CREATING A MULTI-RATER CAMPAIGN

CONTENTS

CTRL + CLICK ON ANY TITLE TO GO TO THAT PAGE

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WELCOME TO MIND GARDEN'S TRANSFORM SYSTEM, A NEW GENERATION OF OUR WEB SYSTEM FOR CONDUCTING SURVEYS AND ASSESSMENTS.

CREATING A MULTI-RATER CAMPAIGN

The Transform system will step you through the tabs from left to right.

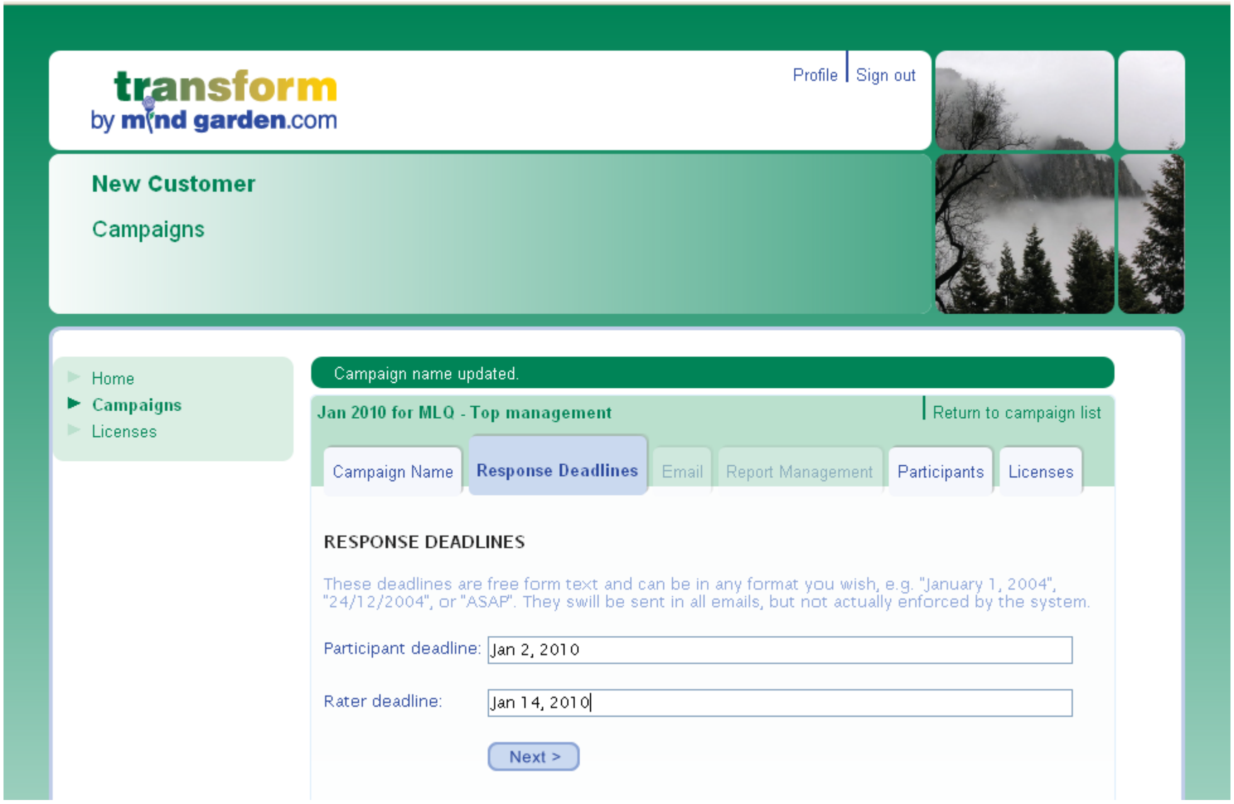
CREATING A MULTI-RATER CAMPAIGN

You will need to purchase licenses for an instrument before you create a campaign, either through Mind Garden.com or by setting up a billing arrangement with Mind Garden. You will need to create a campaign before you can USE your purchased licenses. As you can see from this page, you may change the name of your campaign from the default to one of your choosing. Most people like to identify campaigns by a group name and the approximate date of the administration of the instrument.

There is no limit to the number of campaigns you can create. You can use only one instrument in a campaign. If you wish to use a different instrument, you must purchase at least one license for that instrument and set up a separate campaign.

If you change the name of the campaign from the default name, be sure to click UPDATE to save your changes. You can change a campaign name at any time.

RESPONSE DEADLINES



RESPONSE DEADLINES

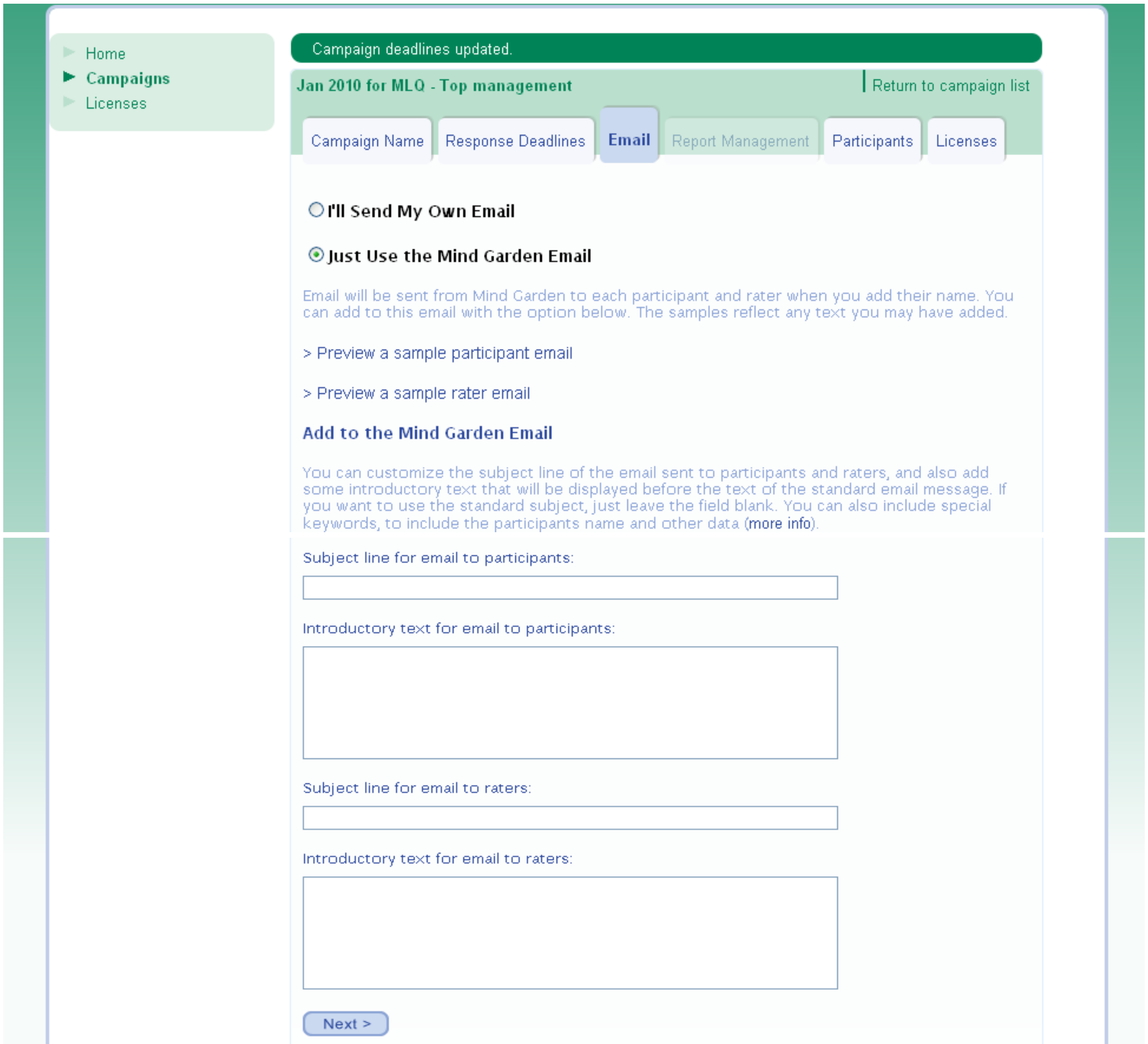
The default setting for response deadlines is ASAP. We recommend you set an actual date if possible in order to maximize your response rate. Near-term dates are better than long term dates since most people will quickly respond to a near term date rather than setting aside the response task for a later time.

