



DIAGNOSTIC AND MONITORING
OF ORGANIZATIONAL COACHING



MANUAL FOR **ASSESSORS**



Content

1. Creating a user account	4
2. Password recovery	5
3. Login to the application	6
4. Managing your user account	7
4.1. Modify your user data	7
5. Organizations Management	9
5.1. Creating a new organization	9
5.2. Updating an organization's data	11
5.3. Deleting an organization	11
6. Assessment management	12
6.1. What you should know before starting an assessment	12
6.2. Selection of the organization to be evaluated	14
6.3. List of assessments	15
6.4. Do an assessment	16
6.5. Print the answers to the assessment questions	23
6.6. Conducting an offline assessment	23
6.7. Results of an assessment	26
7. Management of action plans	29
7.1. What you need to know before developing an action plan	29
7.2. Creating a new plan	29
7.3. Updating information on an existing plan	31
7.4. Indicate the status of an action plan	32
7.5. Information update of the general actions of the plan	32
7.6. Edit a general action	32
7.7. Add, update and complete a milestone	34
7.8. Additional actions	36
7.9. Print an action plan	38
8. Organization Report	39
8.1. Report of the main data of the organization	39
8.2. Assessment report of the organization	40

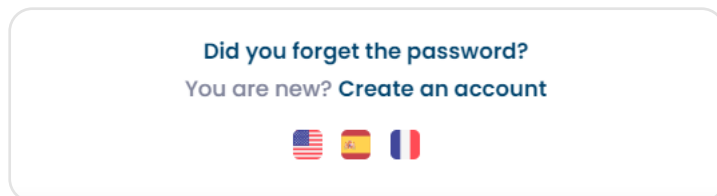
Content

8.3. Personalized report of the organization	40
9. Glossary of terms	42
9.1. Projects	42
9.2. User	42
9.3. User management	42
9.4. User roles	42
9.5. Observer	42
9.6. Assessor	42
9.7. Administrator	42
9.8. Super administrator	42
9.9. Organizations	42
9.10. Dimensions	43
9.11. Levels	43
9.12. Actions	43
9.13. Milestones	43

1

Creating a user account

To create a new user account enter the web address **dmoc.businessschool.coop** and click on the “Create an Account” link

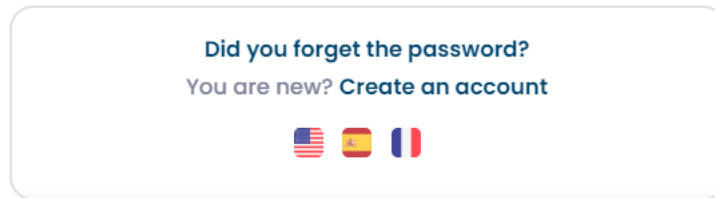


Next, the form for creating a new user account will be displayed, as indicated in the following image:




A screenshot of a web form titled "dmoc" with the subtitle "Create a new user account". The form contains five input fields: "Name *", "Email *", "Project *" (a dropdown menu with "Select an option" and a downward arrow), "Password *", and "Repeat password *". At the bottom, there are two buttons: "Check in" (orange) and "Cancel" (light orange). Below the buttons, there is a small asterisk and the text "* Check your email to get more instructions".

Enter the data requested: Name, Email, Project, Password (greater than 8 characters). After pressing the “register” button, check your email where you will get more information. **It is necessary for an “administrator” to activate their account and/or assign a role to be able to use it.**

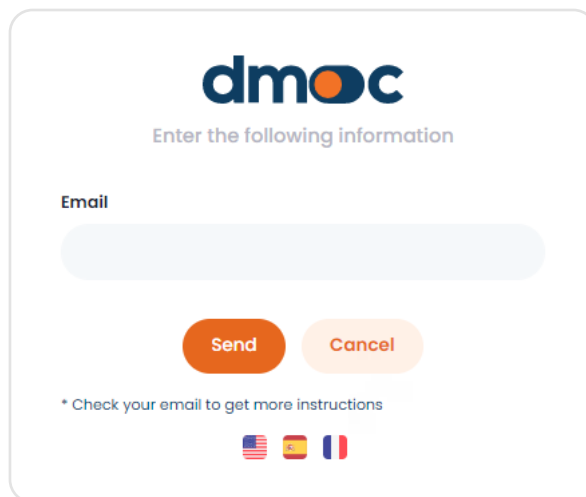
Enter the web address **dmoc.businessschool.coop** and click on the link "Forgot password?".



Did you forget the password?
You are new? [Create an account](#)

Next, the form for recovering a user account will be displayed, as indicated in the following image:






dmoc
Enter the following information

Email

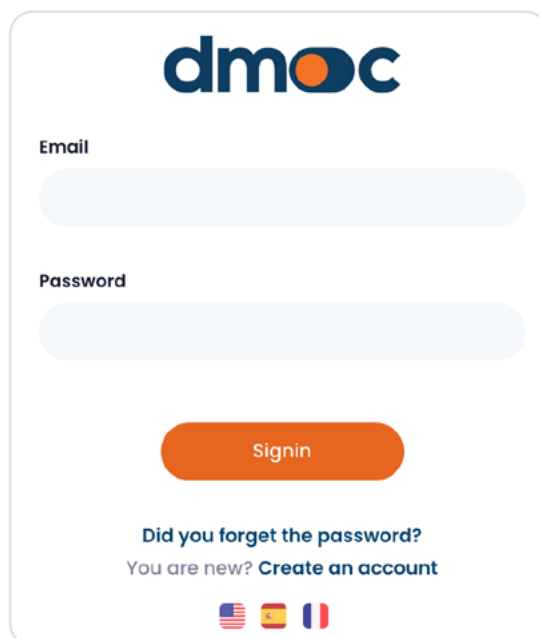
[Send](#) [Cancel](#)

* Check your email to get more instructions

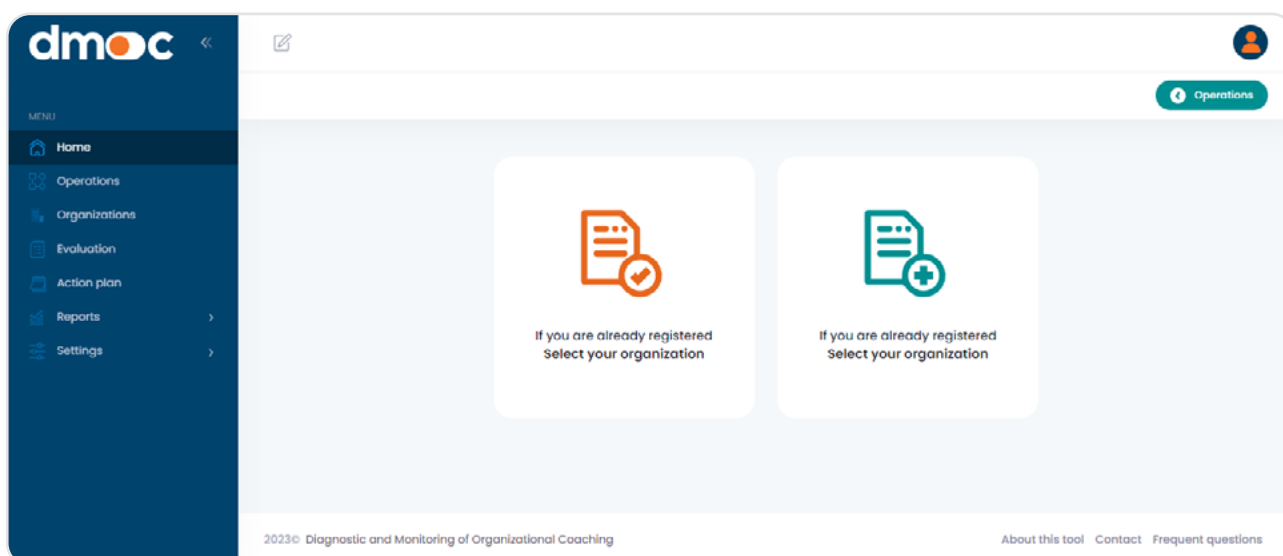
3 Login to the application

To access the application enter the web address **dmoc.businessschool.coop** with the username and password. It is necessary to have your account activated. This operation is done by an administrator. Then the following form will be displayed:



