Module 5

Understanding the Platform

Module 5: Understanding the Platform

Synopsis: This module connects the behavioral theory to the actual WethosAI software features. It trains users on how to use the platform to manage teams and workflows.

- Lesson 1: Personal Insights (Profile & XO)
  - Synopsis: Covers "My Profile" for self-awareness and introduces "WethosXO," the AI behavioral coach that provides real-time advice and conflict resolution.

- Lesson 2: Team Architecture (Groups & Recommendations)
  - Synopsis: Explains the difference between Core Groups (departments) and Project Groups (cross-functional). Covers the "Recommend a Group" feature for building balanced teams.

- Lesson 3: Collaboration Tools (Brainstorms & Docs)
  - Synopsis: details how to use "Brainstorms" for agile collaboration and "Documents" with Google Drive Sync points to keep artifacts centralized.

- Lesson 4: Organization & Biases
  - Synopsis: Covers the Admin Console, CalendarIQ for meeting prep, and the "Traits & Biases" framework for identifying cognitive patterns in team communication.

Overview

| Feature	Function	Primary Use
WethosXO	Behaviorally aware AI assistant, embedded everywhere in the platform.	Real-time coaching, summaries, and guidance across all contexts.
My Profile	Displays each user's Wethos Style and behavioral strengths.	Build self-awareness and understand communication preferences.
Groups	Persistent, structured teams (Core or Project).	Daily collaboration, Shared Conversations, and organizational cohesion.
Recommend a Group	AI-powered team formation tool.	Assemble balanced, high-performing teams using Wethos Style data.
Brainstorms	Time-bound, outcome-driven workspaces.	Drive innovation, strategy, and project-based collaboration.
Breakouts	Focused subspaces within Brainstorms.	Explore complex topics or side tasks without disrupting main workflows.
Comfort Index	Behavioral alignment and engagement metric.	Track comfort, identify early misalignment, and enhance retention.
CalendarIQ	Behavioral insights integrated into meetings.	Prepare, communicate, and reflect more effectively.
Documents	Centralized file hub with Google Drive Sync Points.	Manage shared materials, enable automated analysis, and connect real work to behavioral data.
Traits & Biases Analysis	Behavioral pattern recognition via transcripts.	Enrich profiles and uncover communication or cognitive tendencies.
Admin Console	Organizational management and oversight.	Manage users, integrations, analytics, and platform governance.

WethosXO — Your AI-Powered Partner

Purpose:

WethosXO is the intelligent behavioral assistant embedded throughout the platform. It interprets team data, identifies patterns, and provides real-time guidance to enhance communication, decision-making, and collaboration. XO functions as both a coach and collaborator—translating insight into action across Profiles, Groups, Brainstorms, Breakouts, and more.

What You'll See:

- XO Panel: Access XO directly through the left navigation to start new private conversations or revisit previous ones (by clicking "Conversations").
- @Mentions in Conversations: Tag "@XO" within a Shared Conversation or Brainstorm to have XO participate.
- Inline Prompts: Contextual suggestions appear automatically across Profiles, Groups, and Brainstorms.
- Summaries and Insights: XO generates concise overviews, highlights action items, and flags recurring behavioral patterns.
- Behavioral Guidance Cards: Quick, situation-specific recommendations that help you adapt communication styles or resolve friction.
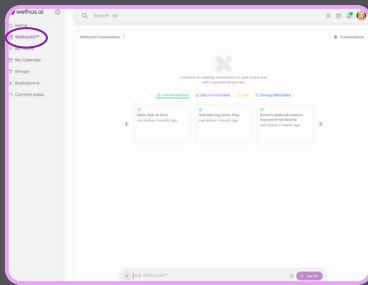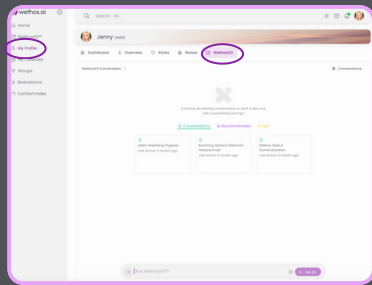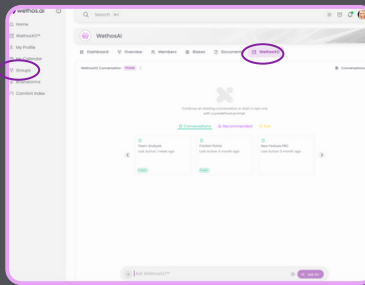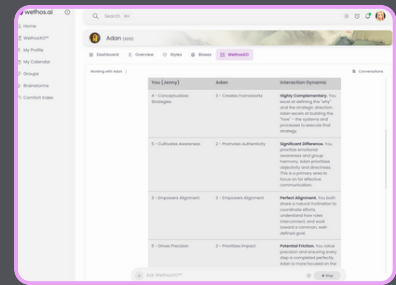

Global XO Chat	XO in My Profile	XO in Groups	XO in Others' Profiles
Private	Private	Private unless changed to Public	Private

How It's Used

- You can chat privately with XO at any time to ask for coaching, reflection, or advice. These 1:1 interactions are completely confidential.
- Within a Group, you can keep your conversation with XO private—XO will use the Group's context (members, styles, biases) to tailor its responses, but no one else will be notified or see the exchange.
- If you want XO's insights to become visible to the entire Group, you can change the status to public.
- In Shared Conversations, XO participates as a visible collaborator, summarizing discussions, surfacing bias, or generating next steps that everyone can see.
- XO integrates across Brainstorms, Breakouts, and Documents to connect learning and insight back into everyday workflows.

Partner Guidance:

Train clients to understand XO's dual functionality:

- Private Mode: For personal reflection, coaching, or preparation—context-aware but confidential.
- Shared Mode: For open collaboration, learning, and transparency—visible to all team members.
- Partners should demonstrate how XO's flexible privacy model encourages both individual growth and collective improvement, reinforcing psychological safety while maintaining accountability across the organization.

My Profile

Purpose:

"My Profile" serves as the personal hub for every user. It combines self-insight (Style, Skills, Biases) with contextual information (Groups, Meetings, XO Shortcuts) to help each person understand how they work and apply that awareness to collaboration and planning.
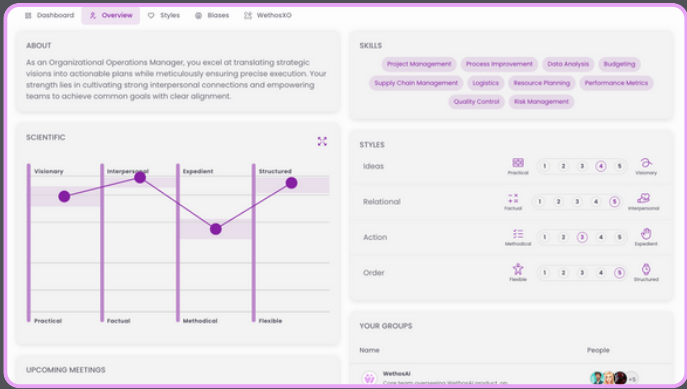
What You'll See:

- **Profile Card & About Summary** — Shows name, title, and a short, AI-generated paragraph describing your strengths and working style.
- **Wethos Style Graph** — Displays behavioral energy across the four scales (Ideas, Relational, Action, Order) with hover-over definitions.
- **Skills Section** — Auto-suggested and editable skills linked to your role; used in Recommend a Group and Brainstorms.
- **Skills Tab**
- **Biases Tab** — Lists top cognitive biases a user is prone to with in-context mitigation guidance via XO.
- **Your Groups** — Quick links to the Groups you belong to.
- **Upcoming Meetings** — Pulled from CalendarIQ integration, with prep prompts from XO.
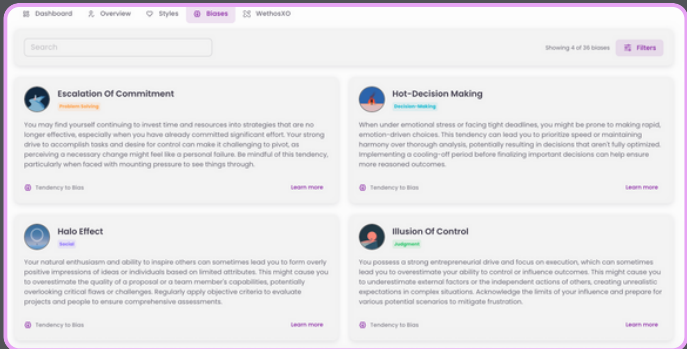
How It's Used:

