

*OCAI Enterprise*

# Manual

December 2019

OCAI online

# How to Set Up Your OCAI Enterprise Assessment?

Great that you are going to use the OCAI Enterprise assessment! The Enterprise assessment delivers one collective culture profile of all respondents as well as any sub profiles that you order. The price does not depend on the number of participants, but on the number of sub profiles. Sub profiles could be departments, locations, levels, and so on. You can find the product features on the webpage:

<https://www.ocai-online.com/products/ocai-enterprise>

Or download and read the product leaflet with more information.

## Start your admin account, then your Enterprise assessment

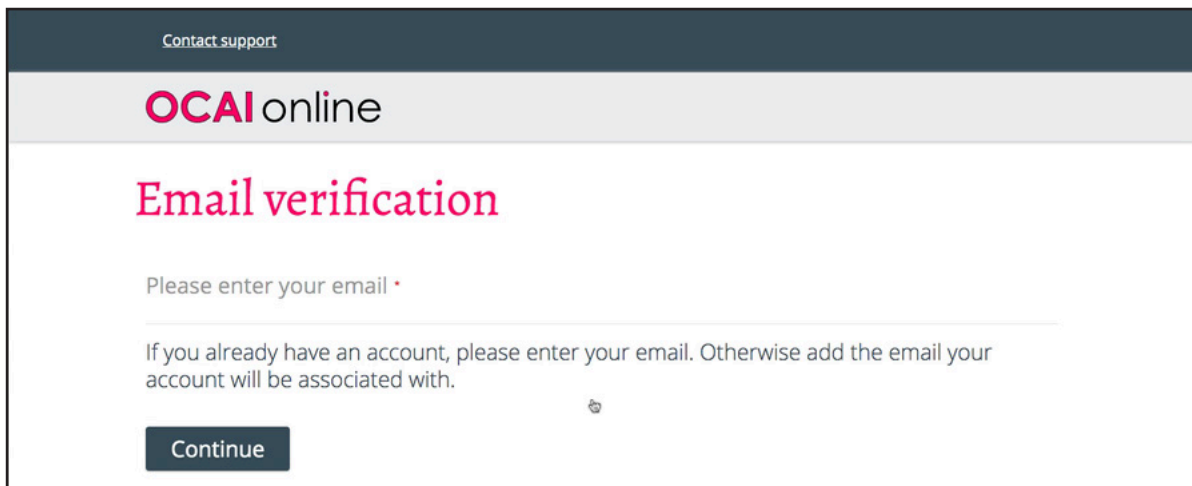
First, create an Administrator account. Then create an OCAI Enterprise assessment for a specific organization.

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

### 1. Create your Enterprise Admin Account

While on the page <https://www.ocai-online.com/products/ocai-enterprise>, click the **Go OCAI Enterprise** 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.



Contact support

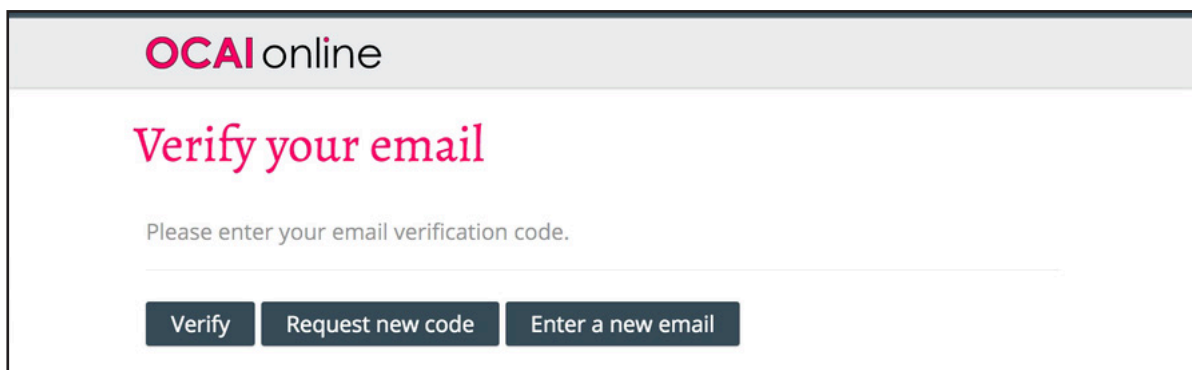
**OCAI** online

## Email verification

Please enter your email \*

If you already have an account, please enter your email. Otherwise add the email your account will be associated with.

