

Getting Started with a TrustBuilder Team Session

A simple guide from client commitment to a successful Team Session

Running your first TrustBuilder Team Session doesn't need to feel complicated. The goal is to give yourself enough time to prepare, understand the team, and create a meaningful experience. Here are the steps and best practices we recommend.

Step 1. Confirm the Team Session

Once you have a client interested in a TrustBuilder Team Session, work with your primary contact to confirm the basics:

Date & time • Location • Number of participants • Primary contact • Room setup •

AV/technology needs

This is also a good time to understand what the client hopes to accomplish. Are there specific challenges, opportunities, or team dynamics they want to address? You don't need to redesign the Team Session around these issues, but having this context can help you facilitate more effectively.

Step 2. Create the Group & Send Profiles | ~4 Weeks Out

Gather the **names and email addresses of all participants** and create a Group in your TrustBuilder Dashboard.

You have two options for distributing the Individual TrustBuilder Profile:

Option 1: Send Invitations Through the Dashboard

From the Group, send each participant an email invitation to complete their **Individual TrustBuilder Profile**.

Option 2: Share a Group Link Through the Dashboard

Provide your main client contact with the Group's shared link so they can distribute it directly to participants.

We recommend sending profiles approximately **four weeks before the Team Session**, giving participants about two weeks to complete them. You can monitor completion directly through your TrustBuilder Dashboard and send reminders as needed.

Step 3. Get Profiles Completed | ~2 Weeks Out

Our goal is to have **all profiles completed two weeks before the Team Session**.

There will almost always be a few people who need reminders, so don't be afraid to communicate with your primary contact and ask for their help encouraging completion.

Having profiles completed early gives you time to review the Team Report, understand the team's results, and begin thinking about where meaningful conversations may emerge during the session.

Step 4. Prepare Your Team Session | 1–2 Weeks Out

Once the profiles are complete, spend time getting familiar with the team's results.

Review the **Team Chart and reports**, look for interesting patterns or themes, and think about questions you may want to ask during the session.

Review your TrustBuilder Team Session PowerPoint and make any appropriate adjustments for the client or audience while maintaining the core TrustBuilder content and experience.

Your printed materials for the session should include:

- **Team Chart** – printed from the Group in your TrustBuilder Dashboard
- **Individual TrustBuilder Profiles** – one for each participant
- **Try This Guide** – available through the TrustBuilder Resources ([Access PDF](#))

Step 5. Finalize the Details | Week Of

Reconnect with your primary contact to make sure nothing has changed.

Confirm the **start and end time, room location and setup, AV capabilities, participant count, and any other day-of details**.

Give yourself time to review your presentation one final time and make sure you are comfortable with the team's results.

Step 6. Facilitate the Team Session

Arrive early enough to get comfortable with the room, organize materials, and test your technology.

Remember: **Your job isn't simply to present the slides.**

The best TrustBuilder Team Sessions create conversation. Use the team's results, TrustBuilder tools, activities, and questions to help participants better understand themselves and one another.

You don't need to have every answer. Your role is to **facilitate meaningful conversation and help the team identify practical ways to build trust.**

Step 7. Follow Up

After the Team Session, reconnect with your primary contact. Thank them, ask how the experience landed with the team, and discuss opportunities to continue the work.

TrustBuilder is available to support you along the way. **If you're preparing for your first Team Session and have questions, reach out. We're happy to review your approach, answer questions, and help you get started.**
