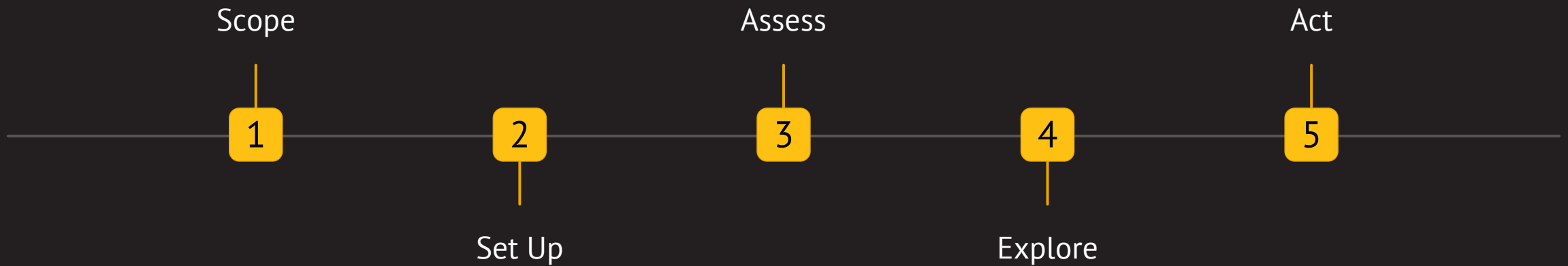


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Running a TBI Campaign

A practical guide for consultants – from agreeing the purpose to exploring the findings and deciding what happens next.



The TBI Campaign Journey

A TBI campaign takes the team from initial scoping through assessment completion to a consultant-led exploration of the findings.

01	02
Agree the campaign	Prepare the participant list
03	04
Set up the campaign	Launch the campaign
05	06
Monitor completion	Close and generate the report
07	08
Prepare the exploration session	Explore findings and agree next steps

 The campaign does not finish when the report is generated. It finishes when the team has explored the findings, agreed what matters and decided what it will do next.

STAGE 1

Agree the Campaign

Establish why TBI is being used, who will participate and what the client wants to achieve.

Consultant

- Explain the TBI approach
- Clarify the reason for using TBI
- Agree the team to be measured
- Confirm the intended outcomes
- Agree scope, timing and key contacts

Client

- Nominate a sponsor and campaign contact
- Identify the participating team
- Confirm what the organisation wants to achieve
- Agree the campaign timing

 **Output:** Agreed purpose, participating team, scope and timing.

STAGE 2

Prepare the Participant List

Confirm who is part of the team and ensure the campaign is built on accurate participant information.

Consultant

- Explain what participant information is required
- Review the proposed participant list
- Check that the information is complete
- Confirm the list before campaign setup

Client

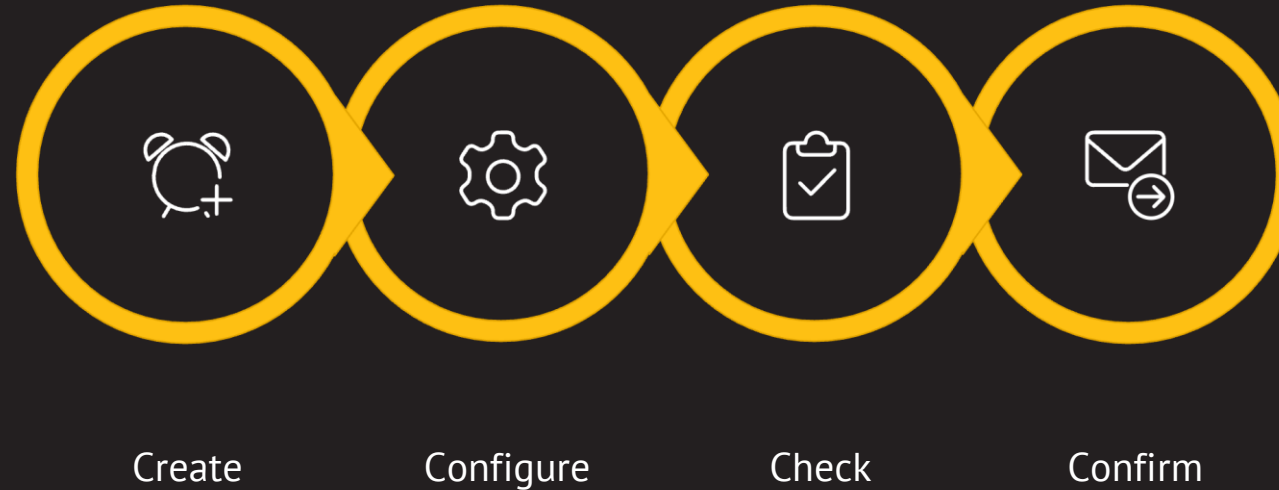
- Provide accurate participant details
- Confirm everyone listed is part of the team being measured
- Identify any changes before setup
- Tell participants why TBI is being used and what happens next