The login form features the dmoc logo at the top. Below it are two input fields: 'Email' and 'Password'. An orange 'Signin' button is positioned below the password field. At the bottom, there are links for 'Did you forget the password?' and 'You are new? Create an account'. Three flags (USA, Spain, France) are displayed at the very bottom.

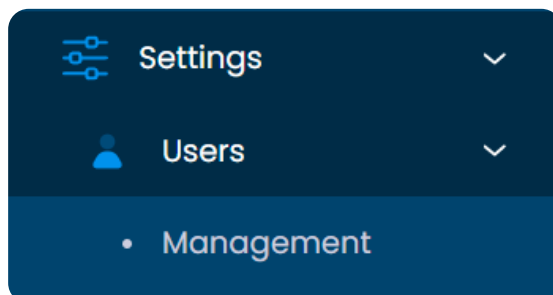
After pressing “enter” the following screen will be displayed where you can choose or create a new organization (topic to be seen later) on which you want to work:



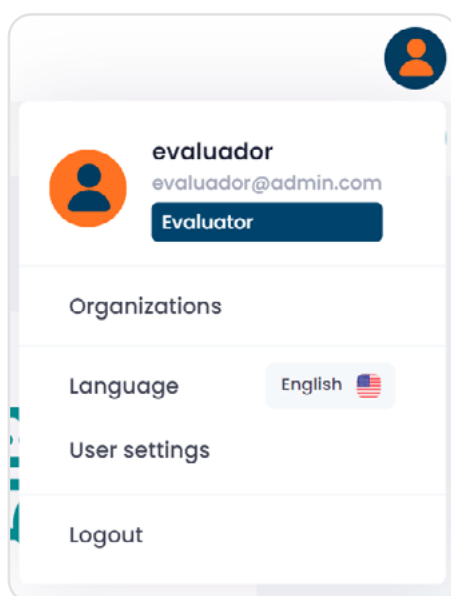
The dashboard has a dark blue sidebar menu on the left with the dmoc logo and a list of items: Home, Operations, Organizations, Evaluation, Action plan, Reports, and Settings. The main content area has a light blue background. At the top right, there is a user profile icon and an 'Operations' button. The center of the dashboard features two white boxes. Each box contains an icon (a document with a checkmark or a plus sign) and the text 'If you are already registered Select your organization'. The footer contains the copyright notice '2023© Diagnostic and Monitoring of Organizational Coaching' and links for 'About this tool', 'Contact', and 'Frequent questions'.

4.1. Modify your user data



Access to modify your personal data email through the main menu, section of "Configuration / Users / Management"



It is also possible to quickly access through the icon on the upper right side of the application where the quick options for the user are located:



When accessing via the "User Settings" option in the menu in the upper right corner, or via the "Users" option in the main menu, a list will be displayed with the user name:

NAME	EMAIL	ROLE	OBSERVATION	AUTHORIZED	CREATION DATE	OPERATIONS
evaluador	evaluador@admin.com	Evaluador		Authorized	2023-04-11 23:28:39	 

10 ▾

< 1 >

4

Managing your user account

To modify the user data press the next button:



Then, the following form will be displayed where you can make the modifications that you think are necessary. **Password modification is optional: if you do not want to change the password, leave that field empty. An assessor user cannot change the project(s) to which he/she has been assigned by an administrator.**

Update user data

Name *
evaluador

Email *
evaluador@admin.com

Role *
Evaluator

Password *

Projects
x Project CECE test x primer proyecto

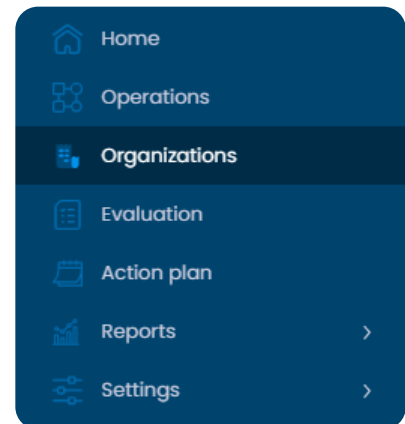
Observation

Authorization

Cancel Save

5.1. Creating a new organization

An assessor user can create one or more organizations, which will be automatically assigned to this user. To do this and to be able to manage them, enter through the main menu on the left side to “Settings / Organizations / Management” where you can create and edit the information related to the organizations as indicated below:



To create a new organization press “New Organization”:

 New organization

Then fill in the details of the form that will appear as in the following image:

It is important that the project is selected correctly in the project field, which should be one of the projects assigned to your user (as it appears in your user information). If in doubt, ask your administrator.

The following describes all the fields that are required:

Projects

They represent the different projects that are developed according to their characteristics, scope or field.

Country

It's the country where the organization is located.

Province/state/region

Represents the province, state, region or other similar of the country where the organization is located.

Municipality/county

Represents the municipality, county or similar that is part of the province, state or region where the organization is located.

Type of organization

It represents a type of organization (primary or secondary cooperative integration organizations or others).

Legal form of the Organization

It represents a legal form that will be assigned to an organization (joint stock company, association, grassroots cooperative or others).

Name of the organization

Name of the organization, legal and/or representative name.

Organization ID

The organization's legal registration number, may be the same as the organization's tax registration.

Representative

Name of the organization's main representative.

Representative's position

Name of the role or position of the organization's representative.

Start of operations

Foundation date related to the start of an organization's operations.

