

README - Move Orthopedics Team - v2

Key Terminology & Ideas

Term	Definition
Period	A grouping of Month and Year or Quarter and Year , depending on the context (e.g., Monthly or Quarterly Retro).

Primary Field naming done so that review of linked records are easier.

Tables Overview

Team Structure

A hidden table that serves as the foundation for dropdown menus in forms for **Monthly Team Retro**, **Monthly 360 Feedback**, and **Quarterly Full Team Retro**.

Table Structure

Team(s)

Defines the team for grouping feedback in AI summaries. Used as a lookup value in other tables.

Participants Involvement

Specifies which forms/processes (e.g., Monthly Team Retro, 360 Feedback) a team member is involved in. This determines whether their name appears in the **Active Participants** view for dropdown menus in forms.

Active Member

A boolean field indicating whether a team member is currently employed. If set to "No," the member is excluded from dropdowns in relevant forms.

Monthly Team Retro

This table captures monthly feedback for full teams and generates a primary AI-driven **Feedback Summary** for team-wide reports.

Table Structure

Name

Dropdown populated from the **Active Participants** view in the **Team Structure** table.

Team

Lookup value from the **Team Structure** table, associating the feedback with a specific team.

Date Created

Records when the entry was made. Note: This may not align with the period for which feedback is given (e.g., feedback for August may be submitted in September). Thus, **Month Year (from date created)** is not reliable.

Month

Dropdown field for selecting the month the feedback pertains to.

Year

Dropdown field with limited options for selecting the year the feedback pertains to. Requires manual updates (see [User Guide](#)).

Feedback Summary

AI-generated summary based on the following prompt:

```
Please summarise this team member's Retro Feedback for inclusion in a team-
wide report. Focus on insights that may inform team morale, performance, and
improvement. Use a positive, professional tone. Highlight key contributions,
challenges, and suggestions.

**Inputs**:
- Team Member: [Name]
- Team: [Team]
- Highlight: [Highlight]
- Lowlight: [Lowlight]
- Quick Fixes: [Quick Fixes]
- Additional Comments: [Additional Comments]

**Output Requirements**:
```

- Begin with the team name and a brief sentence summarising the team member's general sentiment.
- Summarise the highlight and lowlight in 1-2 concise sentences each.
- Clearly state any proposed improvements or quick fixes.
- Include any additional feedback valuable for leadership or peers.
- Keep the tone constructive, insightful, and suitable for sharing with the broader team.

Automated Linking Fields

Month Year : Team

A formula field copied to the **for Team Summary** field via the **Link to Monthly Full Team Retro Summary** automation. Groups entries by team and period in the [Monthly Full Team Retro: Summary](#) table for team-specific insights.

Month Year : Organization

A formula field copied to the **for Organizational Summary** field via the **Link to Monthly Full Team Retro Summary** automation. Groups entries from all teams for a given period in the [Monthly Full Team Retro: Summary](#) table for organization-wide insights.

Note: If no matching record exists in the **Monthly Full Team Retro: Summary** table, a new record is created; otherwise, the entry is added to the existing record. This enables grouping at two levels: **period (Month-Year)** and **team/organization**.

Monthly Full Team Retro: Summary

This table consolidates feedback from the **Monthly Team Retro** table to generate AI-driven summaries at two levels:

1. **Team-specific:** Summarizes feedback for each team.
2. **Organization-wide:** Summarizes feedback across all teams.

Table Structure

for Team Summary

indicates all linked record from [Monthly Team Retro](#) (same naming for ease of reference)

Team Specific Feedback Summary

A roll-up field aggregating all linked **Feedback Summary** entries from the **Monthly Team Retro** table for a specific team based on linked records from `for Team Summary` field.

Team Specific Feedback Retro

AI-generated summary based on the following prompt:

****Task**:** Generate a professional, high-level summary of team feedback from Move's monthly Retro responses.

****Inputs**:**

- Team Name: [Team Name]
- Summary: [Team Specific Feedback Summary]

****Output Format**:**

****Team Summaries****

For each team (e.g., Clinical Services, Patient Services, Team Support):

- Begin with the team name as a heading.
- Provide a short paragraph (3-5 sentences) summarising:
 - Team sentiment (overall morale or tone)
 - Key highlights or achievements
 - Main challenges or lowlights
 - Suggested quick fixes or improvements
 - Any notable additional feedback

Organizational Feedback Summary

A roll-up field aggregating all linked **Feedback Summary** entries from all teams for a given period based on linked records from `for Organizational Summary` field.

