Getting Started with 20/20 Insight

TRIAL VERSION

20/20® Insight GOLD Trial Version

Welcome to the Trial Version of 20/20 Insight GOLD!

We appreciate your interest in this powerful technology and are confident you'll find it to be an important tool in your organization for all kinds of feedback.

This booklet contains everything you need for problem-free installation and use of the software during your 30-day trial.

You'll also find suggestions for setting up different kinds of surveys – organizational climate, team assessment, and pre/post training – to help you check out the program's versatility and flexibility.

You can access the extensive online Help in the Administration Software when you need to find answers.

Your 20/20 Insight Value-Added Reseller will be happy to assist you during this trial period when you have questions. After you've purchased the software, you'll have full access to our training and technical support resources.

Thank you again for choosing to review 20/20 Insight!

Sincerely,

Meredith

Meredith M. Bell, President
Performance Support Systems

CONTENTS

Step 1. Install the Administration Software.

Please complete these steps.

1. Review the Technical Requirements below and make sure the computer you're installing the Trial Version on meets the specifications.
    - Operating system: Windows 2000, XP or higher
    - RAM: 256 MB minimum
    - Hard disk space:
      - 30 MB for software
      - 30 MB (average) for data files
2. From the download page, right-click on the link for the software and choose Run when asked if you want to Run or Save the file.
3. Follow the onscreen instructions.

If you experience any problems when using the Trial Version, please contact your 20/20 Insight Value-Added Reseller.

Step 2. Set up your WebResponse Hosting account.

Follow these steps to configure your Administration Software to connect to the WebResponse Hosting service:

1. Open the 20/20 Insight program by double-clicking the 20/20 Insight Trial shortcut located on your desktop or by choosing **Start | Programs | 20/20 Insight 4 Trial**.

2. In System Manager, click **View | Options | WebResponse**.

3. In the URL box beneath **"Enter and test the URL for WebResponse:"** check that the following URL appears: **http://www.2020insight.net/wh4**

4. Locate your WebResponse Hosting Service Username and Password in the email message we sent you, and enter them in the corresponding boxes.

5. Click **Test URL** and enter your Username and Password to verify your WebResponse account. Click **Login**. A verification page appears.

6. Close your browser.

7. Click **Test Connection** to verify your 20/20 Insight GOLD program and WebResponse Hosting Service connection. If your connection is successful, you will see **OK** next to Test Connection.*****

8. Click **Apply**, then **OK** at the WebResponse tab.

*****If the Test Connection button does not display an OK confirmation, try these simple steps:

1. Ensure that the Username and Password are typed in correctly and try again.

2. If you are using antivirus software, disable the protection and then click **Test Connection** again.

3. Contact your IT department and ask them if you are behind a proxy server. If you are, ask them to click the **Configure proxy** button and complete the required information.

Step 3. Watch the Orientation videos.

Before you begin using the Trial, please view the four Orientation videos. The first three will help you become familiar with the different parts of the program and make the set-up of your projects easier and faster.

To access the videos:

1. In System Manager, click **Help | Index**.
2. There are three major components of 20/20 Insight, with three related videos. Click and watch each of these orientation videos in the sequence shown:
   - System Manager
   - Project Manager
   - WebResponse
3. The fourth video introduces you to **20/20 PowerUser**. This tool is not included in the Trial but comes at no extra charge with the purchase of the 20/20 Insight system package. It contains many resources for HR professionals. See page 17 of this booklet for a detailed description.

Step 4. Learn how the Trial Version differs from the full version.

The full version of 20/20 Insight contains rich proprietary content that's not included in the Trial Version. Reviewing the list of components below will help you appreciate the additional value you'll receive when you purchase the 20/20 Insight system package.

Component	Trial Version	Full Version
Survey Library*	Contains one survey called "Trial-Leader Assessment" with just a few categories and items. You can add your own competencies.	Contains *more than 1,200 items* for Individual, Team and Organization surveys. You can edit them and add your own competencies.
Resources for Development for Subjects	Developmental recommendations only for the items in the trial survey.	Every item in the three leadership surveys (Executive, Team and Personal) has an associated document for the leader containing: • What a low rating in this item might mean • Specific recommendations for improving in this area • Recommended resources Also, a 31-page eBook, *Self-Development Toolkit: 10 Strategies and 10 tools to Help You Improve Your Performance,* for each Subject.
20/20 PowerUser** for facilitators and HR professionals	Multi-media overview of this valuable resource.	A CD that includes tools for HR professionals such as case studies, articles, and lesson plans with PowerPoint files for conducting orientation, feedback and development planning sessions.
Usage Licenses for Subjects	One free feedback recipient, "Test Subject," can be used in all projects you set up. You cannot assign licenses to real people.	Ability to purchase economical usage licenses that permit you to set up an individual, a team or the organization as a Subject.
Sample Project with collected data	Use "2008 Leadership Assessment" in Projects folder to print individual- or project-level reports.	Not included.