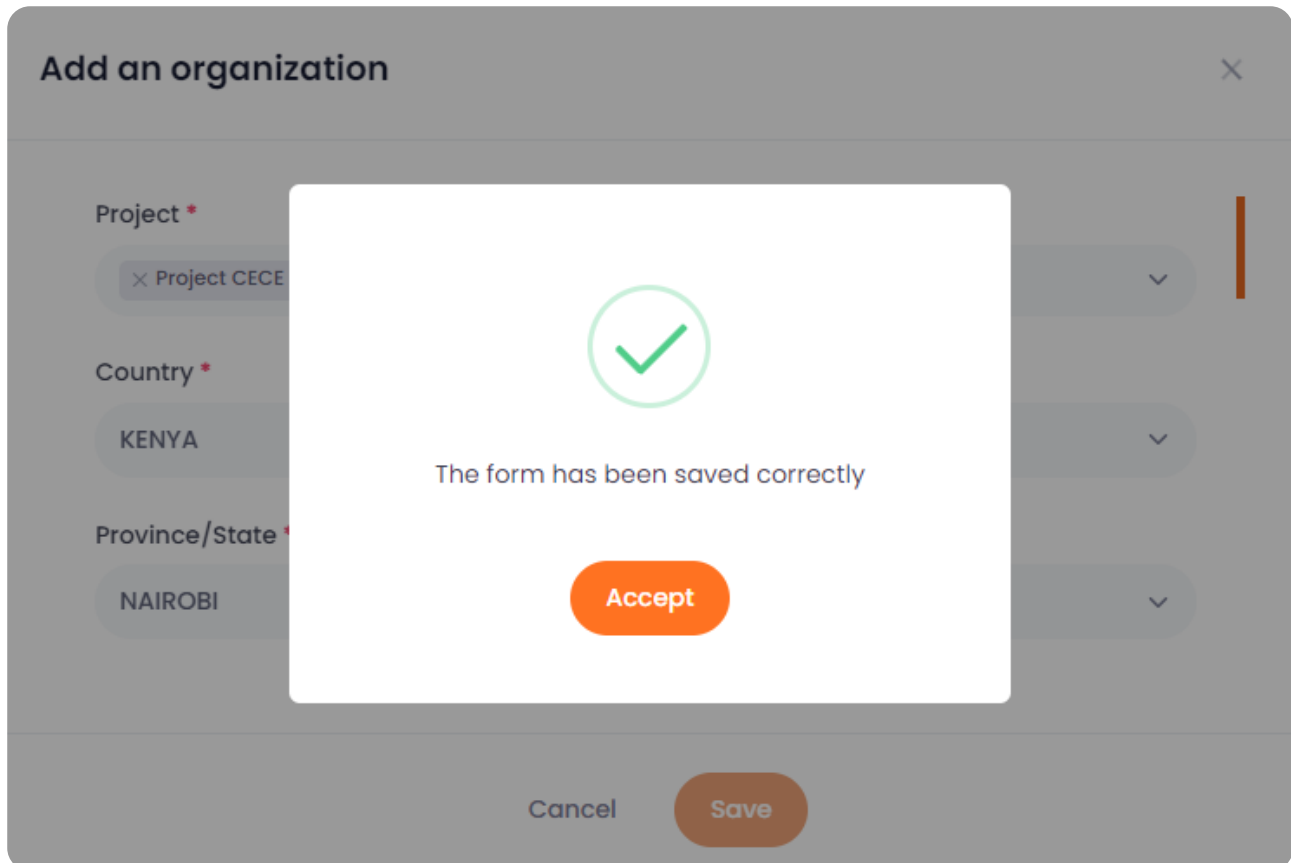
Main product

The main product or service developed by the organization.

Secondary products

If you have more than one product or service, you can optionally select this field.

After saving the form you will see an approval message:



The screenshot shows a modal window titled "Add an organization" with a close button (X) in the top right corner. The form contains three dropdown menus: "Project *" with the value "Project CECE", "Country *" with the value "KENYA", and "Province/State *" with the value "NAIROBI". Each dropdown has a downward arrow icon. A central white box displays a green checkmark icon and the text "The form has been saved correctly". Below this message is an orange "Accept" button. At the bottom of the modal are two buttons: "Cancel" and "Save".

5.2. Updating an organization's data

To update or edit the data of an existing organization, you must be in the "Organizations" menu option where the list of organizations appears. Click on edit to the right of the name of the organization whose data you want to update, and a form similar to the one that appears to add a new organization will appear. If you want to assign this organization to another project, you must add this one in the Projects field.

5.3. Deleting an organization

To **delete an organization** it is necessary that it not have any assessment, then press the following button:



An organization may have none, one or several assessments. Generally, an organization is evaluated with the same assessment template with a certain frequency (usually annual), in order to monitor its development and co-draft a corresponding action plan (together with the organization).

6.1. What you should know before starting an assessment

The assessment should be participatory and inclusive of different members of the organizations. Therefore, it is important to plan the meeting well in advance, to: 1) ensure the presence of key members for their knowledge and different points of view or perspectives, and 2) ensure that they are collecting and have quantitative information available required for the assessment.

The assessment should be carried out in a workshop format where not only the top managers (president, administrator or manager), but the largest number of members in the organization's governing bodies participate. In addition to the board of directors or Administrators council, and management, it is vitally important that the members of the supervisory, auditing or internal control board participate. You can invite as many members of the organization as you consider. It should only be borne in mind that the answers to the qualitative questions of the assessment questionnaire should be selected in such a way as to represent the consensus of the workshop participants, so, usually, a group of more than 15-20 people can delay the assessment process.

To facilitate the completion of the questions, they are subdivided into dimensions. A dimension is a logical subset of the assessment questionnaire questions that groups related questions by subdividing them. Each dimension consists of qualitative and quantitative questions.

The assessment process has several steps:

1. Select an organization to be evaluated. If it has not been created or registered, the organization must be entered or added. In addition, if the organization has been created by another user, it must have been assigned to its assessor user by an administrator user.
2. Before creating a new assessment, please make sure that this assessment has not already been created by reviewing the list of assessments of those organization, as explained below.

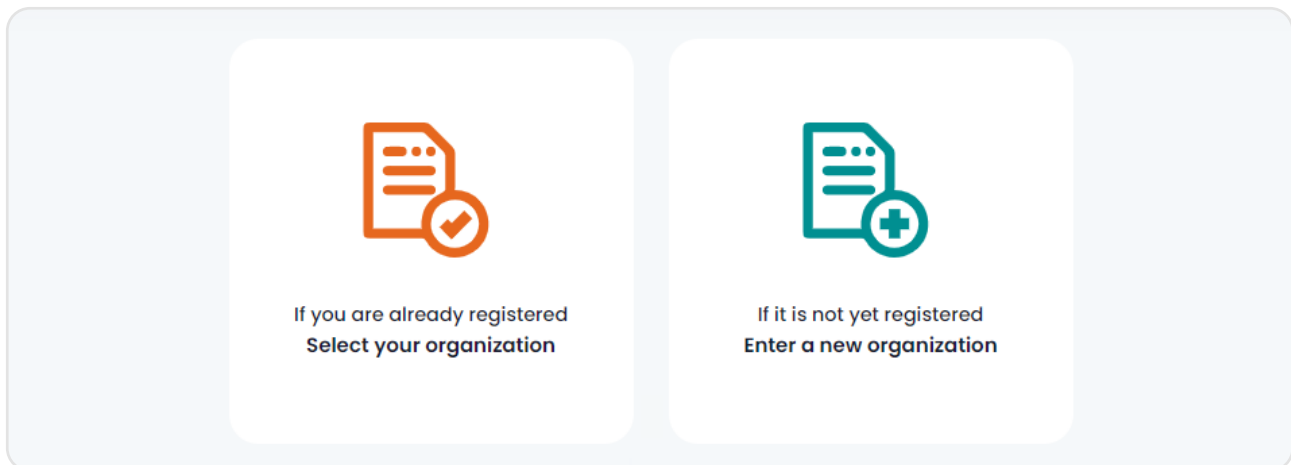
3. If you are going to take the assessment in a location without internet, you should *before going to that location while you have internet access*, add or start the assessment and download or export it so that you can fill it offline, as explained below. Even if you are going to take the assessment at an internet location, it is advisable that you create it in advance and let the organization know the information that you will need to collect in order to fill in the fields with quantitative information.
4. The assessment must be carried out in a participatory and inclusive way, as explained above. The time it takes to complete the assessment will depend on the time it takes for the members of the organization participating in the assessment workshop to reach a consensus on the answers to the qualitative questions of the assessment. Assessment templates should be designed to take no more than 4-6 hours.
5. At the end of each dimension, the quantitative data should be used to triangulate the answers to the qualitative questions of the evaluation, because the quantitative information should be checked and not contradict the answers to the qualitative questions. In case of contradiction, the interviewees should be noted and the qualitative or quantitative answers should be corrected, as appropriate.
6. The assessment can be paused at any time. Even if all the qualitative and quantitative questions of all dimensions have not been answered, you can see the results and even create an action plan for the development of your skills and improvements in your performance.
7. After the assessment is completed, the results should be shared with the organization to then move on to the development of the action plan, as explained below.

