

Team-Centric Survey Setup Checklist



This is a checklist of the items needed/decisions to be made at each step of the Team-Centric Survey setup process.

You can use this page to document the steps completed for a group. Details of each step start on page 2.

☐ Step 1: Set up Organization (if this is first Action - Virtual Sort or Survey - for the Organization)

☐ Step 2: Set up and Save Team-Centric Survey Group Group name: _____

☐ Step 3: Assign Practices

☐ Step 4: Add Team Name

☐ Step 5: Enter Team Rater(s)

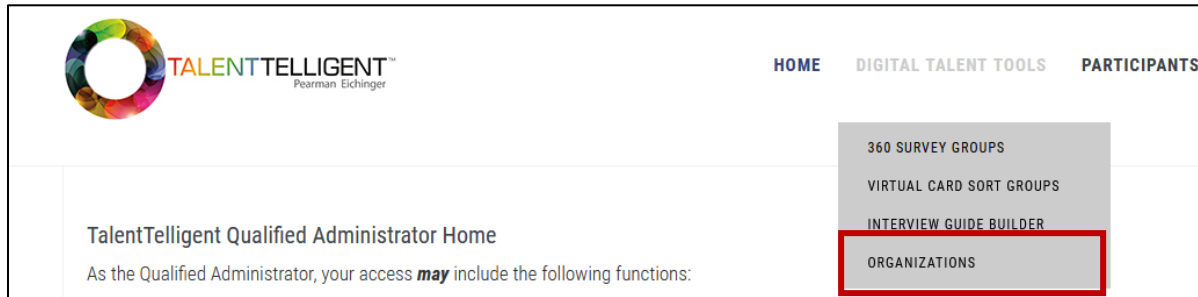
☐ Step 6: Send Email Invitations

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Step 1: Set up Organization (This step is needed once per organization. Once an organization is set up for any action - Virtual Sort or Survey - you can go directly to Step 2 for subsequent groups attached to the same organization.)

From your QA System Home Page, go to Digital Talent Tools > Organizations



You will see a grid of any existing Organizations you have already entered. To add a new Organization, click 'Create Organization' Button.

ADD ORGANIZATION

* Required Fields.

* Organization Name

* Organization Address

* Organization City

* Organization State

* Organization Zip

* Contact Name

* Contact Email

* Contact Phone

* Organization Size

Integers only please

* Organization Economic Sector

Select

* Organization Type

Select

Organization Logo

Browse...

No file selected.

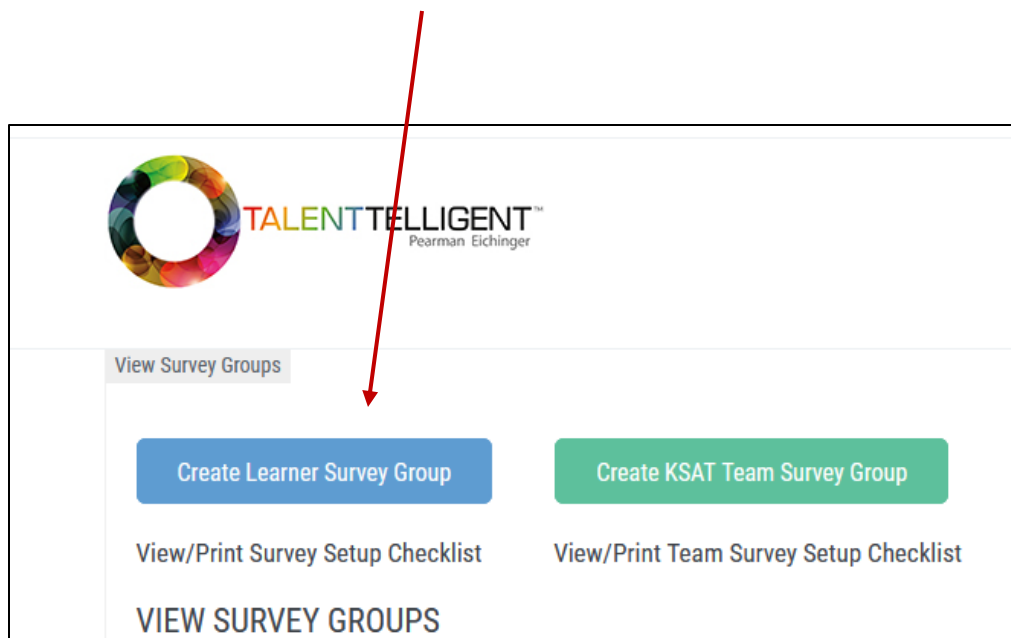
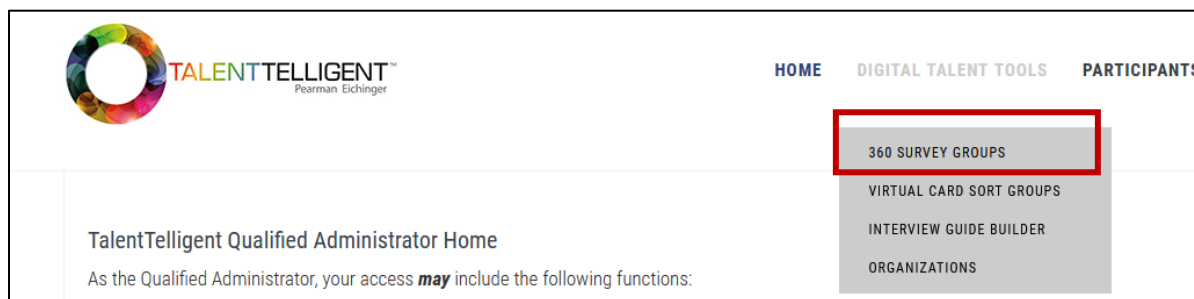
SAVE ORGANIZATION

