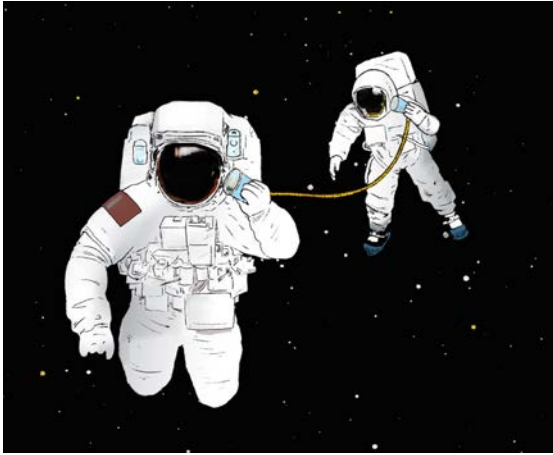


## USER GUIDE



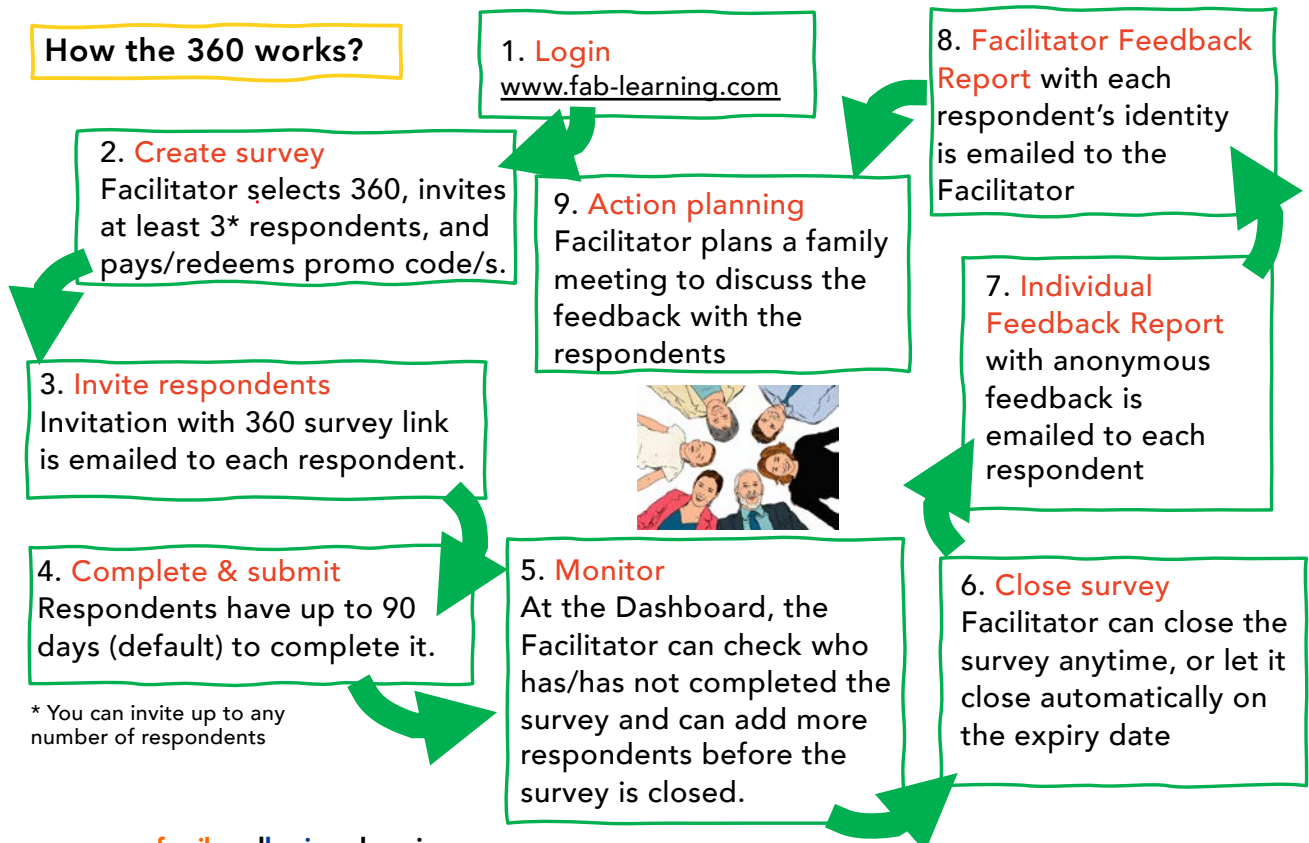
# Family and Business Communication360 Scorecard