***Get more information about Survey Library on page 16.**

****Get more information about 20/20 PowerUser on page 17.**

Step 5. Set up your first project.

This exercise will help you become familiar with the program as you go through the steps for setting up a project.

For this and all other projects you create with the Trial Version, you'll use the **Test Subject** as the feedback recipient. You will not be able to set up names of real people as Subjects.

To open the 20/20 Insight Trial Version, double-click the 20/20 Insight Trial shortcut on your desktop, or choose **Start | Programs | 20/20 Insight 4 Trial**.

IN SYSTEM MANAGER

Create a new project file.

1. Highlight the **Projects** folder on the left.
2. Click **File | New | Project** in the pull-down menu. Keep the setting, "**Create a blank project**" and click **Next**.
3. Type in **Practice Project** as the project name, then click **Done**. The project opens automatically.
4. Bypass the password by clicking **Done**. The **Project Manager** screen appears.

IN PROJECT MANAGER

Project Manager uses 7 steps for building the project, emailing assessments, gathering responses and printing reports.

Click Tab 1: Participants

At this screen you add the names of everyone participating in the project.

1. First, you'll import the Test Subject. Click the (Browse) icon near the top of the Participants window.
2. Double-click the **Rosters** folder.
3. Double-click **Test Subject Roster**. Check the box next to Test Subject and click **Import**. Test Subject appears on the left.
4. Highlight **Test Subject** and click **Edit**. In the Email Address line, enter your email address, then click **OK**.

   NOTE: The pre-assigned Password is **test**, which you can change if you'd like.
5. Add other participants by clicking the **(Add)** icon. Type in the following name: **Crystal Palmer** and use your e-mail address, then click **OK**. Do not check the Subject box. Repeat for **Laura Bryant** and **Joseph Woolard**. When you send e-mails to respondents in this project, the e-mails will be sent to you.

Click Tab 2: Relationships

At this screen you add the respondent relationships that will be used in the project. A respondent relationship is a word or phrase that describes the association of a respondent to the Subject. Assessment data and comments can be grouped by respondent relationships when you print feedback reports. You can select from the standard list or create your own. For this project, you'll add one standard relationship.

1. Click the (**Browse**) icon and double-click **Relationships**.
2. Check the box next to **Manager**, and click **Import**. This relationship now appears in the list.

Click Tab 3: Scales

Here you select the scale for the project, along with the characteristics of the scale, such as length and descriptors. You can have up to 4 scales per project with a range of 1-12 and up to 7 descriptors per scale. For this project, you'll add one of the standard scales.

1. Click the (**Browse**) icon and double-click **Scale Library**.
2. Check the box in front of **Agreement**, and click **Import**. Keep the default 10-point scale with 5 descriptors shown at the bottom of the screen.

Click Tab 4: Items

In this step you select the survey categories and items to be used in the project. You'll use the survey items included in the Trial.

1. Click the (**Browse**) icon.
2. Double-click the **Survey Library** folder.
3. Double-click **Trial-Leadership Assessment**. The four categories in this survey appear.
4. Click the **All** button, and click **Import**. The 4 categories and 12 related items appear on the list.

NOTE: You also have the ability to let respondents write comments for each item, and you can add open-ended questions anywhere in the survey. You will not use those in this project.

Click Tab 5: Respondent Selection

Here you designate (a) who will rate the Subject and (b) the relationship each respondent has to the Subject.

1. Highlight **Test Subject**, and click **Edit Assignments** on the right.
2. To assign participants to rate the selected Subject, click their names. Highlight **Laura Bryant**, then choose the relationship by clicking the drop down box. For this project leave it as Other, and click **Assign**.

3. For Crystal Palmer, choose Other. And for Joseph Woolard, choose MGR (Manager).
4. Click **Save**. The names of all respondents for Test Subject appear in the lower right corner.

Click Tab 6: Assessment

You customize instruction pages and e-mails to respondents in this step. You can also synchronize (upload) the project to WebResponse, where you notify participants via email that their feedback is requested for an assessment.

