xQ 3.0 Administration User Guide

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Course Overview and Objectives

This document provides user directions for the xQ 3.0 administration system. It was designed for new xQ users and includes all steps involved in the administration process.

For existing xQ users, focus on the following sections that contain information on the changes from xQ 2.5 to 3.0:

- Lesson 3
 - Set up a New Organization
 - Enter Set-up Details
 - Enter Organization Demographics
- Lesson 4
 - o Monitor Responses Access Reports

Upon completion of this course, learners will be able to:

- Set up a new organization in xQ 3.0.
 - o Access and Log in to xQ 3.0.
 - Set up a new organization.
 - Enter organizational structure.
 - Enter set up details.
 - Enter organizational demographics.
 - o Enter organizational goals and measures.
 - Enter custom questions.
 - o Validate xQ 3.0 set-up.
 - Write survey invitation email.
- Use the Report Landing Page.
 - Monitor response rates.
 - Batch reports.

- o Rebatch reports.
- o Access reports.
- Work with an existing client.
 - Search for an existing client.
 - Set up subsequent xQs for an existing client.

Lesson 1 – Introduction to xQ (Execution Quotient)

xQ Overview

The xQ tool measures how well an organization and its work units execute organizational goals and serves as a leading indicator of performance. Higher xQ scores relate to better performance, so work units with higher scores should be performing at higher levels than work units with lower xQ scores.

The xQ score enables leaders to assess the degree to which parts of the organization are executing across the six principles of execution, as defined by FranklinCovey. xQ measures improvement in executing key organizational goals and objectives over time. It also serves as a diagnostic instrument for FranklinCovey's Organizational Solutions. FranklinCovey can measure client xQ and work with the client to achieve better operating results and higher xQ scores. This is done through a combination of assessments, action planning, training programs and tools.

xQ Service Explanation

The xQ product includes three elements: the xQ Questionnaire, the xQ Report, and the xQ Debrief. This document focuses on the xQ administration which includes: setting up the survey, viewing the data and downloading and distributing the xQ reports in preparation for the debrief. This document is not a guide for facilitation of the xQ Debrief session.

xQ Questionnaire

The xQ Questionnaire is a standard questionnaire accessed via the Internet. Respondents are invited to participate via email and are given access to the survey via a URL link. The xQ Questionnaire contains the same standard questions in all available languages.

- The xQ Questionnaire contains 27 standard questions (22 objective; 5 open-ended); 20 of these questions are scored. The scores of these 20 questions are averaged to generate the overall xQ score. These questions cannot be changed.
- Client-specific custom questions can be added. The custom questions will not affect the overall xQ score.
- The xQ is a tri- level assessment tool:
 - 1. Organization level
 - 2. Work unit/team level
 - 3. Individual level
- xQ Questionnaires contain 10 organization-level questions, 10 work unit/team-level questions, 6 individual-level questions, and 1 general question.

- Each xQ must be setup specifically for each client to define the appropriate "organization" and "work units." The xQ defines "organization" as the highest level about which all respondents will be asked the same 10 questions. The "work unit/team" are the lowest levels within the organization. Often organizations have many levels from the top organization level, down to the specific work unit/team level. The work unit/team level is where individuals and managers/supervisors deliver on very specific sub-goals and activities. The name of each work unit will dynamically flow into the respondents questions based on the work unit they select. The 10 work unit questions are then tailored to members of different work units/teams.
- Ideally, client data is collected over a 2-week period from their entire population.
- The xQ Questionnaire has been written at a USA 7th grade education level. Please carefully review the questions to assure that the average employee is capable of understanding the xQ questions. If not, it may not be appropriate to have these populations participate. Also ensure that the context of the standard xQ questions apply to all participating cultures.
- The Questionnaire is anonymous and individual responses cannot be traced. But, because we ask some personal demographic identifiers, such as the respondent's position within the organizations (i.e., executive, manager, and employee), and because some clients choose to ask additional questions, such as length of service or location, respondents may feel that they could be easily singled out and identified. To protect the anonymity of respondents, we do not report data for any grouping of fewer than five respondents.
- If Internet access is not available, the client can use paper surveys with the following major reservations:
 - Unit surveys must reflect the respondents work unit/team name in the questions.
 - Data from paper surveys must be entered into the core xQ electronic system by someone in the field.
 - Respondent error rate of 25 to 30% is likely, as no system controls in place. The respondent may not complete the necessary questions or may not answer all questions.
- The Questionnaire is designed to be re-administered to track improvement over time. To determine overall execution progress and we strongly recommended administering the xQ Questionnaire every 6 to 12 months.
- Over time, the xQ metric becomes as crucial to managing an organization as financials or other operational metrics. It can be added to an organization and/or unit's performance scorecard.

Report

The xQ Report is automatically generated for all levels/units defined in the xQ administration set-up. These xQ Reports are distributed to executive leadership and to each unit manager of the client organization. The report contains aggregate findings, unit findings, and comparisons to average data representative of total FC client database, industries, geographic regions, some countries and Harris averages, as made available.

- The report uses the xQ score as the primary value for consideration. The xQ score is a number on a scale of 0 to 100, where 100 indicates flawless execution against the standards defined by FranklinCovey, and 0 indicates chaos. An xQ score of 50 indicates that an organization is operating at about half capacity.
- The xQ score is calculated from the scores of questions 1 to 19 and 21. Other questions do not affect the xQ score, but they provide critical insight into execution issues.
- xQ scores are calculated at an overall level, for each of the six principles of execution, and for each of the three organization levels (i.e., organization, work unit/team, and individual).
- The six principles of execution are:
 - o **Clarity**: Do they know the goals?
 - Commitment: Do they buy into the goals?
 - Translation into Action: Do we know what to do to achieve the goals?
 - **Enabling**: Do they take down barriers and have sufficient resources?
 - Synergy: Do they work together to arrive at better ways to achieve the goals?
 - Accountability: Do they account to each other for their commitments?

xQ Debrief

xQ metrics are important tools for managing the organization at all levels. Thus, we recommend conducting xQ Debriefs at as many levels as possible and ideally at every level.

• The xQ Executive Debrief is conducted by a FranklinCovey consultant and is a 4-hour work session where executives process the data and plan actions to improve organizational focus and execution. Participants receive hard copies of the xQ Report before or at the time of the xQ Executive Debrief.

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- Work units or teams are encouraged to conduct their own xQ Unit Debriefs. A FranklinCovey consultant, client unit leaders, or client licensed certified facilitators can conduct these debriefs.
- In many cases, the xQ debrief is conducted in conjunction with the Four Disciplines of Execution workshop. Take this into consideration when preparing for the xQ action planning part of the debrief.

Lesson 2 – Accessing xQ 3.0

Overview

Each country must be set up by a FranklinCovey xQ Administration in Salt Lake City, Utah with a country-specific profile, which includes a certified administrator, and debrief consultant(s). The country administrator needs to have an xQ Admin username and password. The country-specific profile enables you to access only xQs that have been set up by you or for you by xQ Administration.

Lesson Objectives

- Access xQ 3.0.
- Log in to xQ 3.0.

Access xQ 3.0

To get set up as a country administrator, please contact: Vandy Evans, Director of xQ vandy.evans@franklincovey.com
801-817-6627

Tips

- Once we have created your profile, you will receive the live xQ 3.0 access link similar to this: http://xq.franklincovey.com/admin/home.php
 This is the same link you currently use to access xQ 2.0.
- For future reference, save this link to your internet **Favorites** folder.

Log in to xQ 3.0

Once you have been set up as a certified administrator, click on the xQ 3.0 link and access the xQ and log in.

Tips

If are having problems logging in, please email
 xQadmin@franklincovey.com
 or contact a member of the xQ team for login and password support.

Relevant Fields

Field Name	Description
Username	The username is for access to the xQ system as agreed to by the user. It is set up in the system by xQ Administration. It must be at least five characters in length.
Password	The password is for access to the xQ system as agreed to by the user. It is set up in the system by xQ Administration. It must be at least six characters in length.
Login	When selected, the login button will active the login and navigate to the xQ home page.

Procedural Steps - Access 3.0

1. Select the xQ 3.0 link from your Favorites folder. The xQ home page will appear.



- 2. Enter your **Username**.
- 3. Enter your **Password**.
- 4. Click **Login**.

Lesson 3 – Adding an Organization in the xQ 3.0 System

Overview

Setting up a new xQ client file is the first step in administering an xQ. Using the tabs in the system, you will enter all of the information required to set up your client and create a demonstration questionnaire and report link for your client.

Most of the work done in administering the xQ is done during this process. It is important that you work with your client throughout this process to ensure that the set-up has been done correctly.

Lesson Objectives

- Set up a new organization.
- Enter organizational structure.
- Enter set-up details.
- Enter organizational demographics (positions).
- Enter organizational goals and measures.
- Enter custom questions.
- Validate xQ 3.0 set-up.
- Write survey invitation email.

Process Description

- 1. Enter the client information into the system. See steps below.
- 2. The client partner will set up a call with the administrator and the client to discuss any missing information. Typically, during the call you will review the units, demographics, goals and measures.
- 3. Once you've received all of the needed information, send the demo link to the client for review and approval.
- 4. Once approved by the client, send the live link and the email invitation to the client for distribution to those participating prior to the start date.

Set Up a New Organization

The first step is to set up a new organization in xQ. When setting up an organization, you will be directed to the **New Organization Set-up** page. After entering the information, you can edit it by navigating to the **Set-up** tab.

Tips

- When setting up a new organization, have a thorough consultative discussion with the client to decide what the Organization level and name should be for purposes of the questionnaire. Often, groups completing an xQ are part of a larger organization. Depending on the results the client wants to see in the Overall Org reports, you may need to include your group's information at a lower level (e.g., as a department within an organization).
- When setting up an organization with a client, check to ensure that all
 respondents have a place to take the survey, everyone can find their
 unit/team and all potential respondents have access to the Internet. It is
 common in manufacturing or field-related jobs for employees to not have
 an individual computer.