Continue



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## Verify your email

Please enter your email verification code.

Verify Request new code Enter a new email

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

## 3. Create a new Enterprise assessment

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

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## Create new *Enterprise* assessment

**Assessment Name** \*

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**Advanced introduction page**

**Economic activity broad** \*

Agriculture, forestry and fishing

**Economic activity detailed** \*

- Select -

**Organization size** \*

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

unit, location, or your client’s organization if you are consulting with them.

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

### Advanced introduction Page:

You can leave this blank or add a message to respondents, if you wish. If you add a message the standard introduction page will be replaced. For instance, repeat why the assessment matters, that you value their input and what you plan to do with the results.

If you don’t add any text here, the standard text will be shown:

**Welcome** to the Organizational Culture Assessment Instrument (OCAI, © Kim Cameron) to diagnose organizational culture.

The OCAI is validated and developed by Quinn and Cameron based on the Competing Values Framework and used by over 10,000 companies worldwide.

It takes around 15 minutes to complete. Which culture type dominates? Are people most focused on collaboration, control, competition, or creativity? How would your organization be at its best?

After you completed the OCAI, you will see your personal culture profile with a short explanation.

**Your individual OCAI profile** shows how you perceive the current culture, but also what the best-preferred culture would be, according to you. This profile is private.

**The collective OCAI profile** of your organization helps to check the culture and see if anything needs to change, according to all respondents. This profile can be turned off by the administrator.

Assess your culture right now and prepare for the future. Let's make culture work.

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

<b>Country</b> <input type="text" value="Participants will select their country"/>
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## Create sub profiles:

Click the button **Add sub profiles**. Here you add the customized registration questions for your respondents. Decide which departments, or other features you'd like to compare. Then ask respondents to select theirs and we will calculate the sub-profiles for these features.

Mandatory registration question or not? Tick the box for **Required**. This is necessary if you want to order these sub-profiles. If one of the questions is an extra (“nice to know”) or doesn’t apply to all respondents you could leave the question optional. But you run the risk that people don’t answer the question.

Most clients use questions that are mandatory and that allow only one answer (radio buttons). Many organizations work with sub profiles for departments, locations, and levels.

**Title:**

Enter the question that respondents must answer.

For instance: **Please select your location.**

**Type:**

Choose the type of answer field that applies to your question:

- ◆ a Text field (allows a short sentence answer)
- ◆ Radio buttons (people can choose only one of the options)
- ◆ Check boxes (people can check multiple options)
- ◆ a Textarea field (allows a longer answer)

**Options:**

If you select Radio buttons or Check boxes, an Options field will appear. Input the possible answers to your customized registration question. Don’t add bullets or numbers before the options. Use one value per line, for instance:

Headoffice  
New York  
California  
Michigan

You can add as many demographics as needed. To add another question click the grey button: **Add sub profiles**. You can change the order in which the questions will appear by changing the Order number. The lowest number will appear at the top. If numbers are the same, sorting is done alphabetically.

**Some advice on the number of sub-profiles:**

The price of the Enterprise assessment is based on the number of sub profiles you order - not on the number of respondents. The amount of sub profiles is based on the amount of answers not the amount of questions. In the above example there are 4 sub profiles. The chatbot on our Enterprise product page and the price table can further assist.

**OCAI online**  
○ Over 1000 employees

**Country**  
Participants will select their country

Create sub profiles	Order
Title	0
Department	
<b>Type</b> Radio buttons	
<b>Options</b> Department A Department B Department C Department D	
Please enter one value per line.	
<input checked="" type="checkbox"/> Required	
	Remove

Add sub profiles

Add sub-profiles when you expect differences between groups, thus insights. Order sub-profiles based on units or levels that you plan to work with. If possible, aim for at least 10-20 respondents per sub-profile.

