OCAI Pro

Manual

November 2019

OCAIonline

How to Set Up Your OCAI Pro Assessment?

Great that you are going to use the OCAI Pro assessment! The Pro assessment delivers one collective culture profile of all respondents. The price is fixed, regardless of the number of participants. You can find the product features on the webpage:

https://www.ocai-online.com/products/ocai-pro

Or download and read the product leaflet with more information.

Start your admin account, then your Pro assessment

First, create an Administrator account.
Then create an OCAI Pro assessment for a specific team or organization.

If you already have an admin account, log back in. Go to the tab Assessment List and click **Start new Pro Assessment** (see #2 on the next page of this manual). If you completed the free OCAI One or you already created an OCAI Enterprise account, you can merge either accounts with a Pro administrator account. In that case, skip step 1 and go to step 2.

1. Create your Pro Admin Account

While on the page https://www.ocai-online.com/products/ocai-pro, click the **Go OCAI Pro** button to start the process. You are asked to register as an Administrator with a valid email address.

Our system will send you an email with a verification code. Please enter this code to proceed. Keep this email safe as it contains your verification code / password.

Next time, you can log into your administrator account at the top or the bottom of our homepage. Now skip step 2 and proceed with step 3.
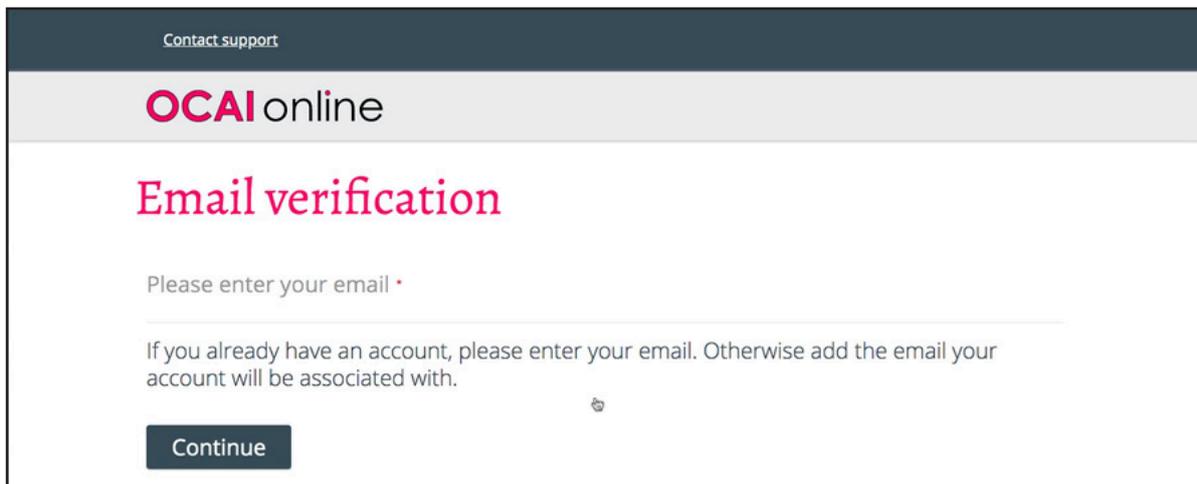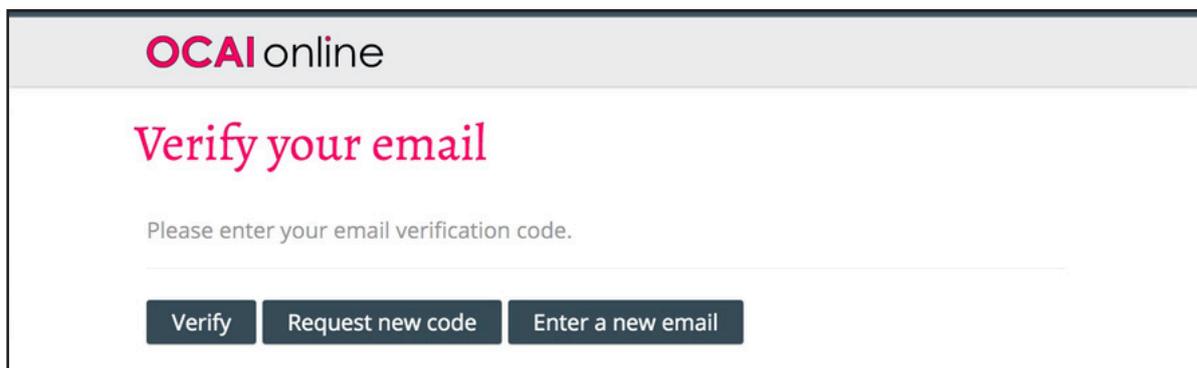
2. Update your account

If you completed OCAI One before or you already created an OCAI Enterprise assessment, you can merge your existing account with a new OCAI Pro account. After logging in to your existing account, click on the **Update Account** tab and next the **Update account to OCAI Pro** button and proceed with step 3.

