Evalu8ing

Manager's Guide

This guide describes **Evalu8ing** Version 8079.01.01 and later.

Welcome to **Evalu8ing**.

Evalu8ing is the only online survey system that allows you **to** evalu8 the status of the complex relationships between up to eight groups of people working with each other. This could be;

- up to eight groups within your organization,
- up to eight offices in various locations,
- up to eight suppliers all working together on a project,
- or a combination of them all.

Once you create a free online account, your computer becomes a tool to assess collaboration, relationships and performance amongst these groups. Register for a free online account at http://survey.evalu8ing.com/

Overview:

With **Evalu8ing** each member of your extended team expresses their opinion about key supplier/business teams, and the Overall and 'Question by Question' scores are presented in 3 ways that shows strengths and weaknesses between teams:

1. Participant Comments – presented in an excel spreadsheet
2. Raw Data Scores – presented in an excel spreadsheet
3. Intuitive, easy to interpret Charts – polygons displaying colored lines

How to read the Evalu8ing Charts:

The color closest to your group indicates the score given to you by the other group. The color indicates the relationship status:

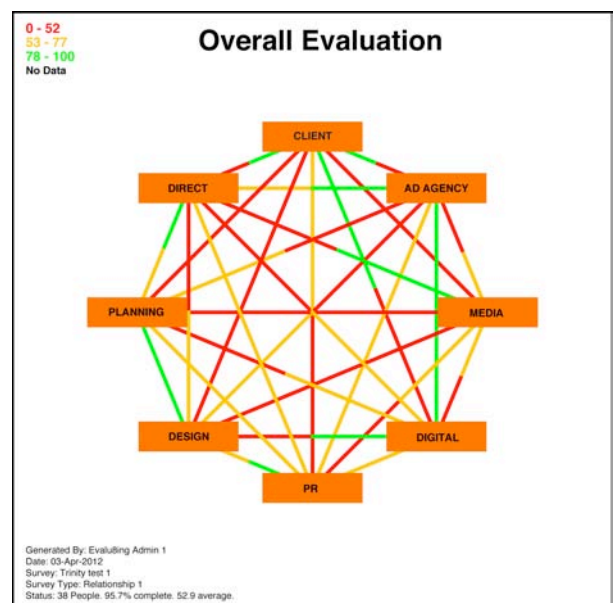**Green** - Upper quartile, "Relationship is working well".

Yellow - Above survey average, "Relationship may need attention".

Red - Below survey average, "Urgent attention required".

For example, Figure 1, show the results of the overall survey, where the **Client** (top) sees the relationship with the **Ad Agency** (North East position) as **Red** or "Urgent attention required".

Evau8ing also drills down and looks at results Question by Question'.

Evalu8ing comes standard with five question templates specifically designed to measure key business areas. You can also customise and create your own question templates.

See Table of Contents for Version 8079.01.01 *NEW Features

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Getting Started - Register

1. Point your browser to http://survey.evalu8ing.com/

2. On the left of the page click on "Create an Account".
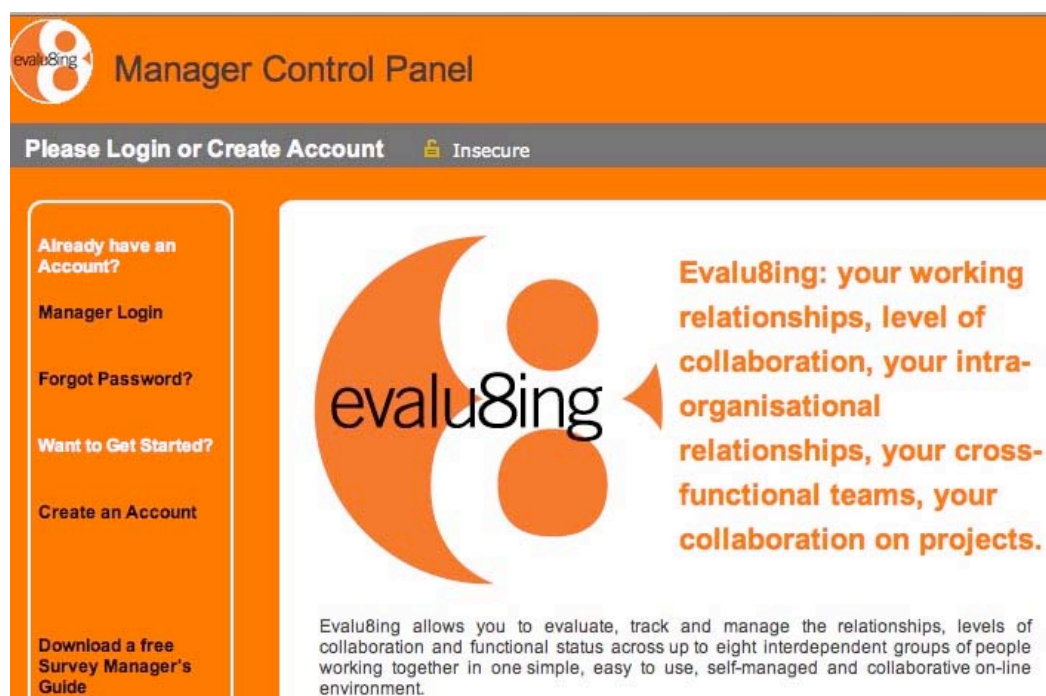
3. Enter your account details. Some of these details will appear on the live surveys, which participants will see.