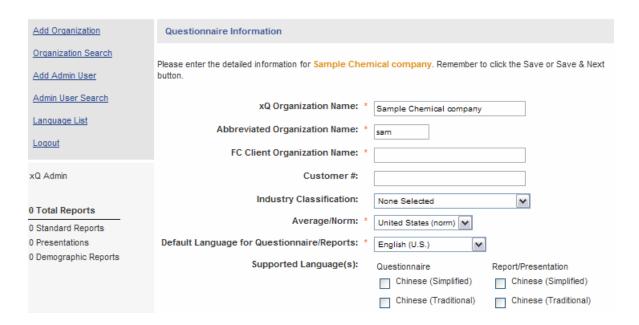
Relevant Fields

Field Name	Description
xQ Organization Name	The xQ Organization name is the specific name of the highest level of the organization being asked about in the specific xQ. The entered name will dynamically flow into each of the 10 standard organization-level questions.
Abbreviated Organization Name	An abbreviated name of the organization that can be easily recognized.
Project Manager Name/Email/Phone	The project manager is the person at the client who will be your primary contact during the entire xQ process.
Industry Classification	From the drop-down list, select one of the 18 industries listed. This classification is to track aggregation of scores across countries and industries for data analysis and normative comparison.
Average/Norm	Includes a drop-down list of about 30 average/norm selections to appear as the comparison in the report. These include the representative average scores for the selection made, including: FC total client database, industries, geographic regions, some countries and Harris averages.

Field Name	Description
Default Language for Questionnaire/Reports	The default language is the primary language your client wants to use for the questionnaire and the reports.
Supported Language(s) Questionnaire	This field lists all languages available for the questionnaire. Select all languages that the client has agreed they will need for their respondent population.
Supported Language(s) Report/Presentation	This field includes the few and critical languages for the formal reports and debrief sessions.
Comments	Enter any additional comments about this client such as, "This is a pilot xQ that is being set up so it can be reopened at a later time to add more units."
Save	This field saves the information you entered and provides a demonstration questionnaire and a report link that you can send to your client.
Cancel	ONLY cancel if you want to permanently cancel a client. Once set up, a client file remains in the xQ system.
Save & Next	This field saves the information you entered and takes you to the Units tab where you can enter the unit names of the organization.
Demo Links	The Questionnaire Demo link and the Report Demo link allow you to send links to your client to review the xQ system. Your client will be able to experience how the xQ questionnaire will work. These links allow a client to review the data, but not actually submit completed surveys. These links are VERY IMPORTANT to complete the client approval process before going live on the designated start date.

Procedural Steps – Set up a New Organization

- 1. From the xQ home page, select **Add Organization**.
- 2. Enter the **xQ Organization Name**.



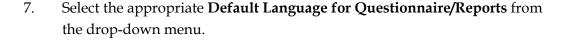
3. Enter the **Project Manager Name**, **Email** and **Phone** number.

Tip: The project manager is the person at the client who will be your primary contact during the entire xQ process.



- 4. Select the appropriate **Industry Classification** from the drop-down menu.
- 5. Select the appropriate **Average/Norm** from the drop-down menu.
- 6. Select the appropriate **Questionnaire Grouping** from the drop-down menu.

Tip: This is very important. If you select the wrong country/area by accident, you will not be able to find/access your client data.



Note: The system includes additional languages not listed in the visual above.

Tip: Clients will typically want more languages for the questionnaires than for the reports and presentations.

8. Select the **Supported Language(s)** for both **Questionnaire** and **Report/Presentation** from the list.

Tip:



Be VERY selective when indicating you need any reports in languages other than your default/primary language. Any Report/Presentation language selected must also be selected as a Questionnaire language.

All selected supported languages will require translation of the unit names, demographics (except countries), goals and measures data.

- 9. Enter **Comments**, if appropriate.
- 10. Select **Save & Next** to continue with the set-up process.

Enter Organizational Structure

During this step in the process, you will enter all of the names of the client's organization structure levels and associated work units under the **Units** tab. The organization level name was entered in the **Setup** tab. These different organization levels and work units will determine:

- The names of the units that will flow into the work unit/team questions in the xQ Questionnaires.
- The organization level at which respondents can answer questions.

Client organizational structures are the most important and most difficult part of setting up an xQ Questionnaire. Understanding the client's organizational structure and analyzing organizational charts (org charts) can be a complex process that requires a high level of consultation with the client. Once you determine the organizational structure, it is critical to accurately enter the information.

Respondent data can be entered only at the lowest level units within the organization. For example, if there is a unit named Sales, with three units, such as Region A, Region B, and Region C, data can be entered into only the Region A, B, C units not into the Sales level. Data from the sub-levels can then be rolled-up to the Sales unit level.

In most cases, you will need to add a final sub-unit where the leader of the overall department (e.g., Sales) can take the xQ. Remember, all managers should take the xQ as part of the unit they lead. If they are the Senior Vice President of Sales and also a member of the Executive team, they should take the xQ under Sales.

For example:

Level 1: Company X (organization)

Level 2: Sales (unit)

- o Level 3: Region A (sub-unit)
 - Level 4: Product A
 - Level 5: Client A (work unit/team level)
 - Level 5: Client B (work unit/team level)
 - Level 4: Product B
- Level 3: Region B (sub-unit)
- Level 3: Region C (sub-unit)
- o Level 3: Sales (sub-unit for Senior VP only)

Process Description

Follow the process below with the client when setting up a new organization in xQ.

- 1. Get a copy of the client's formal org charts, if available.
- 2. Discuss the details of the management reporting structures with the client.
 - Explain that all managers take the xQ for the unit they lead, not as part of
 the Executive team. An easy way to get the client to understand this
 concept is by reviewing the 10 unit questions. The words "Executive
 team" rarely makes any sense in these questions.
- 3. Define the names of the work levels and units, not the names of the managers. Use the names of the work functions, such as Sales, Finance, Accounting, or Territory.
 - Write the structure out on paper first. Do this exactly the way it will look in the system using indentations, etc.
 - Carefully consider the number of levels you will need in your structure to get down to the work unit level that will make sense in the 10 unitfocused questions. See Example above.
 - Level 1= organization named in the Setup tab
 - Level 2 = names of functions/work units reporting directly to the Senior Executive of the organization
 - Level 3 = names of sub-units that report under the level 2 units
 - Level 4 = names of sub-units that report under level 3 units

- Level 5 or more: In very large organizations with over 1,500 respondents, you may need to go down to more levels.
- 4. Determine if you are going to need the reports or presentations in any of the supported languages. Even if you need the questionnaire in another language(s), you may not need any or as many supported languages for the reports or presentations. Be very selective in requesting organizational reports in the other languages. Rarely check all. For example: only check Italy for Italian reports.

Tips

- Only request presentations for the units in which they will be used, typically the highest executive level. Because it takes twice as long to generate presentations as well as reports, please check the box only if you will use the presentation.
- Use discretion when generating reports into additional languages. Even if
 you need a questionnaire is needed in additional languages, you may not
 need any or as many supported languages for the reports or
 presentations.
- If you need a report or presentation after you have already closed the survey (e.g., additional languages needed, changes made to the questionnaire, or respondents added), you must make and save the changes and then rebatch the reports.

Relevant Fields

Field Name	Description
Unit Name	Enter specific names spelled correctly of all units and sub-units within the organization for which the client wants xQ Reports generated.
	The unit names entered will dynamically flow into each of the 10 work unit level questions.
Abbreviated Name	Enter an abbreviation for the unit name if it is longer than eight characters. This abbreviation will be used in the names of the columns on the Summary Tables at the end of the report.
Create In Button	This button adds a unit name under its correct higher level, which we refer to as the "parent". Select this button after you populate the unit name field and select the correct parent.
Rename Button	This button changes a unit name that has already been entered.

Field Name	Description
Delete Button	This button drops and deletes a name completely from the system. You cannot delete a unit if it has any sub-units under it.
Promote/Demote Drop- Down	This field allows you to promote or move a sub-unit up a level. It also allows you to demote or move a higher level unit or parent down to become a sub-unit.
Move Down/Move Up	This field allows you to move a unit up or down within its current level. Use this option to change the order of the levels (e.g., if you want them in alphabetical order).
Expand All and Collapse All	These two links allow you to change the view of the structure. To view all of the sub-units, click Expand All . To view only one level of the structure, click Collapse All . You can also expand and collapse any set of specific sub-units by clicking on the + or – signs to the left of unit names where sub-units exist.
Presentation Needed	Select Presentation Needed for the units that will need a formal PDF presentation. If checked, the system will automatically generate the formal presentation.
Demographic Report(s) Needed	Select the units for which you will need different demographic reports batched. You can identify which demographics you want reports for on the Demographics page.
Demo Links	The Questionnaire Demo link and the Report Demo link provide access to demo versions for clients to review and approve.

Procedural Steps - Enter Organizational Structure

Complete the steps below for each language you have selected for the questionnaire. If appropriate, once you have completed the steps for the default/primary language, you can select **User Default Language** and the organizational structure will repopulate in the default language.

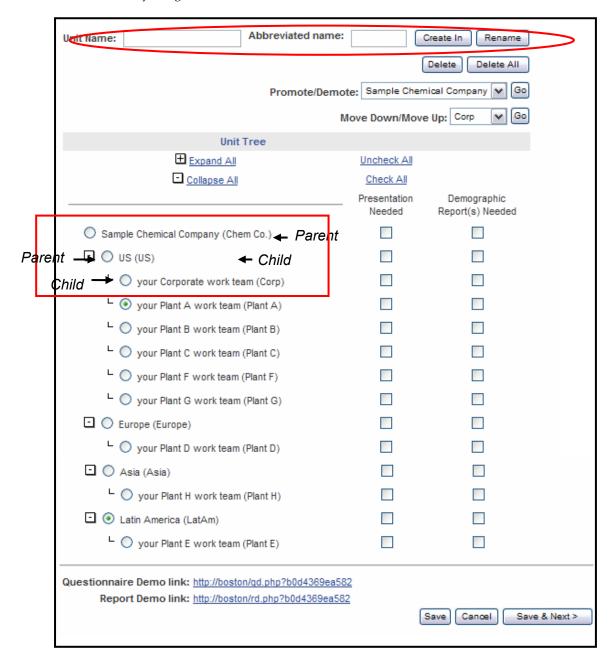
Enter the first unit (level 2) under the organization:
 Write the Unit Name for the first level below the organization.
 Write the Abbreviated Name.
 Select Create In.