 **Output:** A confirmed participant list and agreed launch arrangements. The quality of campaign setup depends on the accuracy of participant information.

STAGE 3

Set Up the Campaign

Configure the assessment correctly and prepare it for launch.



Consultant

- Create the campaign in the TBI platform
- Configure team and participant details
- Review settings and check launch information
- Agree the invitation and reminder approach

Client

- Confirm that campaign information is correct
- Agree the launch date
- Ensure the sponsor is ready to support the launch
- Confirm how the campaign will be introduced internally

 **Output:** A fully configured campaign ready to launch.

STAGES 4 AND 5

Launch and Monitor the Campaign

Launch

Consultant:

- Launch the assessment campaign
- Confirm participant invitations have been issued
- Provide guidance where participants experience difficulties

Client:

- Reinforce the purpose of the campaign
- Encourage honest and timely participation
- Create confidence that findings will be used constructively

Monitor

Consultant:

- Monitor completion and keep the client contact informed
- Issue or coordinate appropriate reminders
- Resolve participant or access queries

Client:

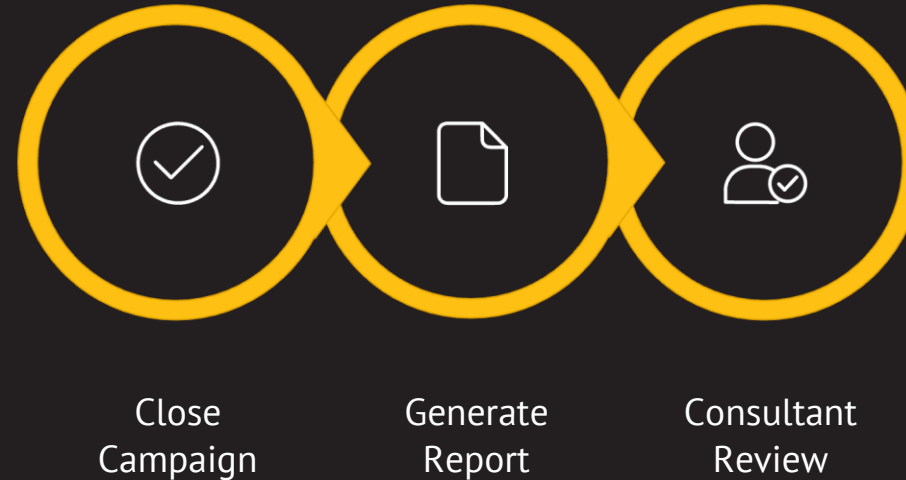
- Encourage completion across the team
- Provide internal support where needed
- Avoid influencing how participants respond

 **Output:** Sufficient participation to close the campaign and generate the team report. Encourage participation without influencing responses.

STAGE 6

Close the Campaign and Review the Report

Move from data collection to informed consultant interpretation.



