

# Airtable README - Nubis Team Feedback

This system enables **bi-monthly team check-ins** and automatically aggregates responses into a **retro Notion Retro Summary** for leadership review.

It consists of two linked tables and one key automation.

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## Tables

### Nubis Team | 2 Month Check-In

#### Fields Included in Form:

- [Name](#)
- [How are you feeling overall at work right now?](#)
- [How would you rate Nubis' performance as a business over the last 2 months?](#)
- [What helped you work faster, better, or smarter?](#)
- [What slowed you down or frustrated you?](#)
- [One improvement you'd like to see?](#)
- [One action you think Nubis should take?](#)
- [Team check-in Do you feel you're supported by the team?](#)
- [Tell us why?](#)
- [Anything else you'd like to share?](#)

#### Name

**Type:** Single line text

#### Date Created

**Type:** Date

#### Period

**Type:** Formula

Determined using [Date Created](#)

Feedback from Carla: "ASSUME FOR MOST RECENT TWO MONTHS PERIOD"

```
CONCATENATE(  
  DATETIME_FORMAT(DATEADD({Date Created}, -2, 'month'), 'MMMM YYYY'),  
  ' - ',  
  DATETIME_FORMAT(DATEADD({Date Created}, -1, 'month'), 'MMMM YYYY')  
)
```

**Description:** Returns the two most recent full months before the month of *Date Created*, formatted as Month YYYY – Month YYYY

Used to link to [Nubis Team 2 Month Retro Summary](#).

## Manual Period Override

**Type:** Single line text

**NOTE:** Crucial that this uses the **same format** as [Period](#) to ensure correct grouping in [Nubis Team 2 Month Retro Summary](#).

**Description:** Use this to set the "Period" if the formula-based calculation is incorrect (e.g., late submission)

## How are you feeling overall at work right now?

**Type:** Score (1–10)

## How would you rate Nubis' performance as a business over the last 2 months?

**Type:** Score (1–10)

## What helped you work faster, better, or smarter?

**Type:** Long text

## What slowed you down or frustrated you?

**Type:** Long text

## One improvement you'd like to see?

**Type:** Long text

## One action you think Nubis should take?

**Type:** Long text

## Do you feel you're supported by the team?

Type: Single select — Yes / No / Sometimes

## Numeric Feeling of Support

Type: Formula

```
IF({6. Team check-in: Do you feel you're supported by the team?} = "Yes", 10,
  IF({6. Team check-in: Do you feel you're supported by the team?} = "No", 0,
    5)
)
```

**Description:** Returns 10 if "Yes", 0 if "No", 5 otherwise (assumes "Sometimes")  
Required for averaging in [Nubis Team 2 Month Retro Summary](#)

## Tell us why?

Type: Long text

## Anything else you'd like to share?

Type: Long text

## Link to Nubis Team | 2 Month Retro Summary

**Type:** Link (to [Nubis Team 2 Month Retro Summary](#))  
Populated by automation: [Automatically Link to Nubis Team 2 Month Retro Summary](#)  
Triggered when [Period](#) or [Manual Period Override](#) is updated

**NOTE:** Not allowed to link to multiple records

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## Nubis Team | 2 Month Retro Summary

## Nubis Team | 2 Month Check-In 2

**Type:** Link (back to [Nubis Team 2 Month Check-In](#))  
Populated by automation: [Automatically Link to Nubis Team 2 Month Retro Summary](#)

**NOTE:** Allowed to link to **multiple records**

## Average Overall Feeling

**Type:** Rollup of [How are you feeling overall at work right now?](#)

```
IF(values, AVERAGE(values))
```

## What Helped Faster, Better or Smarter Work

**Type:** Lookup of [What helped you work faster, better, or smarter?](#)

## Summarised: What Helped Faster, Better or Smarter Work & Average Overall Feeling

*(AI-generated summary combining all insights from [What Helped Faster, Better or Smarter Work](#) and [Average Overall Feeling](#))*

## What Frustrated or Slowed Down Work

**Type:** Lookup of [What slowed you down or frustrated you?](#)

## Summarised: What Frustrated or Slowed Down Work & Average Overall Feeling

*(AI-generated summary combining all insights from [What Frustrated or Slowed Down Work](#) and [Average Overall Feeling](#))*

## Average Nubis Performance

**Type:** Rollup of [How would you rate Nubis' performance as a business over the last 2 months?](#)

```
IF(values, AVERAGE(values))
```