You need to set response deadlines BEFORE you enter your Participants. Setting response deadlines is the second step because if you are in the middle of entering your Participants (from inside the Participants tab) and leave that entry process to go to the Response Deadlines tab, you will lose the Participants you have entered.

You can change the response deadlines later in your campaign if you wish, however you will need to resend the email (by clicking the Resend button) to those who have not responded. NOTE: the Response Deadlines you set are false deadlines in Transform and therefore will not prevent a Participant or Rater from responding after the deadline.

Click NEXT when you are ready to move to the next tab.

EMAIL



EMAIL

Please read the entire EMAIL "how to" section before proceeding in the Transform system.

You have several options for inviting people to participate in your assessment(s).

OPTION 1 (default): JUST USE THE MIND GARDEN EMAIL

If you choose the "Just Use the Mind Garden Email" you can preview a sample Participant email or a sample Rater email.

With this option, it is important to note that the email message will be sent automatically (and immediately) when you enter the names and email addresses of Participants into the system. Click NEXT to save your changes and move to the next tab.

Rater emails will be sent from Mind Garden immediately upon entering the names and email addresses of the Raters **(this is true regardless of the Email option you select).** Raters will have their own unique link and will not have to login.

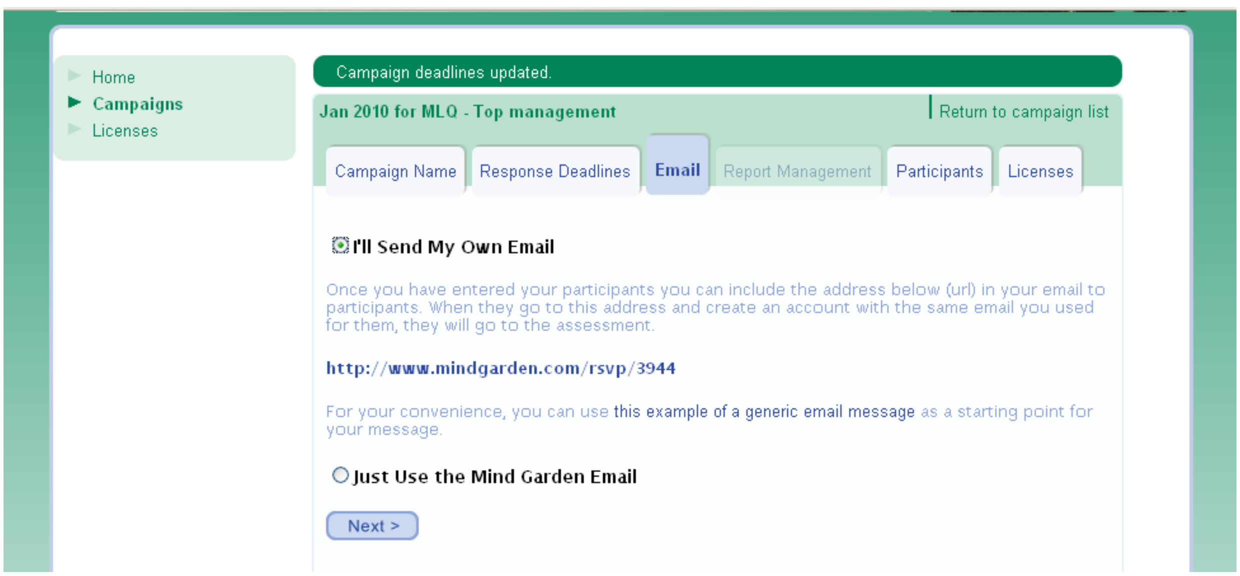
OPTION 2: ADD TEXT AND A CUSTOMIZED SUBJECT LINE TO "JUST USE THE MIND GARDEN EMAIL"

If you choose to add text to the Mind Garden email, your text will appear BEFORE the Mind Garden text in the email. You can also change the email Subject Line if you wish.

With this option, it is important to note that the email message will be sent automatically (and immediately) when you enter the names and email addresses of Participants and Raters into the system. Click NEXT to save your changes and move to the next tab.

Rater emails will be sent from Mind Garden immediately upon entering the names, email addresses and relationships of the Raters (this is true REGARDLESS of whether you choose to use the Mind Garden email or to send your own email). Raters will each have a unique link and will not have to login. If you want to add text to or customize the subject line of the Rater email, you can alter it after selecting the "Just Use the Mind Garden Email" option. Be sure to Update or Save so that your changes will show in the email.

OPTION 3 "I'LL SEND MY OWN EMAIL"



OPTION 3 "I'LL SEND MY OWN EMAIL"

The "I'll Send My Own Email" option allows you to do **two** things:

1. **Create your own message** to Participants. You may wish to use the “example of a generic email message”. (You cannot send your own Rater emails – however, if you want to add text to or customize the subject line of the Rater email, you can alter it after selecting the “Just Use the Mind Garden Email” option.)

2. You MUST include in your email the link shown on YOUR screen, since the link shown on the screen above is only an example (http://www.mindgarden.com/rsvp/xxxx). The xxxx means there will be four numbers unique to your campaign.

   The link for your campaign will take your Participant to a login screen, where they will enter their email address (the email address you enter for them when you add them as a Participant) and they will create a password.

   AND

3. **Send your message with the link at a time of your choosing from your regular email program**. YOU MUST REMEMBER TO SEND THE EMAIL – THERE WILL BE NO PROMPT TO DO SO FROM MIND GARDEN’s TRANSFORM SYSTEM.

Once again, it is important to know that with this option the invitation to participate will NOT be sent automatically when you enter the names and email addresses of Participants in the system. You **must** send it yourself from your own email program.

