# Table of Contents

## Contents

1. OVERVIEW OF THE BUSINESS MANAGEMENT ASSESSMENT .......................................................... 1

2. WHO SHOULD TAKE THE ASSESSMENT .................................................................................. 2

3. SCORING ON THE ASSESSMENT ............................................................................................. 2

4. SETTING UP GROUPS FOR THE ASSESSMENT ........................................................................ 3

5. INSTRUCTIONS FOR ADMINISTERING THE ASSESSMENT ............................................... 4

6. VIEWING ASSESSMENT RESULTS/REPORTING ..................................................................... 6
Business Management Assessment Guide

Overview of the Business Management Assessment

In addition to the core training program, our Business Management Assessment tool will enable you to probe into the minds and opinions of your entire staff to instantly understand where bottlenecks, frustrations, and time-wasting business processes are slowing down their work, and keeping them from delivering profitable and successful projects.

This anonymous assessment will evaluate your employee’s answers to about 160 questions in nine areas of your business including:

- Managing Opportunities
- Proposal Management & Execution
- Estimating
- Scope Creep and Extra Services
- Utilization and Resource Management
- Project Financial Management
- Invoice Cycle and Cash Flow
- IT Systems and Data Management
- Client Relationship Management

For each of these areas we will break down the data by People, Process and Systems, giving you a clear picture of where your firm is strong, average, or possibly, struggling. There is also a place for your employees to provide their comments and suggestions for each of the nine categories.

Your leadership team will receive a detailed color report that will provide scores in each of the 27 areas (each of the nine areas by people, process and systems), recommended actions, and your employee’s comments. One of our strategic advisors will schedule a time to review the results with your team and determine a follow up approach.
The assessment can be administered in Groups according to your firm’s organizational structure. See instructions below in Setting Up Groups for the Assessment for setting up and using groups.

The results of this assessment can provide valuable insights to guide decisions into business process improvements, internal initiatives, purchase or development of new systems, and input to your strategic planning.

Who Should Take the Assessment?

We recommend sending the assessment to as many employees as possible in order to get a good cross-section of opinions, perceptions, and comments. Because the questions are very detailed and cover such a wide group of topics, you will find that many of your staff do not know the answers to every question. We have accounted for this in the scoring by allowing them to answer “I Don’t Know” on each question.

Because the Assessment is usually administered anonymously, you will not be able to see who has taken the assessment, or what their answers are.

Scoring on the Assessment

When taking the assessment, your employees will be asked approximately 160 questions broken into nine categories. For each category, the questions are assigned to either Process, Systems, or People behind the scenes.
Each question can be answered with one of seven responses that are scored as follows:

0 = I Don’t Know  
1 = Strongly Disagree  
2 = Disagree  
3 = Somewhat Disagree  
4 = Somewhat Agree  
5 = Agree  
6 = Strongly Agree

They will have the option to answer “I Don’t Know” to any question where they do not have an opinion or any idea as to how your firm operates in that area. You will be able to see the total number of employees that answered “I Don’t Know” to each question, as well as the total number of employees that answered a certain way to each question. “I Don’t Know” answers are not factored into the scoring.

The scores are added up for each question and aggregated and averaged to give a final score for People, Process and Systems under each of the nine categories. An average of a 1 or 2 will give a final RED score, an average of a 3 or 4 will give a final YELLOW score, and an average of 5 or 6 will give a GREEN score. In total you will see 27 different scores – a score for each of the nine areas and a separate color coded score for People, Process and Systems under each of the nine areas. “I Don’t Know” answers are ignored in the scoring. If you use groups in the assessment, you will have 27 scores for each group that can be compared against each other, or printed on the assessment report in summary or separate.

**Setting Up Groups for the Assessment**

You have the option to run the assessment by groups for sorting, reporting and analysis of data. This can be used to report by Office, Department, Division, Market, Discipline, Studio or Team. To create the Groups:
1) On the main screen, click on ADMIN
2) Click on Manage Groups
3) Create each group by typing in the name and hitting submit. You will see the list of groups on the screen as you create them.
4) Once the groups have been created, you will see the total number of groups available for your assessment below under Business Management Assessments. You will have the option to use all groups or selected groups when you create a new assessment (see instructions below in Viewing Assessment Results / Reporting.)
5) We recommend you create one assessment with all of the groups. The reporting will allow slicing and dicing of data for analyzing the group results.

