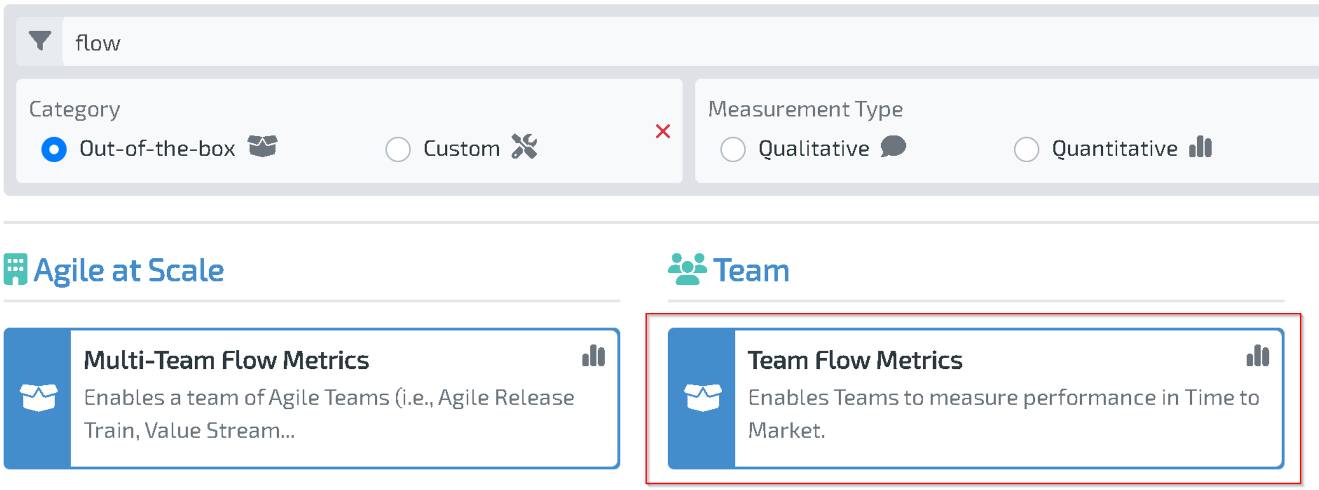
3. Take First Assessment

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*.

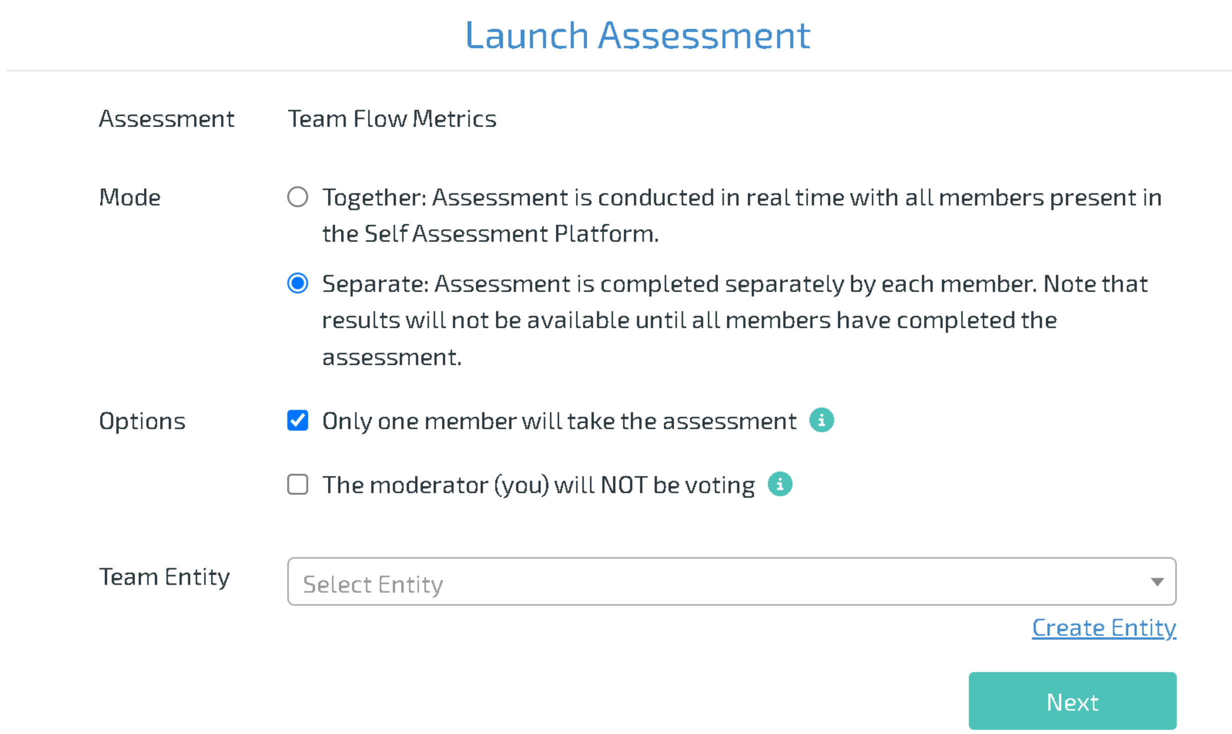
Click on *Team Flow Metrics*.

Lean Agile Intelligence
Accelerating Outcomes



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*).