## Improvements Like to See

**Type:** Lookup of [5. Looking forward to the next 2 months...5.1 One improvement you'd like to see?](#)

## Summarised: Improvements Like to See & Average Nubis Performance

*(AI-generated summary combining all insights from [Improvements Like to See](#) and [Average Nubis Performance](#))*

## Suggested Action for Nubis

**Type:** Lookup of [5.2 One action you think Nubis should take?](#)

## **Summarised: Suggested Action for Nubis & Average Nubis Performance**

*(AI-generated summary combining all insights from [Suggested Action for Nubis](#) and [Average Nubis Performance](#))*

## **Average Feeling of Support**

**Type:** Rollup of [Numeric Feeling of Support](#)

```
IF(values, AVERAGE(values))
```

## **Why Feeling Un-/Supported**

**Type:** Lookup of [Tell us why?](#)

## **Summarised: Why Feeling Un-/Supported & Average Feeling of Support**

*(AI-generated summary combining all insights from [Why Feeling Un-/Supported](#) and [Average Feeling of Support](#))*

## **Anything Else**

**Type:** Lookup of [Anything else you'd like to share?](#)

## **Summarised: Anything Else**

*(AI-generated summary combining all insights from [Anything Else](#))*

## **Summarised: Overall**

*(AI-generated summary combining all insights)*

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## **Automations**

### **Automatically Link to Nubis Team | 2 Month Retro Summary**

#### **How it works:**

If no record exists in [Nubis Team 2 Month Retro Summary](#) with a name matching the value in

Period (or Manual Period Override), a **new record is created**.

Thus, retro summaries are generated **on-demand** as check-ins are submitted.

## TRIGGER: When "Period" or "Manual Period Override" is updated

The screenshot shows the Zapier trigger configuration for "When a record is updated". The trigger is set to fire when a record is updated in a table. The configuration includes the following details:

- Trigger type:** When record updated
- Configuration:**
  - Table:** Nubis Team | 2 Month Check-In
  - View:** FULL VIEW
  - Fields:** Period, Manual Period Override (Watching 2 fields)
- Test Step:** Test this trigger to confirm its configuration is correct. The data

The trigger is connected to a series of actions:

- Test step:** When a record is updated (Period and Manual Period Override)
- Actions:**
  - If Manual Period Override is empty:** Update a record using "Period"
  - Otherwise if Manual Period Override is not empty:** Update a record using "Manual Period Override"

## CONDITION: If "Manual Period Override" is empty

The screenshot shows the Zapier condition configuration for "If Manual Period Override is empty". The condition is set to run when the "Manual Period Override" field is empty. The configuration includes the following details:

- Labels:** Description: using "Period"
- Configuration:**
  - Action will run...** If Manual Period Override is empty
  - Table:** Nubis Team | 2 Month Check-In
  - Record ID:** Airtable record ID
  - Fields:** Link to Nubis Team | 2 Month Retro Summary (Choose record(s) to link to, by entering record IDs or names)

The condition is connected to a series of actions:

- Test step:** When a record is updated (Period and Manual Period Override)
- Actions:**
  - If Manual Period Override is empty:** Update a record using "Period"
  - Otherwise if Manual Period Override is not empty:** Update a record using "Manual Period Override"

→ Update field Link to Nubis Team 2 Month Retro Summary with value from Period

## CONDITION: If "Manual Period Override" is **not** empty

TRIGGER

When a record is updated  
Period and Manual Period Override

ACTIONS

If Manual Period Override is empty

Update a record

Update record  
using "Period"

Otherwise if Manual Period Override is not empty

Update a record

Update record  
using "Manual Period Override"

+ Add condition

Test step

LABELS

Description

using "Manual Period Override"

CONFIGURATION

Action will run...

If Manual Period Override is not empty

\* Table

Nubis Team | 2 Month Check-In

\* Record ID

ID of the record to update. To update a record from a previous step, use the + menu to choose the step and its Record ID. Must correspond to the selected table.

Airtable record ID

\* Fields

Link to Nubis Team | 2 Month Retro Summary

Choose record(s) to link to, by entering record IDs or names

Manual Period Override

+ Choose field

→ Update field [Link to Nubis Team 2 Month Retro Summary](#) with value from [Manual Period Override](#)

**End of Document**

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