The Performance Gap Indicator™

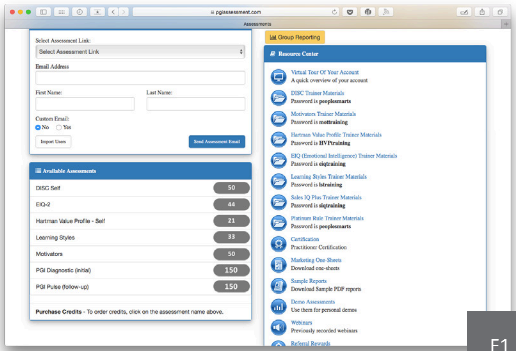
Process Guide: Distribution by Anonymous Link

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

Distribution by Anonymous Link is ideal for organizations that do not provide every employee with a unique email address. This method allows for the greatest participant anonymity, but does make individual participation tracking impossible.

1. Confirm available credits [F1]

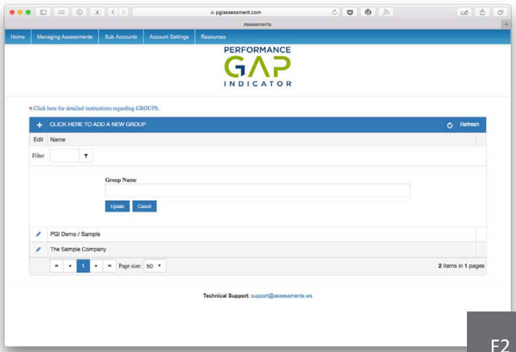
A. Match credits for the intended PGI assessment equal to the expected participant count.



F1

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

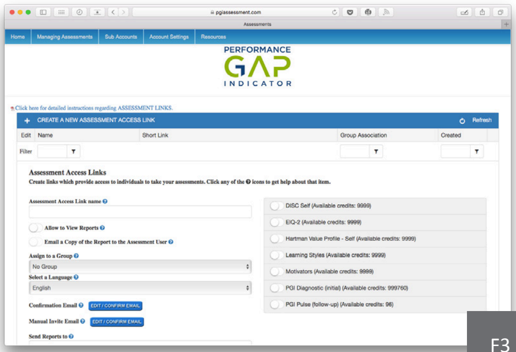
A. From the top menu, hover on "Managing Assessments" and click "Groups"
B. Click "Create a New Group"
C. Type in your Client's Company name and click "Update"
D. To edit group names, click the blue pencil to the left of the intended group
E. To delete a group, there must not be any assessment users 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 be properly analyzed.



F3

The Performance Gap Indicator™

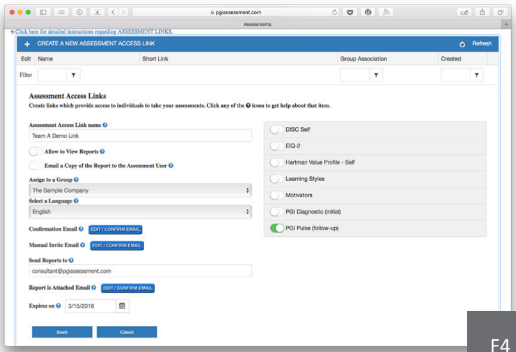
Process Guide: Distribution by Contact List Upload

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. It is not necessary to draft a default invitation email. Participants gain access via the anonymous link.

I. Send Reports To (optional)
   iii. 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.



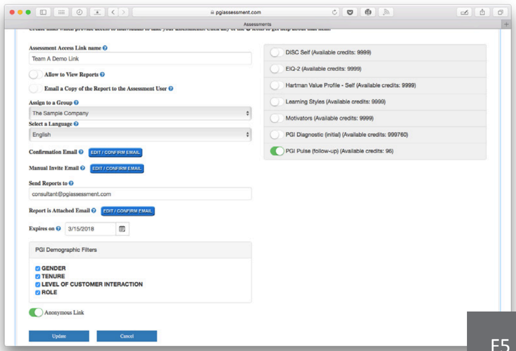
F4

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. Do not combine multiple assessments when conducting the PGI via anonymous link as you will not be able to identify individual results.

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. Toggle "Anonymous Link" to On. To configure PGI Distribution by Contact List Upload, 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

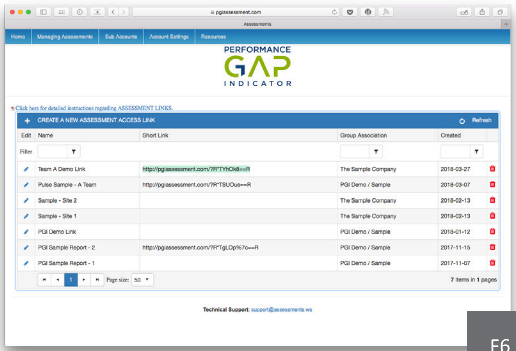
through 3M, ensuring link settings are identical where indicated in this guide.