FOR MULTI-RATER INSTRUMENTS: If the “I’ll Send My Own Email” option is your choice, be sure to check click on the button “I’ll Send My Own Email”, then click NEXT or UPDATE, then go to the Participant tab and enter your Participants’ names and email addresses. It is important to get them entered BEFORE you send your email because they need to be in Mind Garden’s TRANSFORM database when they go to log in. The order of these steps is essential. Thus the order should be:

1) Click on the button “I’ll Send My Own Email”.

2) Click Update.

3) Enter your Participant names and email addresses.

4) Create your own email including the login link and send it to your Participants from your own email program.

RATER EMAILS

Rater emails will be sent from Mind Garden immediately upon entering the names, email addresses and relationships of the Raters (this is true REGARDLESS of whether you choose to use the Mind Garden email or to send your own email). Raters will each have a unique link and will not have to login. If you want to add text to or customize the subject line of the Rater email, you can alter it after selecting the “Just Use the Mind Garden Email” option. Be sure to Update or Save so that your changes will show in the email.

REPORT MANAGEMENT

REPORT MANAGEMENT

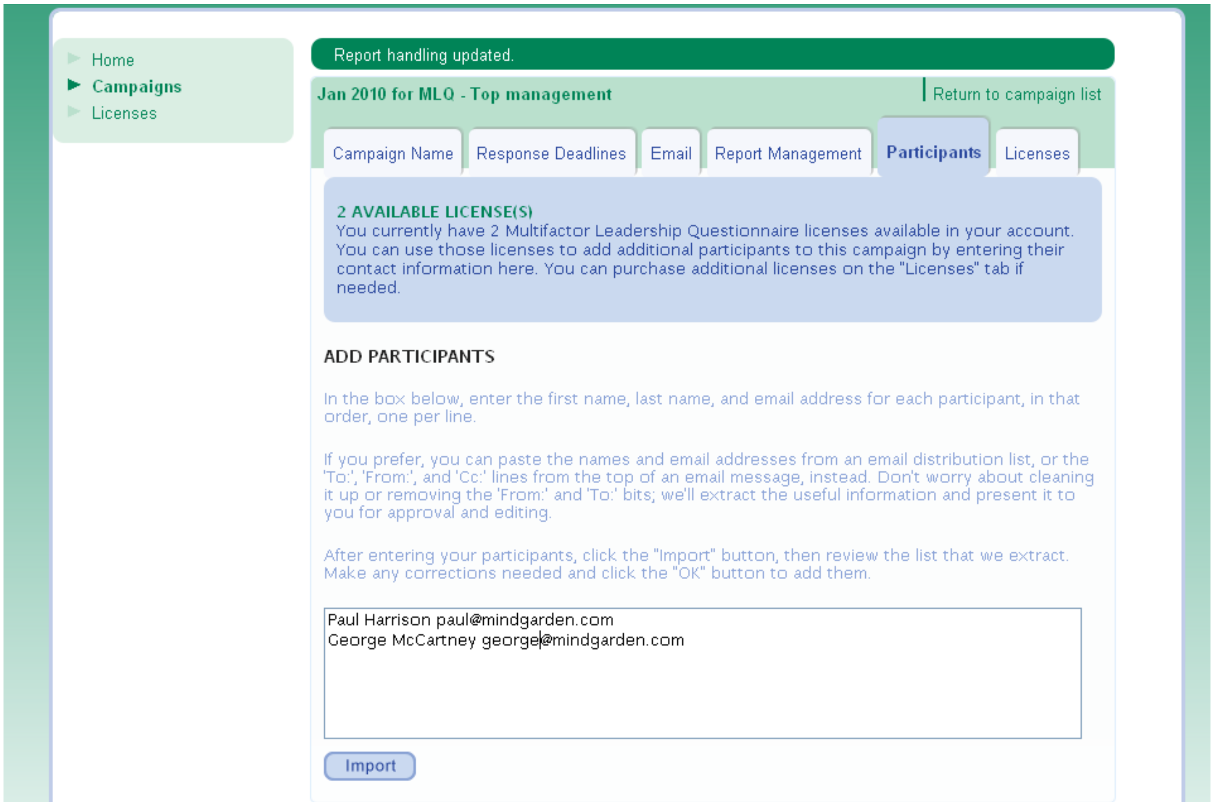
You have 3 options for Report Management. The default, and most commonly used option is "I will release reports". You will be offered the option to release the report to the Participants by a phrase that appears next to each Participant's name. When you click on the phrase, the report will be sent via email to the Participant.

Select the second option if you wish to automatically release reports to Participants as soon as the reports are created.

DO NOT select the third option of "Don't release reports to Participants at this time". The feature is not enabled, and will confuse you by telling you that the report has been released to the Participant, when it has not.

You can select a different option at any time as long as you click on Update to save your changes.

ADDING PARTICIPANTS



ADDING PARTICIPANTS

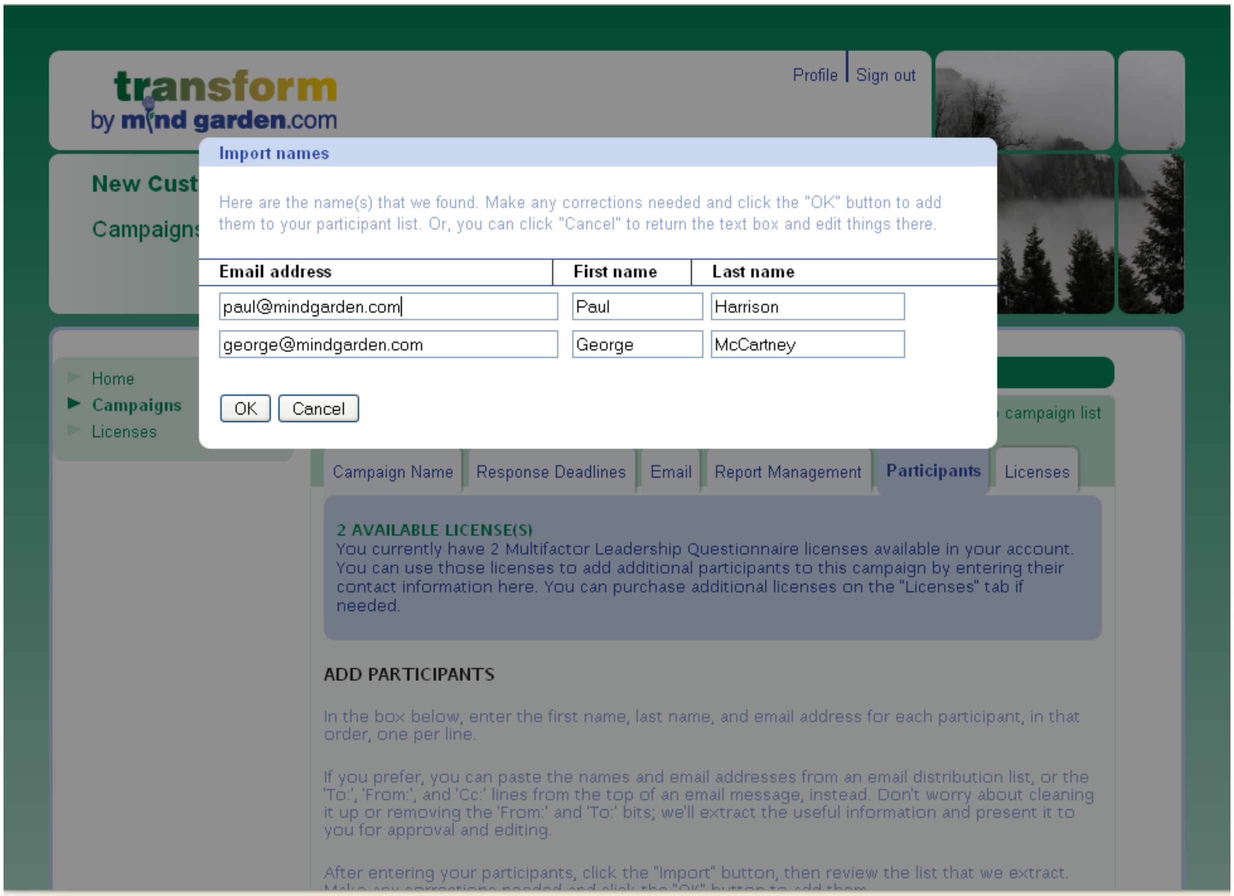
Depending on the instrument, the Participant may be only rating themselves or their environment, or they may elect others to rate them (this is the reason for the term “multi-Rater instrument”).

