The Performance Gap Indicator™

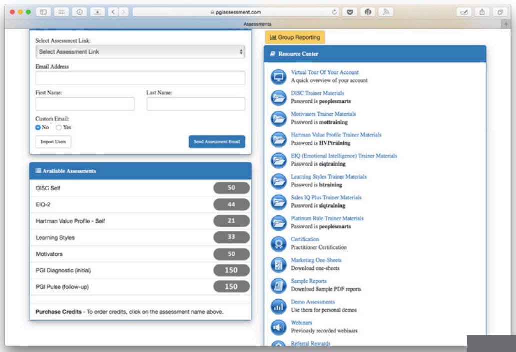
Process Guide: Distribution by Contact List Upload

Both Performance Gap Indicator assessments—PGI Diagnostic and PGI Pulse—can be set up and distributed by 2 methods. This guide covers Distribution by Contact List Upload. Refer to the Distribution by Anonymous Link Process Guide for instructions on the alternate method available.

Distribution by Contact List Upload is ideal for organizations that provide every employee with a unique email address. This method allows for the greatest participation management, but puts special responsibility upon the consultant to maintain participant anonymity.

1. Confirm available credits [F1]

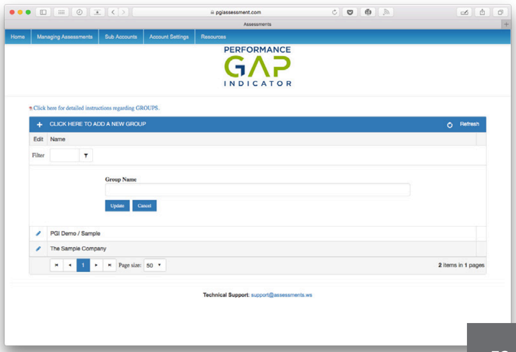
A. Match credits for the intended PGI assessment equal to the expected participant count.



F1

2. Set up a new Group for the client's company [F2]

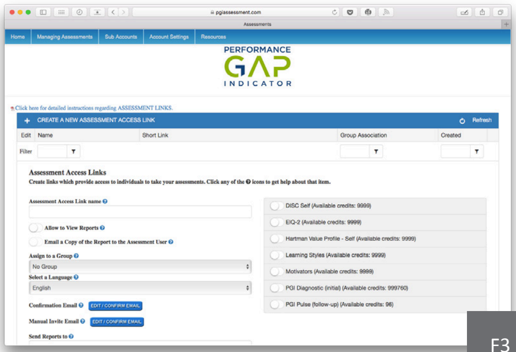
A. From the top menu, hover on "Managing Assessments" and click "Groups"
B. Click "Create a New Group"
C. Type in your Client's Company name and click "Update"
D. To edit group names, click the blue pencil to the left of the intended group
E. To delete a group, there must not be any assessment users associated with it. Once done, a red trash can will appear to the right of the intended group, click to delete.



F2

3. Set up access links [F3 - F5]

A. From the home page, click the yellow button "Manage Assessment Links", from the top menu, hover over "Managing Assessments" and click "Manage Assessment Links"
B. Click "Create New Assessment Access Link"
C. Assessment Access Link Name
   i. For a single-site company, enter the company name
   ii. For multi-site companies, enter the department, team, location name.
D. Allow to View Reports
   i. ALWAYS LEAVE TOGGLED OFF. PGI is a group report and as such, individual responses cannot be properly analyzed.
E. Email a Copy of the Report to the Assessment User
   i. ALWAYS LEAVE TOGGLED OFF. PGI is a group report and as such, individual responses cannot



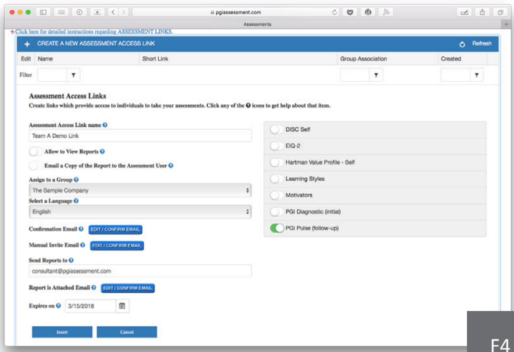
F3

be properly analyzed.

F. Assign to a Group
    i. Select the corresponding company group. For multi-team links, ensure that all links correspond to the same company group.

G. Select a Language
    i. PGI is currently only available in English at this time.

H. Invitation/Confirmation Email
    i. You can adjust the default email sent upon distribution by clicking the blue button and editing the email field accordingly.