Tip:

The organization in the **Unit Tree** will be selected (default) when this page displays. This selection will ensure that the level 2 unit will be a "child" of the organization.



The **Abbreviated Name** has to be eight characters or less. Use abbreviations that your client will easily recognize.



2. Enter all other level 2 units below the organization by repeating step 1.

Tip: Before you add a new unit, ensure that the correct parent unit is selected in the **Unit Tree**.



Write the **Abbreviated Name**.

3. Enter the first unit under Level 2 (Level 3): Select the Level 2 unit in the **Unit Tree** to which you want to add sub units. Write the **Unit Name** (sub-unit) for the first level below the selected unit.

Select **Create In**.

- 4. Enter all other level 3 sub-units below the appropriate level 2 units by repeating step 3.
- 5. Complete the steps above for all levels of the company's organizational structure.
- 6. Rename or edit a unit by selecting the circle next to the unit name you want to change in the **Unit Tree**.

Enter the correct **Unit Name**.

Click Rename.

7. Delete a unit by selecting the circle next to the unit you want to delete in the Unit Tree.

Click **Delete**. The name is automatically deleted.

Tip: You cannot delete a unit if it has any sub-units under it. You must delete each sub-unit separately.



8. **Promote/Demote** or **Move Down/Move Up** a unit by selecting the circle next to the unit you want to move in the **Unit Tree**.

From the **Promote/Demote** or the **Move Down/Move Up** text field dropdown, select the name of the unit to which you want to move the selected field.

Click **Go**. The item will move.

9. **Expand All** or **Collapse All** by selecting **Expand All** or **Collapse All** within the **Unit Tree**.

You can also expand and collapse any set of specific sub-units by clicking on the + or - signs to the left of unit names where sub-units exist.

10. Select **Presentation Needed** for all units requiring a presentation. Uncheck All and Check All will either check or uncheck all of the unit presentations for printing. Select individual boxes as needed.

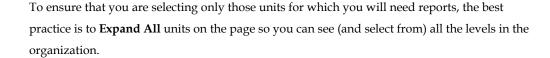
Tip: You must check the presentation box for the highest organizational level report. If the organizational level presentation box is not checked, your reports will not batch correctly.



If you need a presentation after the survey has closed and batched, you can check the presentation, save, and rebatch the entire set. The new presentation will generate along with all other reports and presentations requested.

11. Select the units for which you want Demographic reports batched.

Tip:



- 12. Select the **Questionnaire Demo** or **Report Demo** link to view a demo of the questionnaire or report.
- 13. Select **Save & Next** to continue with the set-up process.
- 14. Complete steps 1-13 for every supported language(s).
- 15. Enter the names of each unit in the appropriate language. Or, to copy the default language name of each unit, select **Insert Default Language Units**. The unit names will appear in the default language.

Enter Set-up Details

The **Details** tab contains any remaining details needed to finalize the set -up of a customized xQ. Once complete, the system will allow you to create the final live questionnaire and report links for your client. This is the tab you are likely to use the most. It includes the set-up factors that allow you to customize all of the remaining elements such as positions, goals, measures and custom questions.

Tips

- Some of the information in the **Details** tab will populate with the information you entered on the **Set-up** page. On the **Details** page, enter additional information and validate what is already there.
- The **Details** tab includes all of the approvals you will need to complete before the system will allow you to send the standard email with embedded link to the client.

Relevant Fields

Only fields new to this particular tab will be defined. Refer back to the previous tabs as needed.

Field Name	Description	
FC Organization Name	This field is the formal name for your client.	
	For example, you can search for the parent name of General Electric and lower levels of the organization may appear in the results screen. If there are no other parent organizations, reenter the xQ organization name here.	
Customer #	Enter the customer number for your billing purposes, if available.	
# of Questionnaire(s) Contracted	This required field is the total number of people that are being surveyed; i.e., 100% of the client population receiving the links. This number is used to calculate the response rate in the report.	
	This number may be different than what you contract or bill for. You can update this number as you monitor the response rate from the Report page.	
Start Date	This is the date that client respondents will begin taking the survey. This will be the formal start date in the system and in the email.	
End Date	This is the last date that client respondents will be able to complete the survey. Once the survey closes, the system will create reports. Make sure you allow enough time for respondents to complete the survey. Once a survey closes and batches, it is a lot of work to reopen the survey and rebatch the reports.	
Debrief Date	This is the date that the client and consultant have agreed to present and review the xQ Reports together.	
# of Reports at Each Level	If you are responsible for making the report copies, specify in this text box how many different level reports must be printed for the client.	
Reports Mailing Address	Enter the address to which to send the reports, if applicable.	
Client Information		

Field Name	Description			
Sponsor Name, Email and Phone	The Sponsor Name is the name of the most Senior Executive of the organization being surveyed. This name will appear at the bottom of the client's invitation email.			
	The email address is needed for the invitation email that will be sent to the respondent.			
	The phone number is not required.			
	The system does not contact the sponsor directly.			
Project Manager Name, Email and Phone	Add the phone number to the project manager information you entered earlier in the process as you will need to talk with the project manager many times to finalize the xQ implementation.			
Other Contact Name, Email	Enter any other contact information here.			
and Phone	In addition to the sponsor and project manager, many clients have another person who will be taking an active role in the xQ.			
	FranklinCovey Information			
Admin Name	Select your name from the drop-down list. This field identifies you as the administrator responsible for the set-up of this specific client.			
Client Partner Name and Email	Enter the name and email of the FC sales person responsible for managing this xQ effort.			
Consultant Name and Email	Name and email of the FranklinCovey consultant responsible for debriefing this xQ.			
	Edit/Custom Information			
Edit Check Boxes	Select this box if you need to add any information appropriate for your client on any of these listed items. Enter the appropriate number in the # field.			
Demographics	For xQ, a demographic is a variable or factor by which you want to analyze or cut data. They are other key factors about the business not built into the organization structure such as: geographic regions or matrixed business units.			
	The two (per language selected) demographics that are required during set-up are:			
	Country (selections cannot be changed)			

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Field Name	Description
	Positions (selections can be changed)
	Increase the number if you would like to track additional demographics. For example, if you would like to add one more demographic question, then enter 3.
	Select the Demographics check box if you want to edit the positions and or add demographics. If you do not check the box, you will not be able to access the Demographics page as the system assumes you are not editing positions or adding demographics.
	You can enter specific demographic information, if appropriate, on the Demographics (previously Positions) page.
Goals and Measures	These fields default to three but you can change them to meet the needs of your client.
	The number you enter will flow into the goals and measures question. For example: "If you know any of the top four goals of Company ABC, please list them."
	Goals and measures are required questions. If your client does not have any formal goals or measures, the question can be asked generally: "If you know any of the top goals of Company ABC."
Custom Questions	Select custom questions, if appropriate. These questions will not affect the xQ score. Try to limit custom questions to the few most important ones.
Additional Customization needed/Custom Reports Required	Check the appropriate box if you require additional customization or custom reports. This field does not affect the survey, but it reminds you to contact the xQ team and request additional customization or custom reports.
	Before you commit to the client for additional customization or custom reports, you must get approval from FranklinCovey xQ Administration (Vandy Evans).
Include Question 27	Selecting this box will include the following question in the survey: "Please comment on what <my unit=""> could do better to achieve its most important goals."</my>
	Responses do not affect the xQ score, but will appear as free form text as comments.
Comments (hybrid)	Enter any additional comments about this project.

Field Name	Description
Cancel Project	If for some reason the project gets cancelled after you've started the set-up process, check this box. Since an organization cannot be removed from the database once it has been entered, you must formally cancel the project. This field is rarely, if ever, used.

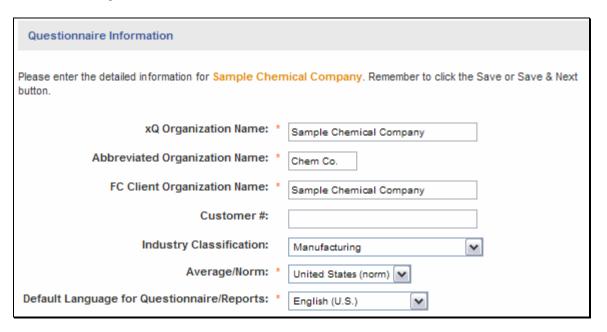
Procedural Steps - Enter Set-up Details

- 1. Go to the **Details** tab.
- 2. On the **Details** page, enter the **FC Client Organization Name**.

Tip:



If you are working with a subdivision or department, enter the name of the higher-level organization here. The organization name will help you find the smaller sub-divisions or departments for which separate xQs have been completed as part of the larger parent organization.



- 3. Enter the **Customer** #, if available.
- 4. Enter the estimated # of Questionnaire(s) Contracted.

Tip: To avoid having a response rate of more than 100%, you may need to increase this number before the survey closes and the reports are batched. For example, if you had originally entered 150 contracted xQs and you notice 165 people have taken the xQ, you will need to increase the contracted number to at least 165. Closely monitor this number as it affects our database and averages when it is over.

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5. Enter the **Start Date** for the survey to begin.

Tip: We recommend at least a 2-week survey window. If you set up the client, and then they decide to postpone their xQ, check **Hold**. The client status will appear as **Hold** when searching for the organization.

6. Enter the **End Date** for the survey to close.

Tip: This date is very important. On the day the survey closes, the xQ system automatically begins to calculate the data and generate the requested reports and presentations. You can extend the date at any time to reopen the survey for additional respondents. To reopen a survey, change the **End Date** to a future date.

7. Enter the **Debrief Date**.

Tip: Allow enough time between the **End Date** and **Debrief Date** to have reports copied and delivered for the debrief. The FranklinCovey client contact is typically responsible for this task.

- 8. Enter the # of Reports at Each Level.
- 9. Enter the **Reports Mailing Address**, if appropriate.
- 10. Enter the **Sponsor Name**, **Email** and **Phone** number.

