



W  THOS ^{AI}

PRODUCT GUIDE

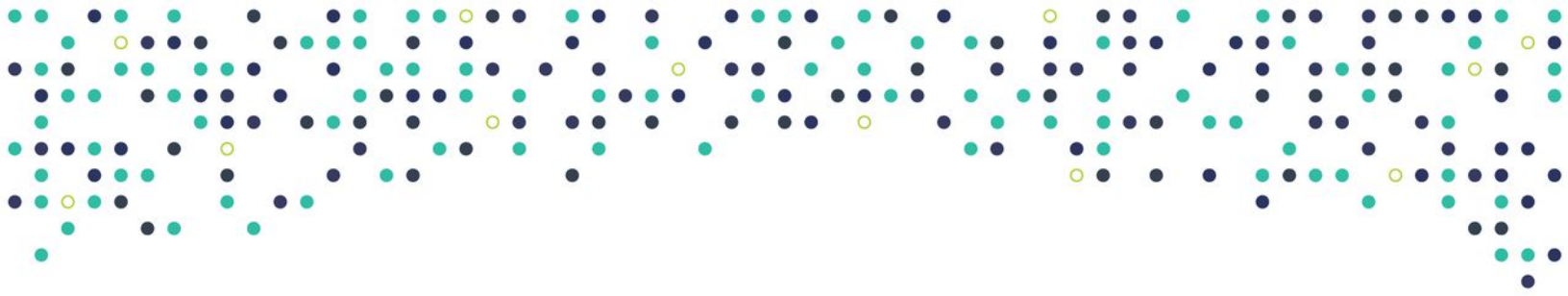
Know. Predict. Grow.



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INTRODUCTION

Purpose: This guide provides a comprehensive overview of the Wethos platform, focusing on how to navigate its features and access specific functionalities.

Target Audience: This guide is intended for all Wethos users, including individuals, team leaders, and administrators.



GETTING STARTED



GETTING STARTED: ADMINS

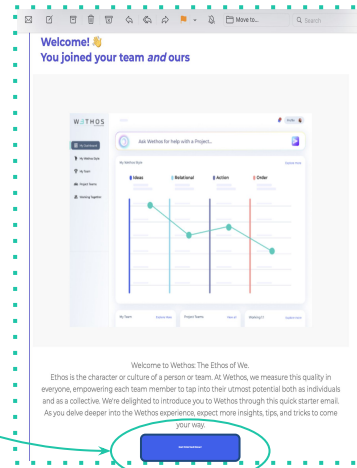
For Admins

1. You will receive a Welcome to Wethos AI email from noreply@wethos.ai

2. Click **Get Started Now**

3. You will be redirected to the platform to set a password

4. Once you've set a password, login to the platform you will be asked to fill out your profile and then to take the Wethos assessment which takes approximately 7 minutes to complete



Lets get to know you
Don't forget to add a profile picture

Profile Picture

First Name *

Last Name *

Preferred Name

Job Title *

Email *

Confirm

You're Almost There!
Time to take your assessment

Start Assessment

[Skip for now](#)

Dashboard > assessment Profile

Welcome to the Wethos Assessment!

Wethos is not a test—there are no right or wrong answers. Please allow yourself approximately 20 minutes to complete the assessment. The assessment will present 84 statements, please keep in mind the following:

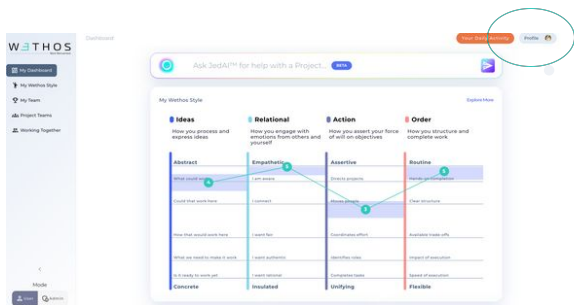
- To best identify your natural work style, we recommend selecting Agree or Disagree in the survey as much as possible. Avoid selecting the Uncertain response unless you are absolutely unsure of your answer.
- Answer from the perspective of your whole life, and not from the perspective of only work or only home.
- Don't over think your response; go with your first impulse.
- By answering truthfully and objectively, we'll identify your most natural work style. Do not over promote or marginalize yourself!

You may leave the assessment at any time - your progress will be automatically saved.

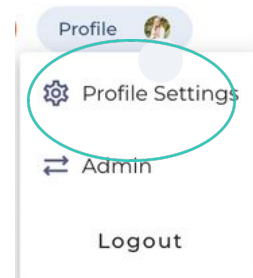
[Skip for now](#) [Begin Assessment](#)

GETTING STARTED: ADMINS

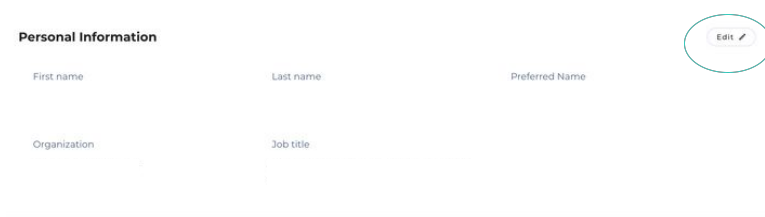
Step 1: Click **Profile**



Step 2: Click **Profile Settings**



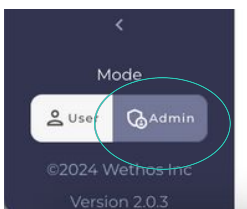
Step 3: Under Personal Information, Click **Edit**



Step 4: Click the Organization You Want to Add Members to & Hit **Save**



Step 5: Select **Admin** Mode



Step 6: Add **New Member**



Step 7: Fill In the Field & Click Add

Add New Members

First Name

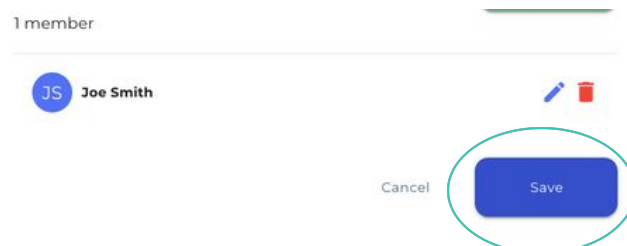
Last Name

Email

Preferred Name

Job Title

Step 8: After Adding Team Members, Click **Save**



GETTING STARTED: USERS

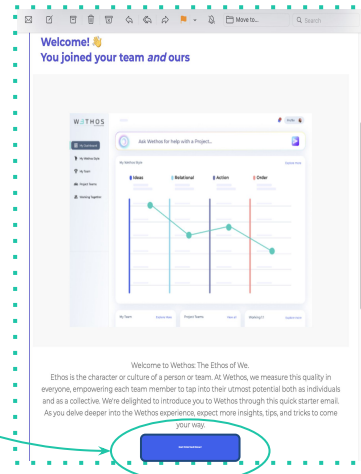
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[Skip for now](#) [Begin Assessment](#)