|		Example
Account Name	This is the name we will use for you in surveys and other communication.	John Citizen
Email	Your email address. This must be correct. It is used to send you a password for login or if you forget your password in the future.	john.citizen@sydtel.com.au
Organisation Name	This is the label that will appear throughout the survey and will be seen by your respondents. Your company name would be a good choice. It can be varied for each survey.	Sydney Telecoms
Your Login Name	Your preferred login user name. We may choose a random value that you can change to any word not already in use.	John1
Graphic Characters	Type in the characters you see displayed. This is to prevent non-human signups.	5VGC

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4. Now check your inbox for our registration e-mail. Also check your spam / junk mail folder in case it was diverted there. The e-mail will be from "Evalu8ing Support" support@evalu8ing.com and the subject will be "Evalu8ing Registration details from Evalu8ing survey web site (survey.evalu8ing.com)".

The e-mail will include a link that will be similar to this

"Please login to the survey web site at http://survey.evalu8ing.com/manager/index.php?uname=jason1 and create your survey."

5. Click on the link or copy and paste the link into the address bar of your browser.

6. Enter your username and password. Your username should be filled in.

7. You may wish to bookmark this link.

8. Your first welcome screen looks like this...
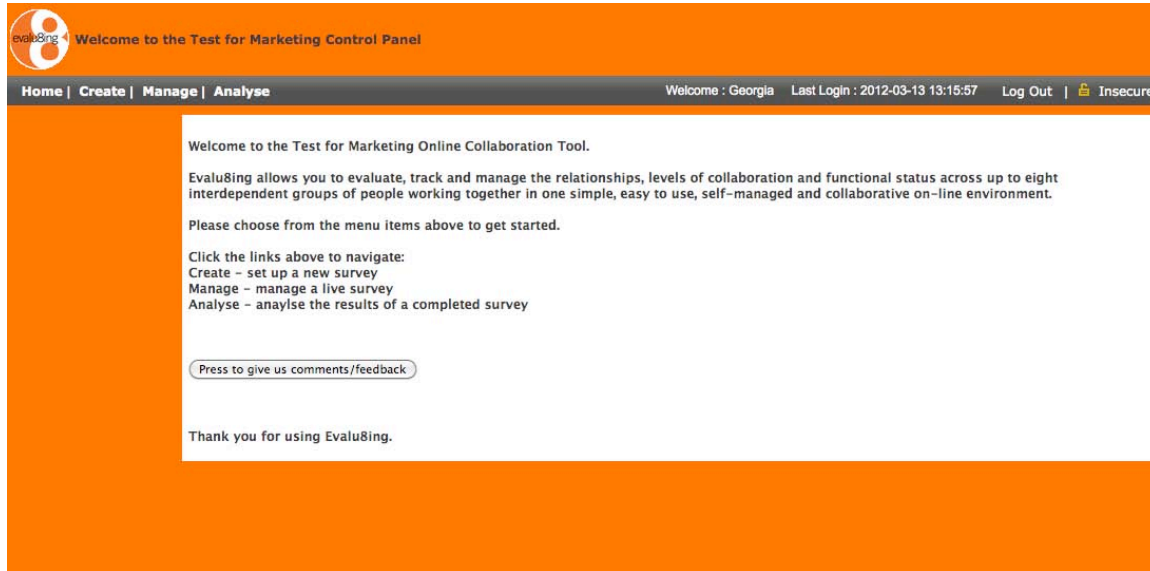
9. Note the Home/Create/Manage/Analyse tabs. This is where you can create, manage and analyse your evalu8ing survey:

Create – set up a new survey
Manage – manage a live survey
Analyse – analyse the results of a completed survey

10. You can use the feedback button to give us comments or feedback about the **Evalu8ing** product.

Create

Choose 'Create' from the menu bar at the top of the screen.

The Create panel allows you to create your surveys.

View the Create Menu contents. Here you will see 3 options to consider before adding any new survey.

