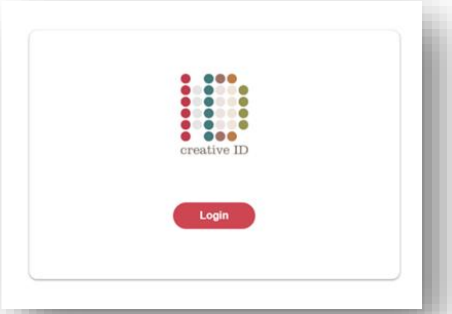
USE CREATIVE ID™ PROFILES WITH YOUR CLIENTS

creative ID

1 LOG-IN TO THE PROFILE DASHBOARD

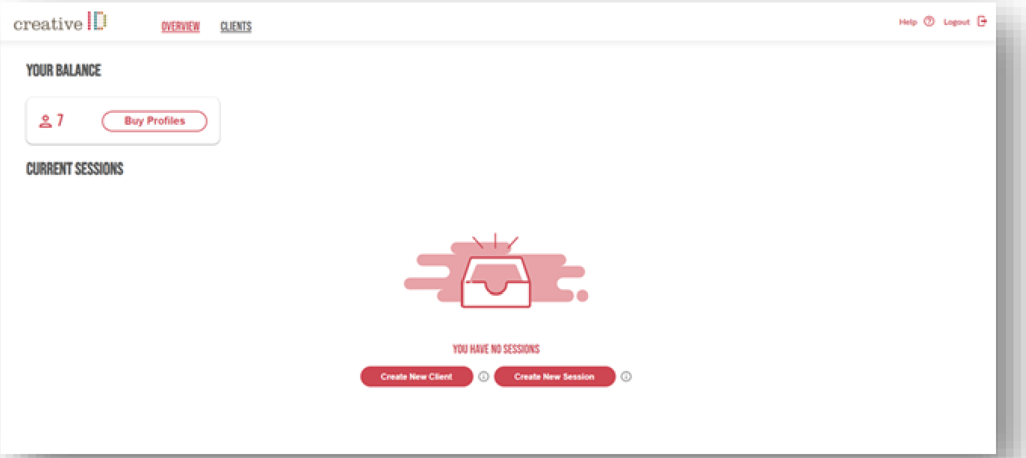
Click here to log-in to the Profile Dashboard:
https://app.yourcreativeid.com/login



Log-in using **the same email and password** you use for the yourcreativeid.com site

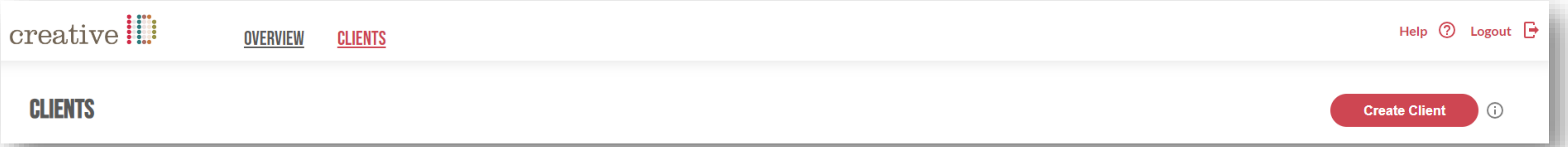
You will see your dashboard, showing an overview of:

- The number of Creative ID™ profiles in your balance
- Your current Creative ID™ sessions
- Your previous Creative ID™ sessions



If it is the first-time logging time then it will show you have no sessions and no profiles. Once you have used the Profile Dashboard to buy profiles, and set-up sessions then you will see everything on this dashboard.

