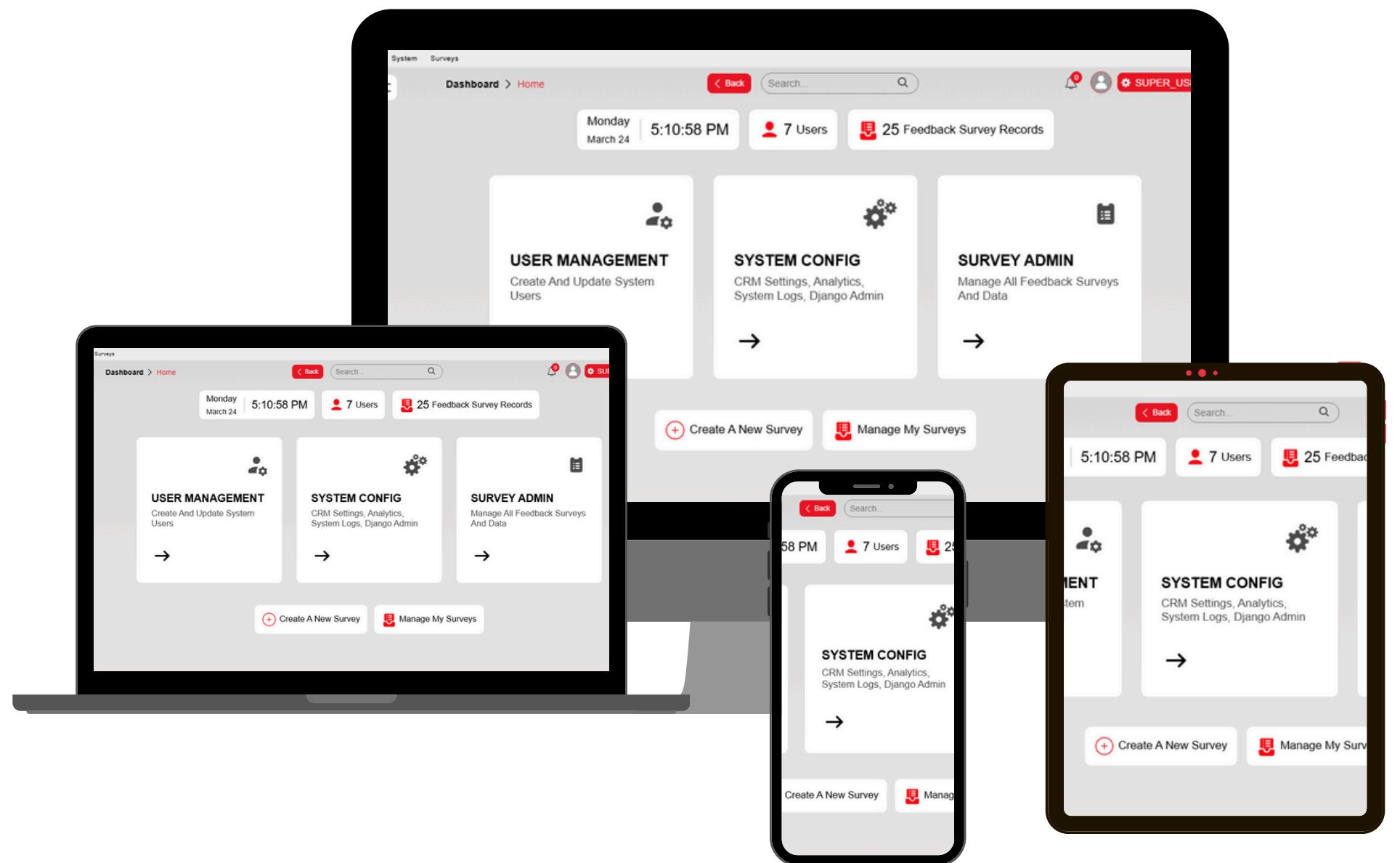




InCue

ONLINE EVALUATION TOOL



PROJECT SCOPE

PROJECT PURPOSE

To implement a flexible online evaluation tool that enables organization-wide assessment, compliance monitoring, and continuous improvement through structured data collection and analysis.