More options will be displayed after you create your first survey.
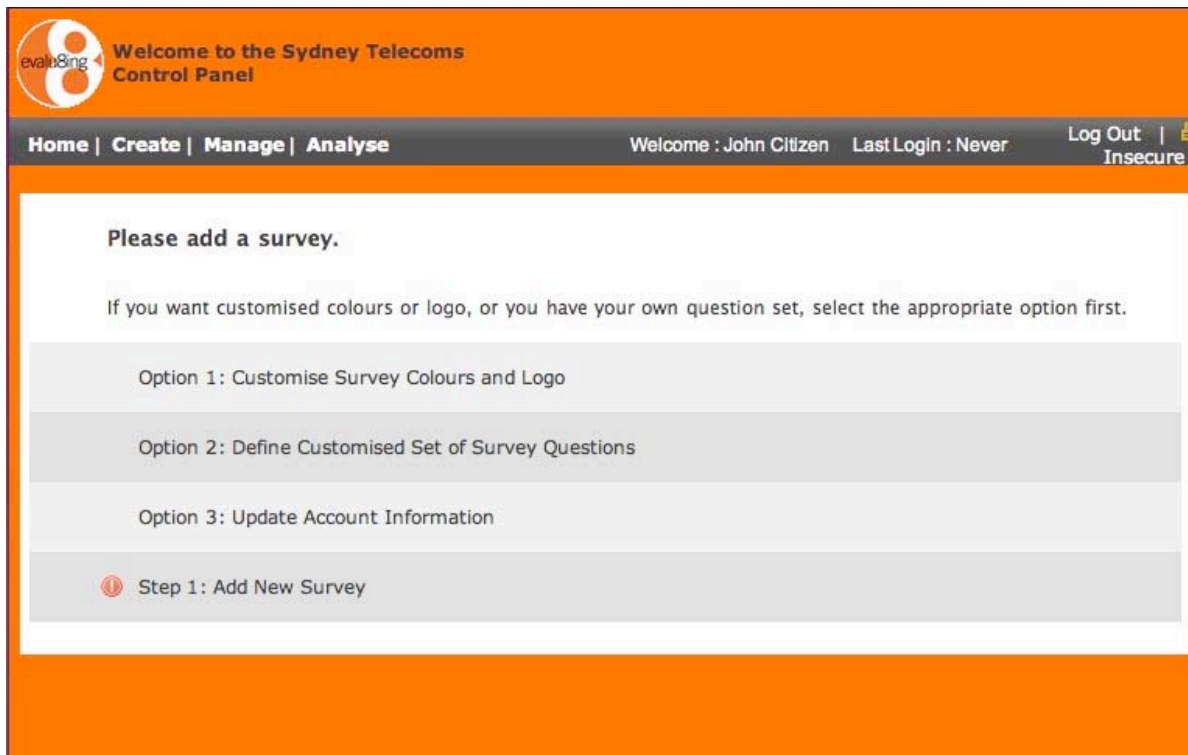
Create: Option 1 – Customise Survey Colours and Logo

1. Choose **'Option 1: Customise Survey Colours and Logo'** from the menu.

2. **Evalu8ing** allows you to customise your survey with your own corporate colours and logo. Any modifications will be seen by the participants, they will not affect the manager screens.

3. You can upload a logo and modify the header background and text colour, the main page background colour, and the logo image displayed in the top left corner.

4. Your logo will be resized to 60 x 60 pixels, so you need to upload an image that is square otherwise it will look distorted. You can use a graphics package to create your image prior to uploading.

5. Always check the colour scheme before using it on a live survey.

6. Changes made here will affect FUTURE surveys not any current surveys (paid or not paid). To change a current survey use the EDIT link on the left hand side of the MANAGE screen.

7. Press the SAVE and RETURN TO MENU buttons.

Create: Option 2 – Define Customised Set of Survey Questions

1. Choose **"Option 2: Define Customised Questions"** from the menu.

2. **Evalu8ing** allows you to set up your own set of survey questions. The product comes standard with a range of template surveys designed by our international team using proven themes. However, you can add a new template with your own custom name and set of questions. Your custom survey can then be selected when in the Create / Add Survey screen.

3. Enter the name of your template. Your set of questions will be referred to by this name. Choose a name like "Sydney Telecom Standard" to show this is your unique set of questions.

4. After adding the name, the display will change and you can press "Add Question" or click on the link with the same name as your created survey.

5. When finished, press the BACK button.

Create: Option 2 – Define Customised Questions, cont'd

1. Add your questions, then click SAVE after each.

2. Edit your display sequence if required.

3. Tick "DELETE" to remove a question, then SAVE.

4. "Label" is automatic (Do not put "Q1" etc in your questions, this is automatic)

5. Question 1 is automatic and cannot be removed. (If you do not want this question answered then you can choose to delete this question in the 'Edit Survey' pop up box in the MANAGE panel.

6. Make sure these questions are correct. Once you create and pay for a survey using these questions you cannot edit that survey.

7. Press the SAVE and BACK buttons.

Create: Option 3 – Update Account Information

1.   Choose "**Option 3: Update Account Information**"

2.   Note: the SAVE buttons relate to their own upper or lower section.

3.   Here you can edit your personal details. You can change your username as long as it is not in use by another person.

4.   Press the SAVE and RETURN TO MENU buttons for each area.

Create – Add New Survey

1. Choose Step 1: **"Add New Survey"**. More options will be displayed after you add your first survey.

2. Select a template from the drop down list. Any customized set of survey questions you have created will also appear here. You can also click on the button of the template name to view each question in that standard survey.

3. Once you choose your template, give the survey a title. This is used in screens and reports and will help you identify this survey. It is a good idea to name your survey with a date in its name, for example, "SydTel Supplier Relationships 2011"

4. The default start and end dates are "today" and two months into the future, adjust date and start times as required. The help e-mail defaults to your sign-on e-mail address. This is where survey participants will direct enquiries. You can edit this now or later.

