

6 Steps to Successful Administration of Kozai Assessment Tools

The following steps have been developed to help administrators be as self-sufficient as possible in managing their online administration of The Kozai Group's online assessment tools.

Step 1. Plan

Begin planning for administration at least 7 to 10 days before you want to see the assessment results. Consider extending that planning time if you are a new administrator and might need technical support.

a. Answer These Questions

- When do you want to send the online invitation to your participants to take the assessment?
- When do you want your participants to complete the assessment?
- Do you want to send reminders to complete the assessment? If so, when?
- Do you want your participants to receive their reports immediately, or do you want to distribute the reports at a later time?
- How do you want to pay for the assessments?
 - Purchase credits for your participants
 - Have your participants pay for survey access directly

b. Gather Participant Information

- Determine the number of participants.
- Collect the names and email addresses of the participants.

c. Check Email Security and Web Browser Compatibility

- The invitation to take the assessments is sent from webtools@aperianglobal.com. If you will be administering within a large organization or institution, we highly recommend you work with their information technology department to ensure that email from that address is not blocked as spam.
- Accessing the inventory requires a current version of any web browser.

d. Give Yourself Time

- Remember that you are working with an online system, as well as with participants whose calendars and priorities may differ from your own. Give yourself time to send reminders and download or distribute last-minute reports.
- Please note that technical support is only available online via a customer support portal (<https://aperianglobal.freshdesk.com/support/home>) or via email

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(webtools@aperianglobal.com). You and your participants may need to wait if support is needed.

Step 2. Set-up

- To prepare the participants, we recommend you send them a preliminary email letting them know about the survey, its timing, and expectations regarding their participation.
- Go to <https://learning.aperianglobal.com/portal> to log in and create your group.
- The welcome page has a video introduction that provides additional guidance.
- Follow the link labeled for the GCI survey to access the assessment platform.
- Create a new group, and add the participants' names and email addresses to the group you created.

Step 3. Distribute

- Review the email template provided and, if desired, personalize the message.
- Send the invitation email to your participants. This email contains registration information.

Step 4. Monitor

- Log in to your account to track participants' completion of the assessment.
- You can send email reminders to follow up with those who have not yet completed the assessment.

Step 5. Access Reports

You will be able to see your participants' results reports immediately upon their completion of the assessment.

- If you chose "Make report immediately available online to user upon completion" when you created the group, the participants will see an icon on their dashboard allowing them to access their report.
 - You may also have opted to have the final report emailed. This is scheduled for when the survey expires.
- If you opted not to make the report available to participants when you created the group (which is the default setting), you can:
 - a) Download and print the reports to distribute in person
 - b) Download the reports and email them as attachments

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- Download the group report for a results summary.
- If you are conducting research, including pre- and post-testing, you can receive your groups' results in Excel format directly from the report page.

Step 6. Evaluate

Before you decide to administer the Kozai assessment tools again, consider what worked and what may need improvement, and adjust your plans accordingly. Please let the Aperian Global staff know if you have specific needs or concerns not outlined in the steps above.