The world's first online  
360° tool to improve your  
family's communication  
effectiveness

[www.familyandbusinesslearning.com](http://www.familyandbusinesslearning.com)

v. 03092020

2020 © Randel S. Carlock



[www.familyandbusinesslearning.com](http://www.familyandbusinesslearning.com)

2020 © Randel S. Carlock

# Introducing the Family and Business 360 Facilitators Feedback Report

These instruments are for training and planning by business families, with the support of a **Facilitator**, who may be a family member, family business advisor, or consultant.

A Facilitators Feedback Report (FFR) with the identities of the respondents will be sent to the Facilitator – the user who creates the survey and invites the respondents. Your completing of the survey grants your consent for the Facilitator to use the data in training and planning activities with the family.

To protect confidentiality among individual respondents, the answers to the survey will be collated in the **Individual Feedback Report**.

Except to the Facilitator, none of the information you provide will be identifiable as coming from you, **unless you voluntarily offer personal information** in the narrative or comment boxes.

**Step 1** Facilitator to **Login** at [www.fab-learning.com](http://www.fab-learning.com)  
Sign up with your email and a password of minimum 8 digits



Username

Password

**Sign up**

Login

Forgot password?

**Step 2** In MY DASHBOARD, click [Create survey](#) for the [Communication360](#). Then add family members (**respondents**) by providing their Email addresses and Names. The Communication360 requires a minimum of one respondent (including yourself) with no maximum limit.

## MY DASHBOARD

### AVAILABLE SURVEYS

Name	Action
Commitment360	<a href="#">Price</a> ▶ <a href="#">Create survey</a>
<b>Communication360</b>	<a href="#">Price</a> ▶ <a href="#">Create survey</a>
Advanced360	<a href="#">Price</a> ▶ <a href="#">Create survey</a>
Basic360	<a href="#">Price</a> ▶ <a href="#">Create survey</a>

## Step 2 Create survey

### Communication360

Create a name for your survey. You can use your business name or any other name that your participants will recognise:

Set your expiry date, not more than 90 days ahead:

Name of the business:

Which country the business resides in:



Which year the business was founded:

Are you also a respondent:

 Yes, I am a respondent and the facilitator.

 No, I am not a respondent, I am only a facilitator.

Select email language:

If you are an external advisor for a family, you can select "No, I am not a respondent, I am only a facilitator." You will not be able to participate in the survey but you will still receive the Facilitators Feedback Report.

If you don't have a family business, use your family name.



We do not want a Facilitators Feedback Report

Checking this box eliminates you from receiving the Facilitators Feedback Report. Please consider this carefully. This decision cannot be reversed

If you are working with a family who doesn't want the identity of each respondent to be shared with the facilitator, tick the box "We do not want a Facilitators Feedback Report". This should be the exception.

**Step 2** Invite family members (**respondents**) by providing their Email addresses and Names/Nicknames. The Communication360 requires a minimum of one respondent (including yourself) with no maximum limit.

**Invite respondents**

Email	Name	What's this?
<input type="text" value="kay@fab-learning.com"/>	<input type="text" value="Family_and_Business_Learning"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	

+ Add more e-mail addresses

Create survey

You can continue adding any number of email addresses and names to the survey. Please check that the email addresses are correct.