3. Create a new Pro assessment

Once your admin account is activated for the first time, you immediately arrive at the screen Create New Pro Assessment (next page). Please complete the required information for your Pro Assessment.

Assessment Title:

Make this as specific as possible to avoid duplicate names and to increase recognition among respondents. "Culture Assessment" is not a good name. Give it the name of your organization, unit, location, or your client's organization if you are consulting with them.

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Create new *Pro* assessment

Assessment Title *

FreshStart Inc

Economic activity broad *

Agriculture, forestry and fishing ⬍

Economic activity detailed

Crop and animal production, hunting and related service activities ⬍

Organization size

○ 1-10 employees
○ 11-100 employees
◉ 101-1000 employees
○ Over 1000 employees

Country

United States ⬍

Logo

[Choose File] No file chosen

[Upload]

One file only. 2 MB limit. Allowed types: png gif jpg jpeg svg.

When do you plan to start the assessment?

dd/mm/yyyy

Make this as short as possible. The assessment title becomes part of the designated URL for your respondents — the shorter, the sweeter.

Economic activity broad and detailed:

Use the drop-down menu to find your industry sector.

Organization Size:

Choose the size from the options.

Country:

Choose your country from the drop down menu if everyone is from the same country. Or

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> **Country**
>
> Participants will select their country ⇕

choose the option: Participants will select their country. They will see the country dropdown during registration.

Logo:

Upload the logo. This could be your organization's logo or your client's logo (if you are a consultant).

When do you plan to start and close the assessment:

Please select a date. Don't worry: this is an indication of your desired timeline. You can start and close the assessment when it suits you. OCAI online reserves the right to close assessments that are not being used for 3 months.

Language:

Tick the languages you need for the assessment. Please note that each language gets its designated URL for your assessment. When you select 3 languages you'll have 3 URLs to send to your participants. People can select their own language link. Note that English is pre selected and the results pdf report is English only.

Next, click Save at the bottom of this page.

4. Add consulting or training

The next page offers to buy an online debriefing with consultant Marcella Bremer via a video call. In this call, you can discuss your results report and ask questions.

We also offer discounted access to the online Positive Culture Academy (14 modules of culture, change, and leadership training with videos, checklists, assignments, and a discussion group). Why don't you use the momentum of the OCAI assessment to develop your culture towards (more) positive and productive?

These are one-time offers. If you'd like to add these services after you've bought your OCAI assessment the regular price applies.

When your order is complete, click **Submit**.

5. Create a new company / Order Information

Next, the system asks who will pay. This is the Order Information page.