2 ADD A NEW CLIENT

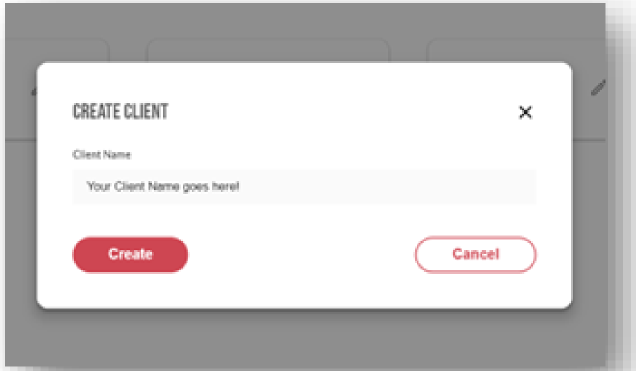


The dashboard has two tabs; Overview and Clients. Click **CLIENTS**.

This is where you add your client(s). You can choose how to record and refer to your client(s); whether they are an individual, a company or a group. You choose the name most representative.

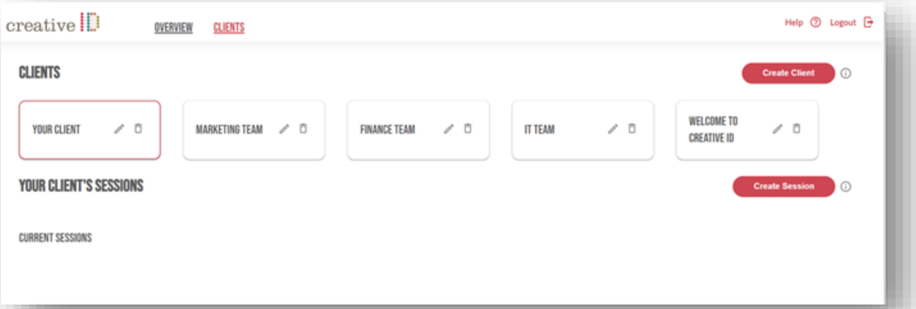
To create the client, click **Create Client** in the right-hand corner of the screen.

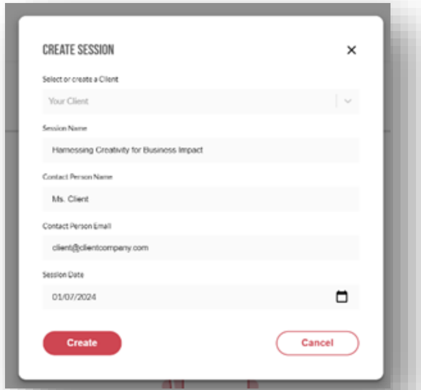
A pop-up box appears: enter the client's name and click **Create**.
They will appear as a on your client dashboard.



3 SET UP A NEW SESSION

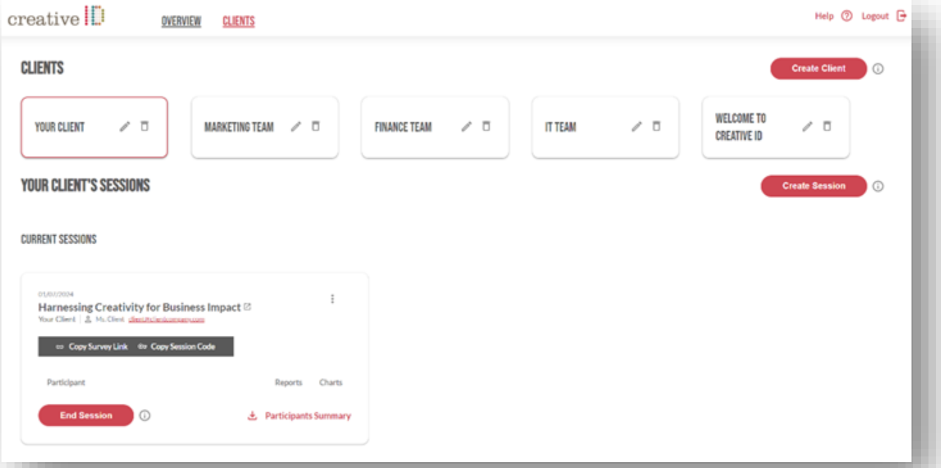
Click on your new client’s name box.
The click **Create Session**.