- Individuals use their profile to understand themselves better (mirror), prepare for collaboration and feedback discussions.
- Managers and teammates review profiles to tailor communication styles or rebalance team assignments.
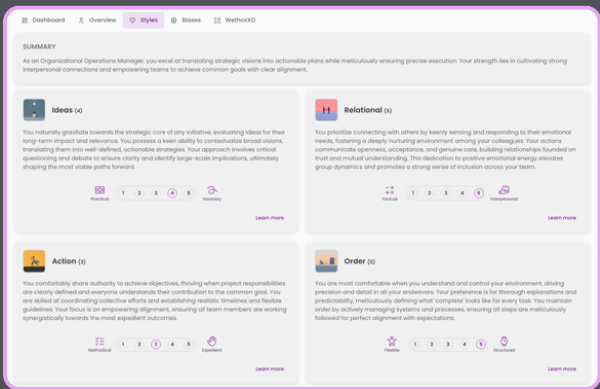- XO answers contextual questions, turning behavioral data into practical advice.
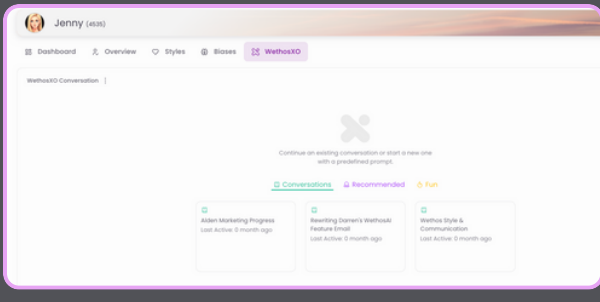
Summary Paragraph & Visual Representation

Breakdown of Specific Scale Styles

Bias Cards & Mitigation Techniques

### Private XO for Self Exploration

Groups

Purpose:

Groups are the structured backbone of collaboration inside WethosAI. They reflect your organization's enduring framework and provide a space for continuous communication, documentation, and behavioral insight.

There are two types of Groups:

- **Core Groups** – department-based teams that reflect the organization's formal hierarchy and manage functional responsibilities.
- **Project Groups** – cross-functional teams that remain stable over time, created to manage complex, multi-disciplinary work requiring continuous collaboration across departments.

What You'll See:

- Dashboard: Sample prompts to spark discovery and insights.
- Overview: Provides a visual and narrative snapshot of the group's working style, cognitive diversity, and a Group Calendar.
- Members: Lists all team members with their roles, Wethos Styles, and behavioral summaries for quick reference.
- Biases: Highlights the group's most prone cognitive biases and offers insights mitigate.
- Documents: Centralizes all shared files and artifacts for easy access and AI-powered summarization using Google Drive or manual uploads.
- WethosXO: Serves as the team's behavioral coach, offering summaries, guidance, and recommendations based on live collaboration patterns.
- Shared Conversations operate as the ongoing communication channel for each Group, keeping day-to-day updates and collaboration accessible in one place.
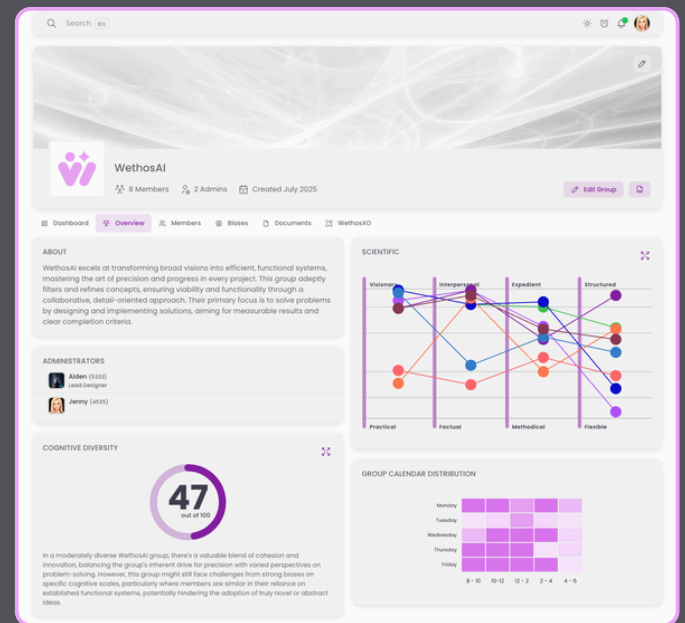
How It's Used:

- Core Groups manage departmental functions—status updates, planning, and long-term execution.
- Project Groups support cross-functional collaboration between disciplines while maintaining stability and shared accountability.
- Shared Conversations keep discussions continuous and centralized
- XO can be invited into any Group thread to summarize discussions, highlight behavioral blind spots, or recommend adjustments to communication style.

Partner Guidance:

When training clients, emphasize that Groups are where structure meets behavior. Encourage leaders to:

- Use Core Groups for stable, function-based collaboration.
- Form Project Groups for permanent cross-functional initiatives.
- Keep Shared Conversations active for transparency and continuity.
- Reference the six tabs regularly to understand both operational and behavioral health.

Each tab reinforces a different dimension of team effectiveness—together, they create a holistic view of how people work, communicate, and grow within WethosAI.
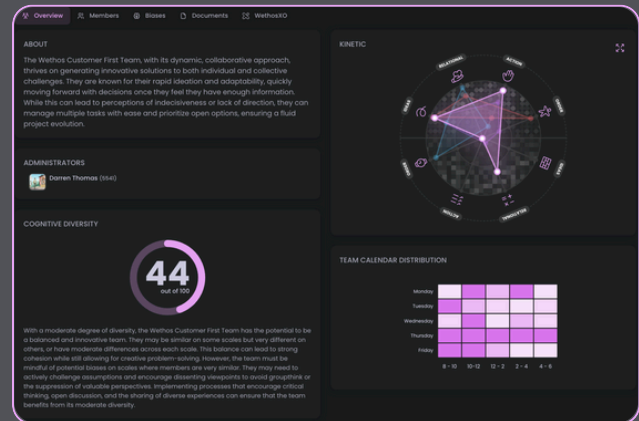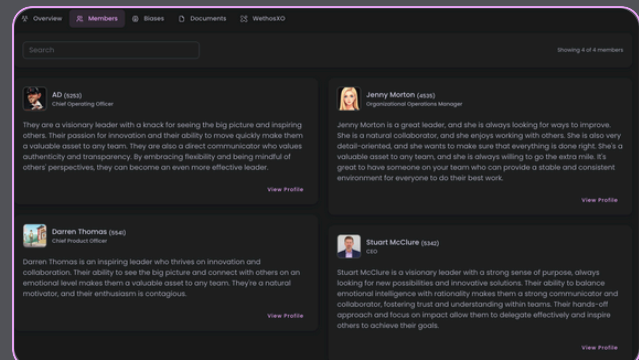
Groups