1. Click **Customize instruction pages** on the right. You'll see that the default setting includes 3 pages. For other projects, you can write your own instructions and set the number of instructions pages you want respondents to see upon logging in to their assessment. For this project, click the box in the upper right corner and change to 1 page of instructions, then click **Save**.
2. You can send emails to respondents from this screen or from the Web. Since most users send them from the Web, you'll use that option for this project.
3. Click the **Synchronize** button in the upper right hand corner of Project Manager. This uploads your project data to your Web Hosting account.

   Important! Be sure you've first set up your WebResponse Hosting account (Step 2 on page 5 of this booklet), or you will get an error message when you try to synchronize.
4. When the project is finished synchronizing, click **OK**.
5. Click the **WebResponse** link on the right.
6. Enter your WebResponse Username and Password, and click **Login**. At this page you can perform several administrative functions. You'll use two for this project.
7. Under "**Set up Respondent feedback**," click **Customize**.
   - Add your email address in the third box, "Email contact for participants."
   - Under "How would you like the items to be displayed to the respondent?" select the second option, One category of items per page.
   - Click **Save all settings**.
8. Under "**Set up Respondent feedback**," click **Invite Respondents**.
   - Here you can edit the e-mail message you send to respondents. You'll use the default message for this project.
   - Click **Save and Continue**.
9. You'll see the list of respondents. Click **Send Email.** The web page will display a list of respondent names and a **SENT** or **Failed** message for each.
10. Click **Log out** to exit WebResponse, and close your browser.

11. Go to your Inbox, and you'll see an email for each respondent.
    - Click the link in one of the emails, log in, and complete the assessment. The default Username is the respondent's first and last name, and you'll create your own password.
    - After completing each assessment, log out and close your browser.
    - Repeat for each respondent.
12. In Step 6 of your project, click **Synchronize** to download the completed assessment data. You'll see the "Completed" column filled in with the number of assessments completed by each respondent.

Click Tab 7: Reporting

Once you've collected the completed the assessments, you're ready to prepare reports. You'll do this in Step 7. Notice that some report sections have a red **X**. You won't be able to print them because they require elements (such as a second scale) that were not included in this project.

1. Click **Click here to PRINT a report**.
2. Leave the radio button selected for **Individual report** and click **Next.**
3. Leave the checkbox selected for Test Subject and click **Next**.
4. Check the boxes next to **Category Summary** and **Item Ratings – by Category** and click **Next**.
5. Leave the radio button selected for **On-Screen Preview** and click **Print**.
6. The report will load and display on the screen. From this screen you can now print a hard copy or print to a PDF writer. Click **Close** when you are finished.

IMPORTANT! In the Projects folder in System Manager, you'll find a completed project file called **2008 Leadership Assessment**. It contains two Subjects that already have data collected from several respondents. You can open this project and experiment with printing different kinds of reports – both individual-level and project-level.

Congratulations on completing the practice project! Now you're ready to set up other kinds of projects.

We encourage you to set up additional projects for the applications described on the following pages.

For additional help when using the Trial:

- Contact your 20/20 Insight Value-Added Reseller
- Consult the online Help from the Help pull-down menu in Project Manager or System Manager

Step 6. Use your Trial Version for several applications.

As you use the 20/20 Insight software, you'll find that it's so flexible that you can use it for many different kinds of surveys. Our extensive Survey Library contains researched items that can be used for all of the applications listed below.

The next three pages in this booklet explain how to set up projects for the applications **highlighted in RED**. Discover how quick and easy the set-up process is!

Individual Surveys

- **Measuring performance improvement -** Administer customized surveys based on course objectives before and after training to determine if the skills taught in training transfer to improved performance on the job.
- **Leadership development -** Diagnose skill strengths and areas for development of executives, managers and supervisors.
- **Managers' coaching skills -** Find out how effective managers are at coaching their direct reports about on-the-job performance.
- **Individual skill development -** Have team members give each other feedback about personal leadership, team interaction and workplace skills.

Team and Organization Surveys

- **Team development -** Assess team issues by collecting input from a variety of customers and stakeholders.
- **Needs assessment -** Study aggregate performance data to decide how much to invest for training and development programs.
- **Organizational climate surveys -** Collect information about your organization's vision, values, policies, structure, communication and management support.
- **Post-training survey of organizational support -** Survey participants of your training programs to find out if the current policies and systems support the application of new skills.
- **Customer satisfaction surveys -** Get feedback from customers to find out what you need to change to create loyal customers**.**

Additional Applications

- **Competency development -** Get feedback about draft competency lists. Ask stakeholders to rate the importance of the behaviors.
- **Market Research -** When you're considering a new product or service, gather input first from potential and current customers to find out what they *really* want.

