

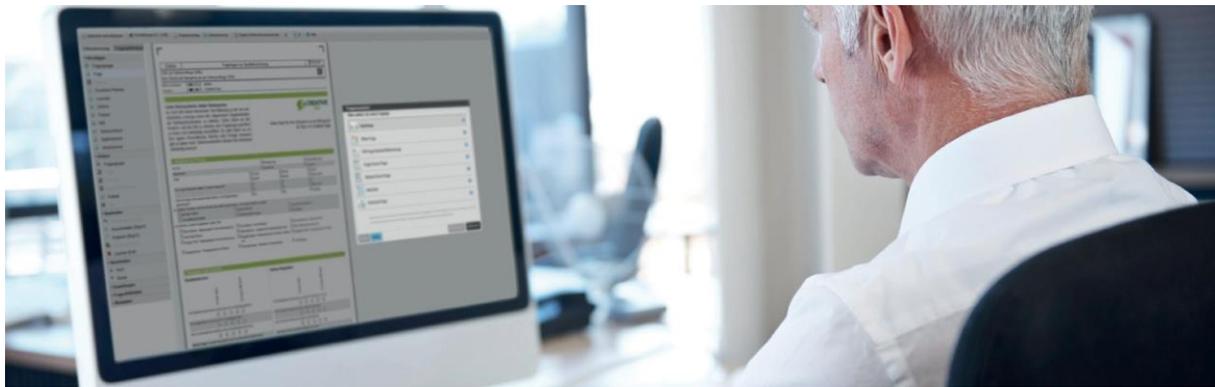
SCANTRON.



A Five Phase Model for Effective Surveys

Surveying customers, employees, training participants, and other stakeholders forms an integral part of successful company operations. Survey results provide valuable feedback that you can use to increase efficiency and effectiveness. If you want to measure product or service quality and obtain feedback, surveys are the method of choice.

EvaSys®, Scantron's web-based survey software, specifically caters to the requirements of corporations to streamline internal processes. EvaSys is ideal for organization-wide and cross-media surveys and satisfies the need for surveys such as these:



- Employee, partner and customer training evaluations
- Continuing education evaluations
- Seminar and event evaluations
- Service quality surveys
- Employee and customer satisfaction and engagement surveys¹
- Training requirement analyses

¹ See even more use cases for EvaSys in academic settings. Scantron publishes EvaSys as Class Climate for higher education institutions. <http://www.scantron.com/articles/cc-uncommon-uses>

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- Kirkpatrick model surveys
- Panel surveys

And many more!

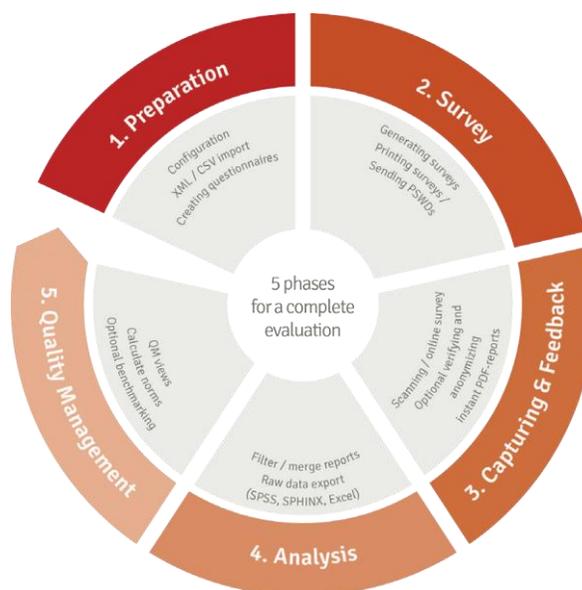
Through regular, methodical, well-designed and executed evaluations and surveys, you can discover more opportunities for improvement.

EvaSys supports you at all phases of your survey or evaluation project. You can design individual questionnaires in a few steps with the questionnaire editor. You can deliver surveys online (including mobile), on paper, or combined as a hybrid survey. Offering these multiple delivery methods encourages adoption and increases response rates.

Once you have captured your survey data, you automatically receive a detailed PDF report of your results. You can then further analyze these results for quality management. Via our web service or plug-in interfaces, you can smoothly integrate EvaSys into various learning management systems and other applications.

The Five Phase Model: A Survey Best Practice

A typical point-in-time survey or evaluation passes through three phases: creation, distribution, and evaluation. Survey projects for commercial training and continuing education call for a more detailed, five-phase process. This process begins with mapping your organizational structure within EvaSys, continues with questionnaire design, survey delivery, and analysis, and finally ends with quality management, which facilitates future survey and organizational improvements. EvaSys offers countless possibilities for supporting the entire process of a survey.