Instructions for Administering the Assessment

1) Login
2) In the upper right hand corner of the screen, click on ADMIN in the grey bar.
3) On the bottom right of the Admin panel, click on Business Assessments
4) For a New Assessment, fill in a name for the assessment.
5) Under Choose Settings, Select the option you wish to use: Anonymous Answers or Know User for Answers.
We recommend using the Anonymous Answers setting, as users tend to answer more honestly if they are anonymous.

6) If you have set up Groups as described above, you will have the option to include Groups when you administer the assessment. The groups are self-selected by the employee before starting the assessment. Select the groups that you want to use for the assessment by clicking on the arrows to move the groups to the box on the right. **For optimal reporting, select all of the groups in one assessment rather than a separate assessment for each group.**

7) When you have all options selected, Click **CREATE**. The Assessment will be created and appear in the list with the Date Created. You have the option of creating separate assessments for each group or sending everyone the same assessment link. If you are running separate assessments for different groups, you will need to create and send them separately. **If you create a separate assessment for each group you will have limited ability to compare the results between groups.**

8) To run the Assessment, click on the underlined date field of the assessment you want to send to your employees.

9) Click on **SUGGESTED EMAIL TEXT**. A pop-up window will appear with some suggested text and a link to the assessment. We suggest you customize this text to your own firm’s desired language.

10) Copy and paste the text in the pop-up window. You can choose to use our recommended email text, or not. However, you MUST send out the LINK specified in the pop-up window. This link will tie the user to your firm, and to **THIS specific assessment.**
When the user clicks on the link that you email to them, they will be able to select their Group and start the assessment. The assessment can take between 30 to 40 minutes. It cannot be stopped and started again so please ask your employees to set aside enough time to get all the way through the assessment.

Viewing Assessment Results / Reporting

1) Login
2) Click on ADMIN
3) Under Business Assessments, Click on Business Management Assessment.
4) You will now see all of the Assessments you have created, and the number of participants that have taken each of the assessments.
5) If you would like to compare different Assessments, Click on ADD TO COMPARE and click Run Comparison Report. If you choose to send out one assessment to everyone, your employees will choose the group they are in and take the assessment. Reports can be run for individual groups, or combinations of groups.
6) When running assessment reports, the system defaults to all groups. To see a subset of groups, click the green Change button and select just the groups you want. When you run the report, just the selected groups will be included.
7) To view the Assessment Results report, click on the Title or Date of the Assessment you wish to view. You will see the reporting dashboard. All of the groups you have created will be on the screen. You can select specific groups to analyze by clicking on the green Change button:

![Groups](image)

You can also compare the groups to each other by clicking on the Green Run Comparison Report Button:

![Run Comparison Report](image)

8) If you would like to share the Assessment Results with someone who is not a Client Admin, Copy the **SHARING RESULTS** link at the top of the page.

**Sharing Results**

To share these results with someone outside of the system, provide the following link: 

9) The report is broken into 9 different sections. The first section displays the average score for each section. They are color coded to represent strengths or weakness. RED: Needs Improvement, YELLOW: Not Bad but Needs More Work, GREEN: Better Than Most, BLUE: Not Graded.
10) Within each section, you will see:

**Overall Score**

**People:** Score, The issue, We Recommend, Benefits of resolving the issues, Create a task

**Process:** Score, The issue, We Recommend, Benefits of resolving the issues, Create a task

**System:** Score, The issue, We Recommend, Benefits of resolving the issues, Create a task

**Manage Tasks:** You will have the ability to create, track and manage tasks and subtasks associated with this topic. As you add new tasks, they will be visible for each Category, and can be exported for all categories together to a CSV file.

**Comments:** The number below the Comments Icon indicates the number of comments your employees have made for this Category. Click on the COMMENTS icon to view the comments.
**Question Scores:** View assessment results per question.

You can click on the People, Process and Systems icons to see the details for each section as well as print the question responses in the Question Report (see below).

11) There are two primary reports included with the Business Management Assessment. You can get an overall printed summary of the assessment and a detailed Questions Report. The Print Report box allows you to print out the results by Group and Category. You have the option to print the report with Groups combined and to Include Comments. If you have selected specific groups below you will only see the report for those groups. The Questions Report will show you the responses to each question. This will provide valuable insight as to how your staff scored each question by number and percentage, and provide a color bar graph where you can see the disparity of answers in color - also referred to as the "Rainbow Effect".

![Printed Report](image1)

![Questions Report](image2)