NAVIGATING THE PLATFORM

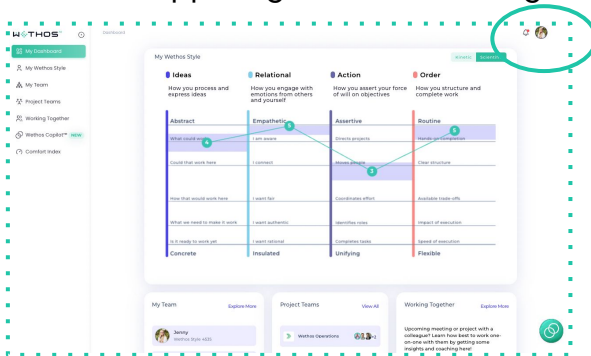


DASHBOARD

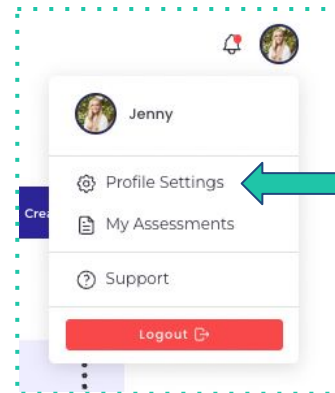
Overview: The dashboard is the central hub for accessing various Wethos features.

Navigation:

Profile: Located in the upper right corner, clicking on the profile picture leads to profile settings, including:

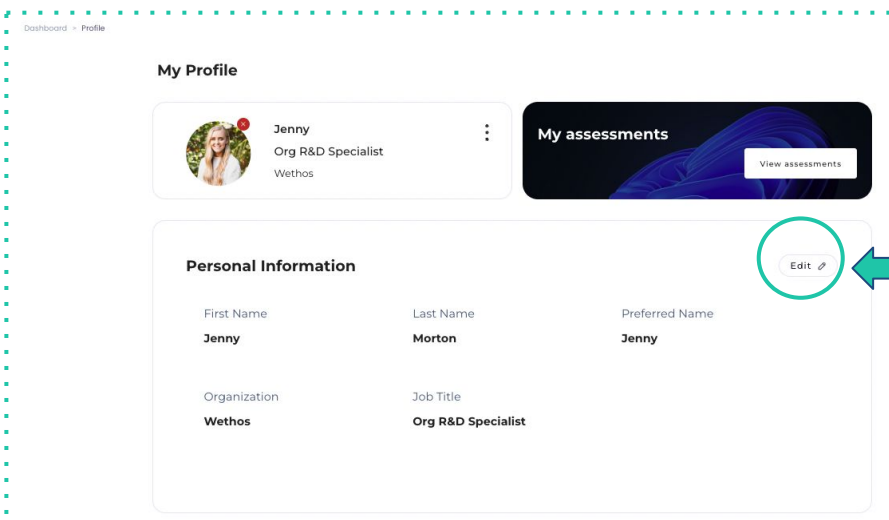
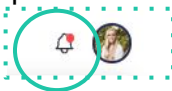


Profile



- Profile Settings: Change avatar, update personal information, view assessments, change organization, opt out of the platform.
- My Assessments: View assessment history, retake assessments, mark assessments as active, delete assessments.
- Admin (if applicable): Access administrative functions.
- Support: Access help resources.
- Log Out: Sign out of the platform.

Notifications: Located next to the profile button, displays notifications about team updates, daily activities, and platform updates.



For admins:

If you are a part of multiple orgs this is where you can navigate to view your other orgs.

Click edit

Then under Organization, there will be a dropdown list of your orgs

Then hit save

DASHBOARD



Sections:

My Wethos Style: Displays your individual work style based on assessments.



My Team: Provides an overview of your core team members and their Wethos styles.



Project Teams: Lists project teams you've created or joined.



Working Together: Offers insights and guidance on collaborating with specific colleagues.



Wethos Copilot: An AI-powered assistant providing support and guidance throughout the platform.



Comfort Index: Analyzes individual and team comfort levels to prevent turnover and help employees align with their strengths



 My Dashboard

 My Wethos Style

 My Team

 Project Teams

 Working Together

 Wethos Copilot™ NEW

 Comfort Index

MY WETHOS STYLE

Overview: This section provides insights into your individual work style based on four key scales: Ideas, Relational, Action, and Order.

Views:

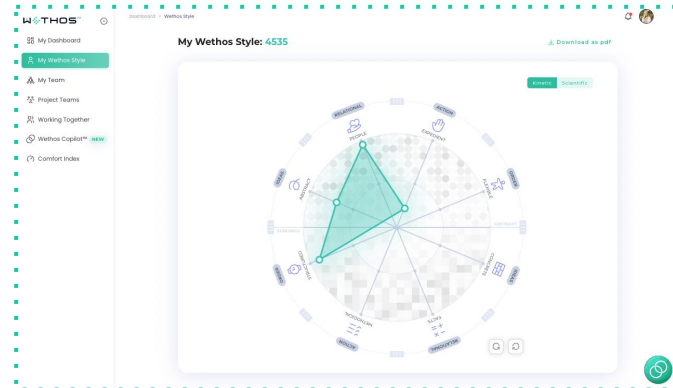
Kinetic View: A visual representation using a radar chart.

- **Chart Interpretation:** The chart plots your scores on each scale, with the center line representing the "equator" between abstract and concrete approaches.
- **Rotation:** Rotate the chart to focus on specific scales and their corresponding extremes.

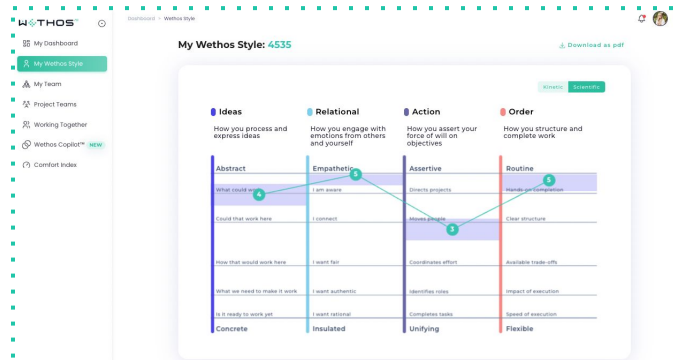
Scientific View: A more detailed breakdown of each scale with specific descriptors.