6.2. Selection of the organization to be evaluated

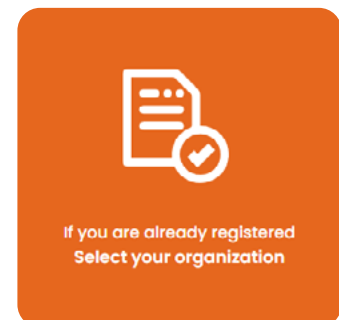
Go to the main screen or home of the application using the main menu:

 Home

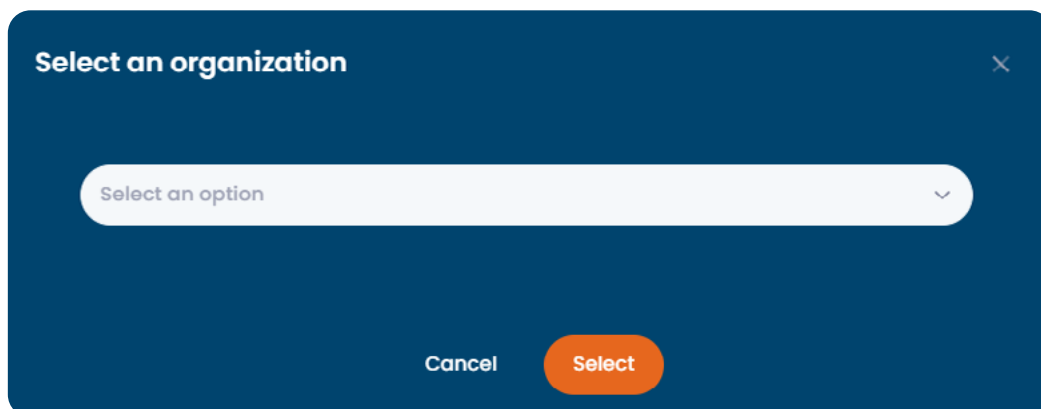
Then the following two options will be displayed:



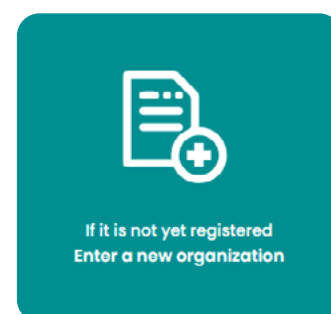
You have two options to choose from, in case you have previously created an organization or have been assigned one, press the green button:



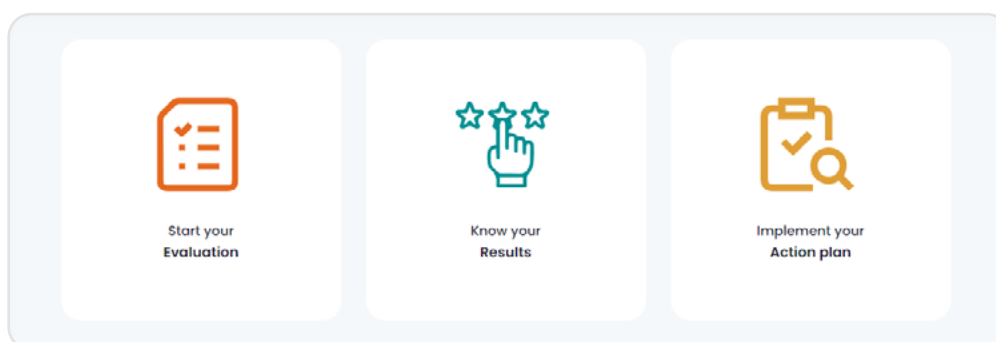
This option will provide a form to choose the organization that you want to evaluate.

A dark blue dialog box with a white title bar. The title bar contains the text 'Select an organization' and a close button (X). Below the title bar is a white search bar with the placeholder text 'Select an option' and a dropdown arrow. At the bottom of the dialog are two buttons: 'Cancel' and 'Select'.

In the event that you do not find the organization you need to assess, you can create a new organization by pressing the blue button:

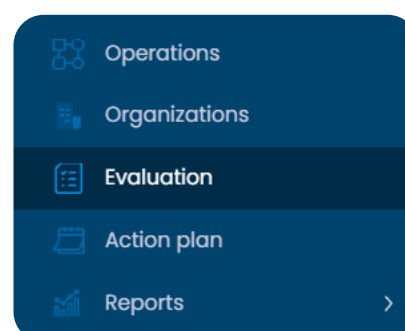


Next, you will be presented with a form for the creation of a new organization, fill out the form and when you are finished after pressing “accept” you will be redirected to the next screen where three buttons will appear:



6.3. List of assessments

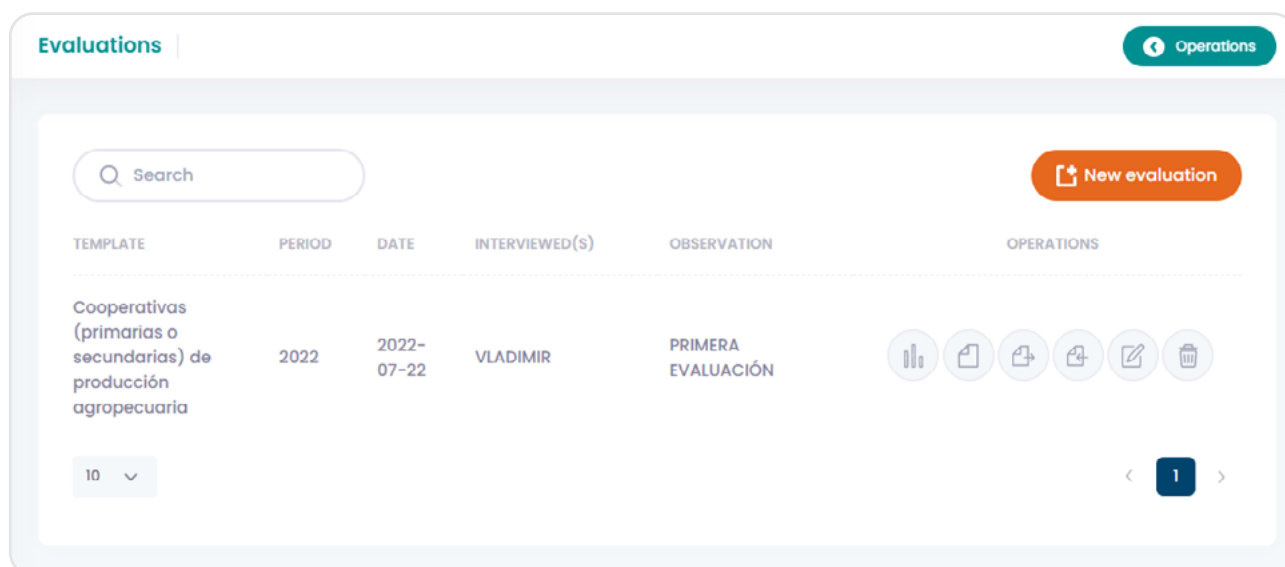
Before creating an assessment, please make sure that the assessment does not already exist. To access all the assessments of an organization it is first necessary to select an organization and then select “Assessment” on the left side menu of the application:



