Deployment Process Checklist

Prior to the Deployment Launch

- ☐ Gather information from client in order to complete the online assessment set up: basic business information, participant names, business titles (if known), email addresses, etc.
- ☐ Obtain a JPG of the client logo if you want to use it on your report.
- ☐ Edit the cover letter and reminder letter if you do not want to use the generic version supplied by TCI. Please translate the letters as needed. If you have a multi-language deployment, please be sure to translate the letters for all languages.
- ☐ Determine open-ended questions you want to ask the team/individual/organization. Please translate them if needed. If you have a multi-language deployment, please be sure to translate the questions for all languages.
- ☐ Send a "welcome" email to team members to prepare them for receiving the assessment and to test the email addresses; make corrections in email addresses as needed.
- ☐ Set up the new deployment on your portal at teamdiagnostic.com.

Once the Deployment Launches

- ☐ Monitor team progress from your portal at teamdiagnostic.com.
- ☐ Check with participants to make sure they received the assessment link; troubleshoot as needed.
- ☐ One reminder message will be sent from the system on the date/time you entered, additional reminders can be sent manually at any time.
- ☐ Complete the deployment.
- ☐ Generate the report.

Note: For multi-language deployments, a report will be generated for each language selected. You can remove and re-order pages of the report and re-generate reports as needed. The system will remember only the last version of the report you create.

For Team Diagnostic™ (TDA) Re-Deployments

The TDA comes with ***one free re-deployment*** to the same team members after a coaching milestone of your choice. Set up a TDA "re-deployment" on the system just like a "new" deployment, but there will be a few extra steps:

- ☐ Compare team members from baseline and re-assessment. Notify your client of the additional charge if the total number of team members has increased from the initial assessment.
- ☐ Edit the Cover Letter and Reminder Letter for re-assessment language versus initial assessment.
- ☐ Compare the open-ended questions and adjust if needed.
- ☐ Send an email to **deploy@teamcoachinginternational.com** to confirm the re-deployment, noting the Month/Year of the initial deployment and the Team Name. TCI will code the re-deployment for accounting purposes and will also place an order for any special reports. (Review ***Understand & Access the Tools*** Lesson 4.11 Special Reports and Other Services.)
- ☐ Set up the re-deployment on your portal at teamdiagnostic.com.