EVASYS ADMINISTRATOR



SURVEY PARTICIPANTS

» Automated batch events

Generate and manage any number of surveys with a few clicks

» Instant results!

Online responses immediately available for analysis



STAKEHOLDERS
Learning & Development leads
Training Sponsor(s)
HR Department
Support Department
Senior Management

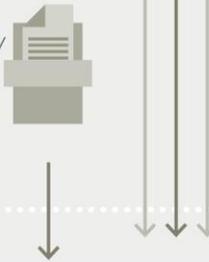
1 Prepare
Configuration;
XML-/ CSV-Import,
API direct connect;
Design questionnaires



2 Deliver
Generate and produce surveys;
Send out passwords



3 Capture
Collect online surveys/
scan questionnaires;
Optional verification;
Instant PDF report



» Insert paper, scan, done

Scanned responses automatically transferred to server for analysis

4 Analyze
Report of results and export of raw data: SPSS, Excel, or access data directly via API



5 Quality Management
QM views;
Calculate standardization;
Benchmarking





Phase 1: Preparation & Design: Mapping the internal structure and designing questionnaires

The first phase of a survey for commercial training purposes starts with mapping the internal organizational and survey structure. You may use the import function for structural data (sites, branches, subsidiaries, departments, etc.) and participant data (event participants, customers, employees, etc.) or set up mapping via an integrated interface.

“Survey periods” indicate whether the survey will be one-time or recurring. You can use various user roles in EvaSys to delegate tasks and allocate responsibility both overall and during these periods. Using roles, you can drive EvaSys centrally with one user or distribute responsibility among many.

You can design individual questionnaires quickly using the questionnaire editor. EvaSys automatically generates the layout of the questionnaire and guarantees an optimal and accessible scanner readability or online rendering. For participants with visual impairment, online surveys are a good alternative. Thanks to our WCAG 2.0 Level AA certification, the survey is fully accessible to participants with disabilities. You can also conduct surveys in multiple languages with EvaSys. A wizard walks you through the process of building individual questions of all types (such as scaled, segmented, simple multiple choice, open entry, etc).

EvaSys makes it easy to design your way. You can design a unique survey for every instance (for example, each class) or you can create a standardized, reusable survey and personalize it with miscellaneous data such as the name of trainer, name of the training, etc. Use the integrated question library to store recurring and validated questions. The question library means you don't have to start from scratch every time.

Created questionnaires are immediately ready to use for online, paper-based, or hybrid surveys. You do not need to manually adapt a questionnaire to suit the survey medium.



Phase 2: Survey: Delivering online, paper-based, and hybrid surveys

Online Surveys

After you design and build a questionnaire, it's time to deliver the survey. EvaSys supports mobile devices including tablets and smart phones -- surveys are automatically built using a

responsive design. Schedule surveys to send them at predetermined times (for example, on the last day of an event or class, annually, or any other interval you determine). Using these scheduled activities, you don't need to manually administer surveys: from starting the survey to sending a reminder e-mail to closing the survey, everything runs automatically. You can conduct surveys anonymously or non-anonymously depending on your needs.

Want to solicit feedback, but you don't have contact information? With EvaSys, it's easy: you can use unique QR codes to enable access to online surveys. Download a survey QR code directly from EvaSys and print it on flyers or posters for respondents to access using their mobile devices. As respondents complete online surveys, results are available to you immediately.

Paper-Based Surveys

For paper-based surveys, EvaSys generates a PDF file that you can print and distribute to participants. Because physical questionnaires are very familiar, they can lead to higher response rates as well as meaningful results. EvaSys prints bar codes on the questionnaires so you don't need to sort them before scanning. Results are available as soon as you finish scanning.

Hybrid Surveys

You can administer the same survey via both online AND paper for a hybrid approach. EvaSys combines all responses into a single set so you get unified results no matter how the respondent takes the survey. EvaSys provides a method to recognize and exclude duplicate responses.



Phase 3: Data Capture: Capturing online survey data and scanning questionnaires

EvaSys automates data capture in two ways:

- Access data from online surveys as soon as a respondent completes a survey.
- Use a scanner to capture completed paper questionnaires. Using modern scanning technology, EvaSys automatically allocates questionnaire pages to the correct survey, regardless of how the pages are stacked. EvaSys can also easily process faulty questionnaires, such as ones which were damaged during printing, during the survey, or

during scanning.

Open-ended, handwritten responses are captured as images. You may choose to anonymize them via an entry mask. You can also divide open-ended questions into categories to better evaluate them and group answers that are similar in content.

Phase 4: Analysis: Creating analysis and reports

Reports are available in PDF or HTML. The report contains a clear and graphic representation of the results. This includes histograms, profile lines, summarizing indicators, or quality guidelines in the form of traffic light illustrations. Comparisons with norm data are clearly represented as profile lines. You may send PDF reports directly to trainers or other program stakeholders using a scheduled and automated email process.