- **Chart Interpretation:** 5's are NOT more desirable than 1's. Every Wethos Style is unique and a strength.

Kinetic View



Scientific View



Interpreting Your Wethos Style:

- **Self-Awareness:** Gain deeper insights into your strengths and weaknesses.
- **Teamwork:** Appreciate the diverse work styles within your team and collaborate more effectively.
- **Project Management:** Choose projects and roles that align with your natural preferences.

Exploring Your Wethos Style:


- There is a summary page as shown to the right
- There are detailed descriptions across the four scales that provide more information about your natural behaviors in various scenarios.

Summary
Ideas
Relational
Action
Order

Influential Catalyst: Driving Team Success with Creative Support

You Unite Intuitive Guidance with Tactical Precision, Motivating Teams Towards Excellence with Visionary Energy and Attention to Detail

Jenny, you gravitate to the strategy and values of an initiative. You consider the consequences of ideas as you evaluate them for strategic importance and impact. Connecting with others by recognizing and responding to their emotions is a priority for you. Nurturing relationships amongst coworkers is natural for you. undefined Your natural comfort is when you understand and have control of your environment. You drive precision and detail in everything you do. More detail and explanation is preferred. Predictability is very important.



Positive Attributes

- Inspirational and motivating
- Good at analyzing data
- Comfortable with taking risks

Negative Attributes

- May become dominating and want to control execution
- May move quickly, not anchoring ideas with practical understanding

MY TEAM

Overview: This section provides a visual representation of your team's Wethos styles, allowing you to understand team dynamics and potential collaboration challenges.

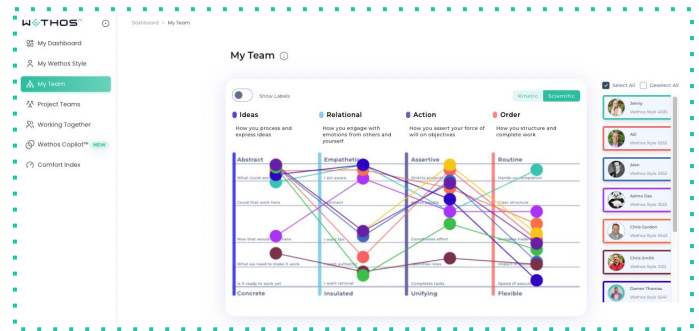
Views

- Scientific View: A more detailed breakdown of each team member's Wethos style.
- Kinetic View: A graphical representation of team members' Wethos styles.

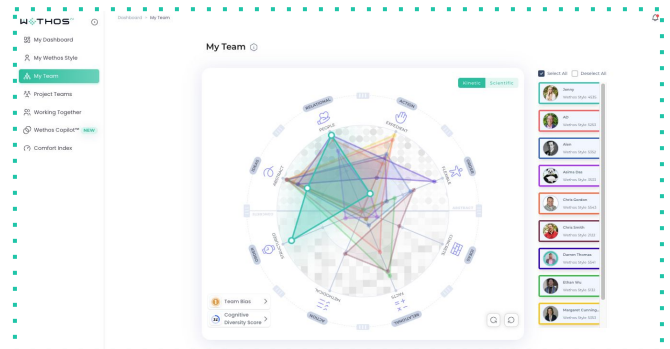
Features: (only visible in kinetic view)

- Team Bias: Identifies potential biases within the team based on the distribution of Wethos styles.
- Cognitive Diversity Score: Measures the cognitive diversity of your team, indicating the range of perspectives and thinking styles present.
- See Outliers: Identifies team members whose thinking styles fall outside the main cluster.

Scientific View



Kinetic View



Team Bias

Decision Fatigue

Your team generates a lot of **IDEAS** very quickly. Constantly discussing and making decisions about new ideas can be exhausting!

Decision Fatigue can lead to decision avoidance, impulsivity, stress, and reduced creativity.

Navigating Decision Fatigue

Limit Choices: Reduce options to simplify decisions and conserve cognitive resources.

Set Routine Decisions: Automate or build routines for recurring decisions to save mental energy for more critical choices.

Take Breaks: Introduce regular breaks throughout the day to refresh and reset the mind, reducing the cumulative toll of decision-making.

Cognitive Diversity & Outliers

32
out of 100

Wethos Cognitive Diversity™ Score

Your team's Cognitive Diversity Score reveals a moderate degree of diversity across all four scales. Your team may be similar on some scales but very different on others, or have moderate differences across each scale. Moderately diverse teams offer a balance of cohesion and innovation, but may still be impacted by strong biases on scales where team members are very similar to one another.

See Outliers

The Realists

The realists have a unique strength in anchoring abstract ideas in reality. (They will ask questions, or "poke holes" in ideas. While uncomfortable, the process will ultimately lead to more new initiatives sustaining beyond launch.)



Asima Das and Chris Smith balance your team with a unique strength on the Idea Scale.

This team trends abstract on the Idea scale, however the realists are closer to the concrete end. They can help you refine big ideas and prioritize which ideas to pursue.

Seek insights by asking them:

- Which ideas seem most viable to pursue?
- How can we modify our most ambitious projects to make them achievable?
- What bottlenecks do you see impacting progress on our current plans or roadmap?

PROJECT TEAMS

Overview: This section allows you to create and manage project teams, which are cross-functional groups formed for specific tasks or initiatives.

Creating a Project Team:

- Navigate to the "Project Teams" section and click "Create New."
- Name Your Team: Provide a clear and concise name for your project team.
- Add Team Description (Optional): Include a short description of the team's goals or project focus.
- Search and Add Members: Utilize the search functionality to find and add individual members to your project team.
- Set Team Privacy: Choose whether to make the project team private or shared.
- Save Your Team: Click "Save" to create the project team.

Managing and Viewing Project Teams:

Access Project Teams List: View and manage all your existing project teams.

Create Project Team

Choose a Project Team name

Example 1

Add a short description of your Project Team

Showcasing project team capabilities

Add colleagues to your Project Team

Search Members

Margaret Cunningham

Darren

AD

Jenny

Would you like to make the Project Team private?