### 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 extra 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**. In your dashboard you see that your order is pending.

The screenshot shows the OCAI online dashboard. At the top, there is a navigation bar with the OCAI online logo and links for About OCAI, OCAI Products, Blog, Downloads, About Us, and Contact Us. Below the navigation bar is a green notification box that says "Thank you for your order! You'll be notified when the price is set and payments can be made." Underneath the notification is a horizontal menu with options: Dashboard, Edit Account, OCAI Results, Assessment List (highlighted), Company List, Orders, and Downloads. The main content area features a table with the following data:

Name	URL	Status	Participants	Results	Int
Enterprise Example	https://www.ocai-dev.com/ocai/enterprise/enterprise-example	Pending	0	None	View

At the bottom of the dashboard, there are two buttons: "Start new Enterprise assessment" and "Start new Pro assessment".

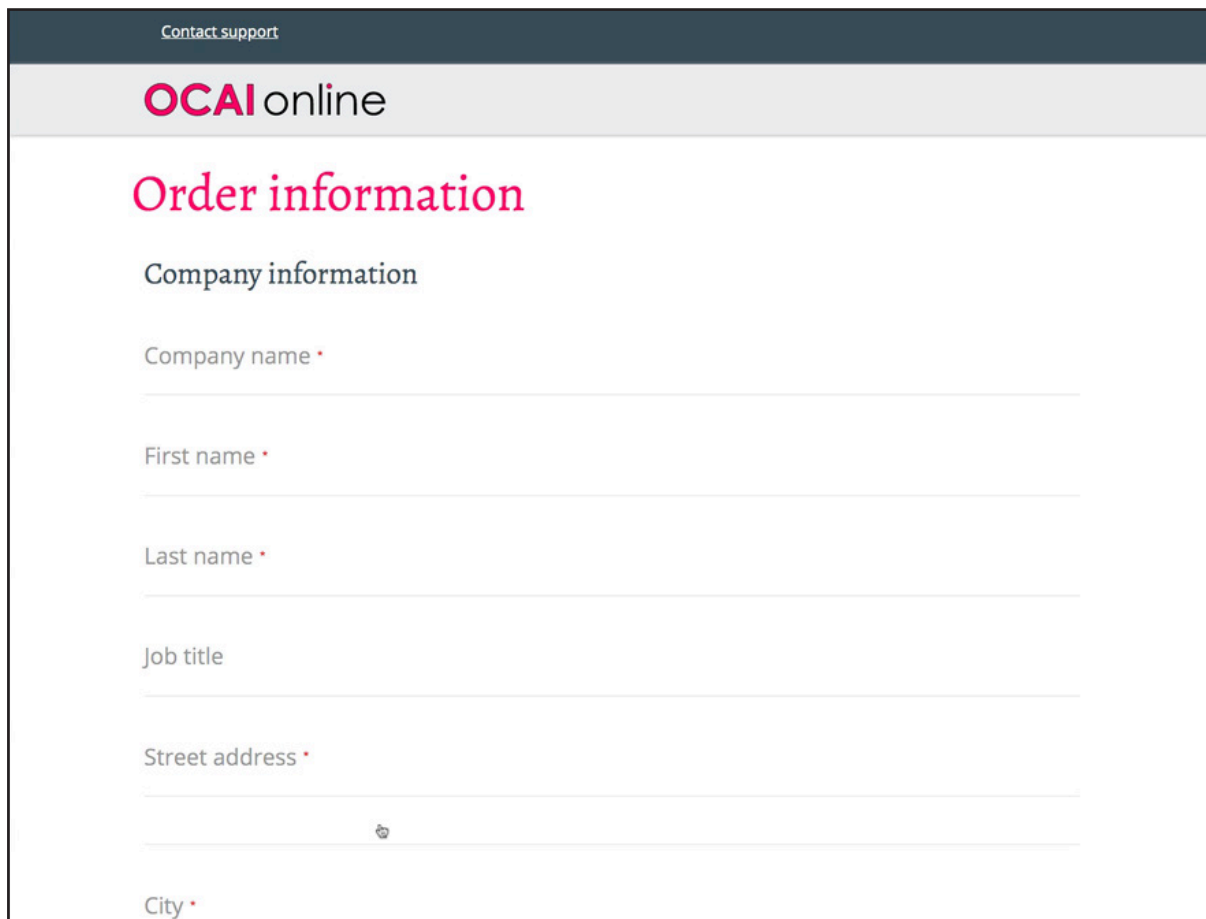
**Now it's our turn!** Your assessment is set up and we'll check (required registration questions for sub profiles with clear answers?) and input the price based on the number of sub profiles you order. This is not automated as it depends on your set-up.