Tip: The **Sponsor Name** is the name of the most Senior Executive of the organization being surveyed. This name will appear at the bottom of the client's invitation email is normally sent from the client's email address.

- 11. Enter the **Project Manager Phone**.
- 12. Enter the **Other Contact Name**, **Email** and **Phone**, if needed.
- 13. Select your **Admin Name** from the drop-down list.

Tip: Your name and email address will automatically flow into the client's invitation email as the FranklinCovey contact if respondents are having any problems while they are taking their xQ.

- 14. Enter the Client Partner Name and Email.
- 15. Enter the **Consultant Name** and **Email**.

Tip: Client partners and consultants normally receive a copy of the instructional email that has all



of the live links. You will also need to make sure the consultant receives copies of the link and reports before the debrief.

- 16. Edit the number/content of the **Demographics**, **Goals**, **Measures** or **Custom Questions** (if applicable):
 - Check the box of the item you want to edit.
 - Enter the appropriate number of each in the space provided.

Tip: Remember the system will only allow you to change the **Positions**, **Goals**, **Measures** or **Custom Questions** if you have checked the **Edit** box. Check the approval box to the far right once the client has approved the customizations using the **Questionnaire Demo** link.



- 17. Click **Include Question 27** if you would like to include it.
- 18. Enter any **Comments** about the project or the client requests, as necessary.
- 19. Click Save & Next.

Enter Organizational Demographics

FranklinCovey believes that the execution gap may vary consistently among different demographics within and across organizations. To track and compare this idea, the xQ gathers data on how different demographics or organizational variables score.

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The two required demographics measured by xQ are **Country** and **Position**. You cannot edit country information but you can change the number and types of positions for each organization. The standard 3 default positions are: executives, managers and non-management. However, each organization may have unique titles for their employee levels or positions. For example, the military do not use the terms executive, manager, employee; they use senior Officer, officer, soldier. Change this information as needed for your client.

Positions

FranklinCovey gathers comparable role/position information across all clients using a mapping equivalent. Every title you enter must map back to the standard three positions. There system does not limit the number of titles within one position box, or the number of positions. However, the greater the number of different positions available, the more a respondent may feel that his or her responses could be identified. If anonymity is important, use the fewest number of levels possible to reflect the difference between executives, managers, and employees.

Additional Demographics

To capture relevant information for complex or matrixed organizations, you may need to add demographics for reporting purposes. Using additional demographics should be the EXCEPTION AND NOT THE RULE since this feature and its equivalent reports will significantly increase time for batching and printing.

This system uses the term Demographics, but they are actually organizational descriptors. These should be used only for complex organizations whose reporting needs cannot be captured via the units. For example, your units may be set up by geography and function, but you may want to also track business product area. Because you do not want to go to that level in the unit structure, you could ask: "What is your business product area of focus?" Then you enter possible answers for tracking.

Other demographics you may need to capture include: length of time with the company, accounts serviced, client-base, department, etc. When you enter additional demographics, you will also indicate which ones need reports. Use caution in selecting reports as you will receive them for all of the units and languages previously selected. This also significantly increases the time required to batch and print reports.

Demographic Reports

This feature allows for greater reporting flexibility. However, because of the increased number of reports you can generate, use it with caution and on an exception basis. You will automatically receive **Summary Tables** at the back of every unit report cut by the demographic. In most cases, **Summary Tables** will be enough information and you will not need to request **Demographic Reports**.

All Demographic reports default to **Complete**. At this time, you cannot create a presentation for a Demographic report. Because an overall Demographic report would be the same as an overall Organizational report, you can use this feature to create partial Demographic reports. To do this, you opt out of certain parts of the demographic.

For example, if you want to track responses for all Executives in an organization, you simply opt out of the other groups within the Position demographic and generate a report on the Executives. If you want to change this report to include or exclude a different group within that demographic, you have to change the report on the **Demographic** page and rebatch.

Process Overview

- 1. Have your client review the three standard levels (**Positions**). Review the **Executive Summary** and the **Summary Tables** with the client at the end of the sample report so he or she can see how the scores will be reported using this variable.
- 2. With the client project manager, determine the fewest number of positions appropriate. In cases where you are surveying a sub-unit that has only a supervisor and employees, use only two position boxes and do not map anything to the Executive level.
 - The order of the listing should go from the highest level of responsibly to the lowest.
 - Enter all of the positions as directed in the procedural steps below.
 - If you are setting up this xQ in more than one language, the position titles must be translated into all of the other languages and entered into the system separately, unless otherwise specified by the client. Typically, someone from the client organization will translate this information.
- 3. If the organization is particularly complex, you may add demographics on this page. Remember, adding demographics should be the exception and not the rule. Make sure you have a true business need to report on additional demographics before including information here.

Tips

 In the Units tab, you selected the units that need a report and/or presentation. On the Demographics page, you can select which demographics to report on for the units previously selected.

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Relevant Fields

Only fields new to this particular tab are defined. Refer back to the previous tabs as needed.

Field Name	Description
Demographics: Question 1	"Please select the country in which you work."
	The xQ system asks this question consistently for all clients worldwide. This is a default question and cannot be edited in any way. Respondents select from a drop-down list of countries in the questionnaire. This information will feed the Franklin Covey client, industry, region and country averages.
Demographics: Question 2	"Which of the following best describes your position at (Company X)?"
	The xQ system asks this question for all clients worldwide. This is a default question but you can edit the number and type of responses.
	This question defines the levels of managerial responsibility for a specific organization. The xQ system includes three standard default levels. These levels are translated into every available language. In English they are:
	Executive/Senior Manager: All high-level staff who have the most senior levels of accountability
	Manager/Supervisor/Team Leader: All who have any degree of management responsibility
	Employee/Team Member/Staff: All non-management roles
	To select these default levels, do not check the Edit box at the left.
	To customize numbers and/or names of levels for a particular client, check Edit and enter the number of levels your client wants to use.
# of Additional Demographic Questions	This box will populate automatically with the number of additional demographic questions you entered into this field in the Details tab. To change the number of demographic questions, enter a different number in this box and then click Update . The system will then update to the correct number of text boxes where you can enter additional questions.
Custom Demographics	To gather custom demographics, enter the question in the box

Field Name	Description
Question X	 provided. Clients can ask only three types or styles of questions, similar in structure to the core xQ questions. Examples of the four types are: 1. Choose One Only Example: "What is your length of service? Less than 1 year, 2 to 5 years, more than 5 years." 2. Drop-down List Example: "What is your location? Utah,
	Arizona, California." 3. Choose All That Apply Example: "What other departments are you most dependent on for your own success? Finance, Marketing, Manufacturing, Sales, Human Resources."
How Many Answers	Enter the number of available answers you would like to have for this particular question.
Update	Clicking this button will update the number of blank text boxes for this set of answers to match the number entered.
1., 2., 3., etc	These numbered text boxes are used to enter the available answers for a particular question.
Abbreviated	Enter the abbreviated name for each answer. This abbreviation will appear if you generate individual reports for any of the answers and as a column names in the summary tables.
Report Title	Include the name of the report you will generate for this demographic. The report for this demographic will generate for all of the units selected in the Units tab.
Report Needed	To select individual reports by response, select the Report Needed check box across from each response for which you want a report.
Opt Out	To select Report Needed for part of a demographic, you will need to Opt Out of at least one group (response). Opting out will EXCLUDE that group(s) from the Partial Demographic report.
	An overall Organizational report will include the entire demographic, so use this feature to create Partial Demographic reports.
Remove	Select Remove for a specific answer to remove that response from the list. Your available response boxes will decrease by one.

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Procedural Steps - Enter Organizational Demographics

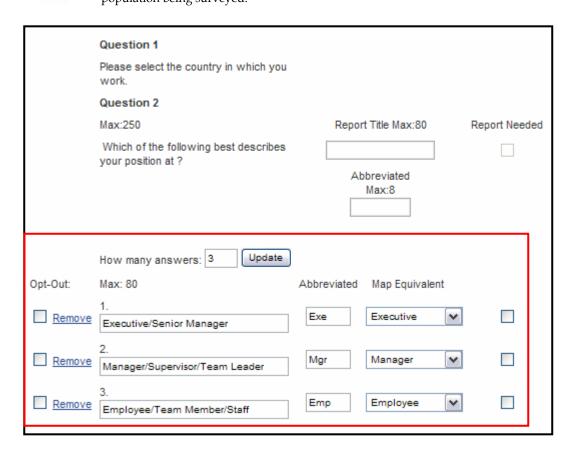
- 1. Go to the **Demographics** tab.
- 2. Scroll to **How Many Answers**.

Check that the number of answers available for **Question 2** (Positions) is correct.

If not, enter the correct number and click **Update**.

If needed, enter the custom name of each position in the boxes provided.
 Enter the **Abbreviation** of each position (for reporting purposes).
 From the **Map Equivalent** drop-down list, select the appropriate mapping of each position.

Tip: For internal mapping purposes, all custom positions must map back to one of the three default levels. Select the default level that makes the most sense based on the size/levels of the population being surveyed.



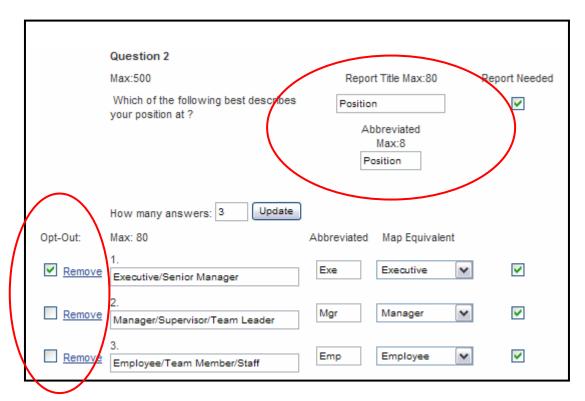
- 4. Enter the information above for all remaining positions.
- 5. To change **How Many Answers** after you've added information, update the field and click **Update**.