F4

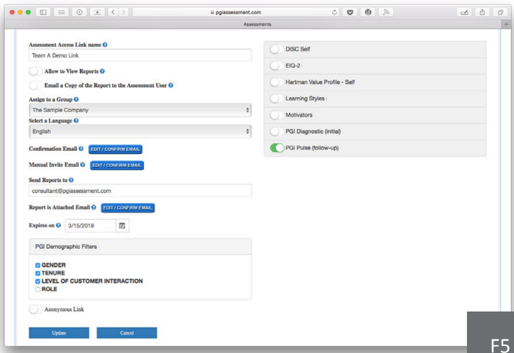
I. Send Reports To (optional)
    i. Enter an email address to receive notice whenever an assessment is complete. This should only ever be you, the consultant, and it largely serves as a participation notification as PGI is a group report and individual responses cannot be properly analyzed.

J. Expires On
    i. Enter the client-agreed survey close date here. For multi-team links, ensure that all links have the same expiration date.

K. Toggle On the appropriate assessment - either PGI Diagnostic or PGI Pulse.
    i. From the grey box in the right column, toggle on so green shows next to the intended PGI assessment. It is recommended not to combine multiple assessments when conducting the PGI. In that instance, create a new link if other assessments will be used with the same client.

L. Click “Insert” to save your settings.

M. (Optional) Customize demographics.
    i. Click the blue pencil to the left of the intended Assessment Access Link to edit the link
    ii. Scroll to the bottom of the edit panel to check or uncheck the desired demographic questions. For multi-team links, ensure that all links have the same demographic settings selected.
    iii. Leave “Anonymous Link” toggled off. To configure PGI Distribution by Anonymous Link, please refer to the appropriate Process Guide.
    iv. Click “Update” to save your settings.



F5

N. (Optional) Set up multi-team assessment access links.

i. For each team link required, repeat steps 3B through 3M, ensuring link settings are identical where indicated in this guide.

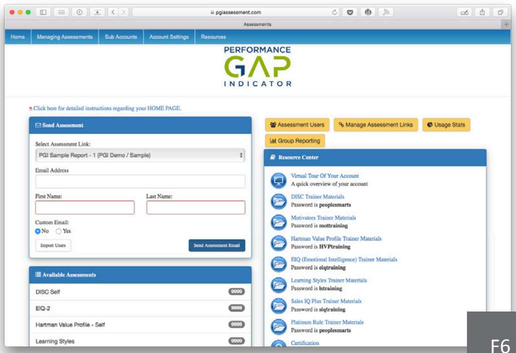
O. To edit link details, click the blue arrow to the left of the intended link.

i. Click "Update" to save your settings.

P. To delete an Assessment Access Link, click the red trash can to the right of the link.

i. Note, completed assessments associated with a deleted link will only be filterable by Group and no longer by Assessment Link. Use caution when deleting links.

4. Upload Contact Lists and Distribute Assessment Invitation Emails [F6 - F10]



F6

A. From the home page, navigate to the "Send Assessment" panel.

B. Select Assessment Link.

i. Click on the intended Assessment Access Link to which you want contacts assigned

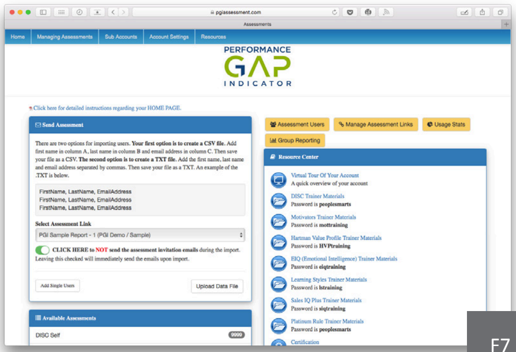
ii. Do note, labels include both the named link and associated company group.

C. Click "Import Users."

D. Organize your contact upload lists.

i. In a spreadsheet, organize contact data into the following 3 columns: First Name, Last Name, Email. No other data should be included in the final upload. Save the document as either a CSV or TXT file.

ii. For multi-team reports, separate contact list upload files organized by team will need to be created and uploaded to the respective multi-team links created in step 3.



F7

E. (Option A) Deliver automatic assessment invitation emails upon upload.

i. If producing only one company-wide report with a single contact list upload, automatic invitation emails is very convenient. Be sure to upload contacts on the agreed PGI survey start date and no sooner to ensure invitation emails are delivered on time.

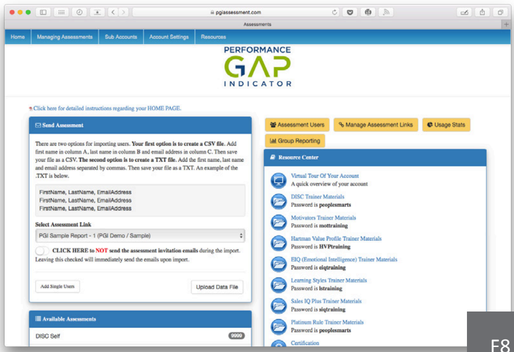
ii. Leave the Green Toggle On and contacts will be sent the default invitation email created in step

3E upon upload.