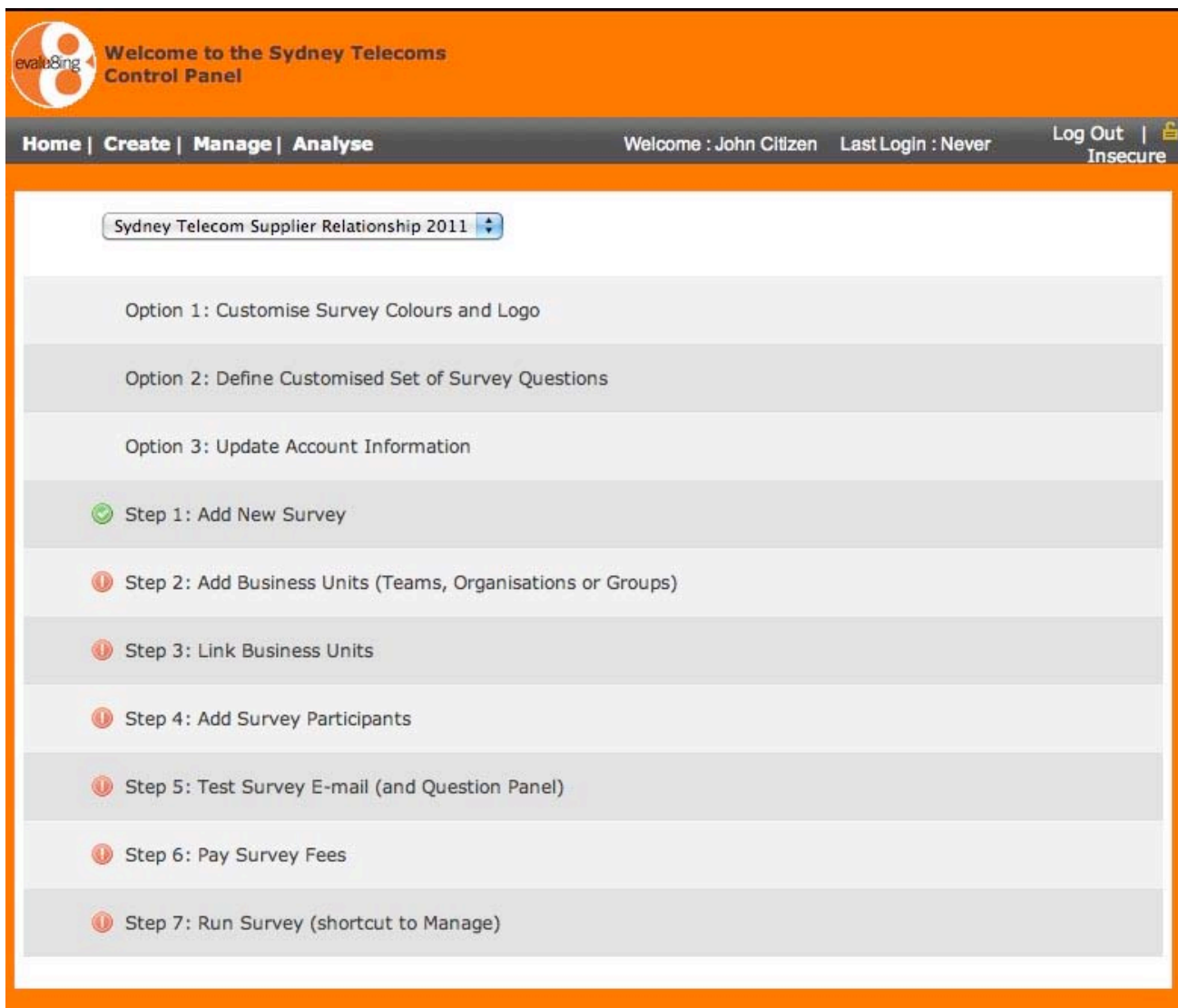5. Press the SAVE & NEXT button or RETURN TO MENU.

Create

Once you have "Added a New Survey", the remaining Steps will appear in the Create menu.

And as you make your way through the steps, the buttons will move from Green to Red, indicating your progress, and ensuring you don't miss a step.

Create – Add Business Units

1. Choose "**Step 2: Add Business Units (Teams, Organizations or Groups)**".

2. People who complete your surveys must be members of a group of some sort. You can evaluate the relationships between internal business units (procurement, marketing, finance, etc.) as well as suppliers (creative, digital, media, PR, etc.) other offices (eg. Sydney, New York, Singapore, etc.) or a combination of them all.

    You can create unlimited numbers of groups but you can only have a maximum of eight (8) groups in any single survey. Use this screen to add business units and to choose which ones are active in this survey. "Short Name" is used in some reports where space is limited and "Display Sequence" controls the order in which the business groups are displayed.