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Note that the organization logo will display in invitation emails and on the surveys. If no logo is uploaded, the TalentTelligent Logo will display.

Step 2: Set up Survey Group: (Digital Talent Tools > 360 Survey Groups)



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Add Team Survey Group

ADD TEAM SURVEY GROUP

View/Print Team-Centric Setup Checklist

- Create a new group here.
- At the group level you will decide the name of the group, the survey, the expiration date, and auto-reminders.
- After creating a group, you will add Teams to the group.
- All Teams inside a group will be set up with the same survey parameters.
- Inside individual Teams you will add people who will rate that specific Team.
- You will also decide if there are others related to this Team who can add raters as well.
- You will control and initiate the invitations to be sent to participants. This can be done in stages.
- Reports are available via the Manage Teams and Reports Area.

* Required Field

* Team Group Name

* Choose Organization

Select

Click to add new organization

* Which Survey

Select ...

* Expiration Date

Auto Reminder Date

Number of days before closing date to send final reminder.

0

Optional custom Email Message to include in Raters Email.

Click to view Welcome Email sent to raters and location of this custom message.

Survey Email Invitation Option (?)

Send a Survey Link in Invitation Email

Learn More

ADD GROUP

Required (*) and Optional Items:

- ***Survey Group Name** (customizable, a name with meaning to the process)
- ***Organization** (Choose from previous setup)
- ***Which Survey** (KSAT) and (Sort or Ratings)

The Sort version allows the participants to pull sort cards into sorting piles. The Ratings version allows the participants to make radio button selections.

If you choose Sort version:

***Number of Sort Columns** (3 or 5). This is the number of sort piles the participants can sort the items into.

***Sorting Type** (Relative or Absolute)

Relative Sort (even number of Practices in each pile) The Practices in this pile of a sort are all less than all of the rest in the higher piles. Practices in this pile are not done as well as all of the others in the higher piles. There will be differences (ranked within a pile) within the high pile because you were directed to put an even number of Practices in each pile.

Absolute Sort (any number of Practices in any pile) The Practices in this pile of a sort are all less than all of the rest in the higher piles. Practices in this pile are not done as well as all of the

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others in the higher piles. Since you could put any number of Practices in this pile, there may be very few or a lot.

- ***Close Date** – The date beyond which the survey cannot be completed.
- **Auto Reminder Date** – Optional, to choose a date to send a reminder automatically.
- **Number of days before closing date to auto-send final reminder** – Optional.
- **Optional custom Email Message to include in invitation to Raters.** This message will be included in all emails sent from the system (re-send, reminders). This message can be edited as needed.
- ***Survey Email Invitation Option** – 1. Send a survey link in invitation email: This option will send a link that will take the participant directly to the survey. 2. Send survey code in invitation email: This option will send a URL and a code. The participant will go to the URL and enter or copy/paste the code. This option is available to avoid active links that may cause problems being delivered by some company security systems.