SUCCESS CRITERIA



System deployment with 99.5% uptime



85% user adoption across targeted client companies within 3 months



Measurable improvement of not less than 30% reduction in time spent on survey reporting

DELIVERABLES



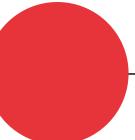
Multi-user survey platform with role-based access controls



Customizable survey templates for various organizational functions

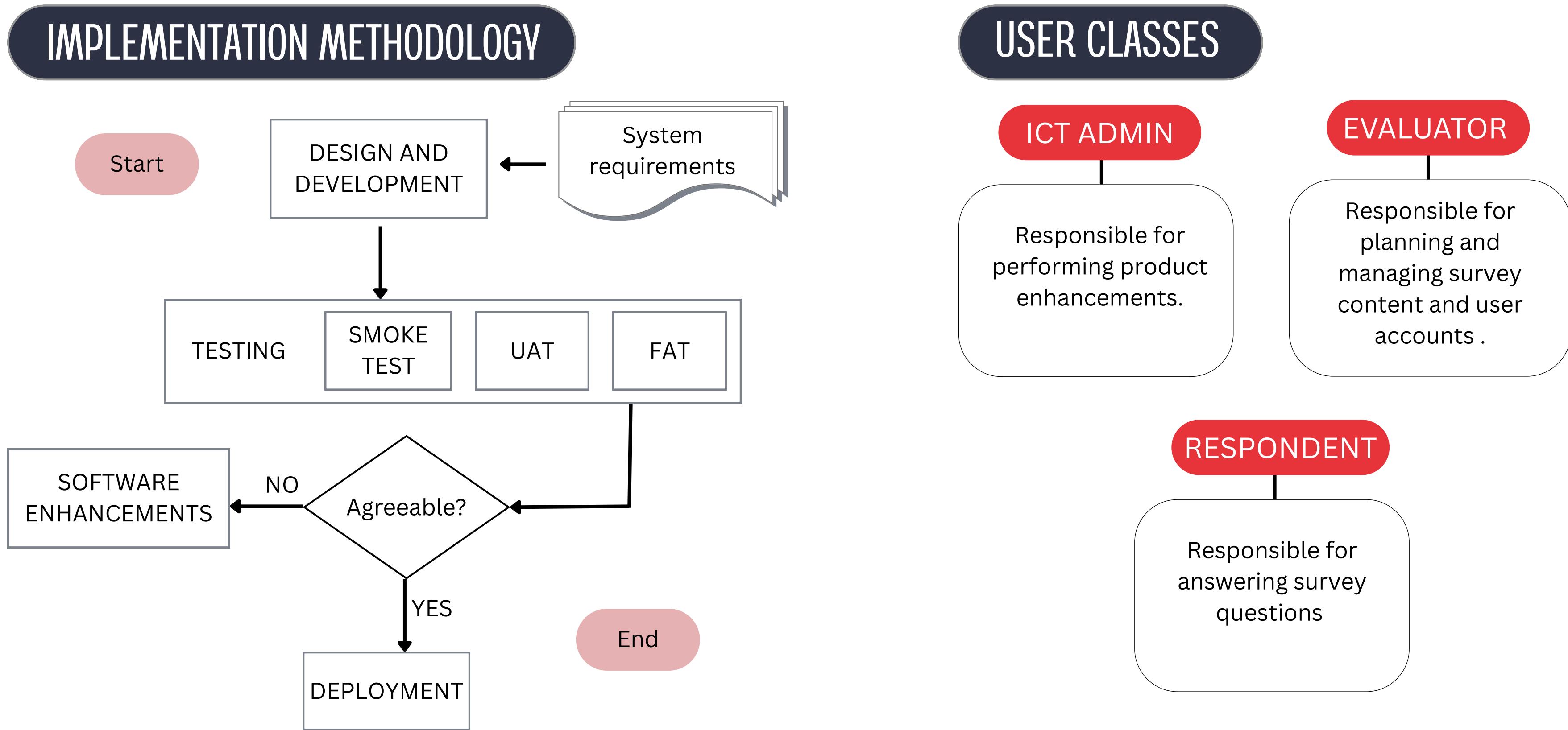


Document handling and attachment functionality



Integration with existing enterprise systems

METHODOLOGY



SYSTEM FEATURES

S/No.	Description	Sequence of User Actions	Functional Requirements
1.	Creating and Maintaining evaluation Questions	<ul style="list-style-type: none">• Evaluation Admin should be able to create, edit, copy and/or delete questions before and during the evaluation exercise.• Admin should also be able to add questions to the questionnaire before and during the evaluation exercise.	<p>The Response types should be enabled for the respondents as follows:</p> <ol style="list-style-type: none">i. Select answer from drop downii. Check boxiii. Text Boxiv. Rating scalev. Radio buttonvi. Like/dislikevii. Ranking i.e arrange options in preferred orderviii. Calendar/date e.g indicate completion dateix. Image choicex. Multiple text boxxi. Multiple drop downxii. Radio/check box gridxiii. Numeric allocationxiv. Captchaxv. Page break

S/No.	Description	Sequence of User Actions	Functional Requirements
2.	Creating and Maintaining Evaluation Questionnaire	<ul style="list-style-type: none"> • The Evaluation Admin should be able to create, title, edit, copy and/or delete the questionnaire before and during the evaluation exercise. • The admin should also be able to add/revise a Unit Questionnaire before and during the evaluation exercise. • The admin should be able to set the questions as either mandatory or optional. • The admin should be able to set marks for each question. • The admin should be able to reorder the questions in the questionnaire. • The admin should be able to export a report of the questionnaires created overtime or over a certain period.. 	Flexibility to add/assign and/or reorder Questions in the Questionnaire.