EvaSys enables you to fully analyze the collected data. For example, profile lines depict the survey behavior of participants. Dual scales facilitate analysis of quality and significance, time comparisons, benchmarking, subgroup reports, and cross tabulations. Furthermore, you can export the raw data. You can conduct further analysis using analysis and statistics programs such as Excel or SPSS.

Phase 5: Quality management: Overview and transparency with quality management views

With the help of EvaSys quality guidelines, you can determine whether overall performance conforms to a specified minimum quality. In addition, you can pinpoint exactly which segments (such as classes, market segments, branches/stores, etc) are not meeting specific quality metrics. Using roles, you can define exactly who can and cannot see the quality management (QM) dashboards. As with the surveys themselves, you can schedule and automate distributing QM reports to managers and other stakeholders. Automatically distributing these reports makes it easy for those who rely on the data the most to receive it regularly.

Beyond regular reporting, EvaSys can send automatic notifications to appropriate people if minimum quality targets are not met. Trainers, project officers, or lecturers can provide notes about a survey and as such release a personal statement (for example, in the case of inferior results due to technical problems).

Flexible Possibilities

Evasys is flexible enough to support virtually all survey or evaluation philosophies and organizational structures. The standard installation already has all the necessary tools and configuration options to ensure a successful system introduction, a high acceptance, and ultimately the development of a feedback culture.

EvaSys supports your organization's unique structures and processes. You can map your organizational structure onto EvaSys on three levels:

- Sub units (departments, branch sites, centers, etc.)
- Users (project manager, department manager, trainer, etc.) with various rights and roles
- Courses (seminars, trainings, etc. which are assigned to the participants)

You may opt to allow individual users to create and conduct their own questionnaires and surveys (active accounts).

Plug-ins



Plug-ins may extend existing functions or they may contain completely independent desktops or analysis reports. With a few mouse clicks, you can install and configure plug-ins for EvaSys.

Some plug-ins are available from Scantron at no charge as open-source-software, which means that you can also change or extend them. In addition, you may create your own plug-ins easily

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and conveniently via the Software Development Kit (SDK). SOAP-API also offers a wide array of potential applications for plug-ins.

Integrated LMS LTI[®] Interface²

For online evaluations, linking questionnaires directly to your Learning Management System is a popular way to increase response rates. When you activate and configure the LTI interface included in EvaSys, you can easily share live survey data to both participants and trainers for tracking response rates and/or access to results. You may customize both the content and design of the interface.

Host on Your Servers or Ours

You may subscribe to EvaSys annually and access a unique site on our secure servers. Subscription licenses work best for organizations that prefer to outsource IT efforts. Your evaluation data always remains private and accessible only by you. Our hosted systems are automatically upgraded when new versions become available.

You may, alternatively, buy a license and install and maintain EvaSys on your own servers. Perpetual licenses work best for organizations that have robust IT departments and that prefer to manage their own applications. Our Software Assurance program ensures you always have access to the latest version.

Conclusion

While basic surveys or evaluations require only three stages (creation, distribution, and analysis), enterprises and agencies who wish to routinely conduct evaluations should use a more detailed and extensive five-phase process. This includes mapping the organizational structure to an evaluation system and enabling quality management processes.

The potential benefits of a five-phase cycle include:

- More refined and relevant evaluations

² The LTI (Learning Tools Interoperability[®]) standard, published by the IMS Global Learning Consortium, is a standard for the exchange of data of web-based systems in the context of courses mapped in LMS. LTI is supported by leading suppliers of learning management systems including Blackboard, Brightspace, Canvas, Moodle, and ILIAS.

SCANTRON®

- Faster and simpler development, delivery and data capture
- An improved feedback cycle for continuous improvement
- Improved response rates and engagement from participants
- Greater value of the delivered training or other product or service

EvaSys is a powerful survey software for various survey projects that integrates smoothly into your existing IT and process landscape. Not only is the application ideally suited for automated creation, delivery and analysis of professional survey projects, but it also easily conforms to an organizational structure and outputs reports that facilitate continuous review and improvement of critical functions and the survey process itself.

- Automate the entire survey process
- Flexible delivery media: online, paper-based, and hybrid surveys
- Extensive configuration possibilities
- Integration via web service interfaces
- Available plug-in interface for functional extensions using the SDK
- Optimal display of online surveys on tablets and smart phones
- Data import (CSV, XML) for easy integration of existing data
- Available SOAP API library facilitates internal or third-party systems integration
- Role-based administrative model for multi-level organizational structures

About Scantron

Scantron provides technology to help you collect data you can use. Our solutions and services deliver the quality you expect from decades of experience. Whether you need to work online, on paper, or anywhere in between, Scantron can meet you where you are and help you get to where you want to be.

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