Group Overview

View Group summary along with administrator details, Cognitive Diversity score, visual representation, and weekly availability calendar.
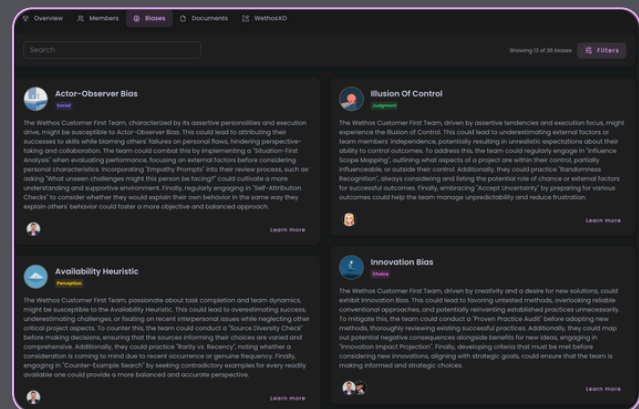

Members

Access all members with behavioral style summaries and detailed profiles through the "View Profile" option.
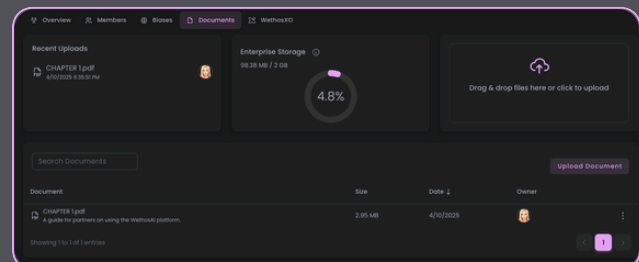

Biases

Identify common biases and patterns that may influence group decision-making and collaborative outcomes.
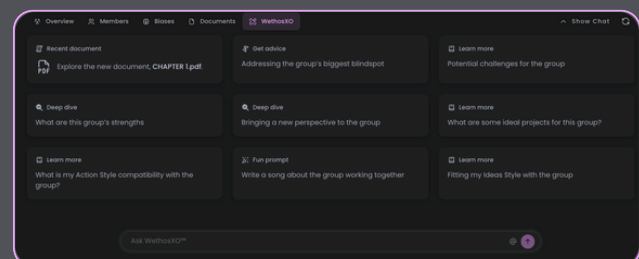

Document Upload

Share documents for collaborative XO interaction, ensuring collective knowledge and alignment to project goals.

WethosXO in Group Context

Generate targeted Group insights through prompt cards or custom questions in the XO prompt interface.
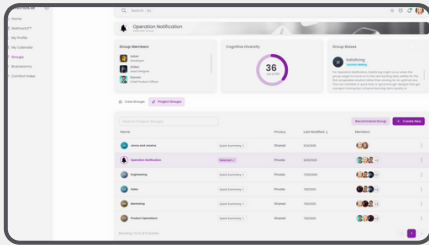
Groups – Shared Conversations

Transform team collaboration with behavioral science-powered AI. Think of it as a chatbot meets Slack, but with a crucial difference: XO understands every team member's behavioral traits, decision-making patterns, and interpersonal preferences. Instead of generic AI responses, your team gets insights tailored to how you actually work together.
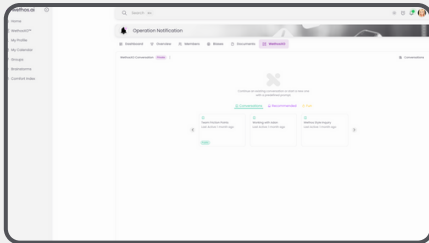
1

Access a Group
Go to either Core Groups or Project Groups and select whichever Group that you'd like to start a shared conversation in.
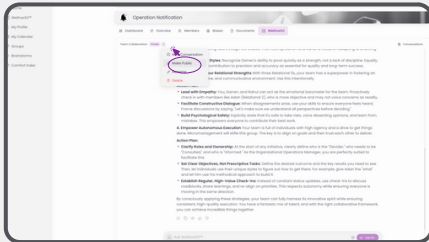
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Navigate to XO
Click the WethosXO tab within the Group and start the conversation with any question, statement, or topic and hit enter or click Ask XO.
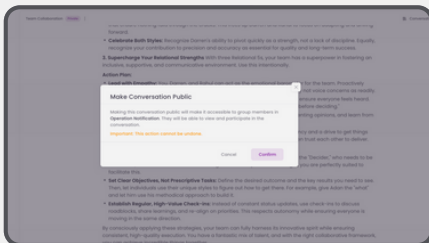
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Make Public
Click the three dots next to the word "Private" and select "Public." This will allow everyone in the Group to see all message history and contribute.
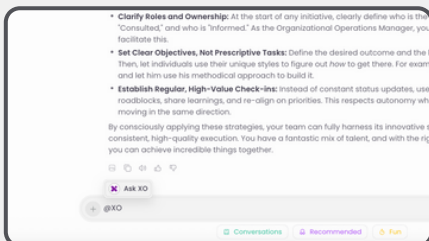
4

Confirm Public Status
You will be prompted to confirm this status change. Making a conversation public will allow everyone in the Group to see what is said and interact.

5

Utilize XO as Needed
To have XO respond to you in the chat, type "@XO". To simply chat with the Group without XO interjecting, just type without tagging XO.

Why This Changes Everything
Unlike generic AI tools, XO understands your team's Wethos Styles—how each person processes information, communicates, makes decisions, and collaborates. This means when your team works with XO together, you're not just getting AI assistance, you're getting insights tailored to your specific team dynamics and working styles.

Two Flexible Modes
Ask WethosXO
- WethosXO will respond to your message
- XO's response is visible to the entire team
- Perfect for getting AI input during discussions

Send Message to Team
- Regular team message without XO
- XO stays quiet and doesn't respond
- Switch back to XO mode anytime you need AI help

Pro Tips
- Control the flow: In shared conversations, switch modes to manage when XO participates
- Catch up quickly: In shared conversations, ask XO to summarize key points, decisions, or action items
- Be proactive: Create dedicated conversation threads for recurring topics (weekly 1:1 prep, project planning, etc.)
- Stay organized: Use descriptive names that will help you find the conversations later

Recommend a Group 👍

Purpose
Recommend a Group uses AI to build balanced team configurations based on members' Wethos Styles, skills, and working patterns. It helps leaders form teams that are both behaviorally diverse and contextually aligned—ensuring the right mix of perspectives, execution styles, and decision-making approaches for the task at hand.

What You'll See
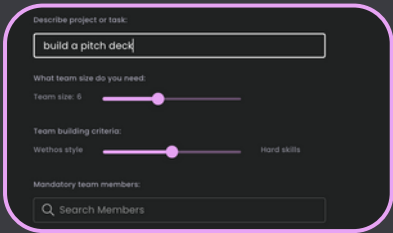After navigating to Project Groups, you'll see the following options and outputs:
- Group Name & Description
- Group Size Slider
- Group Building Criteria
- Mandatory Members Field
- Recommend Group Button

Once recommendations are created, WethosAI displays:
- Scientific Chart: Visualizes each member across the four Wethos Scales (Ideas, Relational, Action, Order).
- Group Style Summary: Shows the team's behavioral profile (e.g., "Relational 4 / Action 3") for quick interpretation.
- Member Selection Panel: Lists proposed members with color-coded Wethos Style tags and skill overlays.
- Narrative Summary: AI-generated overview describing how the group's behavioral composition will likely function—its energy, dynamics, and potential blind spots.

How It's Used
- Define the project or initiative and desired team size.
- Adjust the criteria slider to balance behavioral variety vs. skill alignment.
- Lock in any essential members and click Recommend Group.
- Review the visual and written summaries to understand team composition and predicted collaboration patterns.
- If satisfied, convert the configuration into a Project Group for ongoing work.
- Use this feature early in project planning to ensure team composition matches both the type of work and the work style environment.
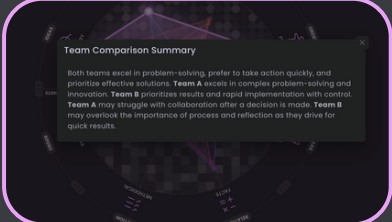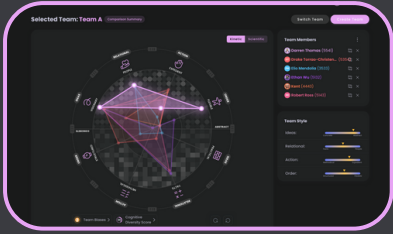

Create a project and weight the percentage of Wethos Style and Hard Skills and set the team size.