- 6. To remove a specific answer from the list, select **Remove**.
- 7. To select a Partial Demographic report for this demographic, enter the **Report Title** and **Abbreviated** name.
- 8. Select the **Opt-Out** check boxes for the answers you want to EXCLUDE from the Partial Demographic report.

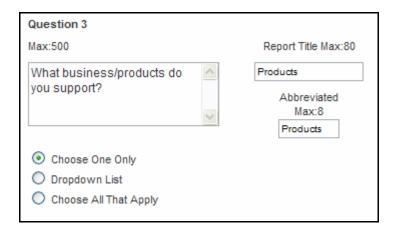
Tip: When running a Partial Demographic report, you must opt out of at least one of the groups listed. Until you do, the **Report Needed** check box will be grayed out. Opting out allows the client to look at a report for multiple groups within a demographic.

If you do not opt out of any of the answers, the overall Organizational report will include the entire demographic.

9. To select an individual report for one of the groups in a demographic, select **Report Needed** for that group.



- 10. Check that the **# of Additional Demographic Questions** is correct. If not, enter the correct number and click **Update**.
- 11. Enter Question 3 in the appropriate text box.



- 12. Enter the demographic name and abbreviation in the Report Title and Abbreviated fields (e.g., tenure, position, region, etc).
 From the list of question types, select the type of question you would like to write:
 - 1. Choose One Only
 - 2. Drop-down List
 - 3. Choose All That Apply
- 13. Enter the number of answers available in the **How Many Answers** field. Click **Update**.
- 14. Enter the available responses for that question in the spaces provided.
- 15. Select reporting options as outlined in steps 8-11 above.
- Enter all additional demographic questions and their available answers in the appropriate boxes until all custom demographic questions and answers are entered.
- 17. Click Save & Next.
- 18. Complete steps 1-17 for every supported language(s) selected.
- 19. Enter the names of each demographic question(s) and response(s) in the appropriate language. Or, to copy the default language name for each question and response, select **Insert Primary Language**. The question(s) and response(s) will appear in the default language.

Enter Organizational Goals and Measures

FranklinCovey believes that specific knowledge of the organization's goals and measures is a significant indicator of the organization's goal clarity. All respondents are asked: "If you know any of the top goals of Company ABC, please list them." And, "If you know any of the top measures that indicate whether Company ABC is achieving its most important goals, please list them." Respondents then fill in, from memory, the top goals and measures. The order of the responses does not matter. The xQ system completes a word content analysis to match responses to the information entered. The data are listed in the report to get a reasonable estimate of respondents' knowledge on specific client goals and measures. These responses are not scored. The system can search for only specific sets of characters, such as single words. The system searches the respondents' written entries for the key words [bracketed] that you entered into the system for client goal 1. As soon as it has found a word match for goal/measures 1, it stops looking for other goal/measure 1 key words and gives the respondent credit for accuracy on goal/measure 1. This process is repeated for all remaining goals/measures by searching the remaining respondent entries that have not yet received credit.

You must enter the goals and measures and place [brackets] around the key words that you want to be searchable. You can use a given word only once for all goals/measures.

The system will provide the client with a quantified accuracy value for each goal/measure and an average degree of accuracy across all goals/measures. For example, if a client has two goals/measures and they scored 50% on 1 (meaning 50% of the respondents got at least one word correct), and then they scored 30% on goal/measure 2, the average degree of accuracy would be 40%.

The client will receive a copy of the verbatim written responses listed in alphabetical order.

Tips

- Discuss with your client what the organization's goals, measures and associated key words should be. If the client does not have any formal goals or measures, use the generic version of the questions. The system does a forced comparison only at the organization level, question 22 and 23. We ask question 24 about unit goals, but no system comparison is made.
- Typically, when working with multi-national (multi-language)
 organizations, it is the responsibility of your client project manager to get
 goals and measures translated into the languages being used.

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Relevant Fields

Only fields new to this particular tab are defined. Refer back to the previous tabs as needed.

Field Name	Description
Goals Description	FranklinCovey uses the term "goals" in our xQ and 4 Disciplines materials. Clients may use other terms in its place. You can enter a clarifying word or phrase after the word goal if the client requires it. This change applies to only question 22.
# of Goals	This box will populate automatically with the number of goals you entered into this field in the Details tab. To change the number of goals, enter a new number in this box and click Update .
Top Goals	Enter each of the top goals in the boxes provided.
	Work with your client to determine all the goals and corresponding (searchable) words that respondents might use. For example, if "improved financial performance" is the goal, "EBITDA", "EPS", Profit might all be key words. If your client wants to use a complete phrase, such as "[improved financial performance]," you can enter it all into one set of brackets. If you use a phrase, the respondent must have every character, including spaces, exactly as it appears in the brackets to receive credit.
Measures Description	FranklinCovey uses the term "measures" in our xQ and 4 Disciplines materials. Clients may use other terms in its place. You can enter a clarifying word or phrase after the word measures if the client requires it. The change applies only to question 23.
# of Measures	This box will populate automatically with the number of measures you entered into this field in the Details tab. You can change the number of measures and the system will update to the correct number of text boxes.
Top Measures	Enter each measure in the boxes provided.
	Work with your client to determine all the measures and corresponding (searchable) words that respondents might use. If you use a phrase, the respondent must have every character, including spaces, exactly as it appears in the brackets to receive credit.

Procedural Steps - Enter Organizational Goals and Measures

- 1. Go to the **Goals** tab.
- 2. Enter a **Goals Description** if your client uses a different term for goals.

Tip: Enter a description in the text box using up to 100 characters. For example, a goal was clarified to mean "corporate strategic initiatives," question 22 would then read, "If you know any of the top three goals (Corporate Strategic Initiatives) of Company ABC, please list them."

3. Check that the **# of Goals** is correct. If not, enter the correct number and click **Update**.



4. Enter the first goal in the **Top Goal** box numbered 1. Enter the remaining goals in their appropriate boxes.

Tip: Enter the goals exactly as you want them to appear in question 22. Bracket all of the individual key words for each goal. The system does not limit the number of key words for each goal. Try to isolate only the words or items that distinguish each goal from the others.

For example:

If the goal is "Organic growth through market share expansion and internally developed technology," then correct brackets are: [Organic] growth through [market] [share] [expansion] and [internally] [developed] [technology].

5. If the client does not have any formal goals, enter "None" in the text box, but DO NOT use any brackets. Enter 1 as the number of goals. The question will then read: "If you know any of the top goals..."

If the client would prefer to have the question read, "... any of the top three goals," then enter 3 for the number of goals.

- 6. Click Save & Next.
- 7. Complete steps 1-6 for every supported language(s) selected.
- 8. Go to the **Measures** tab.
- 9. Enter a **Measures Description** if your client uses a different term for measures.

- 10. Check that the **# of Measures** is correct. If not, enter the correct number and click **Update**.
- 11. Enter the first measure in the **Top Measure** box numbered 1. Enter the remaining measures in their appropriate boxes.

Tip:



Enter the measures exactly as you want them to appear in question 23. Bracket all of the individual key words for each measure. The system does not limit the number of key words for each measure. Try to isolate only the words or items that distinguish each measure from the others. Do not duplicate bracketed words.

12. If the client does not have any formal measures, enter "None" in the text box but DO NOT use any brackets. Enter 1 as the number of measures. The question will then read: "If you know any of the top measures".

If the client would prefer to have the question read, "... any of the top three measures," then enter 3 for the number of measures.

- 13. Click Save & Next.
- 14. Review question 23 using the demo link. Confirm that all of the bracketed key words appear in bold.
 - Ask your client to also review the measures information.
- 15. Complete steps 9-14 for every supported language(s) selected.

Tip: Once a report has been batched and generated and the



Once a report has been batched and generated and the consultant and the client have reviewed the results and written comments, the client may ask you to change the key words and rebatch the report. You cannot change the number of goals or measures at that point, but you can change the key words in the brackets.

16. To change the key words in the brackets after a report has been batched, go to the Goals or Measures tab, change the words in brackets and click Save. Go to Details and select Forced Batch and the system will regenerate all of the reports.

Enter Custom Questions

The **Custom Questions** tab allows you to enter specific custom questions for each client. These questions do not impact the xQ score.

Carefully review the complete xQ and the custom questions requested to avoid redundancies. Limit custom questions to only important client topics so the results of these questions do not overshadow the core xQ results.

Tips

- You can ask a maximum of 100 custom questions. However, we do not recommend asking more than three or four questions. As these increase the length of the survey.
- Custom questions do not impact the overall xQ score but are quantified separately or appear as free-form text depending on the type of question.

Relevant Fields

Only fields new to this particular tab are defined. Refer back to the previous tabs as needed.

Field Name	Description	
# of Custom Questions	This box will populate automatically with the number of custom questions you entered into this field in the Details tab. To chang the number of custom questions, enter a new number in this box and click Update . The system will then update to the correct number of text boxes.	
Custom Question	Clients can ask only four types or styles of questions. Similar in structure to the core xQ questions. The four types are:	
	Text Entry	
	 Choose One Only 	
	 Drop-down List 	
	Choose All That Apply	

Procedural Steps - Enter Custom Questions

- 1. Go to the **Custom Questions** tab.
- 2. Check that the **# of Custom Questions** is correct. If not, enter the correct number and click **Update**.
- 3. Enter the first custom question in the **Question 28** box.
- 4. From the list of question types, select the type of question you would like to write.
- 5. Enter the number of answers available in the **How Many Answers** field. Click **Update**.

The system will automatically provide the appropriate number of answer boxes based on your response above.

- 6. Enter the available responses for the question in the spaces provided.
- 7. Enter all remaining custom questions and the available answers in their appropriate boxes.
- 8. Click Save & Next.

Validate xQ 3.0 Set-up

Once you have completed the steps above, go to the **Tasks** tab. This tab includes all of the actions you need to complete your xQ set-up. The Task tab is a list of required actions that must be completed before the survey is complete. It will take you back to the **Details** page when selected so you can approve your work, if needed.