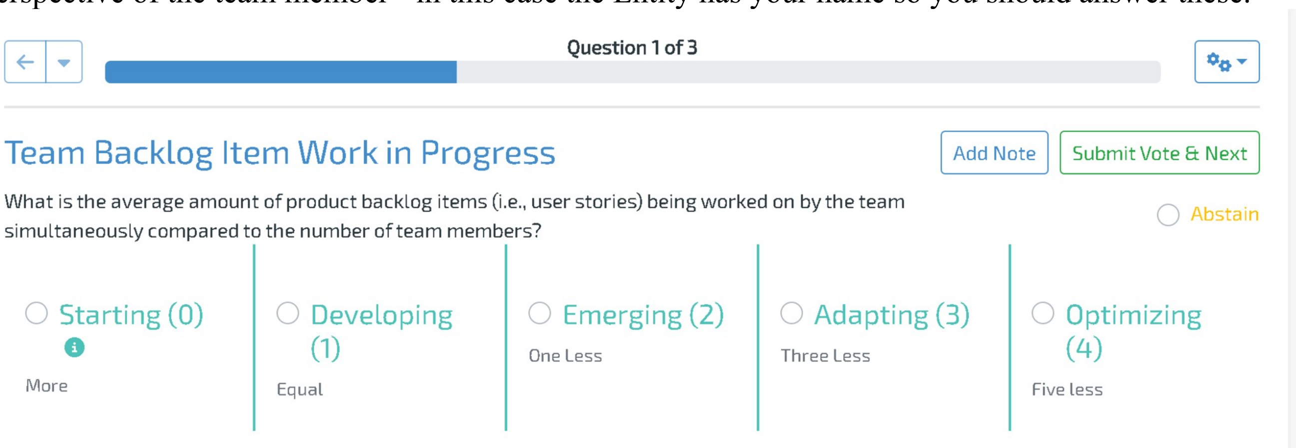


Click *Next*.

On the next screen, click *Launch Assessment*.

Now you are in the Assessment Platform.

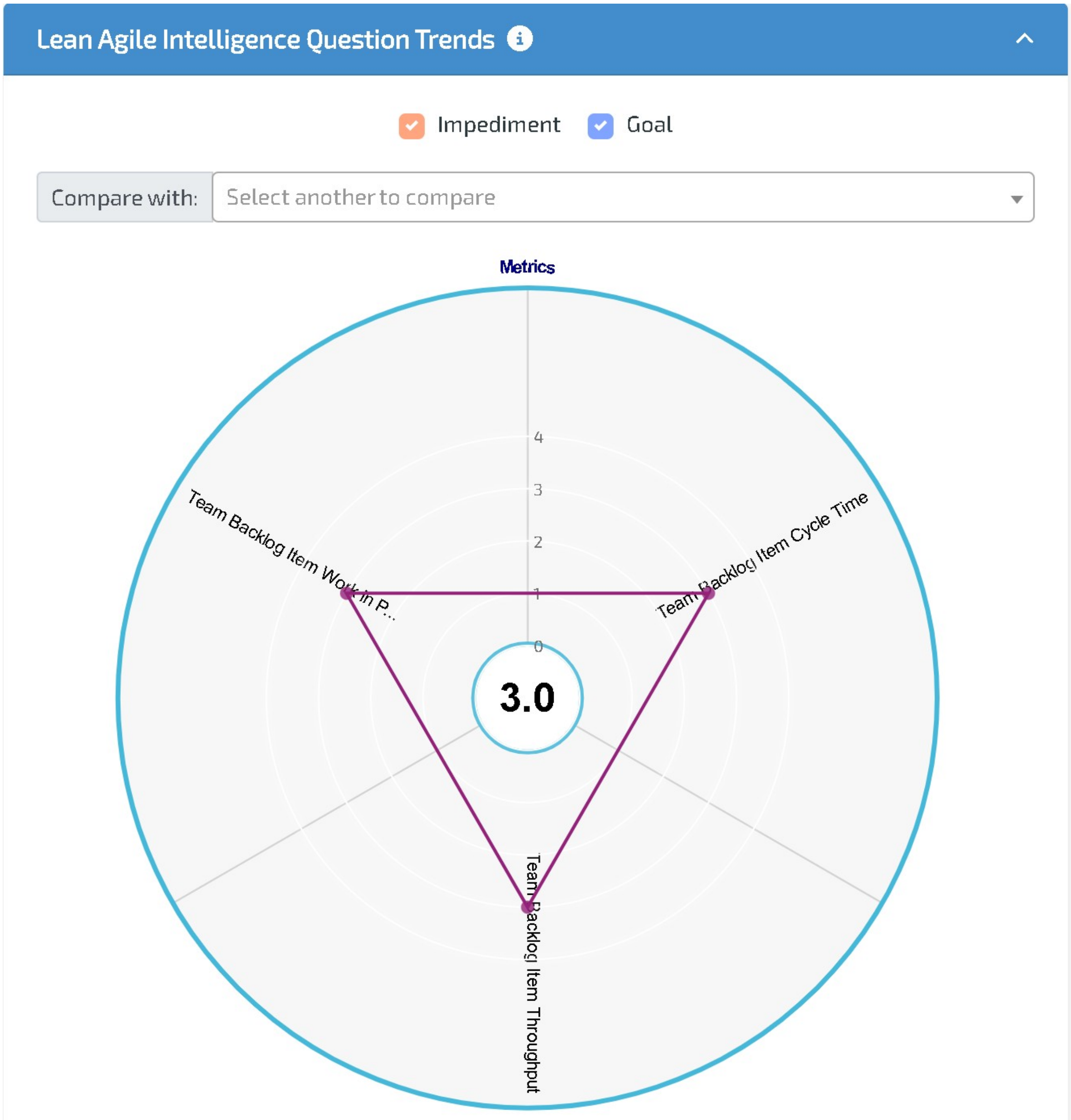
Answer each question and click *Submit Vote & Next*. The questions should be answered from the perspective of the team member - in this case the Entity has your name so you should answer these.



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.

    - 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.