FAMILY AND BUSINESS LEARNING

[HOME](#)
[DASHBOARD](#)
[STORE](#)
[TOOLS](#)
[BOOK](#)
[CONTACT](#)

FBNUSER ▾
English ▾

PAYPAL or CREDIT CARD

STRIPE

Continue with PAYPAL or CREDIT CARD

**Billing**

Communication360 x4	
# of respondents x4	\$10.00
# of respondents x0	\$8.00
# of respondents x0	\$5.00
<b>Total (USD)</b>	<b>\$40.00</b>

Redeem

Multiple Promo-Codes?

Back

**Step 2** Billing page

1. Enter the promo code (if you have one)
2. Redeem
3. Continue to payment page for the balance (if any) via Credit Card, Paypal or Stripe.

**Step 3** Click [Begin survey](#) on MY DASHBOARD to start your survey.

#### MY SURVEYS

Type	Status	Name	Expiry date	Completed/Invited	Action
Communication360	Active	FBN Comm Exercise	2020-04-15 16:00 UTC	0/4	<a href="#">▶ Begin survey</a> <a href="#">■ Close survey</a> <a href="#">↻ Invite</a> <a href="#">↻ Re-Invite</a> ▶ FFR <a href="#">📄 Analyse</a>

### Invite respondents

Your respondents will each receive an email from **Family and Business Learning** with the subject "You are invited to complete the Communication360 Scorecard for {your survey name}" with a unique link to complete their own assessment.

**Step 4** **Complete** the Communication360 Scorecard

Rate **10 Communication Effectiveness statements** on a scale of 1-5 with

1 = "Does not describe our family" and  
5 = "Very well describes our family"

You will see your total score and a table to interpret your score.

Answer **3 open-ended Discussion Questions** to share your family specific thoughts.

All respondents will be reminded that their completion of the Communication360 grants their consent for the Facilitator to view and use the data in family training and planning activities.

This survey should take no more than 10 minutes to complete.

## Step 5 Monitor on MY DASHBOARD (only for the Main user or Facilitator )

- Completed/Invited: track who has or has not completed the survey
- Invite: to add more respondents, and Re-Invite: to re-send the link to respondents
- Close survey: close the survey prior to the expiry date, and even when some respondents have not yet completed the survey
- FFR: view the Facilitators Feedback Report, only when the survey is closed
- Analyse: view your own Individual Feedback Report at any time.

### MY SURVEYS

Type	Status	Name	Expiry date	Completed/Invited	Action
Communication360	Active	FBN Comm Exercise	2020-04-15 16:00 UTC	0/4	<a href="#">▶ Begin survey</a> <a href="#">■ Close survey</a> <a href="#">↻ Invite</a> <a href="#">↻ Re-Invite</a> <a href="#">▶ FFR</a> <a href="#">■ Analyse</a>

**Step 6** Click **Close survey** on MY DASHBOARD to close your survey any time before the expiry date (default 90 days).

## Step 7 Review your Individual Feedback Report

Once the survey is closed, an email from Family and Business Learning with the subject "The Communication360 report for {your survey name} is now ready for your review" and a link to the respondent's Individual Feedback Report will be sent to all respondents.

## Step 8 Review your Facilitators Feedback Report

Once the survey is closed, an email from Family and Business Learning with the subject "The Communication360 FFR report for {your survey name} is now ready for your review" and a link to the Facilitators Feedback Report will be sent to the main user or Facilitator.

You will be able to **EXPORT TO PDF** or **PRINT** using the buttons founds at the end of the reports.

## Step 9 Action Planning

Review the reports and plan a family meeting to discuss, after the course.

## Need help?

Go to [www.familyandbusinesslearning.com/faq.html](http://www.familyandbusinesslearning.com/faq.html) or email [kay@fab-learning.com](mailto:kay@fab-learning.com)