Helm MVP Instructions

Getting started with the Airtable template

Getting started

Downloading

To get started using the Helm MVP, use this link to go to the Airtable and use our template. Once on the page, click 'Copy base'.

If you do not yet have an account, you will be asked to create one at this step. Go through their sign up process if prompted, then arrive at your workspace page where you should see and click into the base titled 'Helm MVP'.

If you already have an account, you will be taken directly to your workspace page where you should see and click into the base titled 'Helm MVP'.

Role profile

The first step in using the Airtable is collecting the role profile information for each member within your team / organization. To do so, within the Role Profiles tab, click 'VIEWS', then click the 'Create your role profile' form. From the form page, click 'Share form' and copy the link. Distribute this link to each member within your team/organization for them to get onboarded.

Objectives

The next step is to create the objectives which your team/organization is working on. This is done within the 'Objectives' tab, and can be completed through the grid view by adding a row and filling out each field with the exception of progress (this will be done during 1-1s). This can also be accomplished through the 'Create an initiative' form view.

1-1s

Finally, you can schedule and manage 1-1s. Schedule 1-1s by going into the '1-1s' tab and adding a new row, then fill out who is involved and what the conversation is expected to revolve around. 1-1s are then facilitated by entering notes and initiative progress into the same row. Initiative progress is recorded by clicking into that column, clicking the plus, and at the bottom of the popup clicking '+ Add new record'. There you are able to select an initiative by clicking '+ Link to a record from Objectives', selecting which one to record, and giving the progress by clicking on the stars.

Use cases

Directory

Use Helm MVP to find the right people in your organization and discover their work styles and communication preferences with role profile information. By going into the ‘Role Profiles’ tab, an employee is able to sort, filter, and view their colleagues to better understand how everyone works together.

New hire onboarding

Use Helm MVP to clarify role expectations, get to know your teammates and how to work with them with role profiles. When an individual is sent the role profile form, they will need to have an understanding of their role to fill it out. Once complete, they can see others to understand where they fit within a company.

Team meetings

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Periodical reviews

Managers can use Helm MVP to reference weekly progress and development for every employee to contextualize periodical (quarterly or annual) reviews with continuous data points by reviewing past objectives and 1-1s.