3. To add groups, press the "add more" link.

4. Press SAVE after adding each team.

5. If you have more than 8 groups, only 8 may be active in any one survey.
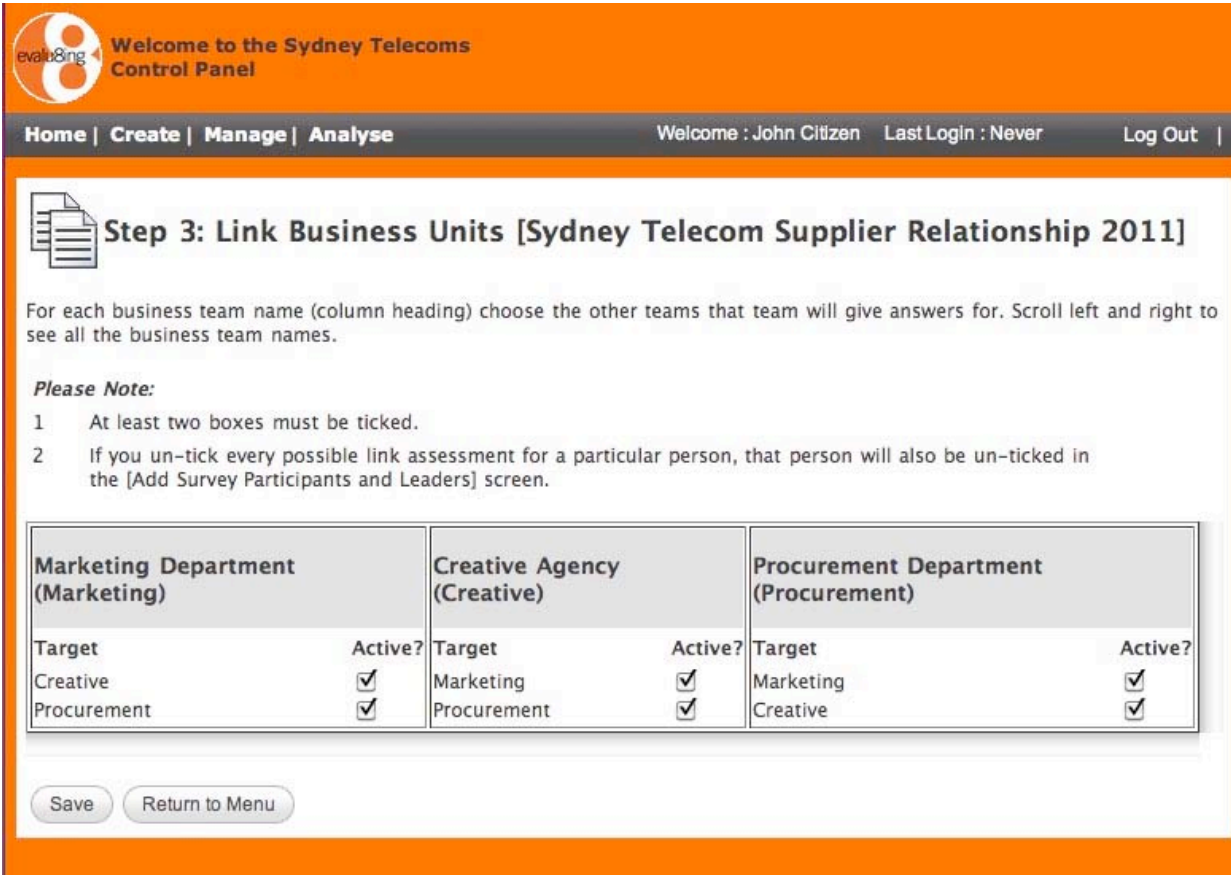
6. Change Display Sequence for a specific order to appear in your reports and graphical images.

7. When all your groups are added, press SAVE and RETURN TO MENU buttons.

Create – Link Business Units

1. Choose "**Step 3: Link Business Units**"

2. You can control which groups evaluate which other groups. So the **MARKETING** team might evaluate **CREATIVE** but not **PROCUREMENT**, because the **MARKETING** team may not deal with **PROCUREMENT** at all. Simply mark active those groups who will evaluate each other.

3. For each team in the headings, tick the teams that group will assess.

4. When finished, press the SAVE and RETURN TO MENU buttons.

5. Note: if your survey is directed at a single group and that group does not have any people within it who are actually doing the survey - you still need to click on that group in the LINKS screen otherwise the chart will not display. The way you avoid having people in that group doing the survey is by not adding them to the participant screen.

Create – Add Survey Participants

1. Choose "**Step 4: Add Survey Participants**"

2. You need to add the names and e-mail addresses for all the people who will participate in the survey.

3. Import Participants button
    This option allows participant names to be imported from an Excel which saves time compared with individually entering the names into the web screen. Managers can ask team leaders to send an Excel document with team member names and email addresses pre-entered.
    Instructions are displayed in the pop up window as follows. If you choose the option "Automatically set the salutation to the first word in the participant name:" then the email salutation (i.e. "Dear XXX") will be set to the first word in the person's name. Note: the Excel needs to be saved as ".xls" format and not ".xlsx"

Your excel file should have three columns as follows: Group Name, Participant Name and Email. The header (first) row is ignores. Enter as many data rows as you wish. For example, your Excel will look something like this:

Group Name	Participant Name	Email
Client	Tony Weeks	tonyw@microsoft.com
Client	Fiona Johnson	Fiona@google.com.au
Strategic Planning	Kate Ansett	kate@comeplanet.org.uk
Strategic Planning	Eliza McNair`	eliza@comeplanet.org.uk

To assist with making the spreadsheet, your current valid business units to use in Column A (Group Name) are: Client, Strategic Planning, CRM, Financial, Production, Commercial, Media. Valid data will be displayed and you can choose to upload or not. Invalid data will not be uploaded. The email address must be valid, the person's name unique and the group name already entered for this survey.