You must have licenses available in order to add Participants. You can share licenses for a given instrument among several campaigns, however you cannot use licenses for multiple instruments in the same campaign. If you need to purchase additional licenses you can do so by going to the Licenses tab.

The first step is to Import the Participants by entering first and last names and email addresses. You may copy and paste these from your own document into the Import box. Click Import.

ADDING PARTICIPANTS - CONTINUED ON NEXT PAGE

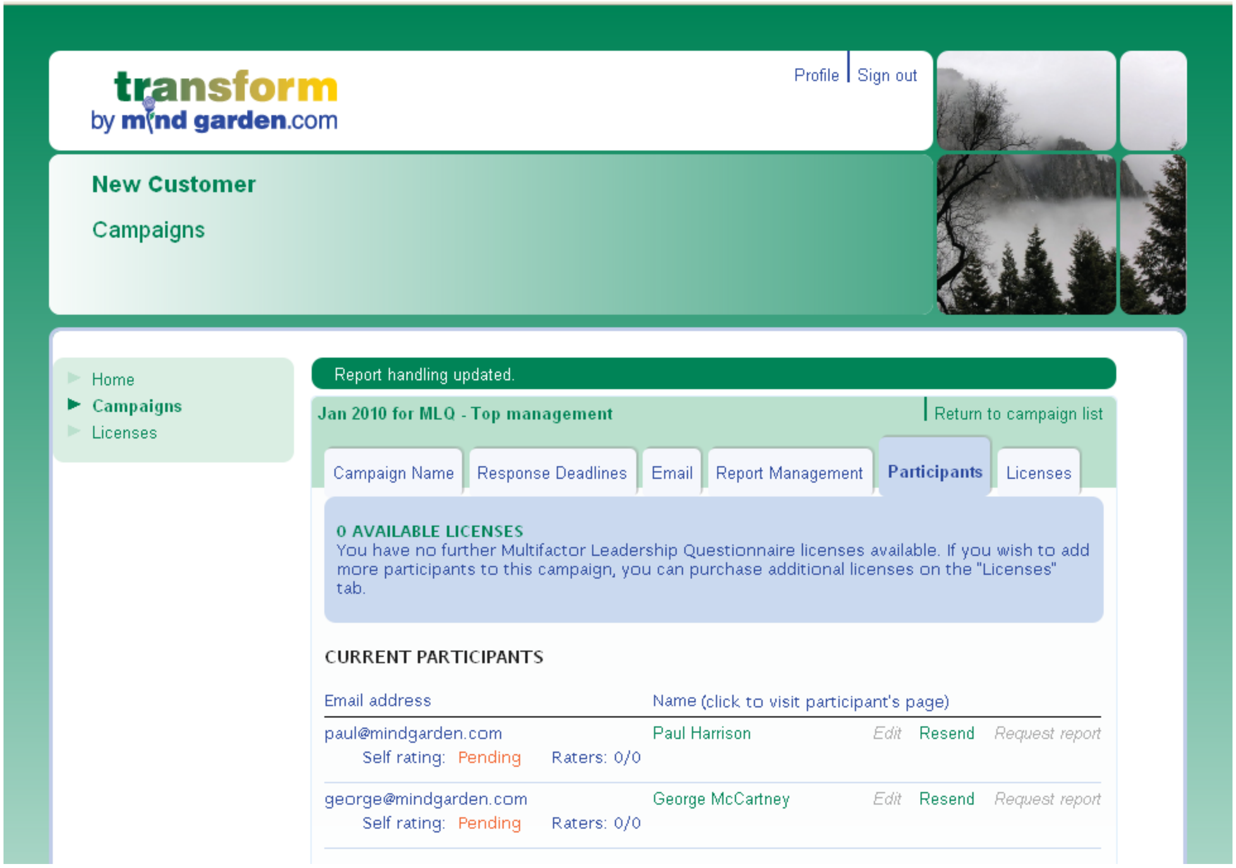
ADDING PARTICIPANTS (cont'd)



Check to be sure the emails and names appear correctly, then click the OK button. If you click the Cancel button, you will be taken back one step in the process to the Import box with all email addresses and names in it.

ADDING PARTICIPANTS - CONTINUED ON NEXT PAGE

ADDING PARTICIPANTS (Cont'd)

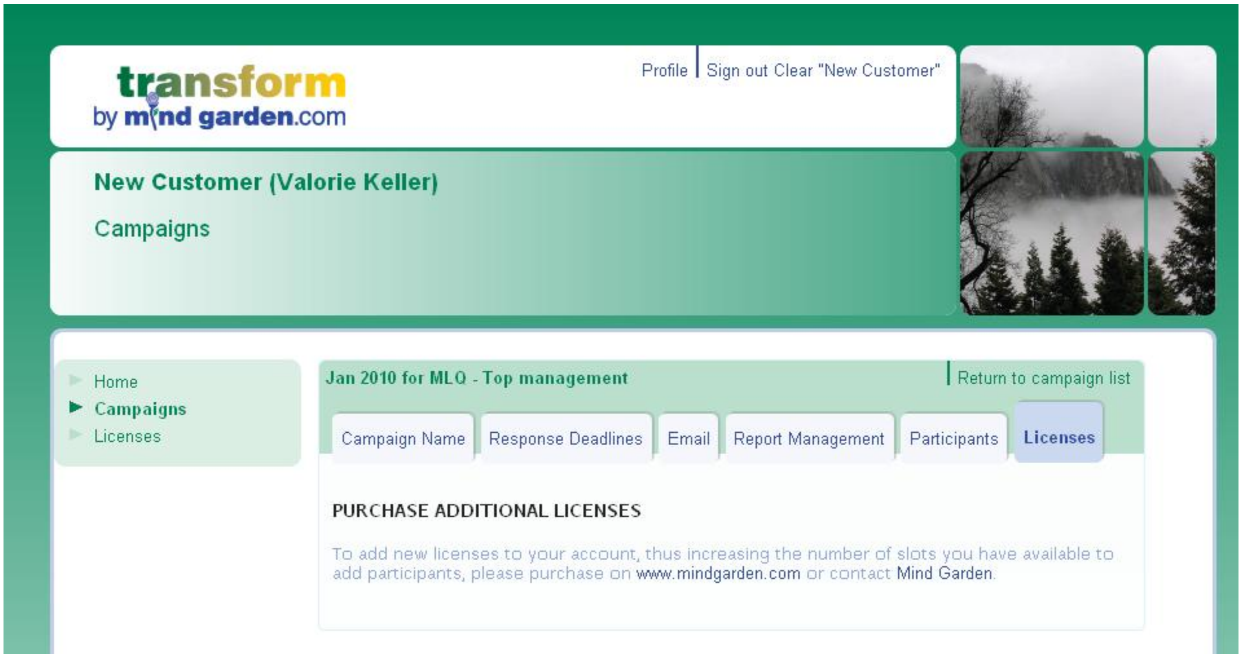


When you have successfully entered your Participants, the page will appear as above. You may have to scroll down to see the complete list.