After you complete the list of actions, you will be able to access and send the invitation email. If you have selected more than one language, the system will remind you to enter the units, positions, goals and measures in each supported language you checked. It will also tell you all of the items listed on the **Edit/Custom** section of the **Details** tab (i.e., goals, measures and custom questions) that still need client approval. Make sure your client reviews and approves the xQ to ensure the highest quality service possible.

Tips

- Once the set-up is complete, it is VERY IMPORTANT that you share the **Questionnaire Demo** link (found on the **Details** page) with the client so he or she can review and approve it before sending to respondents. The demo allows the client to review all of the set-up, experience how the xQ will work and approve the survey without actually entering any data into the system. This step may take a few days to review so allow enough time between set-up and distribution of the survey.
- As part of the review and approval process, you or someone from the xQ team will walk the client through questions 1-4 and 22-23 to make sure he or she understands how the set-up data will flow into the survey. Also review with the client the **Report Demo** link so he or she can track response rates and view xQ summary scores while the survey is open.
- The approvals set up in the Tasks tab help you complete a thorough review with your client before the survey is sent out to the respondents. You will be required to check Approved in several places before the system will allow you to continue to the Email tab where you send out the links.

Relevant Fields

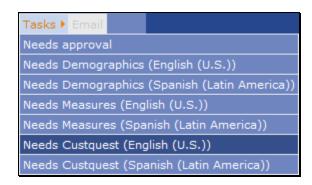
Only fields new to this particular tab are defined. Refer back to the previous tabs as needed.

Field Name	Description				
Edit/Custom Approval	The Approval check boxes are also available in the Details tab.				
	Once the overall xQ has been approved by the client, make sure all Approval check boxes to the right of Edit/Custom are checked. You have to approve only those items you customized in the Details tab. You need to approve in all languages.				

Procedural Steps - Validate xQ 3.0 Set-up

- 1. Go to the **Tasks** tab.
- 2. Hold your mouse over the **Tasks** tab. The remaining tasks will appear in a list below the name of the tab.

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- 3. Select the task you would like to complete. The **Details** page will appear.
- 4. Scroll to the **Edit/Custom** portion of the page.
- 5. Check the **Approval** box next to the item and language you are approving.

Tip: Until you check all **Approval** boxes, the system will not allow you to proceed to the **Email** tab.

Once the approvals are complete, you can select the **Email** tab.



6. Click **Save & Next**.

Write xQ Invitation Email

The final step in the xQ setup process is to send the invitation email. Once you have completed all of the tasks required by the xQ system, you be able to access the **Email** tab. Using the **Email** tab, you can customize and send the invitation email. It contains the live questionnaire and report links for your client. The email header will populate with the addresses of the client sponsor, client project manager, FranklinCovey consultant and FranklinCovey client partner from the information you previously entered in other tabs.

Complete Email Text (for Example purposes ONLY)

Dear Client,

We welcome you as the contact to help complete the xQ^{TM} process. If you have questions about your responsibility in this process, please contact Susie Stewart at FranklinCovey. Susie Stewart can be reached by phone at 801-817-6195 or by email: susie.stewart@franklincovey.com.

The xQ Questionnaire consists of 27 questions accessed through the Internet and takes about 15 minutes to complete. Respondents receive an xQ invitation via your organization's internal e-mail system. This e-mail invitation, printed below, provides instructions for each respondent to access the xQ Internet address (link) and complete the questionnaire.

We ask your help in distributing the xQ invitation via your internal e-mail address books to all employees who will be participating.

INSTRUCTIONS FOR ADMINISTERING xQ

THIS IS A SIX STEP PROCESS. The instructions are numbered below. If you have any questions about administering this process, please call the xQ Administrator listed above.

- 1. OPEN A NEW E-MAIL MESSAGE.
- 2. PREPARE INVITATIONAL E-MAIL BY COPYING THE FOLLOWING TEXT INTO THE NEW E-MAIL and then add a personal invitation from the senior manager within your organization with language that will entice your participants to respond. This is your primary opportunity to encourage participation.

SUBJECT LINE: *Client Sponsor* requests your input to the xQ[™] Questionnaire

Dear xQ Participant,

Martin Pippin

We all know that some things are more important than others, whether in personal life or at work. At Augusta Chronicle Accounting, we want to do the important things well. We are asking your input on just how well we are doing by completing the FranklinCovey xQ Questionnaire.

Your responses will be anonymous and cannot be linked to you, so please be candid and honest in your answers. You can answer the questionnaire anytime between Apr 12, 2006 and Apr 18, 2006 at 11:59 p.m. MST. The questionnaire requires about 15 minutes to complete. Please take a few minutes now to share your thinking with us by clicking on the following Internet link to complete the xQ Questionnaire:

http://xq.franklincovey.com/q.php?84d072
Thank you,

3. ADD ADDRESSES AND SEND THE E-MAIL LETTER (PRINTED ABOVE) TO THE RESPONDENT GROUPS.

4. MONITOR YOUR RESPONSE RATE:

Your report link is http://xq.franklincovey.com/r.php?84d072

This link is live and will allow you to monitor your response rate. (Please note: This link should not be sent out to participants.) After clicking the report link, the page will then display a blue table. Next to the title of each work unit will be a number in parenthesis; this number will indicate your response rate up to that moment. You may check back as frequently as you would like to see if your response rate has changed.

5. SEND THE FOLLOWING E-MAIL REMINDER AT THE MIDPOINT, Apr 15, 2006, OF THE QUESTIONNAIRE PERIOD.

SUBJECT LINE: *Client Sponsor* reminds you to complete xQ™ Questionnaire.

Dear xQ Participant,

Last week you received an e-mail request to participate in the xQ Questionnaire. If you have not already completed the questionnaire, please take a moment to do so now. Access will close on Apr 18, 2006 at 11:59 p.m. MST. Click on the following Internet address to complete the brief questionnaire.

http://xq.franklincovey.com/q.php?84d072

Thank you for your participation,

Client Sponsor

6. ACCESS COPIES OF YOUR FINAL REPORTS: Click on the following report link:

http://xq.franklincovey.com/r.php?84d072

This link allows access to your final report(s) as soon as the data collection closes. Click on the report link, the page will then display a blue table. Next to the title of each work unit will be 3 columns. Decide which unit level report you desire to download by putting a check mark in the box to the left of the unit name, go to the next column and choose the appropriate Demographic (if applicable) then click on the language in which you would like to view the report. The 4th column is where you choose the type of report or presentation. It will then bring up the list of reports in a second table titled "Report list". You will now have access to all reports that were requested above in alphabetical order. Decide which unit level report you desire to download, go to the name of the report you desire and click on it. It will then bring up the PDF report and you can save as desired.

If you have questions, please do not hesitate to contact the FranklinCovey xQ administrator listed above in the first paragraph of this email. We wish you the best with your xQ effort.

Note: items in italics will populate with the information you entered into the xQ set-up.

Tips

• If you cannot access the **Email** tab, go back to the **Tasks** tab and make sure all required approvals have been checked.

Relevant Fields

Only fields new to this particular tab are defined. Refer back to the previous tabs as needed.

Field Name	Description
From	This field Populates with the administrator's name entered in the Set-up tab.
То	This field populates with the project manager's name entered in the Set-up tab.
CC	This field populates with both the client partner and consultant names entered in the Set-up tab.
Subject	This field populates with xQ Questionnaire for Company X .
Suggested Email	This field includes suggested email text (see above) populated with client information that you entered earlier in the set-up process.
Open Email	This link opens Outlook so you can send the email.
Email Sent	Check the Approval check box once you have sent the email.

Procedural Steps - Write xQ Invitation Email

- 1. Go to the **Email** tab.
- 2. Copy all of the email text and click the **Open Email** link at the bottom of the page. An Outlook email will automatically open that is already addressed.
- 3. Paste the email text into the new email.
- 4. Confirm that the email is addressed to the correct people using the correct

email address.

- 5. Make all of the links (within the live by putting your cursor at the right end of the link and clicking the space bar. (The links should be colored and under-lined.) Confirm that the link works by using it to open the questionnaire and the report.
- 6. Edit the email text to best meet the needs of your respondents.
- 7. Send the email. Once it is sent, call your project manager to confirm he or she received it. Remind the project manager to forward the message to the respondents.
- 8. Return to the **Email** tab in the xQ system. Click the **Email Sent** check box to confirm that the email has been sent.

9. Click Save & Done.

9/12/2007

Lesson 4 - Using the Report Landing Page

Overview

Once the set-up of the xQ survey is complete, you are ready to send it to your client so they can distribute it to the appropriate employees for participation. While the survey is open, you and your client can monitor response rates. Once the survey closes, you can access, run and view reports using the **Report Landing** Page.

Lesson Objectives

- Monitor response rates.
- Batch reports.
- Rebatch reports.
- Access reports.

Process Description

- 1. Send out the report link to the client prior to when the xQ is opening. Make sure they know how to read and use the **Report Landing** page and request a custom list of reports, if needed.
- 2. Regularly monitor the responses while the survey is open to ensure that people are completing the xQ.
 - Halfway through the survey period, contact the project manager and discuss the level of response. Suggest he or she send out the halfway email reminder included in the invitation email instructions.
- 3. The day before the survey closes, contact the project manager to verify plans to close the survey. If the response rate is low consider extending the close date. When you extend the date, be sure to build in enough time to accommodated the debrief date and printing needs.
 - Once the survey closes, the reports will automatically batch. They will be available to download, view and print the next day.
- 4. The day after the survey closes, check to make sure the reports have batched appropriately.
 - If you need additional reports, update the reports/presentations needed in the appropriate tabs. Then complete a **Forced Batch** of the reports.

- 5. Share the report link with the client. Make sure they understand how to use the **Custom Selection** menu to create and share custom lists of reports.
- 6. Work with the client to determine who is responsible for printing and distributing the necessary reports before the debrief.

Monitor Response Rates

Once a survey has opened, you and the client can monitor the response rates real-time. This feature provides a snapshot of the responsiveness of the organization. If the response rate seems low, the client can send out reminders to the groups who are least responsive.

Tips

- You can use the **Custom Selection** menu to create a different list of unit reports to view, if needed. For more information, see the *Access Reports* section of this lesson.
- If a particular unit does not have at least five responses, a response rate and summary xQ score will not appear for that level in the **Report Landing** page.