Yes No

Cancel Save

Project Teams

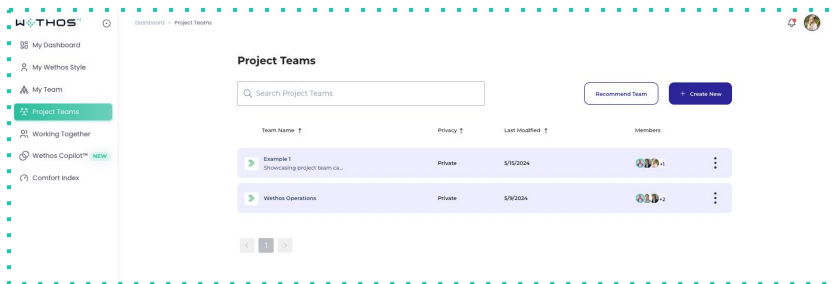
| Team Name | Privacy | Last Modified | Members |
|--|---------|---------------|---------|
| Example 1 Showcasing project team ca... | Private | 5/20/2024 | 1 |
| Wethos Operations | Private | 5/20/2024 | 2 |

You can now see your new project team in your overall Project Teams dashboard

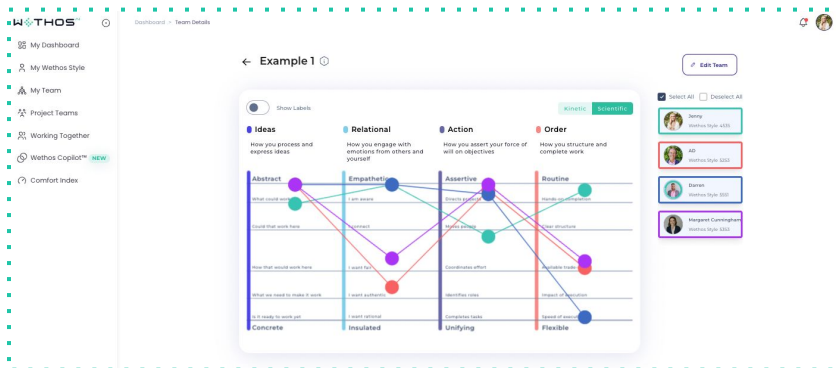
PROJECT TEAMS

Managing and Viewing Project Teams:

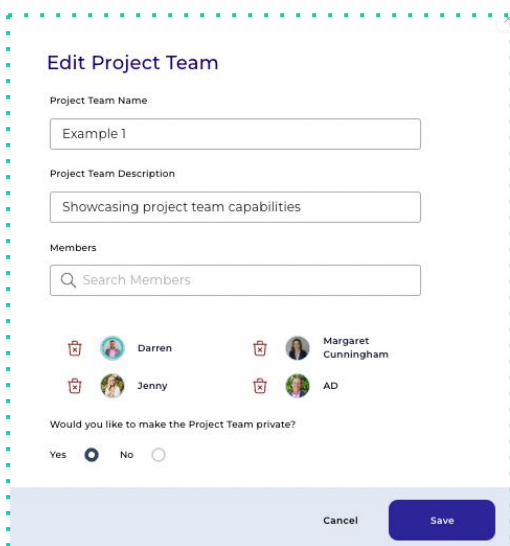
Access Project Teams List: View and manage all your existing project teams.



View Team Details: Click on a specific team name to access its details page



Edit Team: Modify the team's settings, including name, description, members, and privacy settings

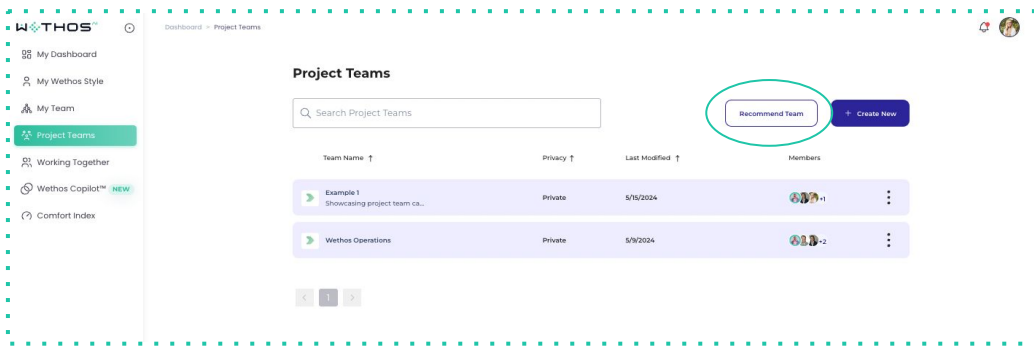


RECOMMEND TEAM

Overview: (LEADER LICENSE ONLY) This section allows leaders to create specialized project teams tailored specifically to tasks for optimal performance.

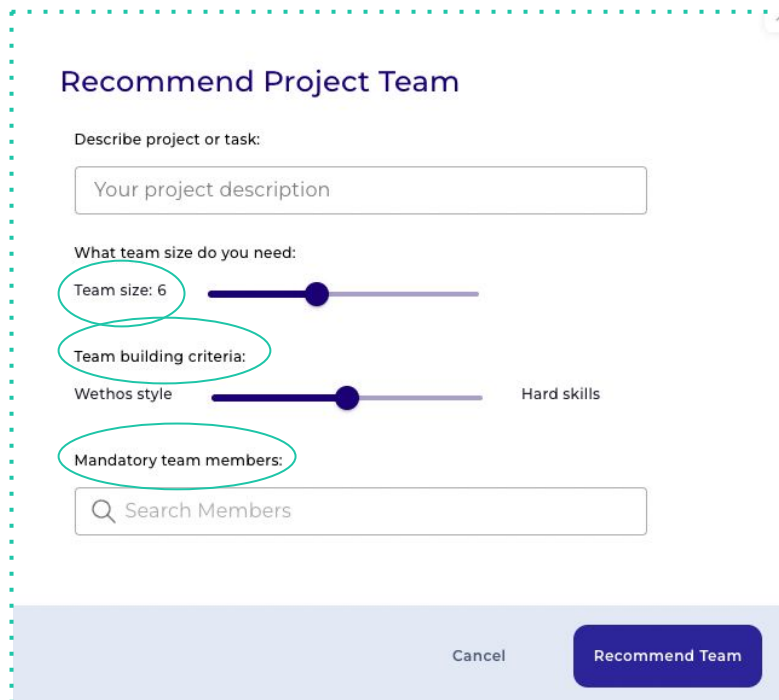
Creating a Tailored Project Team:

Access the Feature: Navigate to the "Project Teams" section and click "Recommend Team."



Define Project and Team Needs: Input project details, team size, and prioritize team-building criteria (Wethos style vs. hard skills).

Mandatory Team Members: Add specific individuals who must be included in the team.