Receive Recommendations of Group A and B and compare to decide on the best fit for the project or task using the comparison summary.

Review each Group suggested and examine their alignment to both the project and the styles most suited.

Partner Guidance:
When introducing this feature to clients:
- Demonstrate how the criteria slider changes team composition in real time.
- Highlight how the Scientific Chart visually reinforces behavioral balance.
- Explain that XO's Narrative Summary provides actionable context, not abstract data.
- Encourage leaders to treat this as a co-design exercise—balancing human judgment with AI insight.
- Recommend a Group transforms the way teams are assembled, turning what was once subjective guesswork into an intentional, behaviorally intelligent process.

Brainstorms 🧠

Purpose:

Brainstorms are outcome-driven, collaborative workspaces built for specific initiatives. While Groups provide structure and continuity, Brainstorms enable agility and focus — uniting the right people across departments to achieve defined goals.
 Each Brainstorm is powered by AI-assisted behavioral insight, helping teams move from ideas to outcomes with speed, clarity, and balance.

Brainstorms — Dashboard View

When users land on the Brainstorms dashboard, they see a high-level overview of all active and recent Brainstorms, making it easy to jump in, assess progress, or start something new.
What You'll See
- Brainstorm List: A table of all Brainstorms with titles, short descriptors, last active dates, and member avatars for quick context.
- Selected Brainstorm Indicator: The currently open Brainstorm is highlighted and marked as Selected for clarity.
- Search & Filters: Users can search by name or keyword to quickly find a specific Brainstorm.
- Engagement Score (for the selected Brainstorm): A live activity indicator showing how active and balanced participation is across members.
- XO Generated Preview: A short, auto-generated summary showing what the Brainstorm is about and recent updates.
- Members Panel: Quick view of who is included in the selected Brainstorm.
- Participants Panel: Shows who has engaged recently or most frequently.
- New Brainstorm Button: Allows users to initiate a new Brainstorm from anywhere on the dashboard.
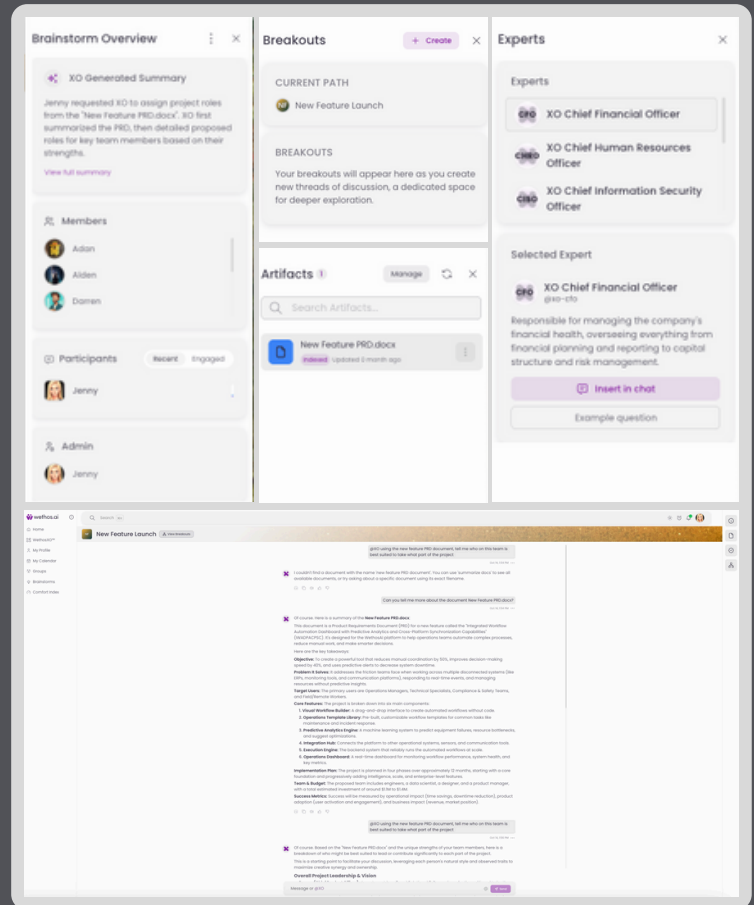
Brainstorms

Brainstorms — Inside the Brainstorm View

Once a user selects a specific Brainstorm, the interface shifts to a focused workspace that organizes people, insights, files, and discussion tools in one place.

What You'll See

- **XO Generated Summary:** A dynamic, AI-generated overview capturing context, objectives, strategic insights, anticipated questions, and emerging themes.

- **Members Panel:** All members included in the Brainstorm, along with admin designation.

- **Participants Panel:** A breakdown of who is actively contributing, with "Recent" and "Engaged" filters for quick activity checks.

- **Breakouts Drawer:** A panel where new Breakouts can be created and existing ones are listed—useful for exploring subtopics without cluttering the main thread.

- **Experts Drawer:** Access to XO Expert Personas (e.g., CFO, CHRO, CISO), each with a profile and one-click insertion of expert guidance or sample questions.

- **Artifacts Workspace:** A full document hub including recent uploads, cloud-synced files, drag-and-drop upload, storage indicators, filtering options, and ownership details.

- **Action Icons (Right-Side Floating Bar):** Quick access icons for:
  - Brainstorm Overview
  - Document Panel
  - Experts
  - Breakouts

- **Brainstorm Conversation Area (primary workspace):** Where users draft messages, tag others, insert XO prompts, and collaborate asynchronously.

How It's Used

- Create a Brainstorm around a single initiative, meeting, or decision that needs structured collaboration.
- Add the relevant members and set a clear objective so the workspace stays focused.
- Use the message bar to post updates, tag teammates, and ask XO for summaries, clarity, or next steps.
- Upload or reference key documents in Artifacts to keep everything in one place.
- Create Breakouts when a subtopic needs deeper exploration without disrupting the main thread.

Partner Guidance

When introducing this feature to clients:

- Show how XO can immediately summarize context, extract decision points, and highlight style dynamics.
- Emphasize how tagging teammates, asking XO questions, and using Breakouts keeps async work organized.
- Encourage clients to use Brainstorms in place of unnecessary meetings—letting XO keep momentum between touchpoints.
- Reinforce that Artifacts should hold all relevant documents so teams never lose context.
- Brainstorms give teams a structured, AI-supported space to think, align, and make progress—without the noise or fragmentation of traditional collaboration tools.

Brainstorms

Creating a New Brainstorm

Step 1 – Name your Brainstorm
- From the Brainstorms dashboard, click New Brainstorm.
- In the Create Brainstorm modal, enter a Brainstorm Name.
- Add a short Description so others understand the purpose and context.
- Click Next.

Step 2 – Add members
- Use the Search Members field to find colleagues.
- Click each person to add them to the Brainstorm.
- Remove anyone you added by mistake using the trash icon next to their name.
- When your initial list looks right, click Next.

Step 3 – Assign admins
- Decide who should help manage the Brainstorm.
- For each person, use the dropdown to choose Member or Admin.
  - Admins can edit settings, add/remove members, and assign other admins.
- The creator is marked as Brainstorm Creator by default.
- Click Next when roles are set.

Step 4 – Add Brainstorm visuals (optional)
- Upload a Brainstorm Image to represent the Brainstorm (e.g., project icon, team logo).
- Upload a Brainstorm Banner to appear at the top of the Brainstorm view.
- You can skip this step and add visuals later if you prefer.
- Click Create to finish setup.