Relevant Fields

The following fields are found at the bottom of the **Report Landing** page in the **Custom Report Selection** table.

Field Name	Description			
Unit Name & Response Rate	This field includes the names of the unit levels you are viewing. This view defaults to level 2 in the org structure. You can expand individual levels in the structure by clicking the + sign for the level you want to expand until you get to the right level. The number to the right of each unit name is the current response rate. This number updates as additional respondents take the survey.			
Expand All/Collapse All	These features allow you to view information at the organization level (Collapse All) or at the lowest level(s) of the survey (Expand All).			

Procedural Steps - Monitor Response Rates

From the top of the **Details** page, click the report link.
 The **Report Landing** Page will display.

Tip:



Teach the client how to use the report link so he or she can monitor the response rate. Both of you will be able to see the level of response for all of the units by clicking on the active report link included in the invitation email. This link is only for the project manager and not for respondents.

2. From within the **Custom Selection** menu, select the units that you want to check responses for. Use the +/- selections and the **Expand All/Collapse All** features to view the information for any unit level(s).

Note: For more information on how to use the **Custom Selection** men, refer to the *Access Reports* section of this lesson or the Report Landing Page itself.

3. Check the number of **Respondents** who have completed the survey by the number in parenthesis next to each level in the organization.

Custom Report Selection

Hide Custom Selection

Unit Name and Response Rate	Demographics	Language	Report Type
Expand All Collapse All ☐ ✓ FranklinCovey Co. (1492) ☐ ✓ OSBU (534) ☐ ✓ CSBU (878) ☐ ✓ Central (80)		☐ All☐ Spanish (Latin America)☐ English (U.S.)	☐ All ☑ Complete ☐ Core ☐ Presentation

4. If you need to extend the close date due to a low response, go to the **Details** tab and change the end date. Click **Save.**

Batch Reports

Once the survey has closed, the reports you requested during the set-up process will batch. Once batched, you and your client can download any reports for any unit that has at least five respondents.

Reports will start to auto-generate as soon as a survey closes. The administrator does not have to do anything to begin this process. This automated process is triggered by the **End Date** you entered in the **Details** page.

In RARE CASES, you can force batch reports. This action overrides the autogenerate process and cues your reports to batch as soon as possible. Using the feature begins the batching process immediately. Please use this feature only if you have an immediate business need for reports, such as: reopening the survey to allow more respondents to participate or changing the goals and/or measures after a survey has closed.

Tips

- The time required to generate reports depends on the size and complexity of the xQ. The greater the number of units, the greater the number of languages, the greater the number of specific reports and presentations the system must create and the more time it will take.
- Forced batch should only be used in RARE CASES. Using this feature can impact the ability of other Administrators to get the reports they need.

Relevant Fields

The following field is found at the top of the **Details** page.

Field Name	Description			
Force Batch Process	This link begins the force batch process, overriding all other reports in the cue to batch. DO NOT USE this feature unless you have a critical need to recreate reports immediately.			

Procedural Steps - Batch Reports

- 1. Go to the **Details** tab.
- 2. Click the **Force Batch Process** link at the top right side of the page.

Tip: This link is accessible only if you've completed all of the approvals in the set-up process and the survey has closed. Until then, you will not see the link on the page.



3. The following question will appear, "Are you sure you want to force batch?" Click **OK** if you truly have a need to force batch.

The reports will batch.

Click **Cancel** if you cannot justify this action.

Access Reports Using the Report Landing Page

You can access, download and share reports from the **Report Landing** Page. This page is the client's key interface, so be sure your client understands how to use it. The page can be used to limit the number of reports you share or view, to provide a custom view of real-time responses for a select group(s) or to allow clients to view response rates for a limited set of groups.

This page defaults to the primary language of the xQ. You can select another language (if applicable) from the drop-down list if you requested reports in these languages during the set-up process.

Because xQ 3.0 has the capability to batch many reports at many different levels, you can use the **Custom Selection** menu to filter and select a sub-set of the reports you want to see or share with others. The **Custom Selection** menu displays the **Unit Name & Response Rate**, **Demographic** (if applicable), **Language** and **Report Type** for which you selected a report to be batched earlier in the set-up process. You and your client can create a custom list of reports by selecting the appropriate information from the menu.

The **Report List** displays all of the selected reports by **Unit Name** in alphabetical order once you select the appropriate reports. The **xQ** score, (number of) **Respondents, Demographics** included (if any), **Status, Language** and **Report Type** will list for each report.

You can also send a custom report link to others. Use the custom report link when clients within an organization need access to only a select number of reports. When you do this, the **Custom Selection** menu will also appear above the custom report list with the units selected previously on the **Report Landing** Page. That way, others can filter the report list you sent them further, if needed.

Use caution when creating customized report lists. The number of reports can grow very quickly, so make sure you select only the reports you need. Once you create a link to a custom list, you can go back and complete the process again as needed.

Report Types

You can select any of the following reports:

- Complete report: A complete report provides the entire report (with written comments) for the selected units. It includes questions 22-25, goals, measures, and question 27.
- **Core report:** A core report provides the entire report (without written comments) for the selected units. It includes all numerical results with no written comments for questions 22-25 and 27.
- **Presentation:** A presentation provides the report data in a presentation format.
- **Demographic:** A core report of the demographics selected in the **Demographic** column.

Note that most units do not require more than one type of report.

Tips

- Use the Custom Selection menu only for large and/or complex clients who want to share limited reports with other individuals in their organization.
- When making report selections in the Custom Report Selection, if you select any demographics in the **Demographic** column, you will receive only demographic reports for the units selected. No Unit reports will appear in the **Report List**. To view Unit reports only, no not select any demographics.

Relevant Fields

The following fields are found on the **Report Landing** page.

Field Name	Description			
Language drop-down list	If you requested reports in multiple languages, select one from the drop-down list to change the language of the page.			
Summary Tables	This field links to a Summary Table for all units with at least five or more respondents created for this xQ.			
All Written Comments	This field links to a list of all written comments for this xQ in the language the comment was entered.			
About xQ	Provides more information about the xQ Questionnaire and the xQ Report.			
QuickStart Guide	This field links to a guide for conducting an xQ Debrief.			
Abode Acrobat Reader	This field links to a downloadable Abode Acrobat Reader required to view the reports and presentations.			
	Custom Selection Menu			
Hide Custom Selection	This link shows or hides the Custom Selection menu. When selected, the Custom Selection menu disappears and the Show Custom Selection link replaces it. Selecting this link causes the Custom Selection menu to reappear.			
Unit Name & Response Rate	This information is the client's unit structure. This view defaults to show the first and second Level in the organizational structure with all levels selected. When you select or deselect a unit, all units underneath it are automatically selected or deselected. You can expand or collapse each individual level in the structure by clicking the + or - sign for the level you want to expand until			

Field Name	Description				
	you get to the right level.				
Expand All/Collapse All	Use the Expand All and Collapse All selections for view information differently. These features allow you to view information at the organization level (Collapse All) or at the lowest level(s) of the survey (Expand All).				
Demographics	This field includes a list of all of the demographics you entered on the Demographics page for which you selected reports.				
Language	This field includes a list of all of the languages for which you selected a report in the Details page.				
Report Type	This field lists types of reports available: All (includes all three types of reports), Presentation , Core or Complete . The selection defaults to Complete .				
	Report List				
Link to this list of Reports	This button creates a link to the custom list of reports, which can be shared with clients who do not need a complete list.				
Number of Reports Displayed	This field displays the number of reports based on the reports you selected in the Custom Selection menu.				
Unit Name	This field lists the levels in the unit structure for which you selected a report. This list defaults in the order it appears in the unit structure.				
xQ	This field displays the summary xQ score for each Unit Name . The xQ score does not appear until the survey has closed. An xQ score does not appear for units with less than five respondents.				
Respondents	This field displays the number of respondents at that level of the organization who have completed the survey.				
Demographics	This field includes a list of all of the demographics you entered on the Demographics page for which you selected reports.				
Language	This field includes a list of all of the languages for which you selected a report in the Details page.				
Report Type	This field lists types of reports available: All, Presentation, Core, and Complete . The selection defaults to Complete .				

Procedural Steps – Access Reports Using the Report Landing Page

- 1. From the top of the **Details** page, click the report link. The **Report Landing** Page will open.
- 2. To select another language in which to view the **Report Landing** Page, select the appropriate language from the drop-down list.
- 3. If you do not want to create a customized report list, select **Hide Custom Selection**. Continue to step twelve to download all of the available reports.
- 4. To create a customized report list, select the reports you would like to include using the **Custom Selection** menu.
- Tip: Because you can generate so many reports, use this feature to decrease the number of reports in the list. The reports that batched were determined earlier in the set-up process. From the reports batched, you can decide which of those you want to share with the client by filtering and creating a customized report list.
 - 5. Click +/- until all of the unit names you need display.
 - 6. Select the unit level(s) you want to appear in the report list from the **Unit Name & Response Rate** column by checking the box next to each name.
- Tip: When you select a unit, all units underneath it are also selected. When you deselect a unit, all units underneath it are deselected. Use +/- and Expand All/Collapse All to change the view of the unit structure. The number of respondents is listed next to each unit level in parenthesis. A minimum of five questionnaires must be completed to generate a report in order to protect the anonymity of the respondents.
 - 7. Click the box next to the **Demographics** you want to appear in the report list.
 - 8. Click the box next to the **Language(s)** you want to appear in the report list.
 - 9. Click the box next to the **Report Type** you want to appear in the report list.
- Tip: Use discretion when selecting the reports you want to appear in the list. Particularly, be mindful of the **Languages** and **Report Types** you select as they increase the number of reports you will be downloading and printing.
 - 10. Check the **Number of Reports Displayed** to ensure you are not selecting an unnecessary number of reports.

- 11. To create a link to the customized report list, right click **Link to this** Page. Copy and Paste the link where appropriate.
- 12. To download a report or presentation, click the correct report from the **Report List**. The report or presentation will open.