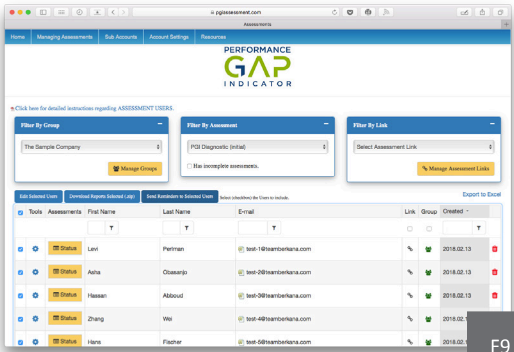
- iii. Click “Upload Data File.”
- iv. Find the appropriate CSV or TXT file and click upload.
- v. Confirm contacts and click “Import Assessment Users.”

F. (Option B) Delay assessment invitation emails upon upload.

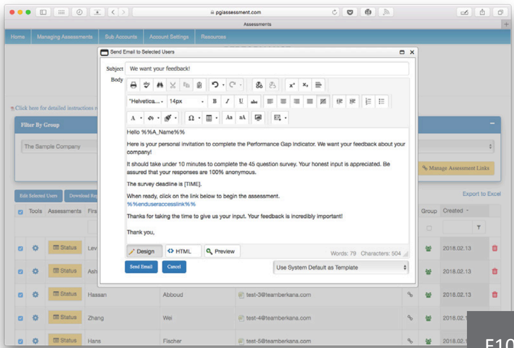
- i. If producing and distributing multi-team access links where you want all teams to receive the invitation simultaneously, or uploading contact lists prior to the agreed PGI survey start date, delayed assessment invitation emails is ideal.
- ii. Turned Off the green toggle, where green is not visible, so contacts will be uploaded and associated with the chosen Access Link, but no email will be sent.
- iii. Click “Upload Data File.”
- iv. Find the appropriate CSV or TXT file and click upload.
- v. Confirm contacts and click “Import Assessment Users.”
- vi. (Optional) Repeat steps 4Fi - 4Fv for each multi-team assessment link contact list upload.
- vii. When ready to send, from the top menu under “Managing Assessments” or on the home screen, click “Assessment Users.”
- viii. Filter By Group to match the intended company.
- ix. Filter By Assessment to match the intended PGI assessment.
- x. Filter By Link to match the intended multi-team. If sending invitation emails to all teams simultaneously, only filter by Group and Assessment, not by Link.
- xi. Click the square on the grey bar to the left of “Tools” to select all contacts.
- xii. Click “Send Reminders to Selected Users” and draft your invitation email.
- xiii. Click send.



F8



F9



F10

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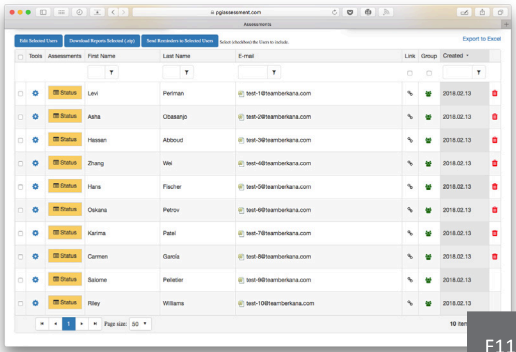
5. Track Participation [F11]

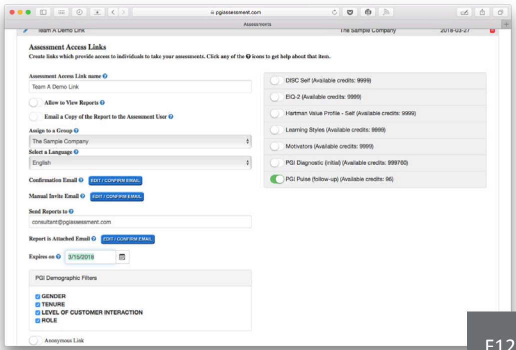
A. From the top bar, hover over "Managing Assessments" and click "Assessment Users"
B. Filter By Group to match the intended company.
C. Filter By Assessment to match the intended PGI assessment.
D. (Optional) Filter By Link to match the intended multi-team. Only necessary when implementing a multi-team PGI and you need to review participation by team.
E. Review participation.
   i. A participant has not yet taken the PGI if a red trash is present to the very right of the row.
F. Click "Has incomplete assessments" within the "Filter By Assessment" field to only show incomplete assessments.
G. Click the square on the grey bar to the left of "Tools" to select all contacts.
H. Click "Send Reminders to Selected Users" to draft and distribute reminder engagement emails.