Step 5 – Start the Brainstorm
Once created, you'll land in an empty Brainstorm with starter prompts such as:
- Ask WethosXO – e.g., "Hey @XO, tell me about the participants in this Brainstorm."
- Define goal – e.g., "Let's clearly define our goals so we have a concrete roadmap."
- Tag peers – e.g., "Hey @XO, can you tell me more about Darren's participation on this Brainstorm?"

Type in the Message or @XO bar and press Send to begin collaborating and let XO start summarizing and guiding the discussion.

Breakouts

Purpose:
Breakouts extend the flexibility of Brainstorms by allowing smaller groups to focus deeply on specific topics or challenges without disrupting the main discussion. They support parallel progress and faster decision-making, helping teams maintain agility while staying aligned to shared objectives.

What You'll See:
Each Breakout mirrors the structure of a Brainstorm but operates as a nested, purpose-built workspace:
- Breakout Overview: Shows the title, description, and goal that link it back to the parent Brainstorm.
- Members Panel: Lists only the subset of participants involved in the focused discussion.
- Conversation Area: Dedicated space for concentrated conversation and tagged input.
- Artifacts Panel: Holds files, notes, or drafts relevant to the Breakout's topic.
- Breadcrumb Trail: Appears at the top of the screen, showing the navigation path between the parent Brainstorm and the open Breakout.
- WethosXO: Remains active (when tagged) in each Breakout, providing synthesis, bias detection, and quick summaries to feed back to the main workspace.

How It's Used
- Breakouts are created from within a Brainstorm when a tangent, sub-topic, or issue needs deeper exploration.
- Members select only the colleagues required for that discussion, keeping focus tight and communication efficient.
- XO assists by summarizing progress, highlighting alignment gaps, and recommending next actions.
- Once the Breakout's goal is met, results can be published back into the main Brainstorm thread for broader visibility and decision-making.
- Multiple Breakouts can run simultaneously, enabling parallel workstreams within the same initiative.

Partner Guidance:
- Encourage clients to use Breakouts when a Brainstorm becomes broad or multi-faceted.
- They enable concentrated attention without losing overall context.
- Emphasize that XO keeps continuity between layers, ensuring that insights from small-group discussions are captured, synthesized, and reintegrated seamlessly into the main initiative.
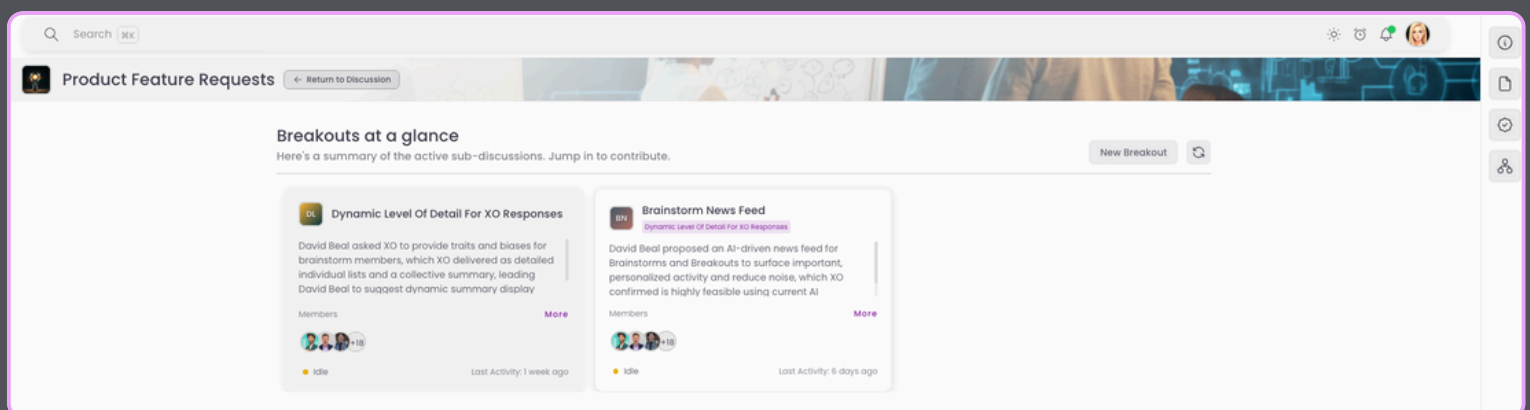
CalendarIQ

Bringing Behavioral Intelligence to Your Schedule

Purpose:
CalendarIQ connects your everyday meetings and events with behavioral insight. It helps teams prepare more thoughtfully, communicate more effectively, and debrief more productively by linking calendar data with Wethos Styles. This integration turns scheduling into a strategic collaboration tool, giving users visibility into how to approach each interaction—not just when it occurs.

What You'll See:
- Integrated Calendar View: Displays all upcoming meetings and events pulled from connected sources like Google Calendar or Outlook.
- Meeting Cards: Each card shows the event name, attendees, and direct behavioral insights based on participants' Wethos Styles.
- Pre-Meeting Insights: XO provides short behavioral notes, such as "Jordan (Order 5) prefers structured updates—send the agenda in advance."
- Post-Meeting Summaries (Coming Soon): XO generates concise recaps and highlights any recurring communication patterns or unresolved follow-ups.
- Behavioral Context Drawer: Access deeper insight into each attendee's communication preferences and potential collaboration dynamics.

How It's Used
- CalendarIQ syncs automatically with your connected calendar provider once integration is enabled.
- Before a meeting, XO analyzes all confirmed attendees and offers preparation tips tailored to each person's Wethos Style mix.
- After the meeting, XO can summarize key points, detect bias in written notes, and suggest follow-up actions.
- Teams use CalendarIQ to identify meetings where style imbalances—such as too many Visionary 5s and not enough Structured 4s—may affect decision quality.
- Over time, CalendarIQ patterns help leaders understand meeting load distribution, engagement balance, and behavioral representation across recurring sessions.
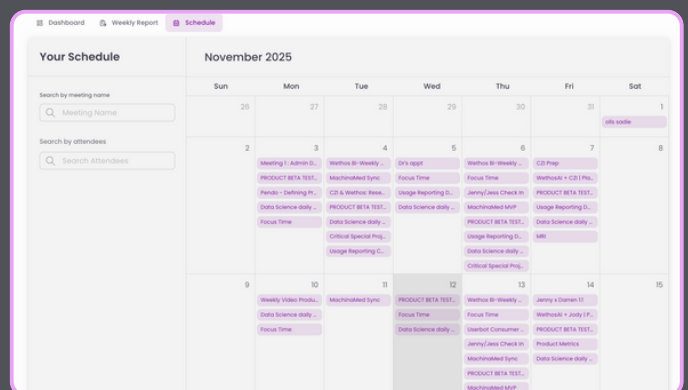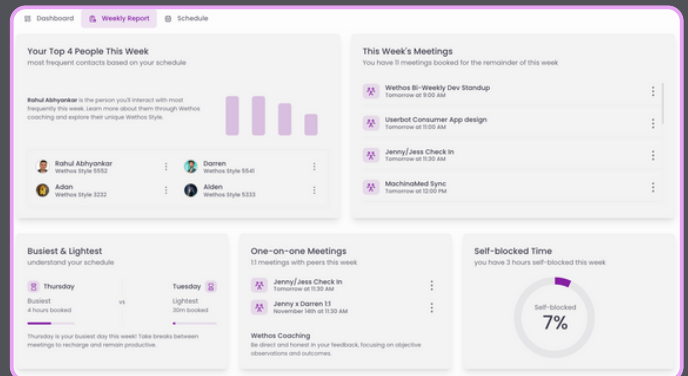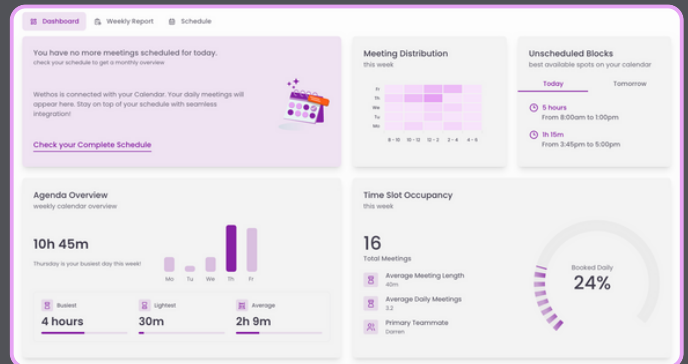
Partner Guidance:
When introducing CalendarIQ to clients:
- Demonstrate how XO surfaces behaviorally aware meeting prep insights—showing the difference between generic and adaptive preparation.
- Emphasize that the feature is not just about efficiency but interaction quality.
- Encourage teams to review patterns across recurring meetings to balance participation and reduce communication fatigue.
- CalendarIQ closes the gap between planning and psychology—making every meeting more intentional, inclusive, and productive through WethosAI's behavioral intelligence.