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. Distribute Anonymous Assessment Links [F6]

A. Provide anonymous link to respective team members.
  i. If multi-team sub-reports will be generated, track which link is associated with its respective team to maintain data collection integrity.



F6

5. Track Participation [F7]

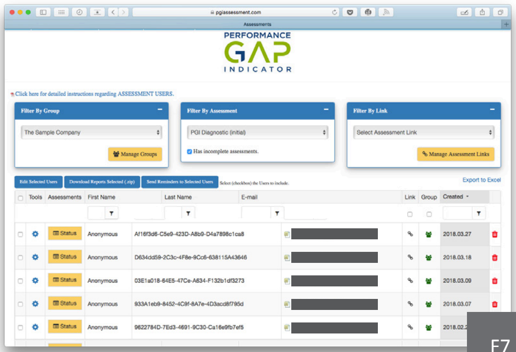
A. From the top bar, hover over "Managing Assessments" and click "Assessment Users"

B. Filter By Group to match the intended company.

C. Filter By Assessment to match the intended PGI assessment.

D. Click "Has incomplete assessments" within the "Filter By Assessment" field to only show incomplete assessments.

E. Clean up incomplete anonymous assessments.
  i. Every time a participant clicks an anonymous link and begins a PGI assessment, a new contact record is created to hold their response data.
  ii. If a participant does not complete the assessment at that time, an incomplete anonymous record is created.
  iii. Because it is nearly impossible to track which participant is associated with the anonymous record, these must be deleted periodically to maintain prevent wasted PGI credits as well to maintain integrity of data reporting.
  iv. Anonymous records, identified by the name Anonymous, that have a red trash can to the right are incomplete and should therefore be deleted by clicking on the red trash can.



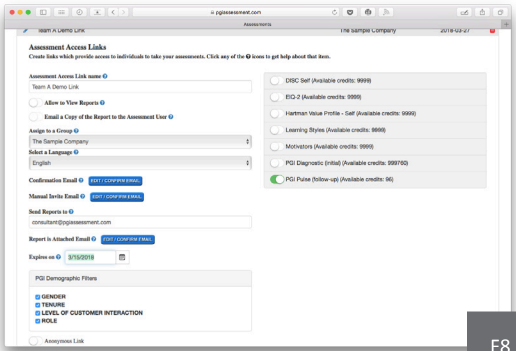
F7

v. It is recommended to conduct cleanings at regular intervals during open data collection.

G. Review participation.
   i. Compare completed assessments to overall participation expectations.
   ii. If using multi-team reporting, Filter by Link and compare completed assessments to overall participation expectations team by team.

6. Close Survey Collection [F8]

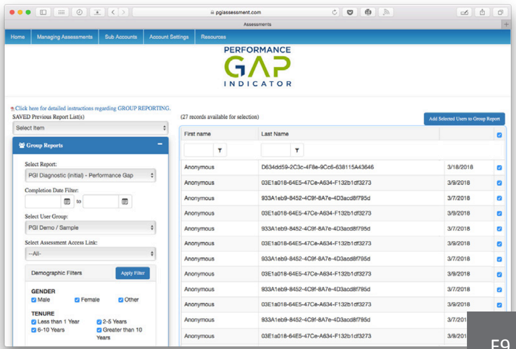
A. PGI access automatically concludes on the assigned expiration date.
   i. Extending access is possible if participation is low.
   ii. Edit expiration date by clicking the blue pencil to the left of the intended Assessment Access Link (or multiple links if applicable) on the “Manage Assessment Links”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



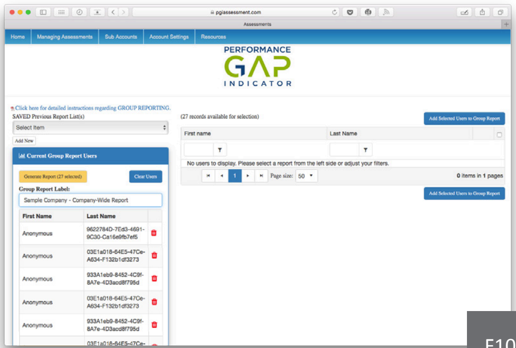
F8

7. Prepare the Company-Wide Report [F9-F10]

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.
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



F9



F10

segment responses with such specificity, it is your responsibility to uphold participant trust and to ensure that individual responses remain anonymous.

8. (Optional) Prepare Multi-Team Sub Reports

A. Repeat steps 7A through 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 through 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.