F11

6. Close Survey Collection [F12]

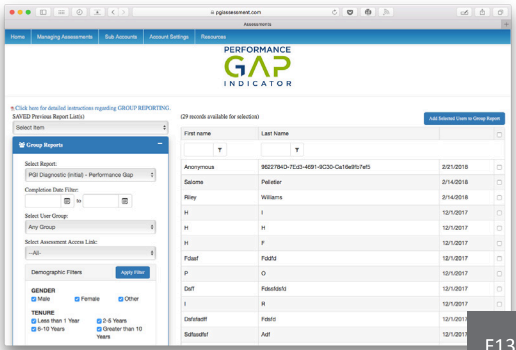
A. PGI access automatically concludes on the assigned expiration date.
   i. Extending access is possible if participation is low.
   ii. Edit expiration date by clicking the blue pencil to the left of the intended Assessment Access Link (or multiple links if applicable) on the "Manage Assessment Links" page.
   iii. Edit the Expiration Date for all relevant links and click "Update" to save your changes for each link.



F12

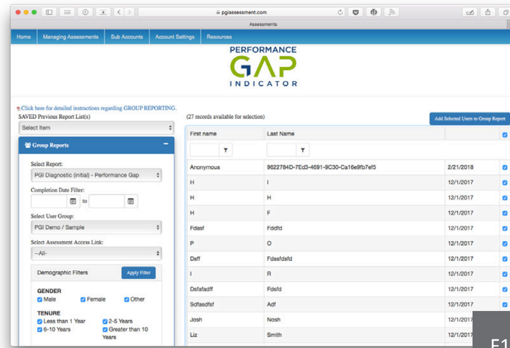
7. Prepare the Company-Wide Report [F13-F15]

A. Click "Group Reporting" from the home screen or the top menu bar under "Managing Assessments"
B. Select Report
   i. Click the intended PGI assessment
C. (Optional) Completion Date Filter
   i. Can be used to filter assessments completed between a date range. Rarely used when creating PGI reports.



F13

D. Select User Group
   i. Select the intended company.
E. From the grey bar, click the square to furthest left of "Last Name" to select all contacts.
F. Click "Add Selected Users to Group Report"
G. Review list and name the report
   i. Group Report Label should be filled in with the company name and report type signifier (Ex: Sample Company - Company-Wide Report)
H. Click "Generate Report"
   i. Data integrity and participant anonymity is essential. With access to data and the ability to segment responses with such specificity, it is your responsibility to uphold participant trust and to ensure that individual responses remain anonymous.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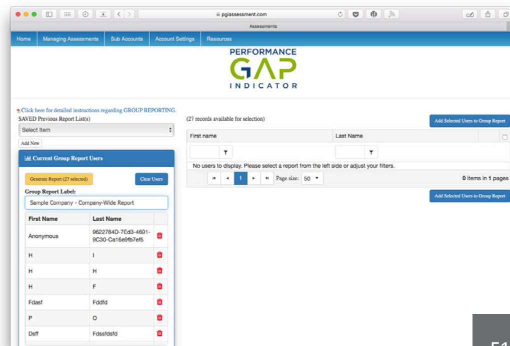
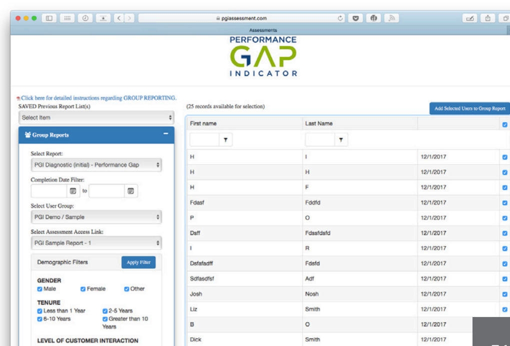

F15

8. (Optional) Prepare Multi-Team Sub Reports [F16]

A. Repeat steps 7A-7D
B. Select Assessment Access Link
   i. To filter team data by the access links created
C. From the grey bar, click the square to furthest left of "Last Name" to select all contacts.
D. Click "Add Selected Users to Group Report"
E. Review list and name the report
   i. Group Report Label should be filled in with the company name and report type signifier (Ex: Sample Company - Team A Report)
F. Click "Generate Report"
G. Repeat steps 8A-8F for each sub-report desired
H. (Optional) You may also filter entire PGI reports by demographics prior to selecting users and adding them to group reports.
   i. Desired demographic filters must correspond to data collected. If demographics were disabled in step 3M, respective filtering will be unavailable.
   ii. Be mindful that over segmenting reporting data does not degrade participant anonymity.


F16