Consultant

- Confirm the campaign is ready to close
- Generate the TBI team report
- Review the report before presenting to the client
- Identify strengths, patterns and areas for further exploration
- Consider client context when preparing the discussion

Client

- Confirm any final participation issues
- Ensure the sponsor and relevant leaders are ready to engage constructively
- Protect sufficient time for the exploration session

📌 The report provides evidence for exploration. It should not be treated as a final judgement on the team.

STAGE 7

Prepare the Exploration Session

Create the conditions for an open, constructive and useful team discussion.

Understand the Feedback

- Identify the most relevant strengths and patterns
- Connect findings to the team's context and objectives
- Avoid labelling or blaming individuals

Plan the Conversation

- Decide how findings will be introduced
- Prepare questions that help the team make sense of results
- Plan how priorities and next steps will be captured

Create the Right Conditions

- Invite the appropriate team members
- Share the client version of the team report in advance of the exploration session giving participants time to review and digest
- Provide sufficient time for meaningful discussion
- Reinforce that the purpose is development, not judgement

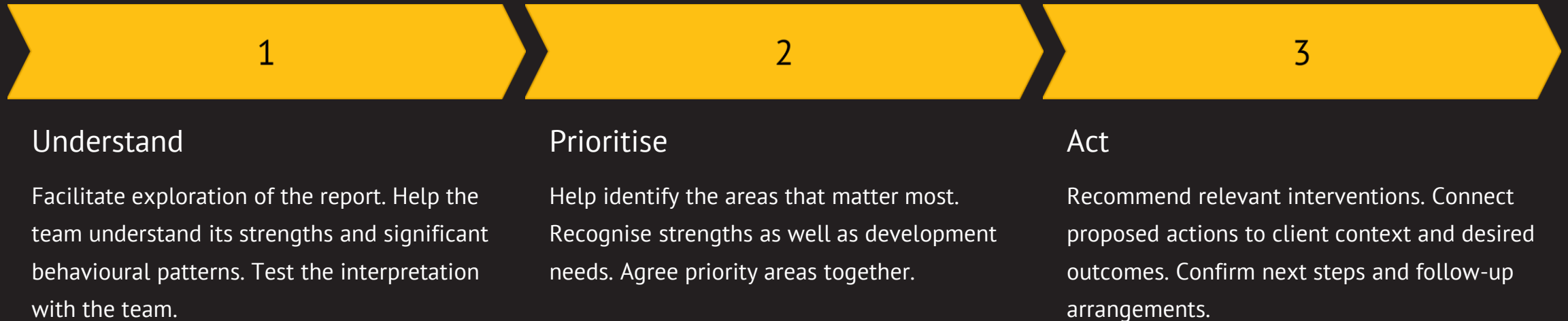


Consultant reminder: Your role is not simply to present the report. Your role is to help the team understand and use it.

STAGE 8

Explore the Findings and Agree What Happens Next

Turn the TBI findings into shared understanding, focused priorities and a practical route forward.



 **Output:** Shared understanding, agreed priorities and a clear route into targeted development.

Running a Successful TBI Campaign

Before Launch

- ☐ Purpose and outcomes are clear
- ☐ Sponsor and client contact are confirmed
- ☐ Participant list is accurate
- ☐ Campaign timing is agreed
- ☐ Internal communication is ready

During the Campaign

- ☐ Invitations have been issued
- ☐ Participation is monitored
- ☐ Appropriate reminders are used
- ☐ Participant queries are addressed
- ☐ Responses remain honest and uninfluenced

After Completion

- ☐ The report is reviewed by the consultant
- ☐ The exploration session is prepared
- ☐ Findings are discussed constructively
- ☐ Priorities are agreed
- ☐ Relevant interventions and next steps are confirmed

Consultant: Manages the campaign, interprets the evidence and creates a constructive route from results to action.

Client: Provides sponsorship, accurate information, active participation and commitment to follow through.

 A successful TBI campaign does not simply produce a report. It creates the shared understanding needed for focused and meaningful team development.