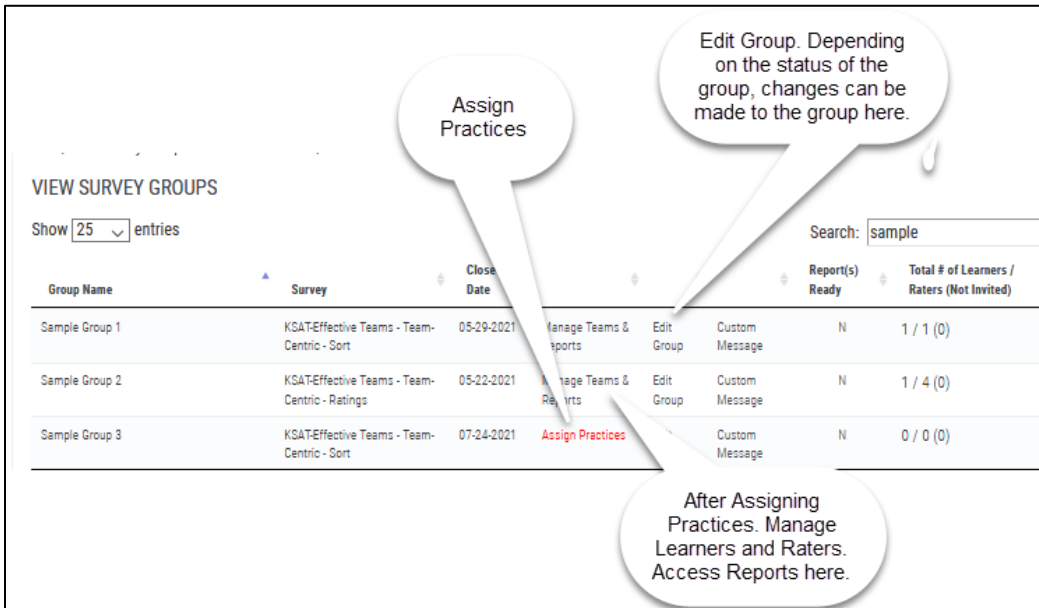
Once the group is saved, all other operations related to managing the process will be via the Groups Grid View.

(Digital Talent Tools > 360 Survey Groups)

Step 3: Assign Practices. After the group details are saved, click the ‘Assign Practices’ in the group grid.

This allows you to select the practices that will be included in the KSAT survey.

Several other functions are available in this grid.



VIEW SURVEY GROUPS

Show entries

Search:

Group Name	Survey	Close Date	Manage Teams & Reports	Edit Group	Custom Message	Report(s) Ready	Total # of Learners / Raters (Not Invited)
Sample Group 1	KSAT-Effective Teams - Team-Centric - Sort	05-29-2021	Manage Teams & Reports	Edit Group	Custom Message	N	1 / 1 (0)
Sample Group 2	KSAT-Effective Teams - Team-Centric - Ratings	05-22-2021	Manage Teams & Reports	Edit Group	Custom Message	N	1 / 4 (0)
Sample Group 3	KSAT-Effective Teams - Team-Centric - Sort	07-24-2021	Assign Practices		Custom Message	N	0 / 0 (0)

Assign Practices

Edit Group. Depending on the status of the group, changes can be made to the group here.

After Assigning Practices. Manage Learners and Raters. Access Reports here.

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Step 4: Manage Teams & Reports.

Create a Team (name can be anything that is meaningful to the process). The purpose of the teams is to allow segmentation within a group of different teams.

Add/Manage Teams for Group: Sample Group 2

Survey: KSAT-Effective Teams - Team-Centric - Ratings
Close Date: 05-22-2021

[CLICK HERE TO PURCHASE SURVEYS](#)

You have 371 remaining survey(s) to assign.

Add Teams:

[ADD A TEAM](#)

All existing teams and raters have been invited previously.

[Edit Group](#)

Team Name	Total # of Teams / Raters (Not Invited)	Profile/Raters	Invite Sent
Code-Team1	2 / 4 (0)	Edit/Manage Raters Remind All Delete	10-11-2020
Code-Team2	2 / 4 (0)	Edit/Manage Raters Delete	N

Step 5: Edit/Manage Raters for the Team.

All existing teams and raters have been invited previously.

[Edit Group](#)

Team Name	Total # of Teams / Raters (Not Invited)	Profile/Raters	Invite Sent
Code-Team1	2 / 4 (0)	Edit/Manage Raters Remind All Delete	10-11-2020

Enter Raters. Inside each Team choose Edit/Manage Raters.

*Rater First Name

* Rater Last Name

* Rater Email

*Rater Type

*Can this Rater add other raters? Y/N (Answer Y here to allow this rater to add other raters to the Team.)

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CODE-TEAM1 RATERS

First Name	Last Name	Email	Rater Type	Add Raters	Done	Options	Invite Sent
[Redacted]	[Redacted]	[Redacted]	Team Manager	N	N	Edit Re-Send Remind Delete	10-11-2020
[Redacted]	[Redacted]	[Redacted]	Team Leader	N	N	Edit Delete	SEND INVITE

Add new raters

Add Individual Rater below.