Enter the billing details that should appear on the invoice/receipt. It's possible that headquarters or the consultancy firm is paying on behalf of the organization that is going to do the assessment.
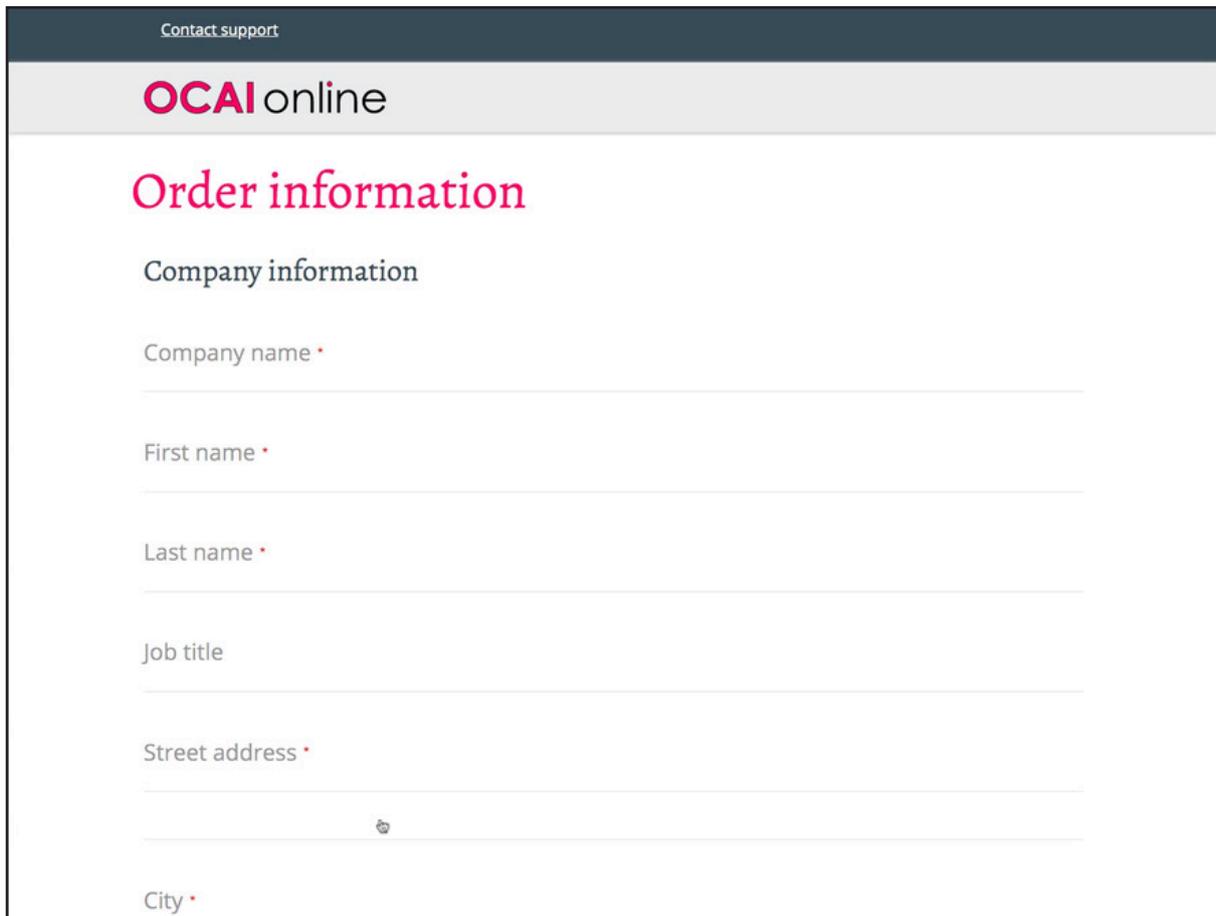

Organizations in the USA don't pay sales tax as our main office is located in Europe.
In Europe, VAT may apply. The system will ask for a valid VAT number to waive the VAT within the European Union. If you don't have a VAT number, the local VAT of the total price will be charged. The system will automatically charge in Euros or US Dollars, depending on your location.

When you've created a company before, the system asks to confirm the existing company or to add a new company for the invoice/receipt.
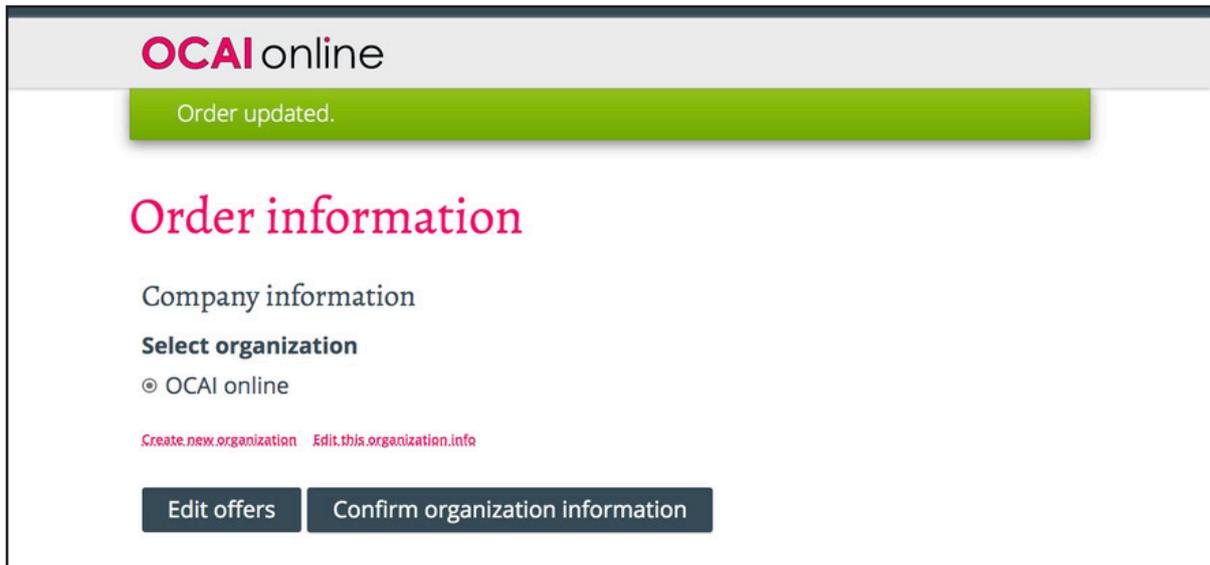
Next, click **Confirm organization information**.