Documents & Artifacts

Turning Knowledge into Insight

Purpose:

The Documents section serves as the central workspace for shared materials within WethosAI. It connects locally uploaded files and external content from Google Drive Syncpoints, ensuring that teams can access the same resources, collaborate in context, and use XO to generate insight directly from their organizational documents.

What You'll See:

- Document Library: Displays all files stored or synced to the current Group or Brainstorm.
- Google Drive Syncpoints: A direct link between your organization's shared Drive folders and WethosAI, allowing selected documents to appear automatically in the Documents tab.
- File Cards: Show document names, owners, and modification dates for quick reference.
- Preview Window: Opens files inline for review and discussion without leaving the platform.
- XO Actions: Within any file, XO can summarize content, extract themes, or flag relevant patterns tied to team behavior.
- Search Bar: Enables quick navigation across all uploaded and synced materials.
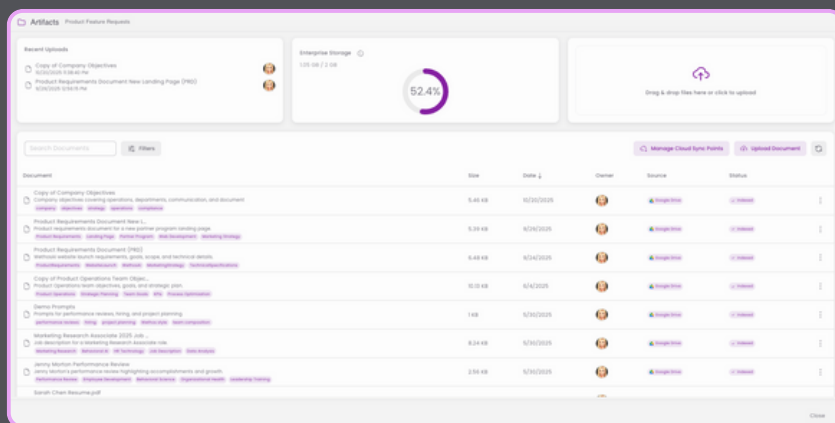
Access Artifacts through Brainstorms in the side bar and click "manage" to be taken to this screen.
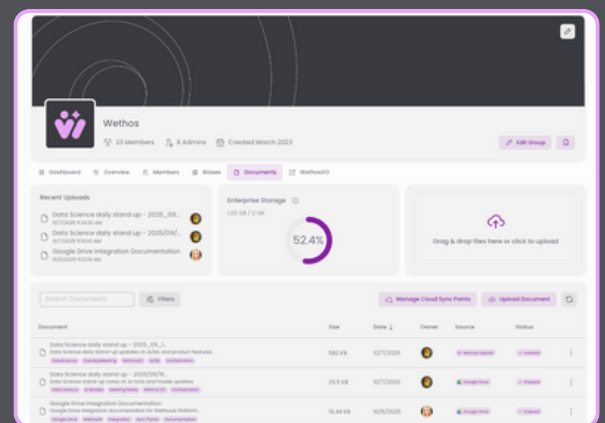
Access Documents through Groups and look for the Documents Tab

How It's Used

- Teams upload internal documents or connect shared Google Drive folders through Syncpoints.
- Once synced, any updates in Drive automatically appear in the corresponding Group or Brainstorm.
- XO analyzes these documents to generate summaries, identify tone or decision biases, and connect insights back to behavioral data.
- Members can reference or tag documents directly in Shared Conversations or Brainstorms for continuity.
- The entire library remains searchable by keyword, keeping critical content accessible across workflows.

Partner Guidance:

When demonstrating this feature to clients:

- Explain that Google Drive Syncpoints maintain a live connection—no need for repeated uploads.
- Emphasize that XO's contextual summaries make large files actionable in minutes.
- Encourage teams to organize shared folders intentionally so that synced documents reflect current priorities.

By linking organizational knowledge with behavioral understanding, Documents transforms shared content into a continuous source of learning and alignment.

Traits & Biases Analysis

Dynamic Profile

Purpose:

The Traits & Biases Framework enriches individual and team profiles by analyzing authentic workplace interactions. It interprets language, communication, and decision patterns from synced meeting transcripts, identifying the degrees to which traits and cognitive biases are expressed in context.

What You'll See: (by asking Wethos XO)

- Traits Dashboard: Displays degrees of expression across 86 behavioral traits.
- Bias Patterns: Identifies recurring cognitive biases (e.g., Anchoring, Availability Heuristic) detected in real conversations.
- Contextual Insights: Summaries explaining how and when these traits and biases appear—showing flexibility across situations.
- XO Integration: XO references this data in coaching prompts, enabling real-time awareness of communication tendencies.

How It's Used

- Create a Sync Point for Transcripts:
  - In Google Drive, create a folder (e.g., Team Meeting Transcripts – Wethos Sync).
  - Connect it as a Sync Point within WethosAI.

- Enable Analysis (Org Admins Only):
  - In the WethosAI Platform, open a synced transcript, click the : menu, and select **Enable Traits and Biases.**
  - The system analyzes each participant's contributions to enrich individual profiles.

- Profile Enrichment:
  - Results update automatically as more transcripts are synced, revealing evolving communication patterns, strengths, and bias tendencies.
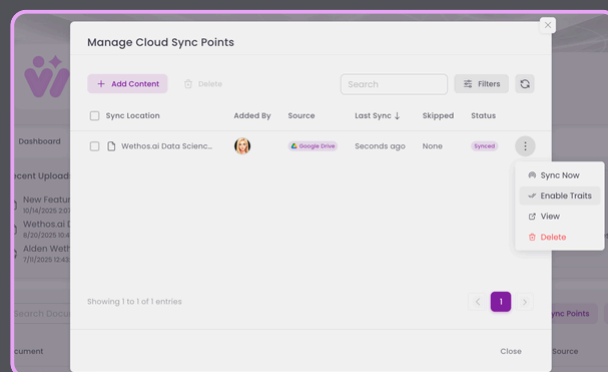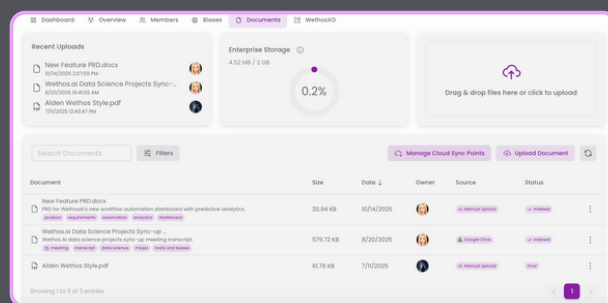
Partner Guidance:

Partners should emphasize that Traits & Biases Analysis provides:

- Continuous Learning: Profiles evolve with each synced transcript—no retesting required.
- Data-Driven Accuracy: Insights reflect observed behavior, not self-reporting.
- Privacy and Control: Only admins can enable or disable analysis for specific folders or files.
- Integrated Value: Combined with Wethos Style, it completes the picture—Blueprint + Behavior in Action.