Report List Link to this list of Reports					Numbe	er of Reports D	isplayed:43
	nit Name	хQ	Respondents	Demographics	Status	Language	Report
							Type
Accounting, HR and Admi	<u>n. Team</u>	70	6	ı	Available	English (U.S.)	Complete
Australia Direct Office		83	19	·	Available	English (U.S.)	Complete
Brazil Direct Office		71	16		Available	English (U.S.)	Complete

Tip:



When downloading a **Complete** report (with written comments), consider not using the organization unit levels that have large numbers of respondents (over 250.) The written comments will have less meaning at this level. Also, printing responses at this level adds a large number of pages to your report. We recommend that you use the full report with written comments at the lower levels of the organization where they will have the most meaning.

Lesson 5 - Working with an Existing Client

Overview

Many of the xQs we set up are for repeat clients who have already taken the survey. These subsequent xQs are set up differently than a new client, since most of the information we need is already in the xQ system.

Lesson Objectives

- Search for an existing client
- Set up a subsequent xQ for an existing client

Search for an Existing Client

You can search the entire xQ database for an existing client. If a client's previous xQ was created in a previous version (2.0, 2.5, etc.), it will appear in the new system because all clients have been migrated to 3.0. You can view and access the **Search Organization** function at any time while working in xQ from the navigation column on the left side of the screen on the xQ home page.

Once you have located an existing client (organization), you can edit, finalize the survey set-up details, set-up a comparative copy of an xQ and access specific links for the client for current and previous surveys.

Tips

 As long as the information in the Set-up tab has been entered, you can search for an organization using Organization Search. This feature allows you to search for clients even if they have not completed their survey.

Relevant Fields

Field Name	Description	
Organization Search	This link is accessible on the left side of the screen at all times in the xQ system.	
	Search using any of the following criteria:	
	• xQ Organization Name : Search on the whole name or on the first few letters of the name.	
	• FC Client Organization Name: Search on the parent company name if you cannot remember the specific organization name.	

Field Name	Description
	 Customer # Client Partner Name: Call up all xQs done for a specific client partner.
	End Date From and End Date To
	• Results/pg : This drop-down list allows you to set the number of clients you want listed in a series. If you check ALL , it will list all of the xQs you have set up in your geographic area in alphabetical order.
	• Status: Search for the status of an xQ with one of the following:
	 Open/Not Started: The set-up has begun, but the survey has not started.
	o Open/Active : The survey has started and is active.
	 Closed/In Process: The survey has closed, but it is prior to the debrief date.
	 Closed/Completed: The survey has closed and the debrief has occurred.

Procedural Steps - Search for an Existing Client

- 1. Click **Organization Search**. The **Find Organization** screen will appear.
- 2. Enter the search criteria you want to use.
- 3. Define the **Results** per number you want per page.
- 4. Check the status of that client's xQ: **Open**, **Not Started**, **Completed**, etc.
- 5. Click **Find Organization(s)**. The **Organization Search Results** will appear.
- 6. Click on the organization name of the client file for which you are searching. The system automatically takes you to the **Set-up** tab for that client.

Set up Subsequent xQs for an Existing Client

Once a client has completed an xQ, it is best practice to have them complete another survey after a certain period of time. Subsequent xQ scores provide data across time so clients can monitor progress as actions are taken to improve performance.

The xQ system has been designed so you can easily create a copy of the previous xQ and use the information as a baseline for creating the next one. As part of this process, consult with the client to make sure that any changes to the organization information are made in the xQ before administering the next survey.

Client Review

Once you've made a copy of the subsequent xQ, send it to the client for review. The client can compare the current organization structure with the original setup and determine needed changes. Common set-up changes are outlined below.

Unit Name Changes: The unit name is a critical part of the set-up process. The name controls the comparative reports (i.e., which unit xQ1 scores will automatically be compared to xQ2 scores). You need to map xQ1 unit names to xQ2 unit names that are the same. Remember to ask the client if they want the data from Unit A xQ1 to be compared to Unit A xQ2. You can make changes only to the xQ2 information. The xQ1 information is provided for easy reference only. Common unit name changes are outlined below.

- If you want to compare units, but the unit name for xQ2 needs to change: Check the circle next to the unit name in the xQ2 column.
 Enter the new name in the xQ2 column.
 Verify that the unit name changed.
- If you want to compare units but you need new sub-units under the unit in xQ2:
 Add new sub-units under the xQ2 parent. This change moves the remaining lower xQ1 unit names down so you can still compare across xQ1 to xQ2.
- If you want to compare xQ1 and xQ2 scores:
 Delete the xQ2 unit entry.
 A blank circle with no name appears and the system knows not to compare data.

Positions for xQ2: Best practice is to have the client keep the positions the same, if possible. This approach helps the consultant and client management understand why the scores have changed. If the client does request this change, update the number and names of the new positions.

Goals and Measures for xQ2: The xQ1 goals and measures will appear on the page. If they have not changed, copy them into the xQ2 text boxes. If they have changed, update them as needed.

Custom Questions: You can use the xQ1 custom questions or create new ones for the xQ2. However, the xQ system does not provide any comparative calculations for custom questions.

Tips

- The system allows you to create multiple subsequent xQs for a client. For purposes of this document, we have the terms xQ1 and xQ2 to refer to a client's first and second xQs. However, a client can complete any number of xQs. The number associated with the name reflects how many xQs they have completed. But, comparative reports show only the last two xQs taken by a particular client.
- Keep in mind that if the unit structure changes to a point that certain levels in the structure are no longer comparable then you will not be able to get a comparative report for those new units/levels. In this case, you will be provided a baseline report but continue to receive comparative information for the units/levels that did not change.

Relevant Fields

Only fields new to this particular tab are defined. Refer back to the previous tabs as needed.

The following field is found in the table displaying the **Organization Search Results**.

Field Name	Description		
Action	This field directs you to do one of two things with the xQ:		
	1. Create Unlinked Copy This field is not used for a comparative copy! Use it only to create a separate exact copy of a set-up when an organization wants to complete another xQ for a different part of the organization. This field makes it easier for you to copy the whole xQ set-up as a starting point for the new one.		
	2. Create Comparative Copy Use this field to link the new xQ2 to the most recent previous xQ.		

Procedural Steps – Set up Subsequent xQs for an Existing Client

- 1. Click **Organization Search** to locate your client's previous xQ. The **Find Organization** screen will appear.
- Enter the Client Name.
 Check the Closed/Completed status box.
 Click Find Organization.
- 3. Locate your client's previous xQ. If your client has conducted many xQs, make sure you select the most recent one.
- 4. From the **Action** column, click **Create Comparative Copy**.

Tip: This step is very important. It instructs the system to link the xQ1 (first) to the xQ2 (subsequent) and calculates changes question by question.

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ı	ك	ı
٦	$\overline{}$	•

Action	Client Partner	Organization	End Date mm/dd/yyyy	Status	Response Rate	xQ Score
[Create Unlinked Copy] [Create Comparative Copy]	Doug Puzey	the Department of Aviation	04/20/2005 (xQ ₁)	Closed/Completed • Reports created [21-APR-05]	273/350 78%	50

5. The system asks you if you're sure you want to create a Comparative Copy. Click **Yes**.

The system takes you to the **Set-up** tab.

Tip: When you complete an **Organization Search**, a line for the new xQ2 appears as an xQ client in the updated database. Under the **End Date** column, you will see (xQ2).

6. Review the information in all of the xQ tabs and edit as needed. (See *Client Review* section above.)

Tip: The best practice for updating client information for subsequent xQs is to send the client copies of the information as it appears on each of the tabs. This way, he or she can review and request necessary changes.

The number of languages available has increased with each new release. Make sure you select the languages you need for both the xQ Questionnaire and the Report/Presentation in the

Details tab.

7. **Save** the updates to the xQ2 and proceed with the administration process as outlined in this document.

Appendix - Sample Chemical Company Case Study

Sample Chemical Company is a global, matrixed organization with plants in four regions around the world. Most reporting is done at the regional level so the client would like overall reports by region and plant. Within each region are plants. Each plant produces one or two of two products: Agriculture/Pesticides and/or Plastics/Polymers. The client would also like to see reports by product type and function.

Within each plant are the following functions:

- Operations
 - Manufacturing
 - o Distribution
- Sales
- Administration

Corporate is centralized in the US and includes the following functions:

- Legal
- IT
- Finance
- Marketing

Below are the plants by region and their respective products.

Business	Geography				
Units	US (500)	Europe (250)	Asia (150)	Latin America	
				(100)	
Agriculture &	Plant A	Plant D		Plant E	
Pesticides	Plant B				
	Plant C				
Plastics &	Plant A	Plant D	Plant H		
Polymers	Plant F				
	Plant G				

Recommended Scenario

After entering 5 different scenarios into the xQ system, the xQ Admin team determined that this was the best approach to take for this client. It is important when determining how to set-up complex, matrixed organizations that you understand the needs of the client.

Consider the following:

- 1. How does the client want to see the reports?
 - If it is in multiple ways, consider what is the simplest (least number of levels) organizational structure you can enter and still capture everyone?

- 2. Where do the employees see themselves working?
 - The more they understand where to answer the questions, the less likely there will be any errors.
 - Consider where their paycheck comes from. This is typically where most employees seeing themselves working.
- 3. If needed, contact the xQ team for direction on how to set up complex organizations in xO 3.0.
 - Vandy Evans and Laura Stevens can provide guidance on how to set up complex, matrixed organizations in xQ 3.0. Do not hesitate to contact us with questions.

Enter Units as:

Sample Company

- US
- Your corporate work team
- o Your plant A work team
- o Your plant B work team
- o Your plant c work team
- o Your plant F work team
- Your plant G work team
- Europe
 - o Your Plant D work team
- Asia
 - Your plant H work team
- Latin America
 - Your plant E work team

Enter Additional Demographics as:

- 1. What business/products do you support?
 - Corporate (US)
 - Agriculture & Pesticides
 - Plastics & Polymers
- 2. What is your function?
 - o Legal
 - o IT
 - o Finance
 - Marketing
 - Corporate (other)
 - Manufacturing
 - Distribution
 - o Operations (other)
 - Sales
 - o Administration