If you wish to enter the Raters for your Participants instead of the Participants entering the Raters themselves, you may click on the name of the Participant on this screen and that will take you to the Participant's page.

This page shows the Resend feature, which allows you to send reminder emails to your Participants if they have not completed their self rating. Note that if you have selected the "I'll send my own email" option, clicking the Resend button to remind Participants to respond WILL NOT WORK. Rather, you must send your own reminder emails.

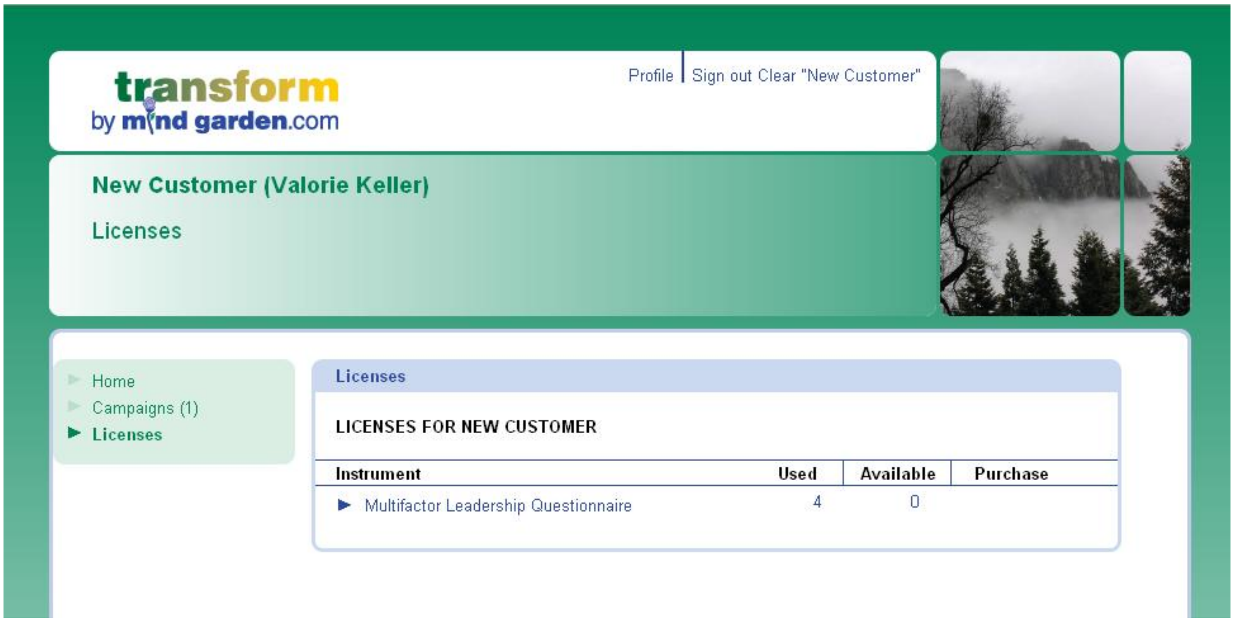
LICENSES



LICENSES

This tab instructs you on how to purchase additional licenses if you currently have none available for use.

LICENSE PURCHASE HISTORY AND CURRENT AVAILABILITY



LICENSE PURCHASE HISTORY AND CURRENT AVAILABILITY

By clicking on the word “Licenses” on the left side of the page, you can see your history of license purchase as well as the number currently available. You may use available licenses in an existing campaign or you may create a new campaign in which to use them.

SPECIAL SITUATIONS

I WANT TO ENTER RATERS RATHER THAN HAVING MY PARTICIPANTS ENTER THEM.

Steps:

1. Alter the email that you send to your Participants to let them know they do not need to enter their Raters. Either add to the Mind Garden email or send your own (go under the Email tab in the campaign to see options).

2. Send the invitational email to your Participants. If you use the Mind Garden email, the invitation will go out immediately upon adding your Participants to your Participant tab. If you use your own email, you should follow the exact instructions for that option.

3. Obtain a list of the first and last names, email addresses, and reporting levels of the Raters for each Participant (one Rater per line) This is easiest with the use of an excel spreadsheet so that you can select just the first three columns and not have to sort out and delete the reporting levels. Click on the Participant's name on the Participant tab to go to the page for that Participant. Copy and paste as one big group the Raters' names and emails into the Import box. Click Import, verify the emails and names, and select the rating level for each Rater. Click OK.

I WANT TO KEEP MY PARTICIPANTS FROM ENTERING (AND/OR SEEING) THEIR RATERS' NAMES.

This is a bit tricky but it can be done.

First, create your campaign.

Second, set your response deadlines on the Response Deadlines tab.

Next: It is critical that the following steps be done in order.

1) From the "Email" tab in the campaign, select the "I'll send my own email" option. Click Update or Next.

    a) NOTE: Do not be confused by the "link" that is shown under this option EXAMPLE http://www.mindgarden.com/rsvp/####. It is NOT the link that you will be sending to your Participants.

2) From the "Participant" tab, add your Participant names and email addresses by importing them and then click "Ok". Once the Participants are added, their names will appear under "Current Participants".

3) From the "Current Participants" section, one at a time, click on a Participant's name, which allows you to enter their page.

    a) On their page, go to Step 2 "Complete your Self Rating".

    b) Click on "Use this link to access your self rating". You should see the actual MLQ Participant questionnaire on the screen.

c) Copy the URL from the top of your computer screen where your web browser displays the link to the questionnaire.

d) Paste this link/URL into an email message that YOU create in YOUR OWN email program.

e) Send this email to the Participant. NOTE: The link will be different for each and every Participant!

4) Repeat Step 3 for each Participant.

5) When you are ready to add the Raters for the Participants:

a) From the "Current Participants" section, one at a time, click on a Participant's name, which allows you to enter that Participant's page.

b) On that page, go to Step 1 "Identify and enter your Raters". Add the Raters (for that Participant) by entering each Raters' first name last name and email address --separated by a space, one per line with no commas -- via the Import Box.

c) Once they are imported, you will be asked to enter the relationship of each Rater to the Participant (Is the Rater above (boss), peer (same level) or below (reporting to) that Participant?). After entering the organization level, and carefully checking the names and emails as shown, select "OK".

d) The Rater invitations will immediately be sent.