Enter the details for this session including the date. Click **Create**.
You can edit these if anything changes.

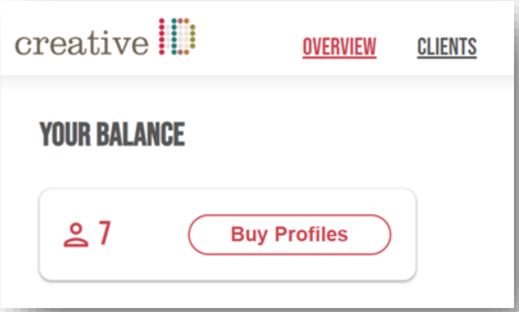
Now you have set up the client and the session, it will appear on your dashboard and you can buy the Creative ID™ profiles.



4 BUY PROFILES

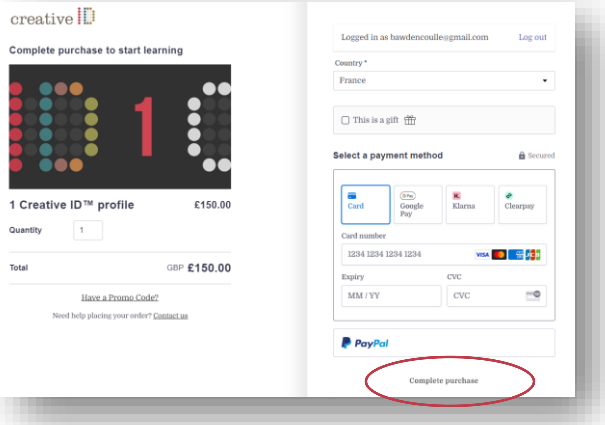
Click **OVERVIEW**, and then **Buy Profiles**

Clicking the **Buy Profiles** button opens a new window on your browser, and takes you to the *yourcreativeid.com* site where you buy profiles.

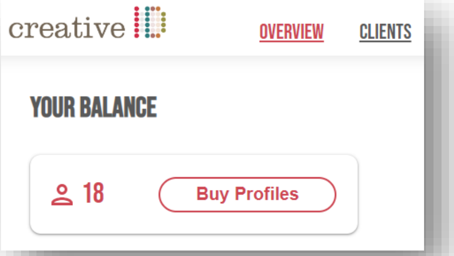


Click on the bundle of profiles you wish to purchase.
Bundle sizes are between 1 profile to 100 profiles.

Enter your payment details.
Finally click **Complete purchase** at the bottom of the page.



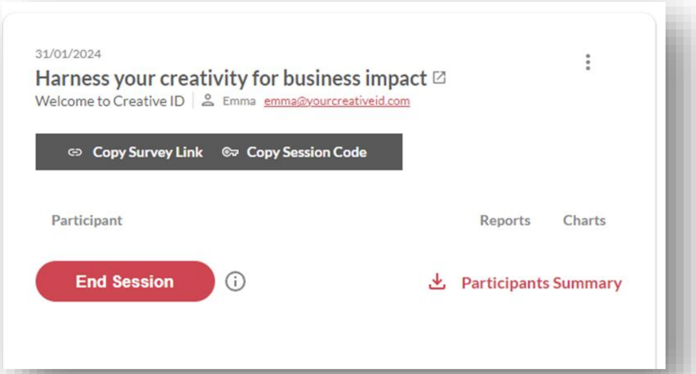
Return to your dashboard on the Profile Dashboard.
Your profiles will be added to your balance.
Your balance will show the purchase within 1-15 minutes.
You my need to refresh the page.



5 ASK YOUR SESSION PARTICIPANTS TO COMPLETE THE CREATIVE ID™ QUESTIONNAIRE

Now, write an email to be sent to the session participant(s). See **Suggested process and text when sending the survey link and session code**

1. Click **Copy Survey Link** and paste it into your email text.
2. Click **Copy Session Code** and paste it into your email text.