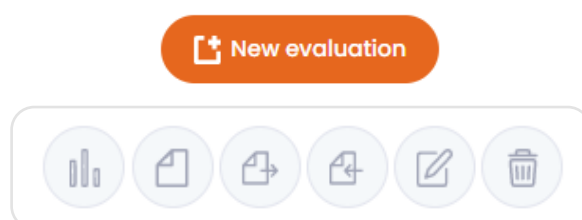
6 Assessment management

This menu, in addition to having direct access to the assessment, also contains access to the start of the application, general operations, action plan, reports and configuration.

After clicking on the main menu the link “Assessment” will take you to the assessment management and you will access the following screen:

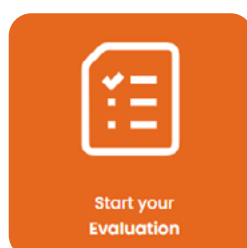


Here it is possible to create a new assessment, access the assessment by dimensions, the action plan, download the files to do an offline assessment, upload the offline content to synchronize, edit general data on the assessment or delete it using the buttons.



6.4. Do an assessment

To start the assessment process press the blue button “Start your assessment”:



A form to add a new assessment to the organization will be submitted immediately afterwards. It is possible to assess one or more organization.

The following describes all the fields that are required:

Template

The chosen template is the name of a questionnaire containing qualitative questions (including their answers and actions), quantitative questions and services offered to its members according to the type of organization. This is the questionnaire that will be answered or filled out later when the evaluation is carried out.

If you have concerns about which template to use, please check with your administrator.

Period (year)

It is the period or year that you want to assess.

Interviewee(s)

It is the name or names of the people who will be interviewed to fill out the assessment questionnaire.

Evaluation Date

Represents the date on which the assessment is made.

6 Assessment management

Observation

In this field you can add any comments you see fit.

When you save the form, you will be redirected to a new screen where the list of dimensions to be assessed is displayed. This list of dimensions, and your questions, will depend on the template that was selected when creating or adding the assessment. The dimensions of an assessnebt template for first or second grade/level cooperatives that carry out productive activities are shown in the case below. There are other templates for other types of organizations such as higher-level cooperatives that mainly have representative purposes.

Dimensions	Advance	Advance %	General progress (Qualitative indicator)	
Management	Qualitative (0/3) Quantitative (0/2)	0% 0%	0%	Evaluate
Governance	Qualitative (0/5) Quantitative (0/2)	0% 0%	0%	Evaluate
Internal control and accountability	Qualitative (0/3) Quantitative (0/2)	0% 0%	0%	Evaluate
Human Resources - Managers and hired	Qualitative (0/5) Quantitative (0/3)	0% 0%	0%	Evaluate
Economic-Financial Systems	Qualitative (0/3) Quantitative (0/2)	0% 0%	0%	Evaluate
Effectiveness and efficiency	Qualitative (0/3) Quantitative (0/1)	0% 0%	0%	Evaluate
Sustainability	Qualitative (0/4) Quantitative (0/3)	0% 0%	0%	Evaluate

Print result
Print manual evaluation

6 Assessment management

By pressing “Assess” for each dimension, you will be able to access the questionnaire related to this dimension, the following screen will be presented:

Effectiveness and efficiency

General

24. Does the organization successfully comply with the planned activities?

25. Does the organization provide its member organizations with the services they need?

26. Does the organization have procedures to ensure the use of resources responsibly, without unnecessary waste or luxuries?

Answers

☐ No

☐ Very few activities

☐ More or less half of the activities

☐ Regularly, well over half

☐ Yes, almost always almost all activities

☐ No

☐ Very little

☐ More or less

☐ Quite

☐ Yeah

☐ No

☐ It is had orally

☐ It exists, but it is not used

☐ It exists and is used

☐ It is used and has had an impact

Save

Quantitative information

Description ^	2021	2022	2023
Cost effectiveness (percentage)			

Save

Services

- ☐ Merchandising (retail sales)
- ☐ Distribution (selling to wholesale buyers)
- ☐ Marketing (brands, certifications, exposure at trade fairs, etc.)
- ☐ Purchases of inputs, etc.
- ☐ Procurement of technical-productive services (eg: phytosanitary care, etc.)
- ☐ Leasing or use of equipment or machinery
- ☐ Storage
- ☐ Transport
- ☐ Post-harvest treatment, production of finished products, etc.)
- ☐ Productive financial services (loans for the purchase of inputs or investments, price risk management, etc.)
- ☐ Savings and credit services for non-productive needs (home construction or repair, purchase of medicines, etc.)
- ☐ Medical services (emergencies, comprehensive, dental, vision, psychological, etc.)
- ☐ Accounting services
- ☐ Legal advisory services
- ☐ Advocacy (representation before governments and local, regional entities, etc.)
- ☐ Training, training or individual consultancies for productive and management issues
- ☐ Cooperative education (values, cooperative principles, best cooperative practices, exchange of experience with other cooperatives, etc.)
- ☐ Child rearing support
- ☐ Formal education (pre-school, primary, secondary, technical, etc.)

Save

As the questions of one dimension are answered, the green “Save” must be pressed in each section of the form.

Effectiveness and efficiency

General

24. Does the organization successfully comply with the planned activities?

25. Does the organization provide its member organizations with the services they need?

26. Does the organization have procedures to ensure the use of resources responsibly, without unnecessary waste or luxuries?

Answers

- ☒ No
- ☐ Very few activities
- ☐ More or less half of the activities
- ☐ Regularly, well over half
- ☐ Yes, almost always almost all activities

- ☐ No
- ☒ Very little
- ☐ More or less
- ☐ Quite
- ☐ Yeah

- ☐ No
- ☐ It is had orally
- ☐ It exists, but it is not used
- ☒ It exists and is used
- ☐ It is used and has had an impact

Save

Quantitative information

Description ^	2021	2022	2023
Cost effectiveness (percentage)	12,000.00	13,000.00	14,000.00