6. Review and pay

Once you click the button the Payment information part will appear as well as an Edit offers button, should you wish to change anything regarding the extra offers. The Payment information presents your billing and payment details and the Order Summary. You can adjust them here, and enter a coupon code if you have one. Coupons are available for research. Email for more information to marcella@ocai-online.com. Next, click **Continue to review**.

The next page will show your contact information and payment information. Next click on **Pay and complete purchase**. You will be redirected to the payment provider and will get back to our site after payments were made. You will arrive at the Assessment List of your dashboard. Your assessment is activated and ready for respondents.

In your dashboard, you can click the tabs in the grey area:

Dashboard: with general information.
Edit Account: edit your account, if needed.
OCAI Results: if you previously completed an OCAI One assessment.
Assessment List: create new and find existing assessments.
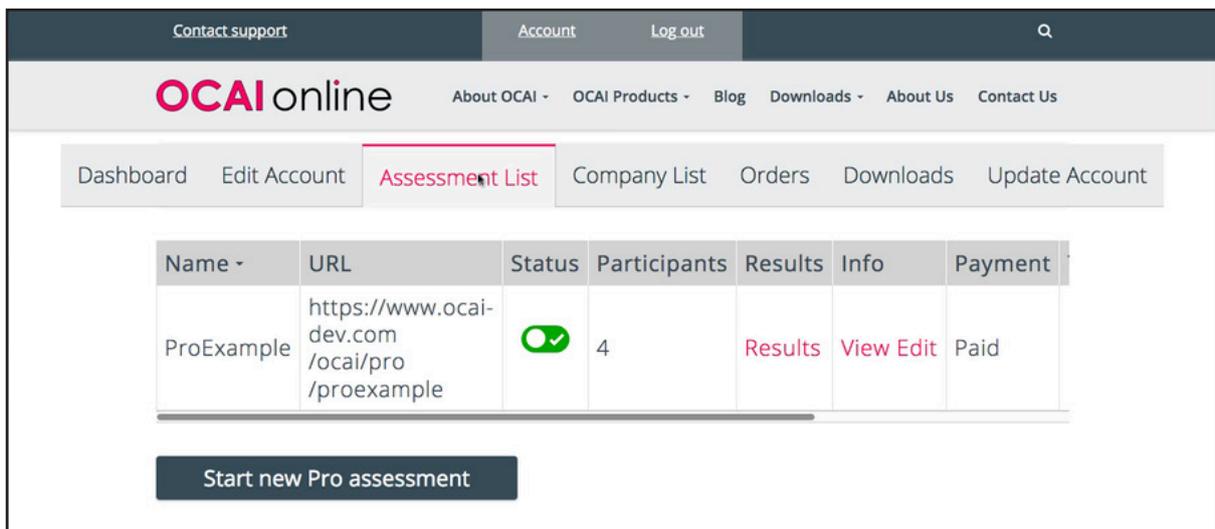**Company List**: add and manage companies (clients or your company's details for the invoice).
Orders: review your orders and download invoices.
Downloads: Download our OCAI work kits and extras and pdf reports and graphs from previous OCAI One assessments.
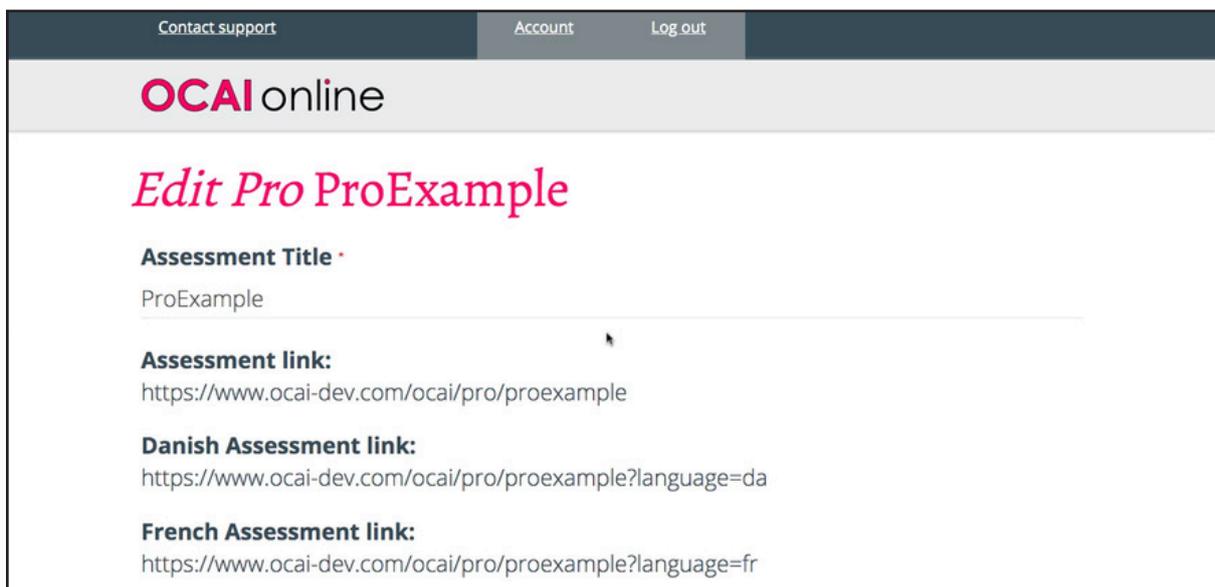**Update Account**: if you wish to start an OCAI Enterprise assessment.