Application: Measure performance improvement after training.

The set-up is similar to a typical individual feedback project (like the practice project), except that the items include behaviors to be addressed in training, and the project will be implemented twice.

Subject. The Subjects are the course participants.

NOTE: For this and all other projects you create with the Trial Version, you'll use the **Test Subject** as the feedback recipient. You will not be able to set up real names as Subjects.

Respondent relationships. The relationships are the groups of people who have first-hand knowledge of the person's performance in the areas related to the course content – Manager, Coworker or Peer, Direct Report and Customer.

Surveys. The scaled survey items used will be determined by the course content. The Survey Library contains hundreds of items related to individual performance, and these can be reviewed initially to determine if any are applicable. For the Trial Version, we suggest you use behaviors tied to the objectives of one of your leadership development programs.

Open-ended questions. Feedback in the form of open-ended comments can help the person focus his/her efforts during the training program.

- What do you think is this person's greatest strength in this area?
- What do you think this person needs to focus on most to improve in this area?

Scales. The Satisfaction scale works well for this application because respondents can indicate how satisfied they are with the person's current performance. If you'd like to use two scales in order to compare actual vs. desired performance, the "Frequency" and "Expected Frequency" scales can be used.

NOTE: In System Manager, you can view all the standard scales and their related descriptors in **Resources | Scale Library**.

Comparing pre- and post-training scores

If you set up and complete two projects for Test Subject using the same items, you can create comparison reports using the Advanced Report function. To access instructions:

1. In System Manager, click Help | System Manager to open the online Help.
2. Click the Advanced Reporting tab at the top.

Application: Assess team effectiveness from internal customers.

The goal of team development is to help a work group become a high-performing unit that accomplishes extraordinary collective results. A "team" can be any group of people that must work well together to accomplish a specific purpose.

20/20 Insight can help a team get feedback from internal customers and other stakeholders who are affected by the team's work.

Subject. The team's name is entered as the Subject.
NOTE: For this and all other projects you create with the Trial Version, you'll use the **Test Subject** as the feedback recipient. You will not be able to set up real names as Subjects.

Respondent relationships. You can customize the relationships to reflect the different groups providing feedback. If you set them up by department – e.g., Engineering, Accounting, Human Resources, etc. – the team can learn which areas a specific department is satisfied with and which areas need improvement.

Surveys. The Survey Library includes two surveys that can be used to assess the team as a whole. For the Trial, you can use questions like:

- I receive prompt, accurate responses when I request information from a member of this team.
- I am treated as a valuable customer when I interact with members of this team.
- This team represents itself effectively as a cohesive group to the rest of the organization.

Open-ended questions. These questions can stimulate feedback that provides the team with important information about its strengths and opportunities for development.

- What does this group do best?
- What can this team do to increase your satisfaction with its work?

Scales. The "Agreement" scale works well for this type of survey.

NOTE: In System Manager, you can view the Agreement scale and its related descriptors in **Resources | Scale Library**.

Application: Conduct an organizational climate survey.

Getting opinions, feedback and ideas from your employees is easy with 20/20 Insight. You can ask all levels of employees about issues such as management support, professional development programs, and work processes and procedures.

Subject. The Subject is not an individual, but the name of the organization itself.

NOTE: For this and all other projects you create with the Trial Version, you'll use the **Test Subject** as the feedback recipient. You will not be able to set up real names as Subjects.

Respondent relationships. How do you want to display responses? What clusters of employees are most revealing? Two common relationship break-outs are:

- Employee level (executive, manager, supervisor, individual contributor, etc.)
- Employee position (engineer, administrative assistant, payroll clerk, etc.)

Surveys. The Survey Library contains a survey called "Organizational Climate." For the Trial, you can use just a few questions such as:

- I really like being part of the team/department I'm in.
- I really like being part of this organization.
- My manager makes good use of my talents.
- My manager listens to information before making a decision.

Open-ended questions. To get additional employee input, consider including a few open-ended questions:

- What is the organization's greatest strength?
- If you could change three things about this organization, what would they be?

Scales. The most commonly used scale for this type of project is "Agreement."