3.	Maintaining authorizations and user accounts.	The admin should be able to create user accounts of respondents before and during the evaluation exercise.	Username, Password and email.

S/No.	Description	Sequence of User Actions	Functional Requirements
4.	Team Collaboration	<ul style="list-style-type: none"> The admin should be able to create a support team of admins who can view the evaluation results (at different Authorization levels) and be substituted to perform some of the functions of the super admin. 	<p>Role of Support team:</p> <ol style="list-style-type: none"> Evaluator ICT Decision Maker Analyst
5.	Security and Storage	<ul style="list-style-type: none"> Respondents should be able to upload documents of any size. The Tool should be able to limit access to confidential documents uploaded by the respondents. 	<p>Respondents to select 'information type' before uploading requested documents i.e whether the document being uploaded is</p> <ol style="list-style-type: none"> Confidential Internal Public
6.	Analysis and reporting of evaluation results	<ul style="list-style-type: none"> The Tool should have an in-built functionality for data analysis and visualization. The Tool should have the following data upload and export capability i.e CSV, PDF, PPT, and XLS. The Tool should be able to rate(score responses and provide real time overall results to respondents before their final submission. 	<ul style="list-style-type: none"> Reporting Templates Scoring criteria.

USER PERSONAS



Marcus

COMPLIANCE OFFICER



Sarah

HR MANAGER



David

PROJECT MANAGER



Bridget

EDUCATION DIRECTOR



MARCUS

- 29 years old
- Compliance Officer
- Director Level
- FinSecure Corp
- Financial services

DESCRIPTION

Marcus oversees regulatory compliance across multiple departments at FinSecure, conducts mandatory assessments to identify risk areas, and implements remediation plans based on evaluation findings..