Automatically set the salutation to the first word in the participant name:

Survey Name	Internal Stakeholder Survey
Choose	Note: Use "xls" file, not "xlsx"

4.   As a Manager in this process, you can also be a Participant in any survey. To so this you can use the same email address as was used in setting up the account, HOWEVER the system will not accept a Manager and Participant with EXACTLY the same name. Therefore you will need to be added to the Participant list under a slightly altered name to the one you used to set up your account, ie add your middle name as a Participant. For example, you may have used "John Smith" to set up the account, and then use "John Andrew Smith" as your Participant name.

5.   Press SAVE after adding each person.

6.   When finished, press the RETURN TO MENU button.

Create – Test Survey Email

1.   Choose "**Step 5: Test Survey E-mail (and Question Panel)**"

2.   The test e-mail and question panel is a replica of the survey manager screen, with the following differences:-

    a.   It is available to you before the payment is made.

    b.   E-mails are delivered to the survey help e-mail address, which is usally your e-mail address. This allows you to read the email and verify it before sending to actual participants.

    c.   You are allowed to preview the survey by pressing the "Preview As" button. This is especially helpful to check any customised survey colours and logo chnages you may have made.

    d.   Any changes you make in the survey are not saved.

Create – Pay Survey Fees

1. Choose "**Step 6: Pay Survey Fees (with PayPal)**"

2. Each time you run a survey you are charged $250 USD per team. A single Evalu8ing survey can handle up to 56 relationships between up to 8 different groups

3. There are 2 options for payment.

   a. You can make an online payment before you can run any survey. We use PayPal (http://www.paypal.com.au/) to process our payments. PayPal is the safer, easier way to pay and get paid online. The service allows anyone to pay in any way they prefer, including through credit cards, bank accounts, buyer credit or account balances, without sharing financial information. Once payment is received, you can start inviting your survey participants.

   b. You can send an email to people@evalu8ing.com and request another payment method that suits you including invoice, phone payment and cheque or money order. Once we have agreed your payment method, we will provide you with a 100% discount coupon to use on the web site. If you have a discount coupon code, simply enter the code and press RECALCULATE to apply your discount percentage.

4. When finished, press the RETURN TO MENU button.

Manage

1. Choose 'Manage' from the menu bar at the top of the screen.

2. The Manage panel allows you to manage your live surveys, control your survey, send invitations to participants and review the number of people who have completed the survey.

3. View the manage Menu contents on the LHS of screen. Here you will see 3 options:

   a. Participants

   b. Edit Survey

   c. Standard Chart Colour

   d. Email settings
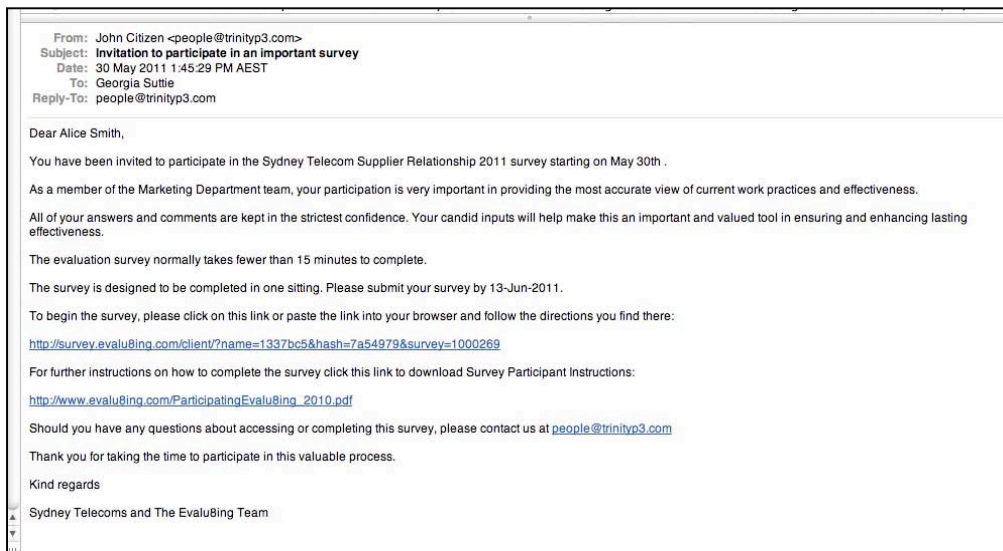
Manage - Participants

1.   Choose "**Participants**" from the menu bar at the left of the screen.

2.   If you have more than one survey, choose the correct survey from the drop down list.

3.   If you are answering the survey, first invite yourself using the "Invite" button next to your name. Otherwise invite someone who you work closely with. This suggestion is made so that if there are any problems you can deal with them before sending the survey invitation to potentially hundreds of people. The most likely problem would be that your company mail server treats the survey invitation e-mail as spam and will not let it pass. In this case, contact your email technical support team and ask them to allow this type of e-mail through the firewall.