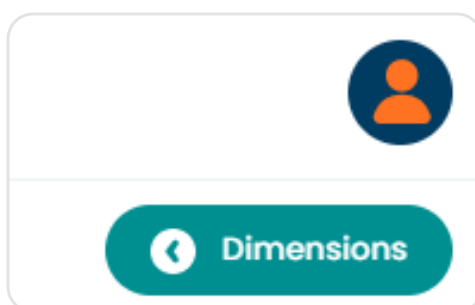
Save

Services

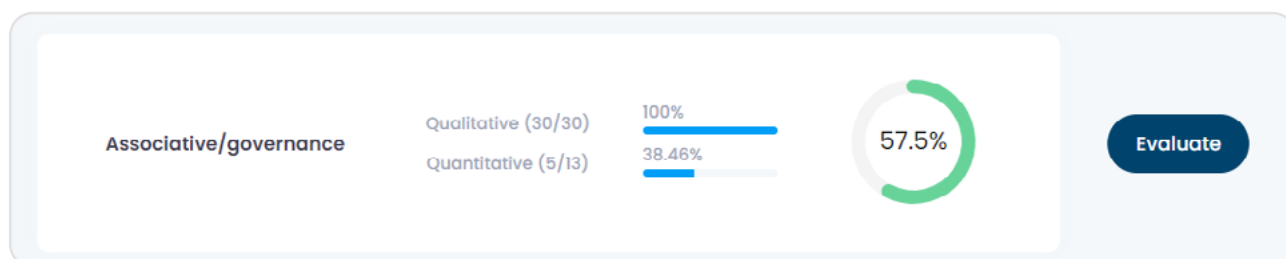
- ☐ Merchandising (retail sales)
- ☒ Distribution (selling to wholesale buyers)
- ☒ Marketing (brands, certifications, exposure at trade fairs, etc.)
- ☐ Purchases of inputs, etc.
- ☐ Procurement of technical-productive services (eg: phytosanitary care, etc.)
- ☐ Leasing or use of equipment or machinery
- ☒ Storage
- ☐ Transport
- ☐ Post-harvest treatment, production of finished products, etc.)
- ☐ Productive financial services (loans for the purchase of inputs or investments, price risk management, etc.)
- ☐ Savings and credit services for non-productive needs (home construction or repair, purchase of medicines, etc.)
- ☒ Medical services (emergencies, comprehensive, dental, vision, psychological, etc.)
- ☐ Accounting services
- ☒ Legal advisory services
- ☐ Advocacy (representation before governments and local, regional entities, etc.)
- ☐ Training, training or individual consultancies for productive and management issues
- ☒ Cooperative education (values, cooperative principles, best cooperative practices, exchange of experience with other cooperatives, etc.)
- ☐ Child rearing support
- ☒ Formal education (pre-school, primary, secondary, technical, etc.)

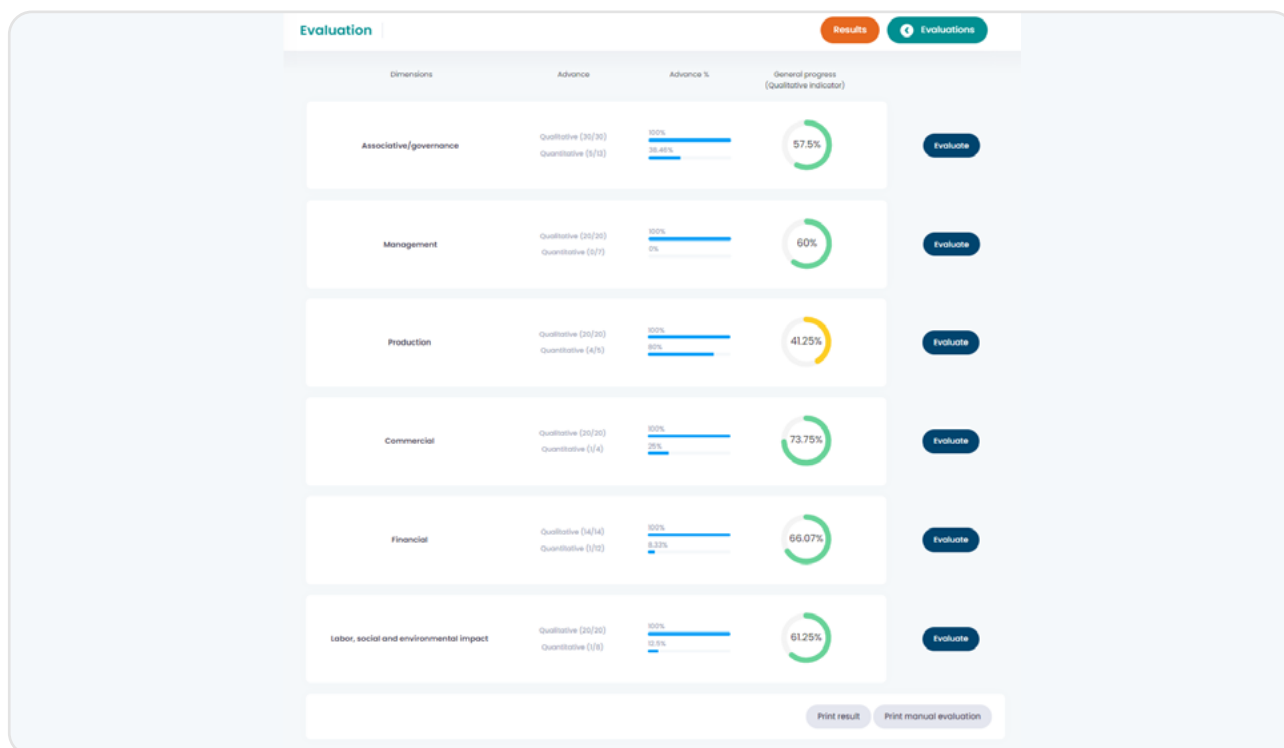
[Save](#)

To re-assess the other dimensions, press “Dimensions” located at the top right of the application.

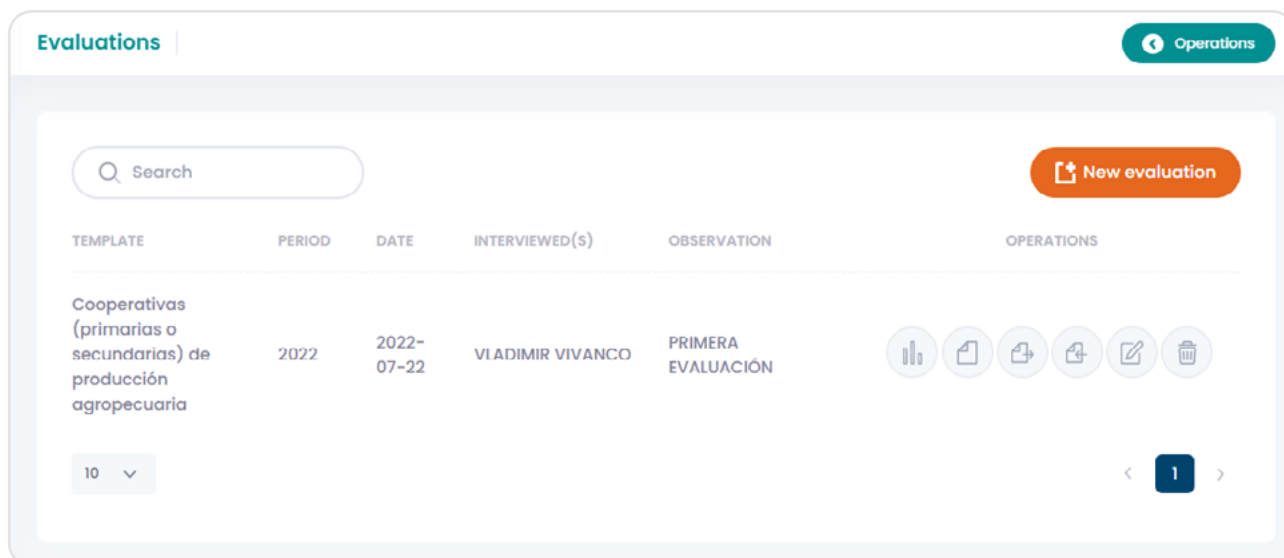
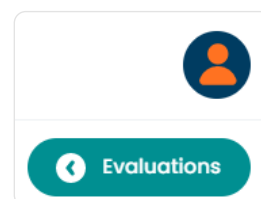


When you return, you will be able to visualize the progress of filling out the questionnaire for each dimension, as well as the result in percentage derived from the assessment according to the scores that were assigned to the answers of the qualitative questions.