Note: the session code is an **8-digit code** that the participant MUST enter when they answer the questionnaire. The questionnaire will prompt them to enter this code.
If the code is not entered accurately, then the participant's answers are lost forever in cyber-space and their report will not show-up on your dashboard. (See **Trouble-shooting for solutions).**

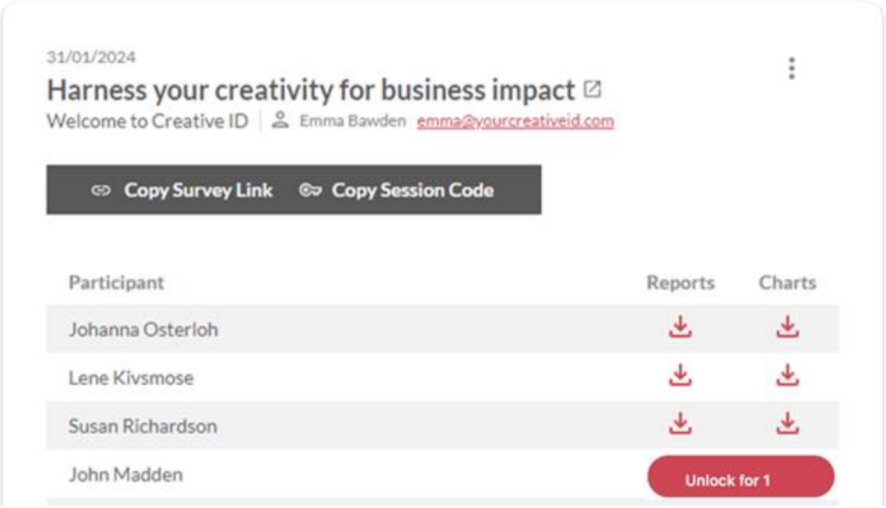
★ Remember to set a date in your calendar a few days before the questionnaire deadline, to check the responses and send a reminder to any participants not yet completed.

6 DOWNLOAD THE CREATIVE ID™ CHARTS AND REPORTS

When the participants have answered the questionnaire, you will see their name on your Session card on your dashboard. This is where you download their report and chart.

To download the report and chart the first time, click **Unlock for 1**. This will reduce your profile balance by 1 for each participant.

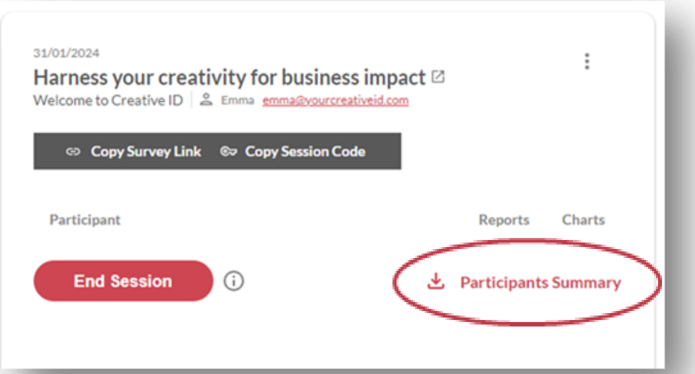
You can download the report and chart any number of times again, without affecting the profile balance. Just click the **download icon**.