NOTE: When adding Raters, make sure you are on the appropriate Participant's webpage; otherwise, you will be adding Raters to the wrong Participant.

I WANT MY PARTICIPANT/LEADER TO ONLY TAKE THE SELF ASSESSMENT, BUT NOT TO ENTER OR SEE HIS/HER RATER LIST.

See instructions above for both "I want to enter Raters rather than having my Participants enter them" and

"I want to keep my Participants from entering (and/or seeing) their Raters' names"

I DO NOT WANT MY PARTICIPANTS/LEADERS TO TAKE THE SELF ASSESSMENT. I WANT ONLY RATER FEEDBACK.

Steps:

1. From the Email tab in a campaign, select the "I'll send my own email" option. Click "Update" or "Next".

2. Enter your Participant/leader's names on the Participant page. Import them and click "Ok"

3. Go back to the Email tab, and select the "Just Use the Mind Garden Email" option. Click "Update" or "Next".

4. Obtain a list of the first and last names, email addresses, and reporting levels of the Raters for each Participant/leader (one Rater per line) This is easiest from an excel spreadsheet so that you can select just the first three columns and not have to sort out and delete the reporting levels. Click on the Participant's name on the Participant page to go to the page for that Participant. Copy and paste as one big group the Raters' emails and names into the Import box. Click Import and select the rating level for each Rater(EX. the Rater may be above (boss), peer (same level) or below (reporting to) that Participant). Click "Ok".

5. You have just sent invitational emails to your Raters. You can return to each Participant's page by clicking on their name to check the status of their Raters. It is okay to click the Resend button next to the Raters names to remind them to take the assessment, however be certain that you **do not click the "Resend" button next to the a Leader/Participant's name, or they will receive an invitation to submit Raters and take the self assessment. In order to avoid this risk, go to the Email tab and select "I'll send my own email" and Update.**

I WANT TO SELECT THE "JUST USE THE MIND GARDEN EMAIL" OPTION, BUT I WANT TO ENTER MY PARTICIPANT/LEADER NAMES WITHOUT HAVING THE AUTOMATIC EMAIL INVITATION GO OUT IMMEDIATELY UPON ENTERING THE NAMES.

Steps:

1. After creating a campaign and setting your response deadlines, click on the Email tab. Select the option "I'll send my own email" and click "Update" or "Next". Use the default for Report Management and click "Update" or "Next".

2. Under the Participants tab, paste your Participant's email addresses and names into the Import box and click "Import". After verifiying that they are all correct, click "Ok".

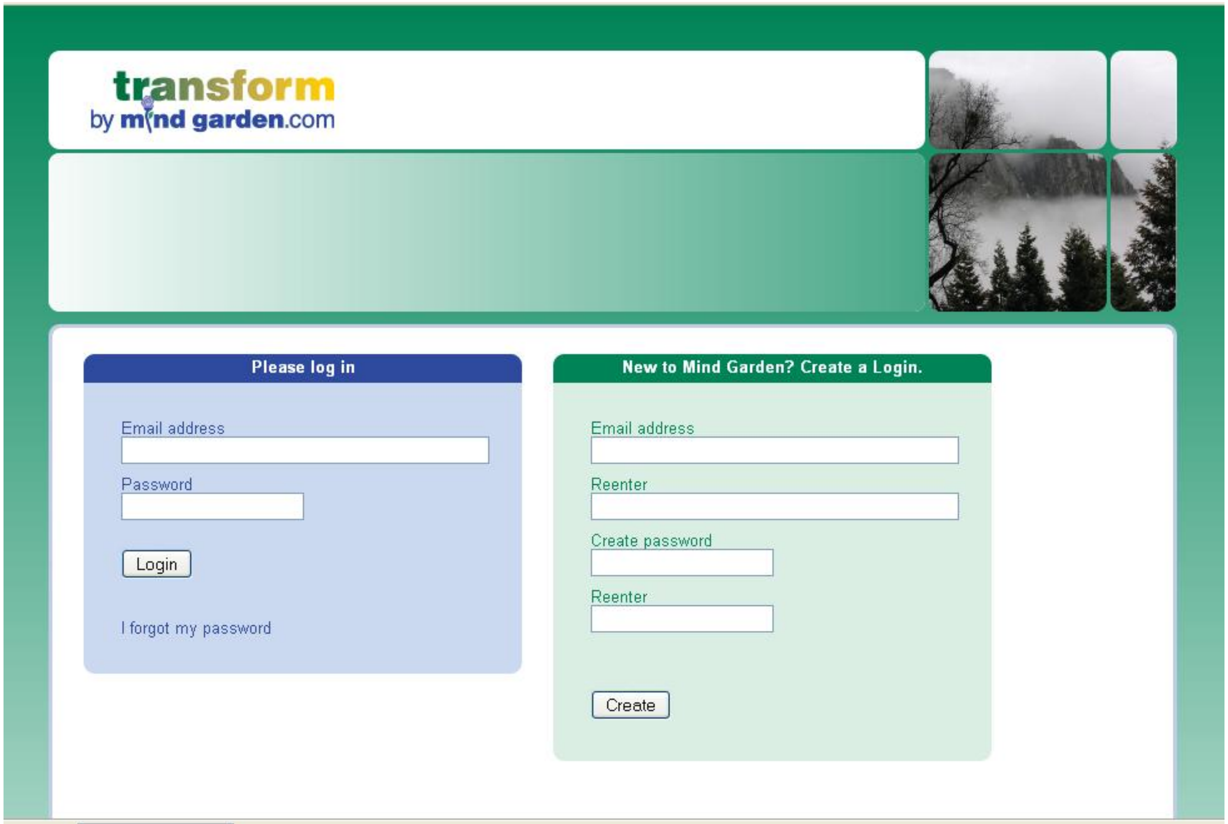
3. You have now entered your Participant names without triggering the instantaneous sending of the invitational email.

4. When you want Mind Garden to send the invitational emails, go back into the Campaign and click on the Email tab. Change the option to "Just use the Mind Garden email" and click "Update" or "Next".

5. Go to the Participant tab and next to each Participant's name, click the "Resend" button. This will send the invitational email.

   IMPORTANT NOTE REGARDING RATER EMAILS: Rater emails will be sent from Mind Garden immediately upon entering the names, email addresses and relationships of the Raters (This is true REGARDLESS of whether you choose to use the Mind Garden email or send your own email). Raters will each have a unique link and will not have to login. If you want to add text to or customize the subject line of the Rater email, you can alter it after selecting the "Just Use the Mind Garden Email" option. Be sure to Update or Save so that your changes will show in the email.

LOGIN PROCEDURES FOR MLQ PARTICIPANTS



LOGIN:

When you receive (via email) your invitation to participate in the online leadership evaluation (MLQ), the email includes a unique link for you to use to access/login to the Mind Garden website. Note: Please save the email for future reference or bookmark it in your browser.

If you do not save the email invitation, you may access Transform by going to the Mind Garden website www.mindgarden.com and on the home page at the top you will see the word Transform. When you click on it you will go to the login page.