Thanks for your patience! You'll get an email when this is done and you can proceed to pay and activate your Enterprise assessment.

## 5. Create a new company / Order Information

Welcome back! The system asks who will pay. This is the **Order Information** page.



Contact support

OCAI online

### Order information

Company information

Company name \*

First name \*

Last name \*

Job title

Street address \*

City \*

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.

**OCAI online**

Order updated.

## Order information

Company information

**Select organization**

OCAI online

[Create new organization](#) [Edit this organization info](#)

Edit offers
Confirm organization information

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](mailto:marcella@ocai-online.com). Next, click **Continue to review**.

Edit offers

Payment information

**Payment method**

Visa ending in 1111

Credit card

PayPal

**Order Summary**

OCAI Enterprise	\$ 2.000,00
Consulting hours	\$ 200,00
Positive Culture Academy	\$ 99,00
Subtotal: \$ 2.299,00	
VAT: n/a	
<b>Total: \$ 2.299,00</b>	

Coupon code

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Apply coupon

Continue to review

If you have a valid coupon code, enter it here. Coupons are available for research. Email for more information to [marcella@ocai-online.com](mailto:marcella@ocai-online.com).

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.

Please note: **Visa** sometimes declines international payments. You can give them a call to release the funds.

After payments, 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.

## 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 Enterprise assessment. You will find these links by clicking on **View Edit**.

	URL	Status	Participants	Results	Info	P
Enterprise	<a href="https://www.ocai-dev.com/ocai/enterprise/enterprise-example">https://www.ocai-dev.com/ocai/enterprise/enterprise-example</a>		0	None	<a href="#">View Edit</a>	P

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.

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## *Edit Enterprise* Enterprise Example

**Assessment Name** \*

Enterprise Example

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**Assessment link:**  
<https://www.ocai-dev.com/ocai/enterprise/enterprise-example>

**Croatian Assessment link:**  
<https://www.ocai-dev.com/ocai/enterprise/enterprise-example?language=hr>

**Dutch Assessment link:**  
<https://www.ocai-dev.com/ocai/enterprise/enterprise-example?language=nl>

**Swedish Assessment link:**  
<https://www.ocai-dev.com/ocai/enterprise/enterprise-example?language=sv>

**Advanced introduction page**

This page will replace the standard introduction page.  
 If you have a specific message for your participants, regarding this Enterprise assessment, enter it here.

When participants click the original OCAI assessment link from your invitation email, they will be taken to this specific Enterprise 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.

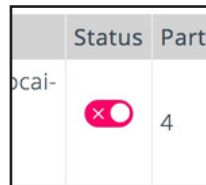
You can also view the results so far at any time during the assessment by clicking on **Results** in the **Assessment List** table.

## 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. Receive your OCAI Enterprise Results Report

**Now it's our turn again!** After closing the Enterprise assessment, we'll start working on your results. The report is created by one of OCAI online's consultants. We deliver your Enterprise Results Report within five business days, but often sooner. The report is emailed to the administrator only.

In case of a very tight schedule on your side and just to be sure: please email us in advance to align our workload planning with yours! We will do our best to help you.

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**