BUYING ROLE

Key Decision influencer

BEHAVIOR

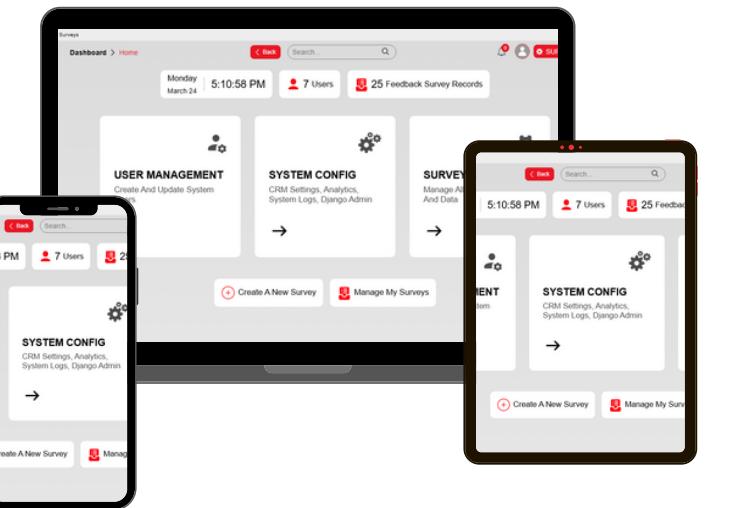
- Detail-oriented
- Documentation-focused
- Reports directly to board

CHANNELS

- Secure email
- Compliance portal
- Department briefings



marcusd@finsecure.com



DEVICES

- MacBook pro
- Iphone 12
- Tablet

GOALS

- Ensure regulatory compliance
- Reduce compliance incidents
- Document due diligence efforts

PAIN POINTS

- Tracking completion rates
- Demonstrating evidence for auditors
- Consolidating findings across teams

MOTIVATIONS

- Risk mitigation
- Legal protection
- Industry credibility

KEY STRATEGIES

- Quarterly compliance audits
- Risk-based assessment priorities
- Automated follow-up systems



SARAH

- 35 years old
- HR Manager
- Senior Level
- Midwest.Co
- Large-sized company
- 15, 000 employees

DESCRIPTION

Sarah connects employee satisfaction to customer care at Midwest.Co, identifies department issues through confidential surveys, and develops targeted retention initiatives.

BUYING ROLE

Decision maker

BEHAVIOR

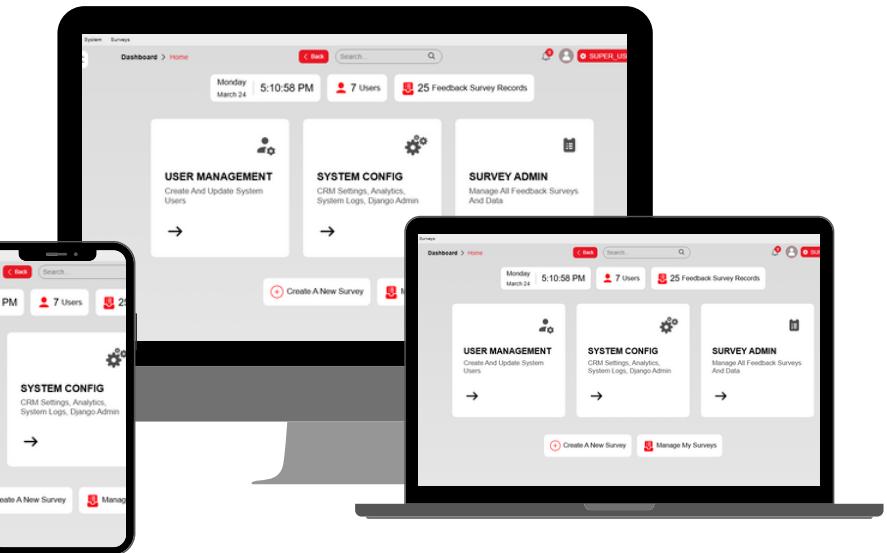
- Relationship-focused
- Reviews results with department heads
- Presents quarterly to leadership

CHANNELS

- Email
- Team meetings
- Company intranet



sarahbisi@mhs.org



DEVICES

- Company-issued Dell laptop
- Android phone
- Office desktop

GOALS

- Reduce staff turnover
- Improve workplace culture
- Measure training effectiveness