7 READ THE PARTICIPANTS SUMMARY

For each session, you can also download the **Participants Summary** excel spreadsheet. It shows:

- Each participant's first name and last name
- Their email (so you can send the report to them after the session)
- The number of "dots" per style (out of a total of 20)
- The confidence hypothesis
- If they have given you permission to share with the other members of the group



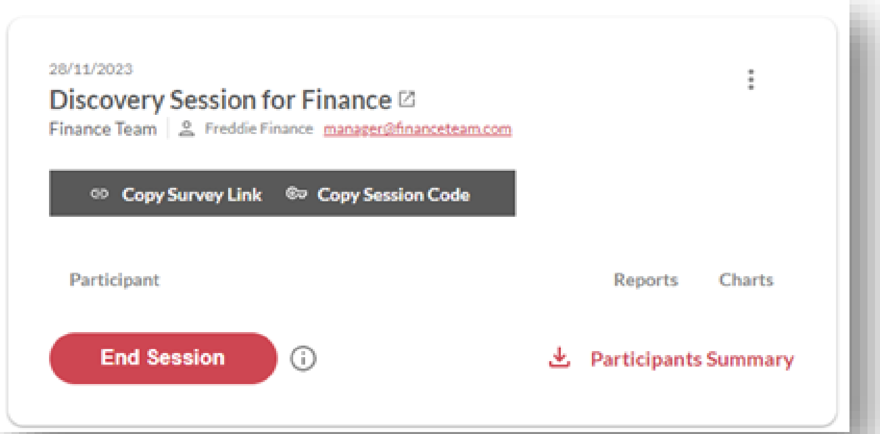
The **confidence hypothesis** reflects how people scored themselves on average on a 6-point scale (the maximum score is 6).
A higher score suggests the participant *may* consider themselves more creatively confident or comfortable.

	A	B	C	D	E	F	G	H	I	J	K
1	**Firstname**	**Surname**	**Email**	**Stimulator**	**Spotter**	**Sculptor**	**Selector**	**Supporter**	**Confidence Hypothesis**	**Permission to share**	
2	Johanna	Surname	johanna.o	7	5	3	4	1	4.3	YES that's fine	
3	Lene	Surname	lfk@bec.d	7	7	2	0	4	4.525	YES that's fine	
4	Susan	Surname	susanjane	5	6	5	3	1	4.05	YES that's fine	
5	Maddy	Surname	maddy.rol	4	4	5	2	5	3.825	YES that's fine	
6	Natalie	Surname	nek@bec.	3	5	3	2	7	4.4	YES that's fine	
7	Lee	Surname	lee@elev	6	6	5	1	2	4.975	YES that's fine	
8	Caroline	Surname	carolinelu	4	5	4	5	2	4.7	YES that's fine	
9	Alison	Surname	alisonrobe	5	5	3	3	4	5.775	YES that's fine	
10											

8 END SESSIONS (TIDY-UP YOUR DASHBOARD)

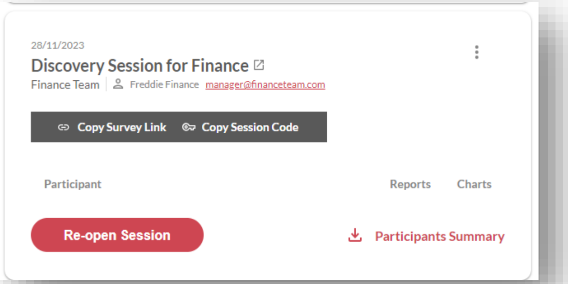
Once you have delivered the session, or if the session is cancelled, click **End Session**.

It removes the session card from your "Current Sessions" area and moves it to "Past Sessions".



You can find "Past Sessions" by going to the **Clients tab** >> Clicking **the name of the client** >> scrolling down to the **Past Sessions** area.

The data and the old reports are stored here.



(If you end a session by accident, you can also **re-open a session**, which will move it back to "Current Sessions".)

9 TROUBLE-SHOOTING

My profile balance has not increased, however I have bought profiles.

- Check purchase went through; Did you click “complete purchase”? If you asked for an email receipt, have you received it?
- Wait for 15 minutes for the transaction to process
- Contact emma@yourcreativeid.com or hanne@wearecreativecreatures.com

The participant says they answered the questionnaire, but their report is not in my dashboard.