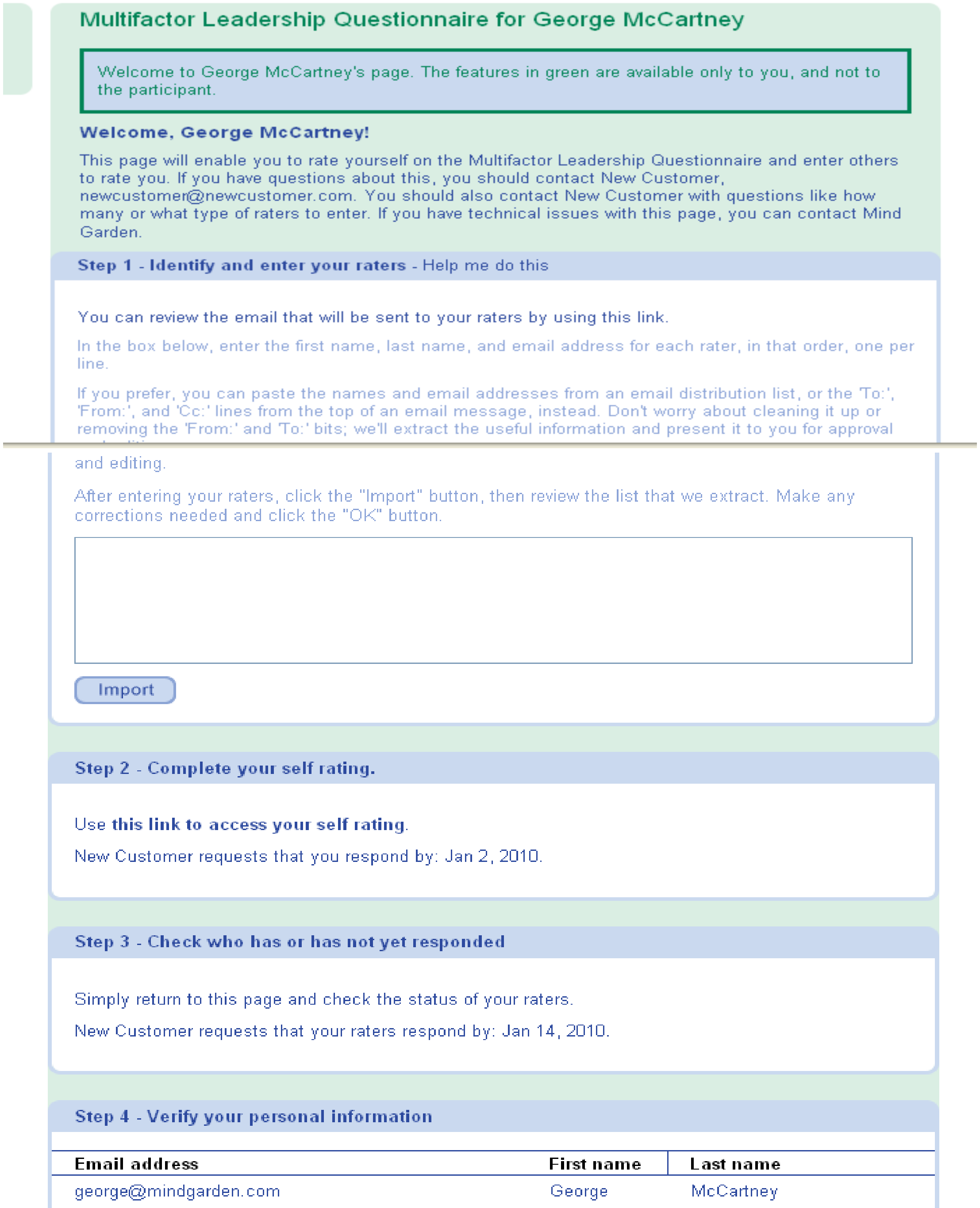
If your email address is pre-filled in the BLUE box, but you have never had a password, click on "I forgot my password" and one will be emailed to you. You can change the password after you log in by going to Profiles.

If your email address is pre-filled in the BLUE box, and you have a password, enter it. If you have forgotten it, click on "I forgot my password".

If your email address is pre-filled in the GREEN box, proceed as instructed there.

When you successfully login, you will be taken to your Participant page. You will be able to complete your Self-Rating, enter/add your Raters and check the status of your Raters. You may also send reminder emails to your Raters.

YOUR PARTICIPANT PAGE



Multifactor Leadership Questionnaire for George McCartney

Welcome to George McCartney's page. The features in green are available only to you, and not to the participant.

Welcome, George McCartney!

This page will enable you to rate yourself on the Multifactor Leadership Questionnaire and enter others to rate you. If you have questions about this, you should contact New Customer, newcustomer@newcustomer.com. You should also contact New Customer with questions like how many or what type of raters to enter. If you have technical issues with this page, you can contact Mind Garden.

Step 1 - Identify and enter your raters - Help me do this

You can review the email that will be sent to your raters by using this link.

In the box below, enter the first name, last name, and email address for each rater, in that order, one per line.

If you prefer, you can paste the names and email addresses from an email distribution list, or the 'To:', 'From:', and 'Cc:' lines from the top of an email message, instead. Don't worry about cleaning it up or removing the 'From:' and 'To:' bits; we'll extract the useful information and present it to you for approval and editing.

After entering your raters, click the "Import" button, then review the list that we extract. Make any corrections needed and click the "OK" button.

Import

Step 2 - Complete your self rating.

Use **this link to access your self rating**.

New Customer requests that you respond by: Jan 2, 2010.

Step 3 - Check who has or has not yet responded

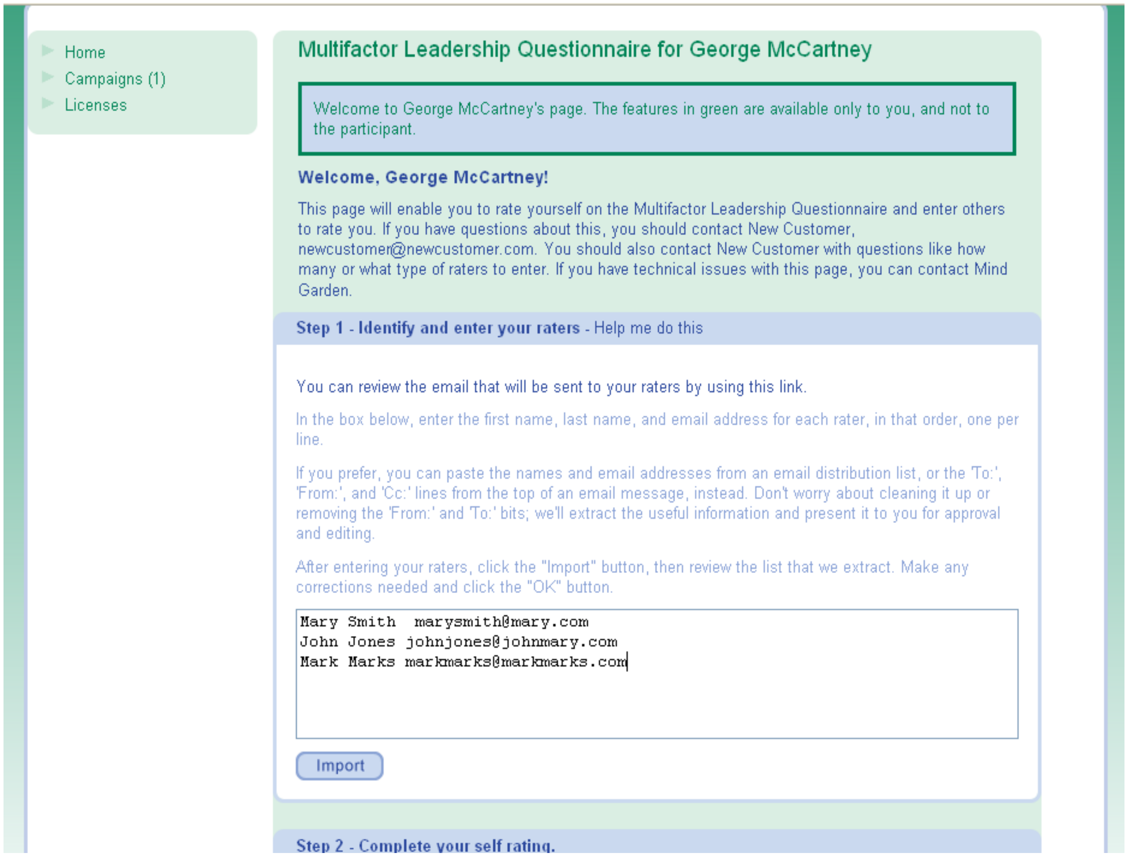
Simply return to this page and check the status of your raters.