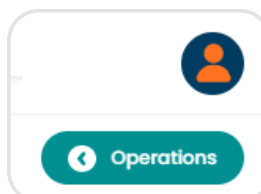




Once the assessment is completed, you must return using "Assessments" located at the top right of the application to return to the assessments section:



Optionally, you can return once more to the assessment operations by pressing the "Operations" button also located at the top right of the application:



6.5. Print the answers to the assessment questions

Access the assessment where the dimensions to be assessed are shown using the button



Then press “print result”

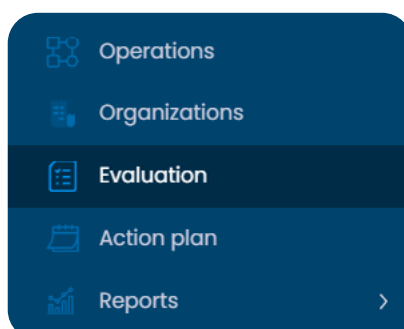
Print result

The information that appears can be printed to share with the assessed organization.

Central de Cooperativas Agrarias Cafetaleras Coclá	
Evaluation - Date: 2022-07-22 - type: Cooperativas (primarias o secundarias) de producción agropecuaria - Period: 2022 - Interviewed(s): VLADIMIR VIVANCO - Observation: PRIMERA EVALUACIÓN	
Associative/governance	
Qualitative evaluation	
Question	Answer
Internal norms and associate rights	
1. Does the organization deliver or make accessible (published on a wall and/or web page) an annual copy of the cooperative's bylaws to members, and does it provide training on these and other internal regulations so that all members know their rights and duties?	No (0 pts.)
2. Does the organization hold, at least once a year, a general assembly where the financial results of the previous year are analyzed in detail (results of production, collection, sales and, above all, comparative evolution of the costs of the last 3 years and the projection for beginning year)?	Yes, and partners understand and ask (3 pts.)
3. Do all associates have the same right to participate and vote in the General Assembly ("one person, one vote"), regardless of position or responsibility, contributed capital, seniority or other criteria?	Yes, totally (4 pts.)

6.6. Conducting an offline assessment

To develop an offline assessment, it is necessary to previously create an online assessment following the instructions previously exposed in the “Assess someone” section or you can access it on the left menu as shown in the image.



6 Assessment management

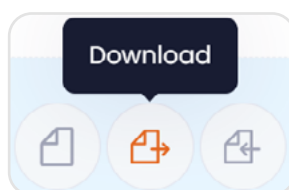
Then you will need to create or choose an assessment from the list of assessments available in this section:

The screenshot shows the 'Evaluations' section of a software interface. At the top, there is a search bar and a 'New evaluation' button. Below this is a table with the following columns: TEMPLATE, PERIOD, DATE, INTERVIEWED(S), OBSERVATION, and OPERATIONS. The table contains one row of data:

TEMPLATE	PERIOD	DATE	INTERVIEWED(S)	OBSERVATION	OPERATIONS
Cooperativas (primarias o secundarias) de producción agropecuaria	2022	2022-07-22	VLADIMIR VIVANCO	PRIMERA EVALUACIÓN	[Icons for chart, document, download, share, edit, delete]

At the bottom of the table, there is a pagination control showing '10' and a page number '1'.

Then press the download button to get a package with the necessary information for offline work:



You will get a single compressed file:

Name	Modification date	Type	Size
eval-23.zip	17/03/2023 09:41		326 KB

Unzip the downloaded (zip) file to get two separate files:

Name	Modification date	Type	Size
dmoc.xlsm	08/03/2023 17:56		307 KB
eval-23.json	17/03/2023 09:41		376 KB

Open only the “dmoc.xlsm” file, this file works with Microsoft Excel 2010 software or higher with macros enabled. It is also necessary that the files “dmoc-xlsm” and “eval-xx.json” are located in the same folder without any additional files.

SECURITY WARNING Macros have been disabled Enable Content

L16

Assessment

Evaluation: 13/03/2023
 Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
 Type of Organization: Cooperative of second level farmer's cooperative (union)
 Legal form: Second Level Cooperative
 ID: 20572190251
 Representative: IRENO MENDOZA
 TOCACHE / SAN MARTIN / PERÚ

Associative/governance	EVALUATE	57.50%
Management	EVALUATE	60.00%
Production	EVALUATE	41.25%
Commercial	EVALUATE	73.75%
Financial	EVALUATE	66.07%
Labor, social and environmental impact	EVALUATE	61.25%

In the event that a message is displayed at the top of the Excel macro in yellow, accept it, close the file and reopen it.

Assessment

Evaluation: 13/03/2023
 Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
 Type of Organization: Cooperative of second level farmer's cooperative (union)
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 TOCACHE / SAN MARTIN / PERÚ

Associative/governance	EVALUATE	57.50%
Management	EVALUATE	61.25%
Production	EVALUATE	51.25%
Commercial	EVALUATE	65.00%
Financial	EVALUATE	73.21%
Labor, social and environmental impact	EVALUATE	37.50%

ACTION PLAN

SAVE AND GENERATE THE EVALUATION

6 Assessment management

The operation of the macro is similar to the online operations to develop an assessment and develop the action plan.

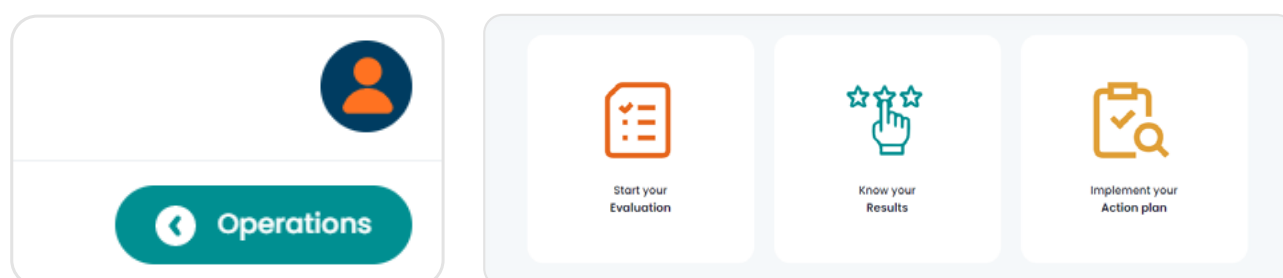
If you want to update the general information of the assessment such as the date, the person responsible or add some information, you must double-click on the section where this information is presented.