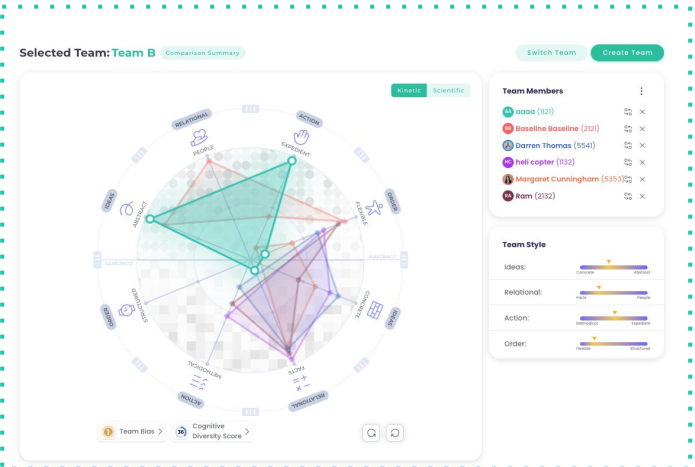
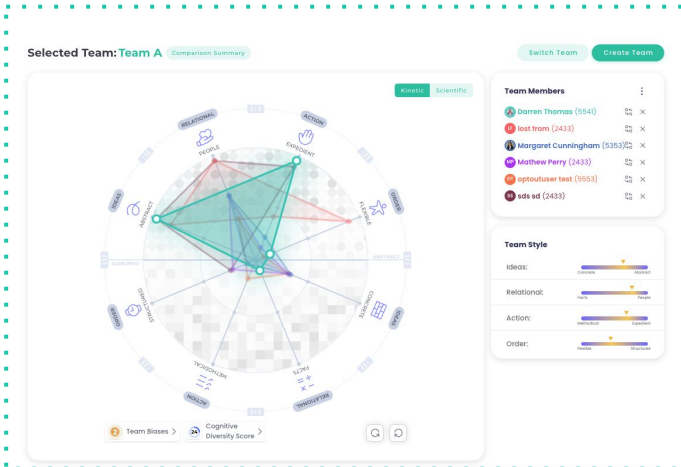
RECOMMEND TEAM

Generating Recommendations: Click "Recommend Team" to receive two recommended team compositions.

To toggle back and forth between teams select Switch Teams

Team A

Team B



Reviewing Recommendations: Analyze the recommended teams based on team members, team style, and comparison summary.

Team A

Team B

Strategic Revitalizers: Turning Setbacks Into Successes

This Team Masters the Art of Practical Problem-Solving with Focus and Precision

Teams with this composite pattern rise to the challenge of taking on projects that are not achieving expected results. They are practical and can step in and assess what is missing or not working in almost anything. Their ability to ask questions that get to the point provides the clarity they need to develop strategic solutions. Because they are not distracted by the relational dynamics around them, they are able to stay focused on the task. While this ability to not be distracted is a clear strength for the team, it can also be a blindspot in that others may see them as pushy and preferential—wanting “their” way. Taking time to pause and ask questions, instead of making statements, is a discipline this team may benefit from—whether the issue is something they are tasked to take on or a project they are tasking others to complete. When under pressure or if they are meeting resistance, this team may tend to simply push harder. Instead, they should pause to communicate their sense of urgency and listen to the perspectives of people they may need to help them achieve their goals. This team works well with high expectations and tight timelines.

Dynamic Innovators: Turning Vision Into Achievable Milestones

This Team Harnesses Energy and Ideas for Impactful Follow-Through

Teams with this composite pattern love to engage others with their ideas, whether they are creating something new or exploring options to improve something that already exists. They are able to manage multiple tasks but, because they prefer to start things, will benefit from knowing which projects require a specific result so they remain engaged and don't leave the project too soon. Because they have a strong drive to engage with people and projects, they may disengage if their ideas are not being given consideration or they feel that others are attempting to hold them back. This may be a blindspot for them because, while they simply want to get something done, others will observe this as them only wanting their way. These teams rise to the challenge of quick turnarounds and may become bored if projects become overly administrative or repetitive. When in the planning stages, this team needs to gain a clear understanding of the project requirements so they stay engaged. This is an accountability they may not seek, but it will help them complete tasks before they move on to something more interesting.

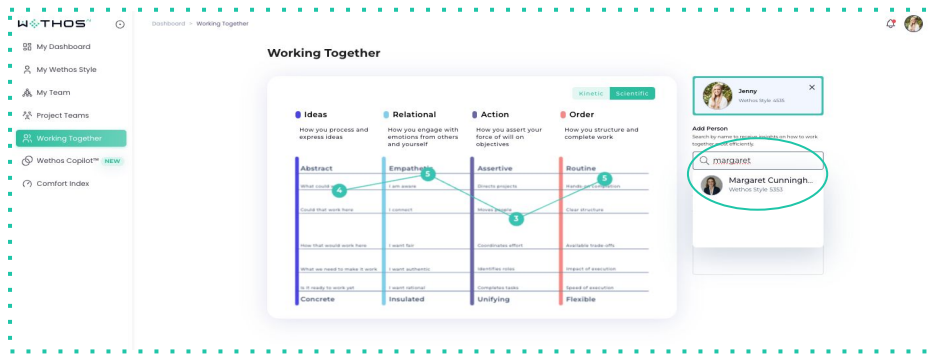
When you have picked a team, select Create Team

Finalizing Your Team: Choose the team that best fits your project needs and preferences.

WORKING TOGETHER

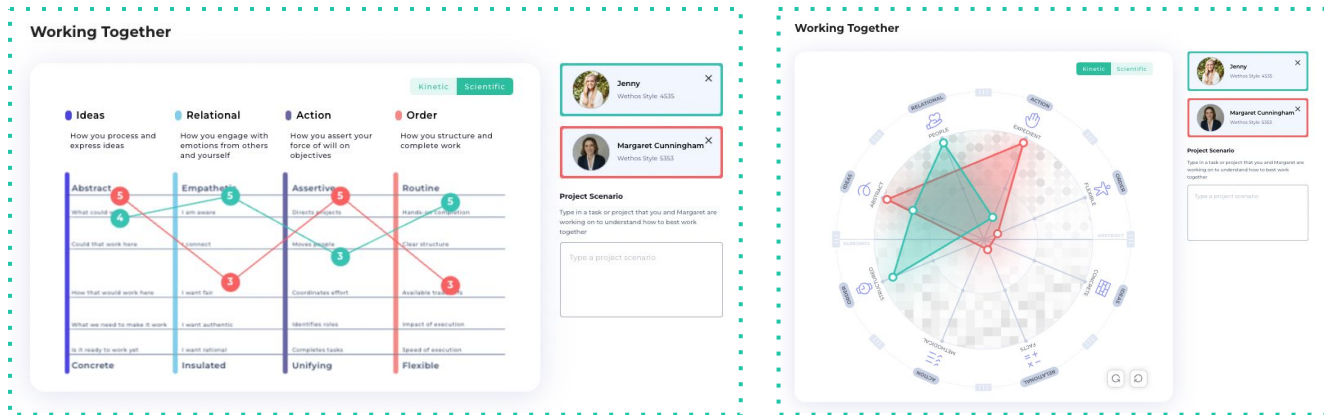
Overview: This feature provides insights and guidance on collaborating with specific colleagues based on your combined Wethos styles.