4.   Press "Invite All" to send e-mail invitations to all participants, or "Invite" to send an e-mail to just that person.

5.   Press "Refresh" at any time to update the 'percentage complete' display.

6.   Survey participants will receive an e-mail asking them to complete the survey and in this e-mail there will be a link to the actual survey. The link includes details unique to this person and therefore there is no need for that person to login with a username and password.

> From: John Citizen <people@trinityp3.com>
> Subject: **Invitation to participate in an important survey**
> Date: 30 May 2011 1:45:29 PM AEST
> To: Georgia Suttie
> Reply-To: people@trinityp3.com
>
> Dear Alice Smith,
>
> You have been invited to participate in the Sydney Telecom Supplier Relationship 2011 survey starting on May 30th .
>
> As a member of the Marketing Department team, your participation is very important in providing the most accurate view of current work practices and effectiveness.
>
> All of your answers and comments are kept in the strictest confidence. Your candid inputs will help make this an important and valued tool in ensuring and enhancing lasting effectiveness.
>
> The evaluation survey normally takes fewer than 15 minutes to complete.
>
> The survey is designed to be completed in one sitting. Please submit your survey by 13-Jun-2011.
>
> To begin the survey, please click on this link or paste the link into your browser and follow the directions you find there:
>
> http://survey.evalu8ing.com/client/?name=1337bc5&hash=7a54979&survey=1000269
>
> For further instructions on how to complete the survey click this link to download Survey Participant Instructions:
>
> http://www.evalu8ing.com/ParticipatingEvalu8ing_2010.pdf
>
> Should you have any questions about accessing or completing this survey, please contact us at people@trinityp3.com
>
> Thank you for taking the time to participate in this valuable process.
>
> Kind regards
>
> Sydney Telecoms and The Evalu8ing Team

Note:

The "Remind" and "Remind All" buttons work the same way as the "Invite" button. The difference is the text that is sent in the e-mail. Reminder e-mails have text that suggests the receiver may have forgotten to complete the survey.

The "Login As" button works the same as clicking on the link in the e-mail. You can use this to login as any person.

Once a person has completed the survey, the survey is closed for them.

Manage – Edit survey

1. Choose "**Edit Survey**" from the menu bar at the left of the screen.

2. A pop up will appear.

3. You can view: Survey Name and Survey Type and Status.

4. You can edit Start Date and End Date, Help E-mail, Survey participant logo and colours.

5. However, the survey will be unavailable to participants if you do any of the following actions: make the start date later than today or make the end date earlier than today.

6. When finished, press the SAVE & EXIT button.

Manage – Standard Chart Colour

1. Choose "**Standard Chart Colour**" from the menu bar at the left of the screen.

2. A pop up will appear.

3. You can view the preset chart colours for the survey.

4. These can be altered to suit your needs, and specifically altered once the average score has been set for any completed survey, (more on this in Analyse).

5. They survey is set to automatically calculate the color ranges. To activate this click CALCULATE.

6. When finished, press the SAVE button.

Manage – Email Settings

1. Choose "**Email Settings**" from the menu bar at the left of the screen.

   This pop up screen allows the manager to set and forget the email invitations and reminders for a survey. It will be most suitable for busy managers running multiple surveys who do not have the time to individually remember to monitor survey answer rates and participation.

   To activate:
   • Note the bottom drop down option "Activate E-Mail Automation" (Yes or No).
   • Until you set this to "Yes" no action will be taken.
   • You can also control the time zone, start time for the first invitation e-mail, and the frequency and total number of reminders.

   The Manager will receive daily summary e-mails with information about what actions were taken by the automatic system.

Analyse

View the manage Menu contents on the LHS of screen. Here you will see 3 options:

1. Choose '**Analyse'** from the menu bar at the top of the screen.

2. The Analyse panel allows you to analyse your <u>completed</u> surveys.

3. If you have more than one survey, choose the correct survey from the drop down list.
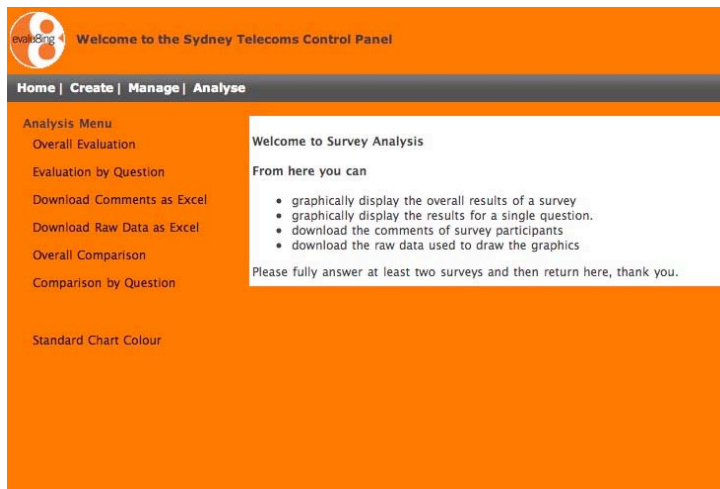
4. View the Analyse Menu contents on the LHS of screen. Here you will see the options for download:

    a. Overall Evaluation: this provides a graphical image of the overall results of the survey. You can export each image as a PDF, or use GRAB software to capture each image.