Encourage clients to use this feature for leadership coaching, team composition reviews, and bias awareness training. Together, Documents, Sync Points, and Traits & Biases form a closed loop: real work feeds real data, and insight flows back into daily collaboration.

Comfort Index
Measuring Team Alignment

Purpose:
The Comfort Index measures how aligned individuals and groups feel with their work environment. It functions as WethosAI's behavioral pulse check—translating group sentiment and alignment into measurable data that leaders can act on. The metric helps identify early signs of disengagement, friction, or imbalance before they escalate into performance or retention issues.

What You'll See:
- Group-Level View: Displays the average Comfort Index score across groups, tracked over time.
- Individual View: Shows how each person's comfort level compares to the group average.
- Behavioral Segments: Links changes in comfort to Wethos Style patterns—for example, lower Order comfort may signal unclear structure or shifting priorities.
- XO Insights: Automatically generates summaries explaining which dimensions are trending positively or negatively and why.

How It's Used
- Employees periodically provide short check-ins on how their current work aligns with their strengths and preferences.
- XO combines these self-reported inputs with behavioral signals to calculate a Comfort Index score for each user and group.
- Leaders review the data to identify trends, such as declining comfort in a specific scale or role type.
- XO offers contextual recommendations—ranging from redistributing responsibilities to adjusting group structure or communication cadence.
- Comfort data can also inform coaching plans, feedback sessions, and organizational development initiatives.

Partner Guidance:
When working with clients, frame the Comfort Index as both a leading indicator and a learning tool. Encourage them to:
- Review comfort data monthly, not reactively.
- Use it to start qualitative discussions rather than drive one-sided conclusions.
- Pair insights with XO's recommendations to reinforce trust and transparency.
- By integrating behavioral understanding with comfort analytics, organizations can identify misalignment early, strengthen engagement, and maintain a healthier balance between structure, performance, and well-being.
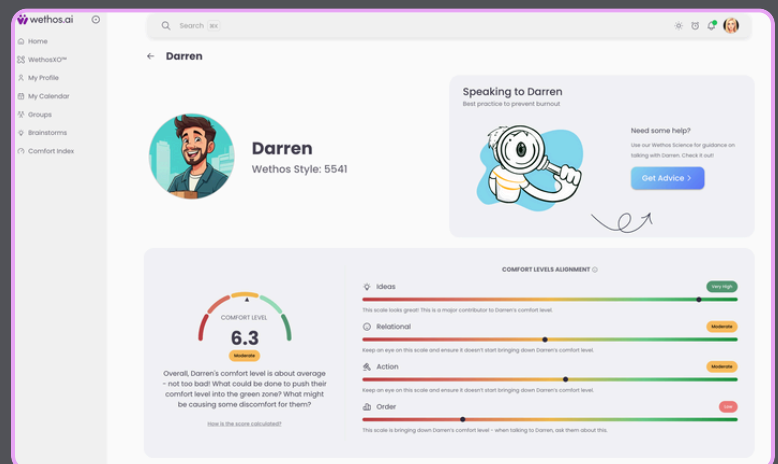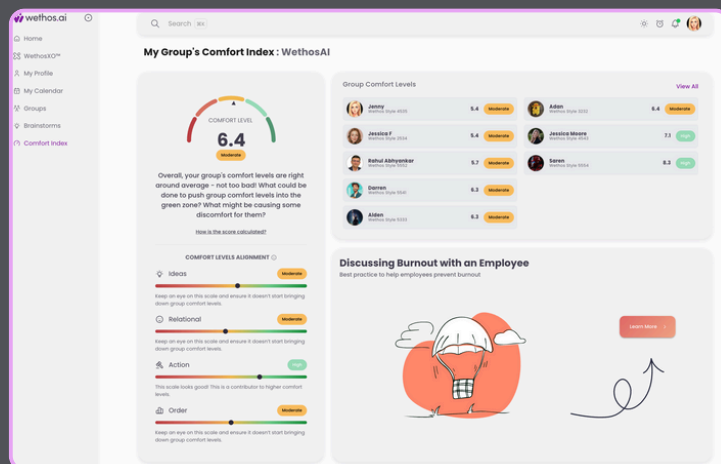
Admin Console

Managing Users and Organizational Settings

Purpose:

The Admin Console gives organizational administrators complete visibility into how WethosAI is configured and used across their company. It serves as the operational backbone for managing members, groups, Brainstorms, licenses, and connected integrations—ensuring the platform remains secure, organized, and aligned with organizational needs.

What You'll See:

- Edit Org: the ability to control what features are turned on or off & control visibility
- Manage Members: A full directory of your organization's users
- Manage Groups: A list of all Groups in the organization
- Manage Brainstorms: A consolidated view of all Brainstorms created across the organization
- Licenses: A central page for reviewing and managing license usage
- Billing: A subscription and checkout view
- Connected Apps: A hub for managing third-party integrations (e.g., Slack)
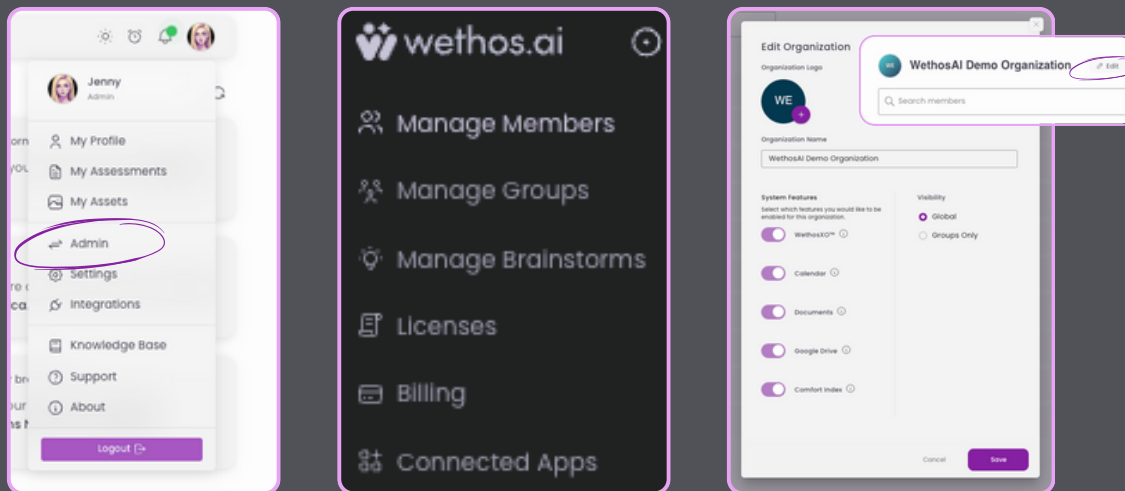
How It's Used

- Add or deactivate members as teams grow or change.
- Create, restructure, or manage Groups to support organizational workflows.
- Oversee Brainstorms to maintain alignment, proper permissions, and collaboration clarity.
- Assign licenses and reallocate unused seats as needed & upgrade plans or adjust seat counts through the Billing page.
- Manage integrations to support communication and sync with external tools.
- Configure global settings to enable the right features, apply branding, and control how capabilities roll out.