Selecting a Teammate: Search and Select: Use the search bar to find and select a teammate.

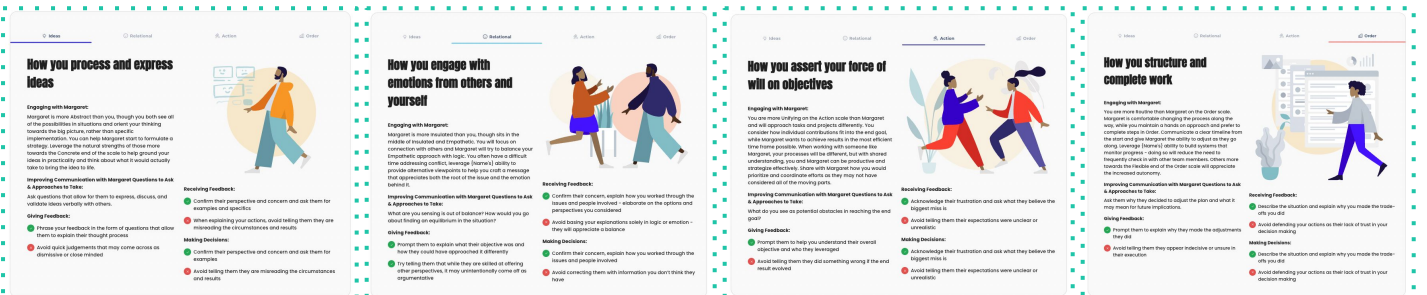


Understanding Collaboration Dynamics:

Visual Representation: View the combined Wethos styles of you and your teammate on Kinetic and Scientific views.



Scale-Specific Guidance: Explore detailed insights across four key scales: Ideas, Relational, Action, and Order.



WORKING TOGETHER

Project-Specific Guidance:

Project Scenario: Input a specific project or task you're working on with your teammate.

The screenshot shows the 'Working Together' interface. On the left is a circular diagram with various scales and axes. On the right, there are user avatars for Jenny (Wethos Style 4335) and Margaret Cunningham (Wethos Style 5213). Below the avatars is a 'Project Scenario' input field with the text 'Create new content for 3 new biases'.

AI-Generated Task List: Wethos leverages AI to generate a customized task list optimized for both your styles and the project context.

Feedback and Improvement:

Provide Feedback: Use thumbs up/down buttons to rate the accuracy and usefulness of the generated task list.

Detailed Feedback: Provide more detailed feedback by selecting specific issues and adding comments.

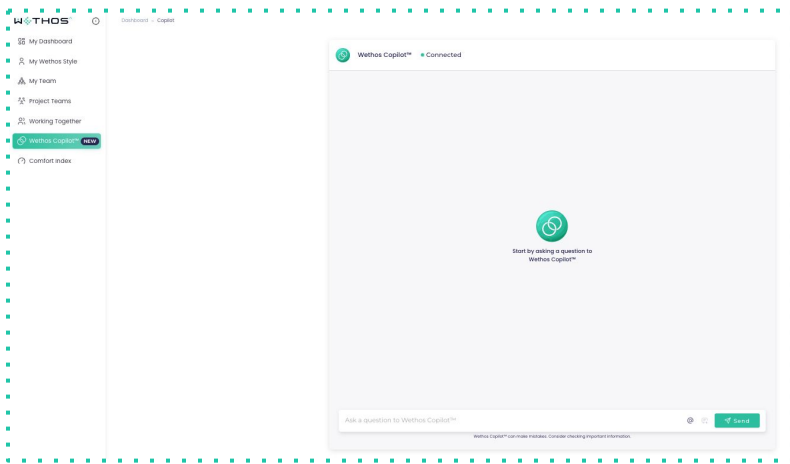
The screenshot shows the 'Create new content for 3 new biases' task list. It features two columns of tasks for Jenny and Margaret. Below the tasks is a 'Reasoning' section with detailed feedback text and a feedback input field with thumbs up/down buttons.

WETHOS COPILOT

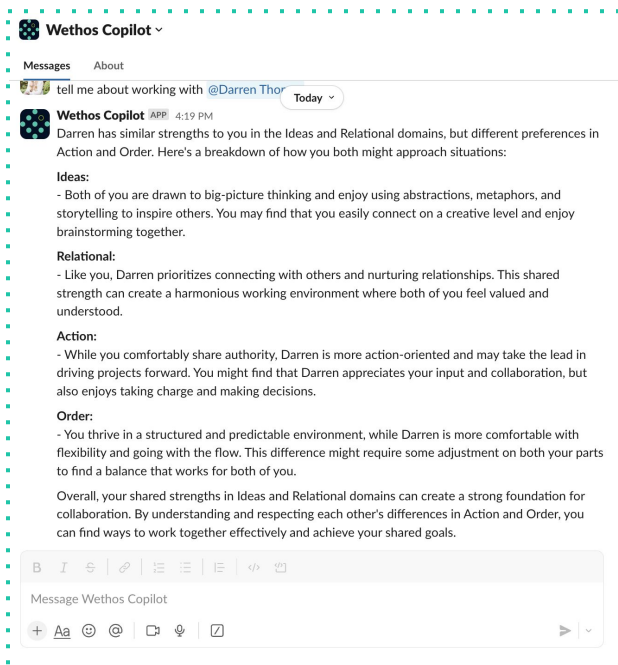
Overview: An AI-powered work coach providing personalized guidance, information, and coaching.

Accessing Copilot:

Chat Interface: Access Copilot through a chat interface within the Wethos AI platform.



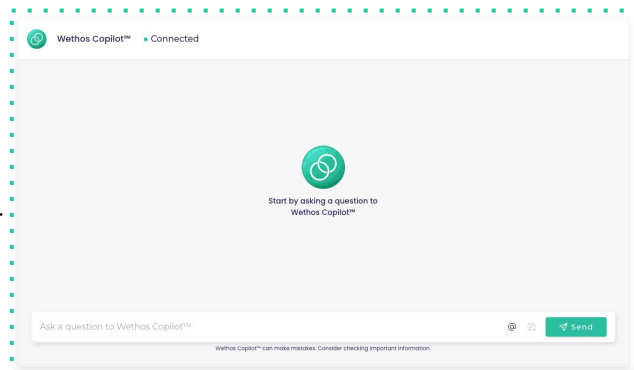
Slack Integration: Access Copilot as a Slackbot within your Slack workspace.