Organizational Feedback Retro

AI-generated summary based on the following prompt:

****Task**:** Generate a professional, high-level summary of team feedback from Move's monthly Retro responses.

****Inputs**:**

- Team Name: [All Teams]
- Summary: [Organizational Feedback Summary]

****Output Format**:**

****Full Organisation Summary****

- Provide a concise overview of collective feedback from all teams.
- Identify common themes, notable highlights, recurring challenges, and

- general morale or tone across the company.
- Highlight any organisation-wide suggestions or quick fixes.

Monthly 360 Feedback

This table captures 360-degree feedback for individual team members, with AI-generated summaries for performance and development notes.

Table Structure

Name

Dropdown populated from the **Active Participants** view in the **Team Structure** table.

Team

Lookup value from the **Team Structure** table.

Date Created

Records when the entry was made. As with Monthly Team Retro, this may not align with the feedback period, so **Month Year (from date created)** is not reliable.

Month

Dropdown field for selecting the month the feedback pertains to.

Year

Dropdown field with limited options for selecting the year the feedback pertains to. Requires manual updates (see [User Guide](#)).

Feedback Summary

AI-generated summary based on the following prompt:

```
**Task**: Summarise the 360 Feedback received by a specific team member for inclusion in their performance and development notes.
```

```
**Inputs**:
```

- Feedback Giver: [Name]
- Feedback Receiver: [Name] and their Team: [Team]
- Positive Impact: [Positive Impact]

- Negative Impact: [Negative Impact]
- Additional Feedback: [Additional Feedback]

****Output Requirements**:**

1. Start with the feedback receiver's name (the team they are part of), followed by a sentence summarising the overall tone of the feedback.
2. Highlight positive contributions that helped accelerate team performance.
3. Mention any constructive feedback or behaviours that may have hindered progress.
4. Include any additional comments or insights relevant to the person's collaboration, communication, or impact.
5. Keep the tone respectful, clear, and developmental – suitable for sharing in 1:1 or team reflection settings.

Automated Linking Fields

Month Year : Team Member : Team

A formula field identifying the feedback receiver's name and team.

Copied to the **for Personal Summary** and **for Team Summary** fields via the **Link to Monthly 360 Feedback Summary** automation. Groups entries by individual for a given period in the [Monthly 360 Feedback: Summary](#) table.

At the same time **Link to Monthly 360 Feedback Summary - retrospectively** automation copies the new entry to all other team members for the same period and team thereby enabling team-specific overviews.

Note: If no matching record exists in the **Monthly 360 Feedback: Summary** table, a new record is created; otherwise, the entry is added to the existing record. This enables grouping at two levels: **period (Month-Year)** and **team/recipient**.

Monthly 360 Feedback: Summary

This table operates similarly to the **Monthly Full Team Retro: Summary**, consolidating feedback for individuals and teams with AI-driven summaries.

Quarterly Team Retro

Quarterly Full Team Retro

This table operates similarly to the **Monthly Team Retro** table but focuses on quarterly feedback. The **Quarter** is determined from the **Date Created** field using the following formula:

```
SWITCH(
  MONTH({Date Created}),
  1, "January - March",
  2, "January - March",
  3, "January - March",
  4, "April - June",
  5, "April - June",
  6, "April - June",
  7, "July - September",
  8, "July - September",
  9, "July - September",
  10, "October - December",
  11, "October - December",
  12, "October - December"
)
```

Quarterly Full Team Retro: Summary

This table operates similarly to the **Monthly Full Team Retro: Summary**, generating AI-driven summaries for team-specific and organization-wide feedback on a quarterly basis. This is again grouped by team or the organizations as whole for given period by linking same record in [Quarterly Full Team Retro](#) to [Quarterly Full Team Retro Summary](#) in two distinct ways: on team level and for organization.

User Guide

Internal Management

Updating Team Structure

The **Team Structure** table requires manual updates when team composition changes. Use the **use to make alterations** view in the **Team Structure** table.

Adding New Team Members

1. Add the member's name to the **Team Members Name** field.
2. Specify their **Team(s)**.

3. Define their **Participants Involvement** to determine which forms (e.g., Monthly Team Retro, 360 Feedback, Quarterly Team Retro) they appear in via the **Active Participants** view.

Removing Team Members

1. Set the **Active Member** status to "No" to exclude them from dropdown menus in forms, as filtered by the **Active Participants** view.

Configuring Dropdowns

Year Dropdown Limitation

The **Year** field in **Monthly Team Retro**, **Monthly 360 Feedback**, and **Quarterly Team Retro** forms has limited options and must be manually updated as needed to reflect the current year.

External Usage

Form Submission

Users complete the relevant forms for **Monthly Team Retro**, **Monthly 360 Feedback**, or **Quarterly Team Retro** to submit feedback. Ensure the correct **Month**, **Year**, or **Quarter** is selected to align with the feedback period.

This README provides a comprehensive guide to the Move Feedback System, ensuring clarity on table structures, automation processes, and user instructions for effective feedback management.