New Customer requests that your raters respond by: Jan 14, 2010.

Step 4 - Verify your personal information

Email address	First name	Last name
george@mindgarden.com	George	McCartney

STEP 1: IDENTIFY AND ENTER YOUR RATER INFORMATION



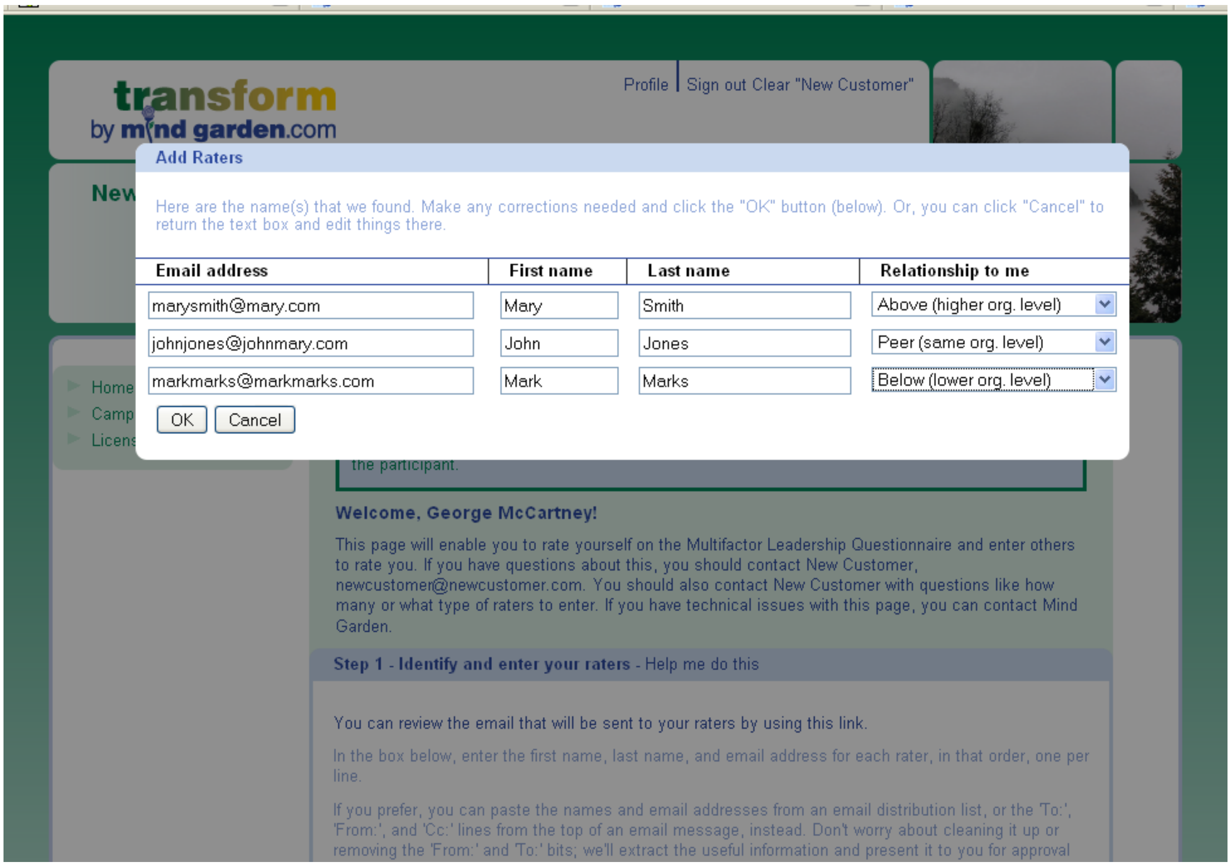
STEP 1: IDENTIFY AND ENTER YOUR RATER INFORMATION

In the box (white box outlined in blue above the word Import) in Step 1, enter your Rater information by typing the first name (space) last name (space) and email address of each of your Raters. Enter one Rater per line.

After typing in your Raters' names and email addresses, click the IMPORT button.

When you click the IMPORT button, your Raters' information will be displayed at the top of the screen where you will be able to verify the names and email addresses, select the relationship and complete the add Rater process. (Example: if the Rater works for you, they are in the Below category.)

STEP 1A: VERIFY/SELECT/ADD OR EDIT RATER INFORMATION



Step 1A – VERIFY/SELECT RELATIONSHIP/ADD OR EDIT RATER INFORMATION

Verify that your Raters' names and email addresses are correct. Make any needed changes.

In the "Relationship to me" column, use the drop down box to select the appropriate relationship of each of your Raters. (Example: if therRater works for you, they are in the Below category.)

After you have verified the Rater information and the relationship has been selected, click the "OK" button. (If you click Cancel, you will be taken back one step to the Import box containing the Rater information you entered.)

When you have clicked the "OK", button, the message "PLEASE WAIT" will briefly appear. When the Raters have been successfully added the "PLEASE WAIT" message will disappear. The MLQ invitation email will be immediately and automatically sent out to the Raters you have added.

Scroll down to Step 3 on the screen and you will see that your Raters have been successfully added.

STEP 3 – LATER: MONITOR WHO HAS/HAS NOT RESPONDED

Step 3 – LATER: MONITOR WHO HAS/HAS NOT RESPONDED

For each Rater that you have added, you will see the following information:

- Rater’s email address
- Rater’s Name
- Edit – may be used to edit the name, email address or relationship of the Rater BEFORE they respond to your invitation. After a Rater responds to the questionnaire, no edits will be possible.
- Resend – may be used to remind the Rater to respond. This resends the original invitation to the Rater.
- Relationship of the Rater (may not be edited after the Rater has responded)
- Pending or Complete – this indicates the status of the Rater’s response. You may return to your page at any time to check the status.