PAIN POINTS

- Low response rates
- Survey fatigue
- Actionable insights from qualitative data

MOTIVATIONS

- Creating positive work environment
- Employee retention
- Executive recognition

KEY STRATEGIES

- Pulse surveys
- Semi-annual comprehensive assessments
- Focus groups



DAVID

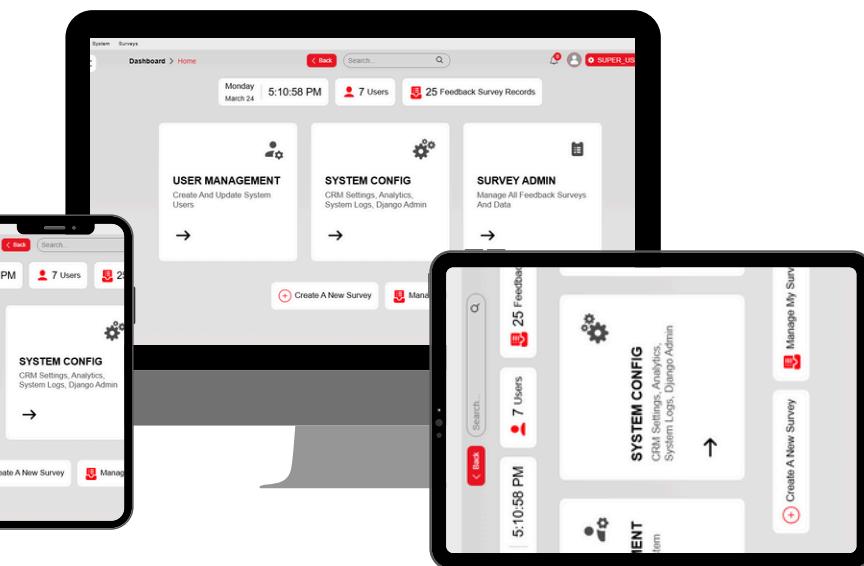
- 38 years old
- Project Manager
- Senior Level
- TechBuild Solutions
- Software development

DEVICES

- iMac
- Personal iPad
- iPhone13 pro

DESCRIPTION

David leads cross-functional development teams at TechBuild, conducts sprint retrospectives and performance assessments, and uses evaluation data to optimize team productivity.



BUYING ROLE

User

BEHAVIOR

- Fast-paced
- Agile-focused
- Data-driven decisions
- Iterative improvement

CHANNELS

- Email follow-up
- Project management tools
- Team retrospectives
- Digital dashboards



davidmie@techbuild.io

GOALS

- Improve team performance
- Identify process bottlenecks
- Enhance client satisfaction

PAIN POINTS

- Consistent participation
- Actionable feedback collection
- Measuring improvement over time

MOTIVATIONS

- Project success metrics
- Team development
- Delivery efficiency

KEY STRATEGIES

- Sprint retrospectives
- 360° feedback sessions
- Performance metric tracking



BRIDGET

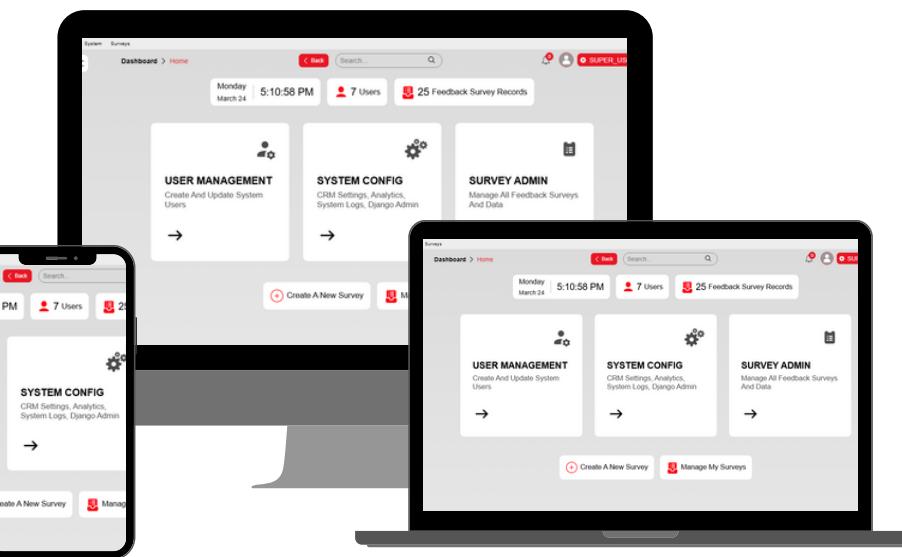
- 31 years old
- Education Director
- State University
- Academic setting
- 200+ faculty members