Add Rater here

* First Name

* Last Name

* Email

* Rater Type

Can Rater Add Other Raters? ☐ YES ☒ NO

[SAVE RATER](#)

Step 6: From the Manage Teams & Reports Page, use the 'send invite button to invite all participants. You can also invite selectively, at the rater level.

[Return to Group - Sample Group 2](#)

[SEND INITIAL INVITE TO ALL RATERS WHO HAVE NOT BEEN INVITED YET!](#)

CODE-TEAM1 RATERS

First Name	Last Name	Email	Rater Type	Add Raters	Done	Options	Invite Sent
[Redacted]	[Redacted]	[Redacted]	Team Manager	Y	N	Edit Re-Send Remind Delete	10-11-2020
[Redacted]	[Redacted]	[Redacted]	Team Manager	N	N	Edit Re-Send Remind Delete	10-11-2020
[Redacted]	[Redacted]	[Redacted]	Team Leader	N	N	Edit Delete	SEND INVITE

Add new raters

Add Individual Rater below.

Send initial invitations to the entire group (only first invite)

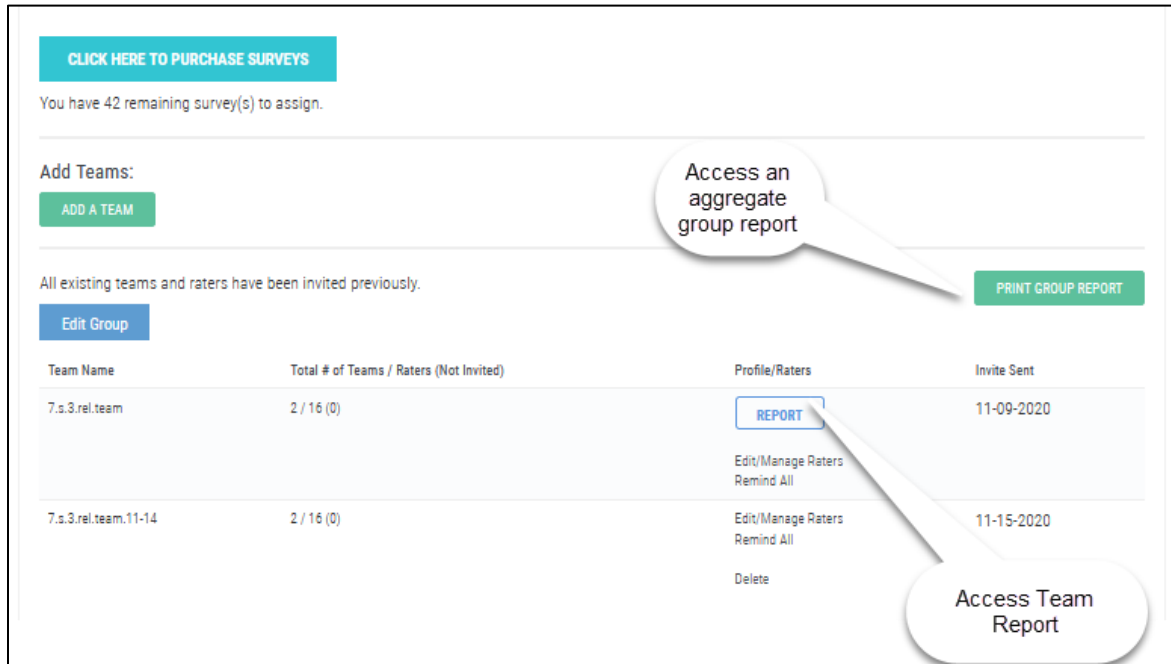
Send individual initial invitation.

Additional functions are available at the Team and the Rater Levels.

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-Sending of individual and group emails. Reminders and re-send of the original emails (only to those raters who have not completed the survey)

-Accessing Team Reports or Group Aggregate Report



CLICK HERE TO PURCHASE SURVEYS

You have 42 remaining survey(s) to assign.

Add Teams:

ADD A TEAM

All existing teams and raters have been invited previously.

Edit Group

PRINT GROUP REPORT

Team Name	Total # of Teams / Raters (Not Invited)	Profile/Raters	Invite Sent
7.s.3.rel.team	2 / 16 (0)	REPORT Edit/Manage Raters Remind All	11-09-2020
7.s.3.rel.team.11-14	2 / 16 (0)	Edit/Manage Raters Remind All Delete	11-15-2020

Access an aggregate group report

Access Team Report