If you want to use two scales to compare "actual" with "expected" performance, you could select "Frequency" and "Expected Frequency" and reword the items as questions. Example:

- How often DOES your manager listen to information before making a decision?
- How often SHOULD your manager listen to information before making a decision?

NOTE: In System Manager, you can view all the standard scales and their related descriptors in **Resources | Scale Library**.

Survey Library

20/20 Insight GOLD's extensive Survey Library contains ***more than 1,200 survey items***. These may be used "as is" or customized to fit the requirements of your organization. You can also add your own surveys to the Library.

Every item in the three Leadership surveys (Executive, Team and Personal) has an associated document for the leader containing:

- What a low rating in this item might mean
- Specific recommendations for improving in this area
- Recommended resources

The Library includes these survey areas:

For Individuals	**For Teams and Organizations**
Executive Leadership	Organizational Climate
Team Leadership	Customer Satisfaction
Personal Leadership	Team Development
Developing and Coaching Others	Team Effectiveness
Sales Management	Project Team
Salesperson Skills	Readiness for 360
Administrative Staff	Post-Training Support
Instructor	
Collaborative Consulting	

20/20 PowerUser

20/20 PowerUser is a CD included with your purchase of 20/20 Insight GOLD. It contains important resources for helping you carry out successful feedback projects, such as: articles, case studies and facilitator resources for conducting workshops for participants.

While you do not have access to 20/20 PowerUser with the Trial Version, you can watch an overview of the program by clicking the icon in the upper right corner of the System Manager screen. Here's a summary of what you'll get with 20/20 PowerUser:

360-degree feedback in perspective

Dennis E. Coates, Ph.D. and CEO of Performance Support Systems, has written several articles about best practices. Get the "real story" about why you'll want to use 360 for development and for measuring the effectiveness of your training programs and not for compensation.

Tips for implementing 360-degree feedback

Whether you're implementing 360-degree feedback for the first time or have some experience, you'll find valuable information about doing it right. Get answers to more than 60 frequently asked questions.

About 20/20 Insight GOLD v. 4.0

You'll appreciate the capabilities of this powerful feedback software as you learn more about its features and review the sample survey items and sample reports.

The Power Applications: How to set up 20/20 Insight GOLD

Learn the different ways you can use 20/20 Insight. Get suggestions for selecting the Subjects, respondent relationships, items and scales for each application when setting up your project.

Case Studies

Discover what organizations like yours have achieved by using 20/20 Insight.

Facilitator Resources

Access lesson plans, scripts and PowerPoint files for conducting pre-and post-assessment sessions for participants.

Train-to-Ingrain

This rich 90-page book explains how to establish and implement a customized process that integrates assessment, training and reinforcement programs to ensure the skills taught in training transfer to improved performance in the workplace.

Glossary

Some of the terms we use in describing steps and functions in the 20/20 Insight program may be new to you, so we've created this glossary as a convenient reference tool.

Participant – Anyone who receives or gives feedback in an assessment, whether that person is a Subject or respondent.

Project – The administration of structured feedback, including: Subjects, respondents, relationships, survey items, and scales.

Project Manager – The part of the 20/20 Insight Administration Software used to set up a single feedback project.

Relationship – A word or phrase that describes the association of the respondent to the Subject, such as manager, peer or customer.

Respondent – A person who gives feedback.

Roster – A master list of participant names. You can create any number of rosters in the program or just maintain one large roster.

Scale – A unit of measure for a feedback project, containing a question stem, descriptors and a range of numeric ratings – e.g., Agreement or Satisfaction.

Scale range – The numeric value for the scale – e.g., 1-5 or 1-10.

Subject – The person or entity receiving feedback.

Survey Area – Survey categories that are grouped by general topic – e.g., Team Leadership.

Survey Category – A topic within a survey area that is more focused – e.g., Innovative Problem Solving or Resolving Conflict. A group of categories makes up a survey area.

Survey Item – A statement describing a specific observable behavior – e.g., Offers suggestions and ideas to coworkers. A group of survey items makes up a survey category.

System Manager – The part of the 20/20 Insight Administration Software that organizes the key functions you'll perform – e.g., setting up and managing rosters, projects, and aggregate reports as well as activating usage licenses.

Test Subject – The free feedback recipient included in the Trial Version, used for all projects you set up.

WebResponse – This software is installed on a web server and connects with the Administration Software, allowing you to upload project data so respondents can complete their assessments online.