WETHOS COPILOT

Asking Questions:

- Open-ended Questions: Ask Copilot questions related to yourself, your colleagues, or any work-related scenario.
- Tagging Colleagues: Use the "@" symbol followed by their username to ask about a specific colleague.



Example Use Cases:

Personalized Insights

- How might my innate behaviors potentially conflict with others?
- How am I similar to my team, how am I different?
- My Wethos Style is a 4535, what does that mean, what are my strengths?

Calendar & Scheduling:

- How should I organize my week to avoid meeting fatigue?
- I have back to back meetings all day, how can I mentally prepare and not burn out?
- How should I structure my day to be the most productive and engaged?

Prepare for Meetings

- I have a brainstorming meeting with my team later, can you write me an agenda?
- I'm feeling nervous about giving my direct report a performance review, how do I provide constructive feedback?
- My team tends to lose focus and go down rabbit holes, how do I get them back on track?

Manage Interpersonal Dynamics:

- I don't feel like my manager listens to me when I try to share ideas, how can I be more assertive?
- My coworkers find me overly blunt but I think I'm just being direct and up front, how can I better communicate?
- My direct report is extremely conflict avoidant, how do I encourage them to speak up more?

Understand Your Team

- Who are the outliers on my team and how can I best leverage their strengths?
- My team does not collaborate well, how do we ensure everyone gets to have a voice?
- What are possible biases my team could encounter, and how can we effectively address them?

Improve Communication

- Despite feeling like our meetings are productive, my team often ends up feeling confused afterward. How do I ensure everyone is clear on goals?
- My coworkers often misinterpret the intent of what I'm saying, how can I fix this?
- My manager's communication style is extremely long-winded, how do I get them to be more concise?

COMFORT INDEX

Overview: This feature provides a high-level snapshot of the overall comfort level of your team and offers a detailed view of each individual team member's comfort levels.

Purpose:

- Identify Potential Burnout: Identify team members who might be feeling uncomfortable or stressed.
- Prevent Burnout: Adjust tasks, provide support, and prevent burnout within your teams.

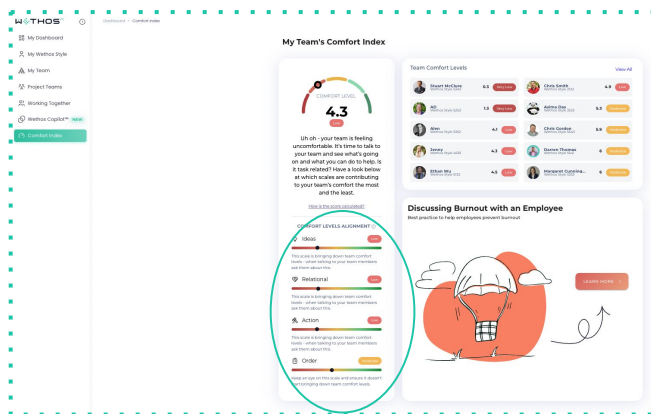
How it Works:

- Data Collection: The Comfort Index is calculated based on initial Wethos assessments, self-feedback, and peer feedback.
- Data Interpretation: The Comfort Index analyzes how your Wethos Style aligns with your daily tasks and responsibilities.

Using the Comfort Index:

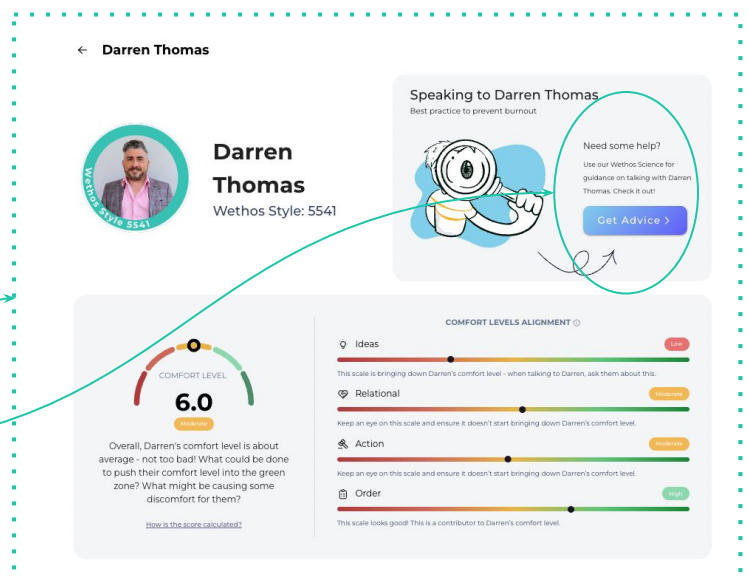
Team Comfort Overview: View the overall team comfort score and individual comfort scores.

Comfort Levels Alignment: Analyze comfort levels across four key scales: Ideas, Relational, Action, and Order.



Individual Comfort Deep Dive: View detailed comfort levels for each team member.

Addressing Low Comfort Levels: Access guidance and best practices for addressing low comfort levels and preventing burnout.

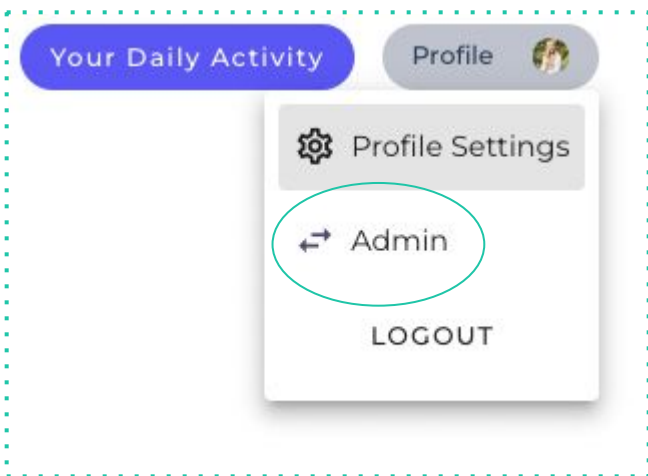


ADMIN SETTINGS

Overview: This section allows administrators to manage organization settings, features, and user access.

Accessing Admin Interface:

- Profile Picture: Click on your profile picture and select "Admin."



