

USER GUIDE



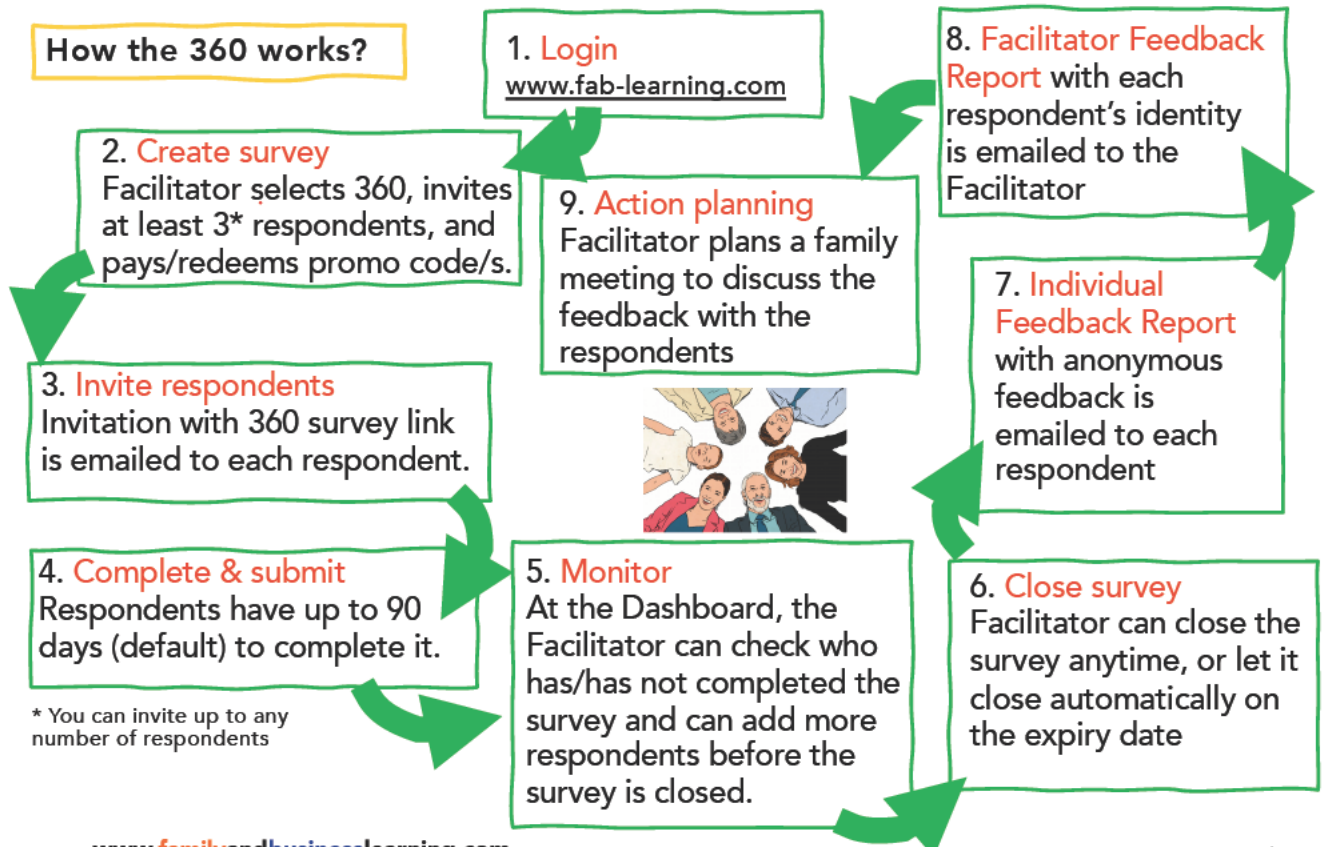
Family and Business Commitment360 Scorecard

The world's first online 360°
tool to improve the level of
your family commitment

www.familyandbusinesslearning.com

v. 12272020
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How the 360 works?



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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
Sign up with your email and a password of minimum 8 digits

**FAMILY AND BUSINESS
LEARNING**

HOME

STORE

TOOLS

BOOK

CONTACT

English ▾



Username

Password

Sign up

Login

Forgot password?

Step 2 In MY DASHBOARD, click [Create survey](#) for the [Commitment360](#). Then add family members (**respondents**) by providing their Email addresses and Names. The Commitment360 requires a minimum of one respondent (including yourself) with no maximum limit.

MY DASHBOARD

AVAILABLE SURVEYS

| Name | Action |
|------------------|---|
| Commitment360 | Price Create survey |
| Communication360 | Price Create survey |
| Advanced360 | Price Create survey |
| Basic360 | Price Create survey |

Step 2 Create survey

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

Commitment360

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:

Select email language:

☐ 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

2020-09-08

select country

☒ Yes, I am a respondent and the facilitator.
☐ No, I am not a respondent, I am only a facilitator.

English

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 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.

Continue

Step 2 Invite family members (**respondents**) by providing their Email addresses and Names/Nicknames.
The Commitment360 requires a minimum of one respondent (including yourself) with no maximum limit.

Invite respondents

| Email | Name | What's this? |
|----------------------|------------------------------|--------------|
| kay@fab-learning.com | Family_and_Business_Learning | |
| name@example.com | Name, nickname or identifier | |
| name@example.com | Name, nickname or identifier | |
| name@example.com | Name, nickname or identifier | |
| name@example.com | Name, nickname or identifier | |
| name@example.com | Name, nickname or identifier | |

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

+ Add more e-mail addresses

Create survey

PAYPAL or CREDIT CARD

STRIPE

Continue with PAYPAL or CREDIT CARD

Billing

| | |
|------------------|---------|
| Communication360 | |
| x4 | |
| # of respondents | \$10.00 |
| x4 | |
| # of respondents | \$8.00 |
| x0 | |
| # of respondents | \$5.00 |
| x0 | |
| Total (USD) | \$40.00 |

Promo code

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 |
|---------------|--------|--------------|----------------------|-------------------|---|
| Commitment360 | Active | Smith Family | 2020-04-15 16:00 UTC | 0/4 | ▶ Begin survey ■ Close survey 🔗 Invite 🔄 Re-Invite ▶ FFR 📊 Analyse |

Invite respondents

Your respondents will each receive an email from **Family and Business Learning** with the subject
"You are invited to complete the Commitment360 Scorecard for {your survey name}"
with a unique link to complete their own assessment.

Step 4 **Complete** the Commitment360 Scorecard

There are 10 statements about your family commitment that you will rate 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 Commitment360 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 |
|---------------|--------|-------------------|----------------------|-------------------|--|
| Commitment360 | Active | FBN Comm Exercise | 2020-04-15 16:00 UTC | 0/4 | ▶ Begin survey ■ <u>Close survey</u> ◀ Invite ◀ Re-Invite ▶ FFR ■ Analyse |

- 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 Commitment360 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 Commitment360 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.

Need help?

Go to www.familyandbusinesslearning.com/faq.html or email kay@fab-learning.com