- There are two possible reasons; either the participant did not click “submit” at the end of their questionnaire or they did not accurately enter the 8-digit session code when the questionnaire prompted them.
- The solution is to ask the participant to take the questionnaire again, making sure they accurately enter the 8-digit session code and click submit at the end of the questionnaire.
- You will not be charged for a profile until you download the profile.

I need to change the date or other details of my session or client.

- You can edit any details about the client and the session.
- Look for the pencil icon or the 3 little dots in the top right-hand-corner of each session card.

I forgot my log-in email / password for the Profile Dashboard.

- Use the same log-in details as www.yourcreativeid.com
- Try to log-in to www.yourcreativeid.com and reset your password
- Contact emma@yourcreativeid.com or hanne@wearecreativecreatures.com

10 PROCESS AND TEXT WHEN SENDING THE SURVEY LINK AND SESSION CODE

VIRTUAL SESSION TIMELINE

14+ days before the session:

Send the email to invite participants to complete the questionnaire. Set a deadline 4+ days before the session.

Add calendar reminders for yourself to check responses received and send reminder(s) to participants to complete the questionnaire.

2 days before the questionnaire deadline:

Send a reminder to participants 1-3 days before the questionnaire deadline

2 days before the session:

Download the participant charts. Prepare to send the chart to each participant during the session. Insert any example charts into your presentation slides.

Download the participant reports. Prepare to send the report to each participant after the session. (see next slide for suggested text).

Download the participant summary and reflect on possible reactions and questions from participants.

IN-PERSON SESSION TIMELINE

Allow **3-5 more days** so the participant charts can be professionally printed before the session. Contact emma@yourcreativeid.com or hanne@yourcreative.com for templates and guidelines.

SUGGESTED TEXT TO INVITE THE PARTICIPANT TO COMPLETE THE QUESTIONNAIRE:

Dear (*name*)

I'm looking forward to our team session on (*date*) at (*location*). The aim of our session is to (*ex. to draw on our creative intelligence to…*). We'll be using a framework called Creative ID™, which is a tool designed to help us understand how - not *if!* - we are creative. I therefore ask you to complete a short online questionnaire

- Find a 15-minute slot in your diary when you can focus on yourself; mindfully and without distractions
- Click on this link to access the Creative ID™ assessment: insert the survey link
- When prompted for the session code, copy & paste the following 8 digits: insert the session code (check they appear correctly!)
- As you answer the questions, think about yourself from the perspective of what you do at work - and remember: there are no right or wrong answers!

The completion deadline is (*day, date, month*).

11 PROCESS AND TEXT WHEN SENDING THE PARTICIPANT'S REPORT

DURING THE SESSION (CHART)

Give the participant their chart only (the one with with 20 dots) during the session. Depending on the size and format of the session, you can send the chart directly to the participant in different ways:

- small group, online session: via the virtual meeting chat (send private/direct messages)
- larger group, online session: in a pre-prepared email to each participant (send during the session)
- small group, in-person session: hand out the professionally printed charts to each participant
- larger group, in-person session: place the professionally printed charts in envelopes per table

AFTER THE SESSION (REPORT)

Send each participant their full report a maximum of 24-hours after the session. Send each report directly to the participant; following GDPR and data handling regulations.

Don't do what we did in the certification course! Don't send the chart / report in advance.

SUGGESTED TEXT FOR SENDING THE REPORT TO THE PARTICIPANT:

Dear (*name*)

Thank you for your positive energy and engagement throughout the session.

As promised, attached is your full Creative ID™ report.

We always encourage people to translate their new-found creative awareness into action.

Sometimes that's easier said than done, which is why we've created a Learning Library packed full of different resources.

You can access it via the QR code found in your report. You can also access it here: https://www.wearecreativecreatures.com/discover-creativity/

The Library is designed to answer 3 critical learning questions:

1. What does it mean? (awareness)
2. How can I use it? (action)
3. How can I become better? (amplification)

If you have any questions about your report, the learning library or indeed anything else, just shout – you know where I am!