DEVICES

- Windows laptop
- iPhone
- Dual monitor setup

DESCRIPTION

Bridget manages faculty evaluations at State University, collects student feedback on course effectiveness, and uses data to improve teaching methodologies across departments.



BUYING ROLE

Decision recommender

BEHAVIOR

- Research-driven
- Collaborative approach
- Values qualitative insights

CHANNELS

- Learning management system
- Faculty workshops
- Department meetings



Bridget.K.W@stateuniv.edu

GOALS

- Improve teaching quality
- Support faculty development
- Enhance student learning outcomes

PAIN POINTS

- Student participation rates
- Standardizing across departments
- Balancing quantitative and qualitative data

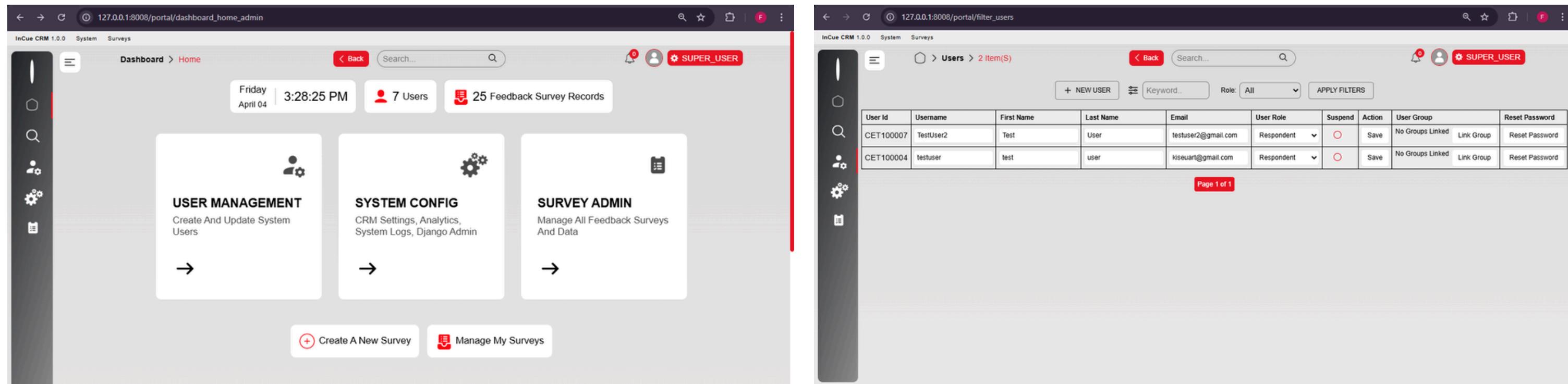
MOTIVATIONS

- Academic excellence
- Faculty support
- Accreditation requirements

KEY STRATEGIES

- Mid-semester feedback
- End-of-course evaluations
- Peer review integration

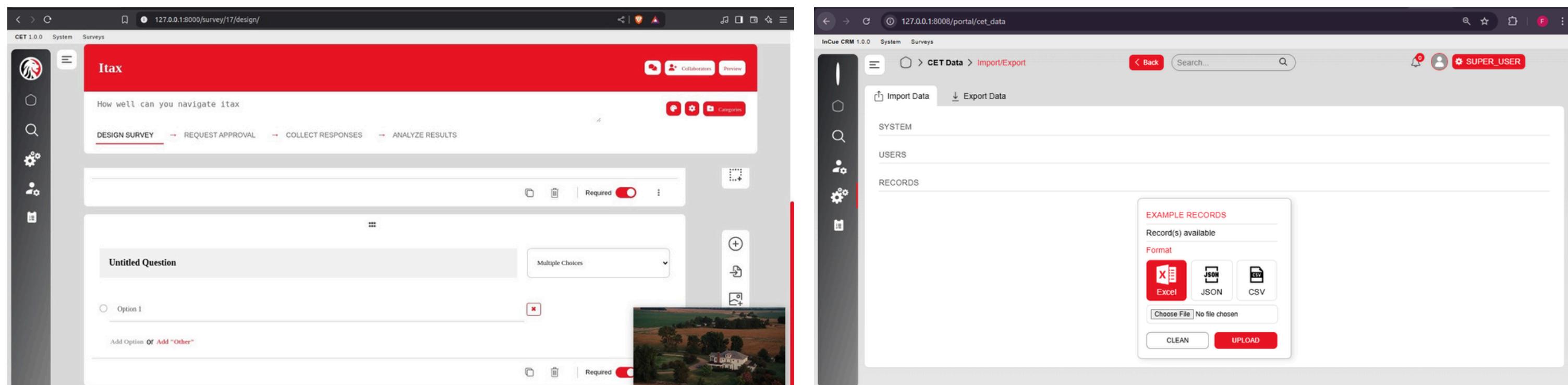
WEBSITE SCREENSHOTS



The image displays two screenshots of a web application interface. The left screenshot shows the main dashboard with a dark header bar containing the URL '127.0.0.1:8008/portal/dashboard_home_admin'. Below the header is a navigation bar with 'InCue CRM 1.0.0', 'System', and 'Surveys' tabs. The main content area features three cards: 'USER MANAGEMENT' (Create And Update System Users), 'SYSTEM CONFIG' (CRM Settings, Analytics, System Logs, Django Admin), and 'SURVEY ADMIN' (Manage All Feedback Surveys And Data). At the bottom are buttons for '+ Create A New Survey' and 'Manage My Surveys'. The right screenshot shows a 'Users' page with the URL '127.0.0.1:8008/portal/filter_users'. It displays a table with two rows of user data:

User Id	Username	First Name	Last Name	Email	User Role	Suspend	Action	User Group	Reset Password	
CET100007	TestUser2	Test	User	testuser2@gmail.com	Respondent	<input checked="" type="checkbox"/>	<input type="button" value="Save"/>	No Groups Linked	Link Group	Reset Password
CET100004	testuser	test	user	kiseuart@gmail.com	Respondent	<input checked="" type="checkbox"/>	<input type="button" value="Save"/>	No Groups Linked	Link Group	Reset Password

Buttons for '+ NEW USER', 'Keyword...', 'Role: All', and 'APPLY FILTERS' are visible at the top of the table.



The image displays two screenshots of a survey management system. The left screenshot shows a survey design page with the URL '127.0.0.1:8000/survey/17/design/'. The survey title is 'Itax' and the question is 'How well can you navigate itax'. The 'DESIGN SURVEY' tab is active. The right screenshot shows a 'CET Data' import/export page with the URL '127.0.0.1:8008/portal/cet_data'. It has tabs for 'Import Data' and 'Export Data'. The 'Import Data' section includes sections for 'SYSTEM', 'USERS', and 'RECORDS'. The 'RECORDS' section contains a 'EXAMPLE RECORDS' box with 'Record(s) available' and a 'Format' dropdown showing 'Excel', 'JSON', and 'CSV' options. Buttons for 'Choose File', 'CLEAN', and 'UPLOAD' are present.