Managing Organization Details:

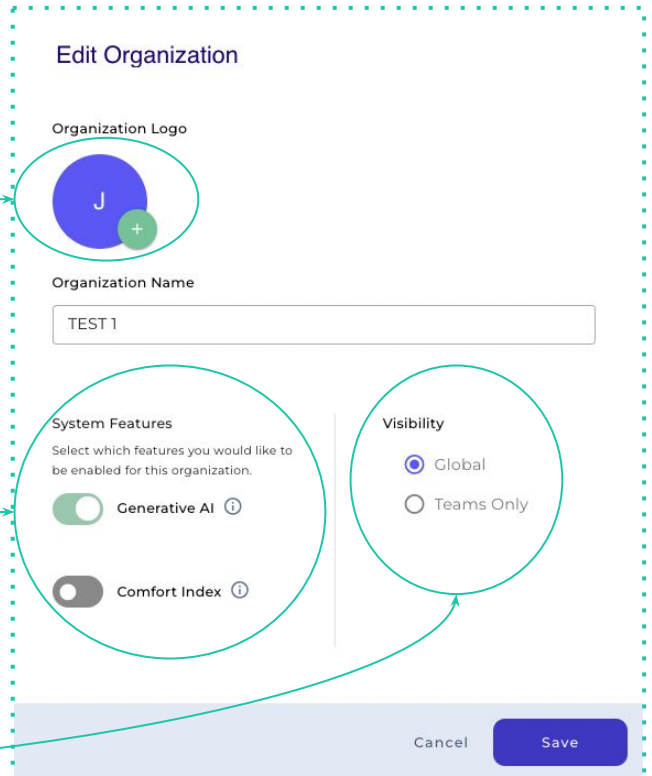
- Edit Organization Logo and Name: Update the organization's logo and name.

Managing System Features:

- Toggle Features: Enable or disable features like Wethos Copilot, Comfort Index, and Longevity Potential (coming soon).

Controlling Feature Visibility:

- Global Visibility: Make features accessible to all users within the organization.
- Teams Only Visibility: Restrict feature access to specific teams.





APPENDIX

Glossary of Terms

- **Dashboard:** The central hub for accessing various Wethos features.
- **Profile:** Your personal account settings, including profile information, assessments, and administrative functions.
- **Wethos Assessment:** Test that measure your individual behavioral work style based on four key scales: Ideas, Relational, Action, and Order.
- **Wethos Style:** Your unique work style profile based on your assessment results.
- **Kinetic View:** A visual representation of your Wethos style using a radar chart.
- **Scientific View:** A detailed breakdown of your Wethos style with specific descriptors.
- **My Team:** A section that provides an overview of your core team members and their Wethos styles.
- **Team Bias:** Potential biases within a team based on the distribution of Wethos styles.
- **Cognitive Diversity Score:** A measure of the range of perspectives and thinking styles present in a team.
- **Project Teams:** Cross-functional groups formed for specific tasks or initiatives.
- **Team Recommendation:** AI-powered predictive engine that aligns team members with specialized projects & tasks.
- **Working Together:** Provides insights and guidance on collaborating with specific colleagues based on your combined Wethos styles.
- **Wethos Copilot:** An AI-powered assistant providing support and guidance throughout the platform.
- **Comfort Index:** A high-level snapshot of the overall comfort level of a team, indicating potential burnout.
- **Admin Settings:** A section that allows administrators to manage organization settings, features, and user access.



TROUBLESHOOTING GUIDE

Account and Login Issues:

- **Forgot Password:** Click the "Forgot Password" link on the login page and follow the instructions to reset your password.
- **Incorrect Login Credentials:** Double-check your username and password for typos. Ensure you are using the correct email address associated with your account.
- **Account Locked:** If you have entered incorrect login credentials multiple times, your account may be temporarily locked. Contact Wethos support for assistance.
- **Unable to Access Account:** If you are unable to access your account, contact Wethos support for assistance.

Dashboard Issues:

- **Missing Sections:** Ensure you are logged in to the correct account and refresh the page. If the issue persists, contact Wethos support.
- **Notifications Not Appearing:** Check your notification settings to ensure they are enabled. If you are still not receiving notifications, contact Wethos support.
- **Wethos Copilot Not Responding:** Ensure you have a Pro or Leader license to access Wethos Copilot. If the issue persists, contact Wethos support.

My Wethos Style Issues:

- **Incorrect Assessment Results:** If you believe your assessment results are inaccurate, retake the assessment and ensure you are answering honestly and thoughtfully. Also feel free to request a consultant session to discuss your results in depth.
- **Unable to Access Kinetic View:** Ensure you have completed the Wethos assessment. If the issue persists, contact Wethos support.
- **Scientific View Not Loading:** Refresh the page. If the issue persists, contact Wethos support.

My Team Issues:

- **Team Members Not Appearing:** Ensure the team members are added to your team and have completed the Wethos assessment.
- **Kinetic View Not Loading:** Refresh the page. If the issue persists, contact Wethos support.
- **Cognitive Diversity Score Not Calculating:** Ensure all team members have completed the Wethos assessment. If the issue persists, contact Wethos support.

Project Teams Issues:

- **Unable to Create a Project Team:** Ensure you have the necessary permissions to create project teams. If the issue persists, contact Wethos support.
- **Unable to Add Members to a Project Team:** Ensure the team members are in your organization and have completed the Wethos assessment.
- **Project Team Details Not Loading:** Refresh the page. If the issue persists, contact Wethos support.



TROUBLESHOOTING GUIDE

Recommend Team Issues:

- **Feature Not Available:** Ensure you have a Leader license to access the Recommend Team feature.
- **Recommendations Not Generating:** Ensure you have provided all necessary project details and team needs. If the issue persists, contact Wethos support.

Working Together Issues:

- **Teammate Not Found:** Ensure you have entered the correct teammate's username.
- **Collaboration Dynamics Not Loading:** Refresh the page. If the issue persists, contact Wethos support.
- **AI-Generated Task List Not Loading:** Ensure you have provided a specific project or task scenario. If the issue persists, contact Wethos support.

Wethos Copilot Issues:

- **Feature Not Available:** Ensure you have a Pro or Leader license to access Wethos Copilot.
- **Copilot Not Responding:** Ensure you have a stable internet connection and refresh the page. If the issue persists, contact Wethos support.

Comfort Index Issues:

- **Feature Not Available:** Ensure you have a Leader license to access the Comfort Index feature.
- **Comfort Index Not Calculating:** Ensure all team members have completed the Wethos assessment and provided feedback. If the issue persists, contact Wethos support.

Admin Settings Issues:

- **Unable to Access Admin Interface:** Ensure you have administrator privileges for your organization.
- **Unable to Edit Organization Details:** Ensure you have the necessary permissions to edit organization settings. If the issue persists, contact Wethos support.

General Troubleshooting Tips:

- **Refresh the Page:** Refreshing the page can often resolve minor issues.
- **Check Your Internet Connection:** Ensure you have a stable internet connection.
- **Clear Your Browser Cache and Cookies:** Clearing your browser cache and cookies can sometimes resolve issues.
- **Contact Wethos Support:** If you are unable to resolve the issue, contact Wethos support for assistance. You can submit a support ticket on the website [here](#).