    b. Evaluation by Questions: this provides a graphical image of every question.

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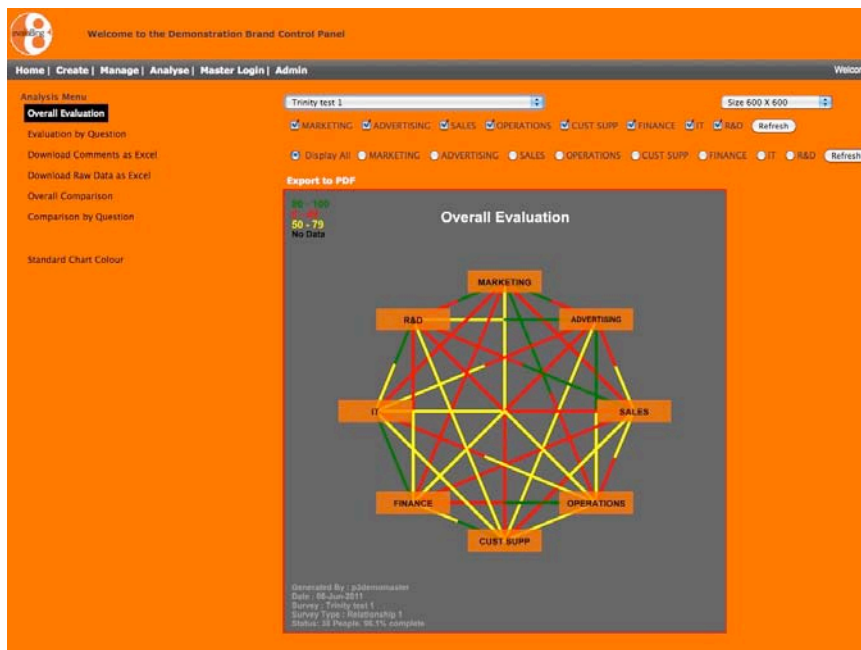
c. Download Comments as excel: this provides an excel document of all survey participant comments. Individual answers are not revealed and therefore individual privacy is ensured.

d. Download Raw Data as excel: this provides an excel document of all scores of all participants, and this is the data used by Evalu8ing to create the graphical images.

e. Overall Comparison: this provides a graphical image comparing the overall results of multiple surveys.

f. Comparison by Question: this provides graphical images of every question comparing the results of multiple surveys.

g. Standard Colour Chart: Evalu8ing will calculate the survey's average score and by clicking on CALCULATE the system will update the surveys images with accurate colour coding. **This calculation must occur before downloading** **any** **images.**

FAQ – Troubleshooting

Issue	Resolution
I am on the manager screen but all the buttons are grayed out. I cannot send invitations or reminder emails.	Try the [Login As] button and view the message you get which may give you some clues. The survey email sending will be unavailable to participants if any of the following are true:- - Status "Closed" or "Offline" - Start date later than today. - End date earlier than today. - Payment not processed.
The e-mails do not arrive	Check your "spam" e-mail folder and then ask the e-mail administrator at your site if the company firewall could be blocking the **Evalu8ing** e-mails.

Standard Surveys

The template surveys are designed with the following specific goals:

Collaboration 1	How collaborative are the members of your project team, either cross function or multi-organisational? This panel of questions focuses on **Evalu8ing** the level of collaboration based on communication, information sharing and vision to ensure all are aligned and working to a common goal.
Collaboration 2	How collaborative are the teams and individuals in your organisation or across your supplier base? This panel of questions focuses on **Evalu8ing** the level of collaboration based on leadership, team culture and attitudes and individual attitudes and behaviour.
Sveiby & Simons Collaboration	How collaborative are the members within your organisation? This panel is taken from the Sveiby and Simons Collaborative Climate Survey. See Sveiby, K.E., and Simons, R. (2002) "Collaborative climate and effectiveness of knowledge work" Journal of Knowledge Management Vol.6. No.5. pp.420 – 433.
Relationship 1	What is the status of the relationship between the teams and groups within your organisation or across multiple organisations working together? This panel of questions focuses on **Evalu8ing** the relationships against their level of professionalism, results, respect and motivation.
Relationship 2	What is the status of the relationship across and between your trusted suppliers? This panel of questions focuses on **Evalu8ing** your relationship with your suppliers and between your suppliers for alignment to business understanding, collaboration, communication, behaviour, deliverables and trust.