7. Invite participants

Click on the tab Assessment List. You'll see a green switch that your assessment is activated. Next to the name of the assessment you will find the assessment URL to send to respondents. If you selected additional languages during set up, you'll have multiple assessment links for one Pro assessment. You will find these links by clicking on View Edit.

Copy the assessment link into an email for participants. You have to invite them, our system doesn't do that. (Privacy laws do not allow uploading email addresses without people's consent). Do NOT shorten, track, or change this original OCAI link to avoid possible technical issues for respondents.

When participants click the original OCAI assessment link from your invitation email, they will be taken to this specific Pro assessment. They must provide an email address to get access

to the assessment so that their scores can be saved in our database. We don't use this address for other purposes and keep it safe.

All data is safe. We comply with the privacy laws of Europe: the General Data Protection Regulation (GDPR). You can find our privacy policy on the website.

8. Keep track of participation

During the assessment, the administrator can check the number of respondents to date from the Assessment List tab. You cannot see who they are (privacy laws), but you can see the number to track progress. In general, we recommend leaving the survey open for at least two weeks to give everyone time to participate.

You can also view the results so far at any time during the assessment by clicking on Results in the Assessment List table.

9. Close your assessment

When participants have done the assessment or time is up, you close the assessment.
Slide the green switch to red. Again, this happens on the page with the tab Assessment List.
When you stop the assessment, you cannot open it again! So please think twice before you do.
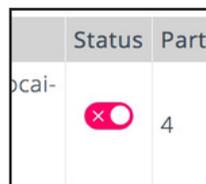
10. Download your OCAI Pro Results Report

After closing the Pro assessment, click on the tab Downloads. You will find your named pdf report there. You'll also find the 7 separate graphs of the culture profiles to paste into your presentations and reports as a zip file. The report is available to the administrator only.

All respondents see their individual culture profile after submitting their scores. They can download this personal culture profile by clicking the little menu on the right or by making a screen shot.

11. Work with Culture

You can benefit from our OCAI Work kit and organize workshops to work with the OCAI results and develop the culture with our approach. Nothing changes until people do things differently in your organization. Make culture doable on a daily basis.

The OCAI Work kit and other materials are available from the Downloads tab in your dashboard.

You might also want to check out the online Positive Culture Academy to aim for a more positive and productive culture.

May the OCAI serve as a great starting point to develop your organization.

Best regards,
Marcella Bremer & Marcel Lamers
OCAI online