Partner Guidance:

When guiding clients through the Admin Console:

- Position it as their command center for governance, structure, and platform health.
- Encourage regular reviews of Members, Groups, and Brainstorms to keep everything clean and up-to-date.
- Recommend enabling features gradually via Global Settings → Visibility when rolling out to large teams.
- Highlight the importance of assigning licenses intentionally to maximize value.
- Suggest connecting Slack early to increase engagement and bring XO into daily workflows.
- Emphasize limiting admin privileges to maintain strong governance and clean data.
- The Admin Console unifies organizational oversight, licensing, integrations, and feature configuration—ensuring WethosAI stays aligned with the company's structure, needs, and growth.

Platform Flow Summary

Connecting Every Layer of WethosAI
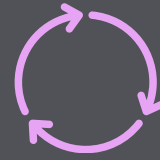
How Data Flows Through the Platform
- Individual Insight → (My Profile)
  - Each user's Wethos Style establishes the foundation of the behavioral model—capturing how they think, communicate, and act.
- Team Dynamics → (Groups + XO)
  - Styles aggregate within Groups, creating shared dashboards that visualize cognitive diversity and potential bias. XO interprets these patterns to generate real-time coaching and summaries.
- Active Collaboration → (Brainstorms + Breakouts)
  - When teams shift from structure to initiative, Brainstorms and Breakouts translate insights into action—turning behavioral awareness into productive collaboration.
- Continuous Learning → (Documents + Sync Points)
  - Work products, meeting notes, and documents feed back into the system, allowing XO to analyze language patterns, identify evolving traits, and connect learning across time.
- Organizational Oversight → (Admin Console + Comfort Index)
  - Admins monitor adoption, balance, and engagement, ensuring that behavioral insights remain accurate, ethical, and aligned with evolving organizational priorities.

In Practice

An organization launches a new product initiative.
- Leaders use Recommend a Group to assemble a cross-functional Project Group.
- The team collaborates in Brainstorms, spinning up Breakouts for pricing and positioning.
- Their shared Documents folder syncs automatically through Google Drive Sync Points.
- XO summarizes progress and identifies decision biases during each phase.
- Over time, Traits & Biases Analysis enriches individual profiles based on transcript patterns, while the Comfort Index monitors alignment and well-being.
- Finally, the Admin Console aggregates performance metrics—turning daily collaboration into measurable organizational intelligence.


In Practice

When presenting the WethosAI ecosystem to clients:
- Emphasize that no feature operates in isolation—each is a node in a continuous feedback loop between behavior, collaboration, and performance.
- Encourage gradual adoption: start with Profiles and Groups, then expand to Brainstorms, Sync Points, and Traits & Biases Analysis as teams mature.
- Reinforce that WethosAI is not just a platform but a living system—one where human insight and AI intelligence evolve together to create more self-aware, adaptive, and aligned organizations.
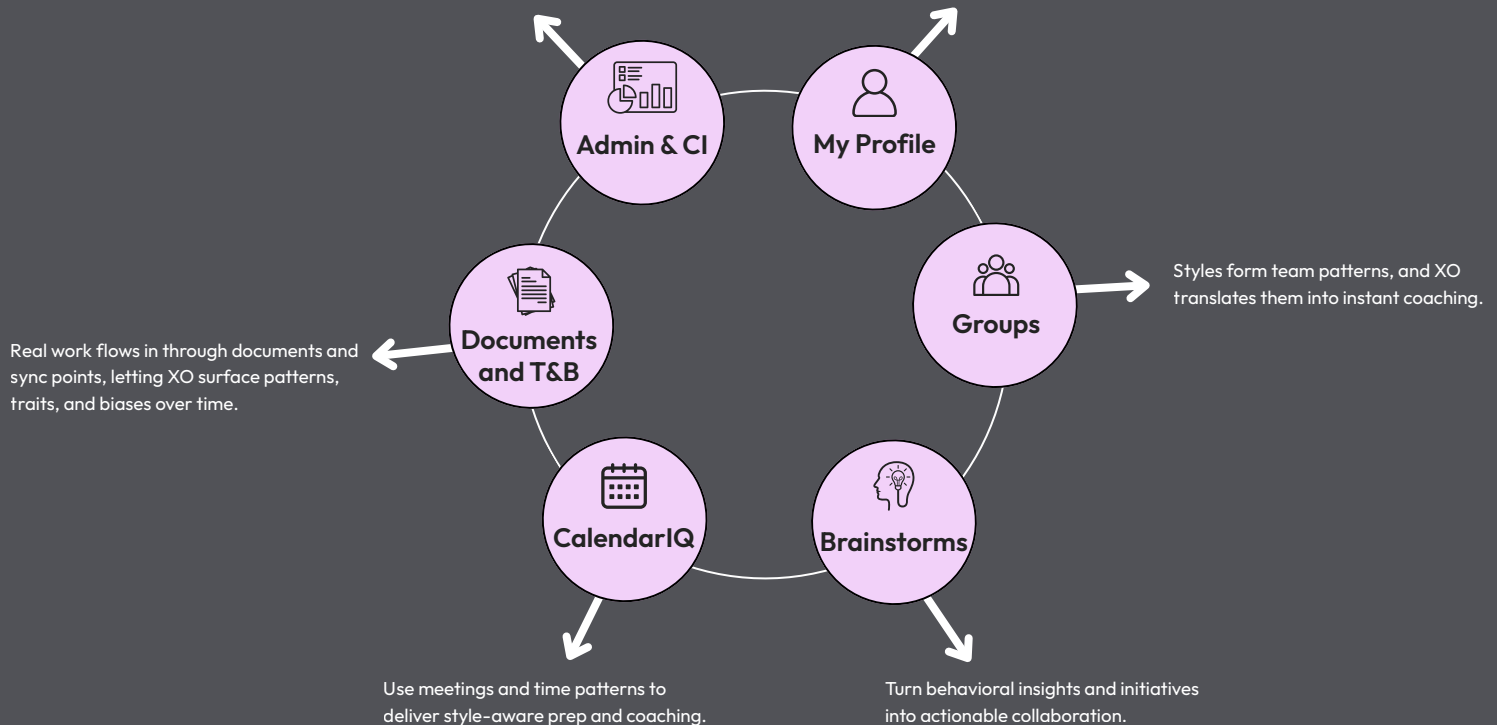
Platform Flow Summary
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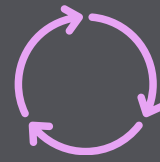
Admins track adoption and alignment to keep behavioral intelligence accurate and useful.

Wethos Style establishes the foundation of the behavioral model

Admin & CI

My Profile

Documents and T&B

Groups

Styles form team patterns, and XO translates them into instant coaching.

Real work flows in through documents and sync points, letting XO surface patterns, traits, and biases over time.

CalendarIQ

Brainstorms

Use meetings and time patterns to deliver style-aware prep and coaching.

Turn behavioral insights and initiatives into actionable collaboration.

- **Individual Insight → (My Profile)**
  - Each user's Wethos Style establishes the foundation of the behavioral model—capturing how they think, communicate, and act.
- **Team Dynamics → (Groups + XO)**
  - Styles aggregate within Groups, creating shared dashboards that visualize cognitive diversity and potential bias. XO interprets these patterns to deliver real-time coaching and summaries.
- **Active Collaboration → (Brainstorms + Breakouts)**
  - When teams shift from structure to initiative, Brainstorms and Breakouts translate insights into action—turning behavioral awareness into productive collaboration.
- **Time Intelligence → (CalendarIQ)**
  - Upcoming meetings, workloads, and time patterns activate style-aware prep, alignment checks, and coaching—bringing behavioral insight directly into daily execution.
- **Continuous Learning → (Documents + Sync Points)**
  - Work products, synced folders, and meeting notes feed back into the system, allowing XO to analyze language patterns, identify evolving traits, and connect learning across time.
- **Organizational Oversight → (Admin Console + Comfort Index)**
  - Admins monitor adoption, balance, and engagement—ensuring the organization's behavioral intelligence stays accurate, ethical, and aligned with evolving priorities.