Evaluation: 13/03/2023
Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
Type of Organization: Cooperative of second level farmer's cooperative (union)
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ID: 20572190251
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TOCACHE / SAN MARTIN / PERÚ

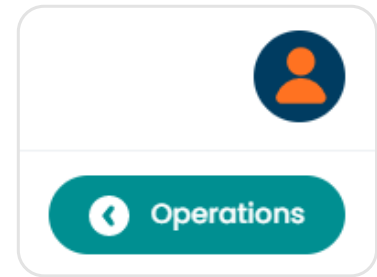
The screenshot shows a modal window titled "EVALUATION" with a close button (X) in the top right corner. The form contains three main sections: "INTERVIEWED" with a text input field containing "Higor Jaramillo"; "EVALUATION DATE" with a date input field containing "13/03/2023"; and "OBSERVATION" with a large empty text area. At the bottom of the form are two buttons: "CANCEL" and "SAVE".

6.7. Results of an assessment

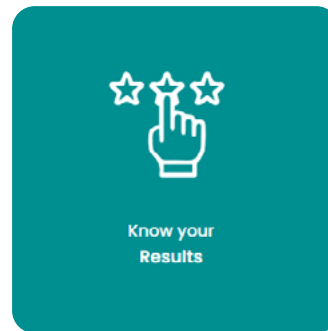
To see the Results of the assessment, you must press "Operations" also located at the top right of the application, obtaining the following screen with "Know your Results":



To find out the results of the assessment, return to the main operations by pressing “Operations” located at the top right of the application.



Then press the green “Results”.



The results of the assessment and the action plan are summarized in this section:

Evaluation

2022-07-22 - 2022

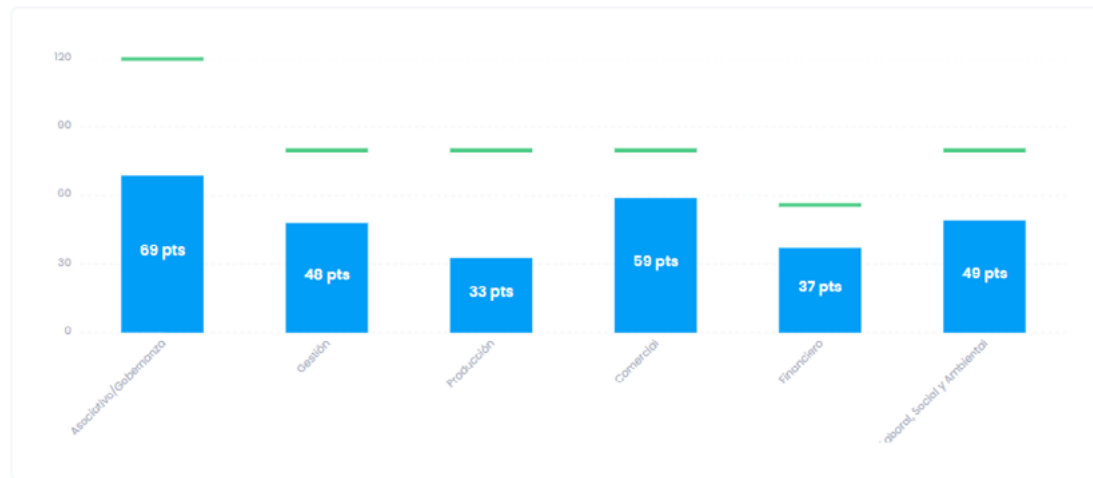
Central de Cooperativas Agrarias Cafetaleras Cocola

Id:	20136201213
Representative:	VLADIMIR VIVANCO - GERENTE GENERAL
Creation date:	0000-00-00
Beginning of operations:	1966-07-26
Type of organization:	Cooperativa de productores agrarios de primer nivel
Legal form:	Cooperativa de segundo nivel
Location:	LA CONVENCIÓN / CUSCO / PERÚ

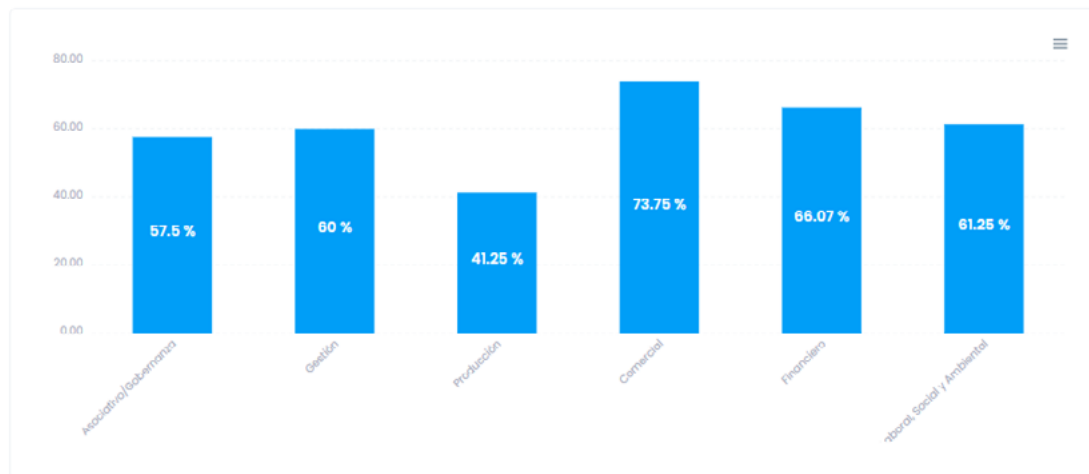
Evaluation

Template:	Cooperativas (primarias o secundarias) de producción agropecuaria	Score %: Situating: <div>Good</div>
Evaluation date:	2022-07-22	
Period:	2022	
Evaluator:	admin	
Interviewed(e):	VLADIMIR VIVANCO	
Observation:	PRIMERA EVALUACIÓN	
Score:	295 de 496 puntos	

Score according to evaluated components



Percentage of development in each component



Advance :

0.00 %

7.1. What you need to know before developing an action plan

An action plan is a list of actions derived from the answers given to the qualitative questions, each with a responsible party and milestones that must be completed by responsible parties.

A single action plan is generated from an assessment, consequently, there is only one action plan for each assessment.

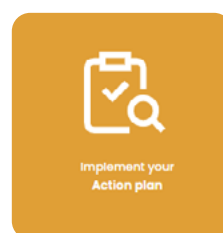
Action plans should be co-developed with the people who participated in the assessment, ideally on the same day or the day after the assessment.

When generating or creating an action plan, general actions will appear that are automatically generated from the answers of the qualitative questions, according to the assessment template. As we will see, you can disable these actions, and also add additional or non-automatically generated actions.

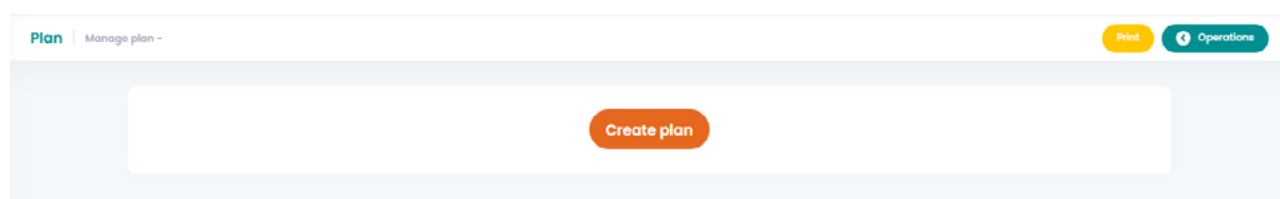
If the assessment has been carried out offline, the corresponding work plan can also be carried out offline, as explained above.

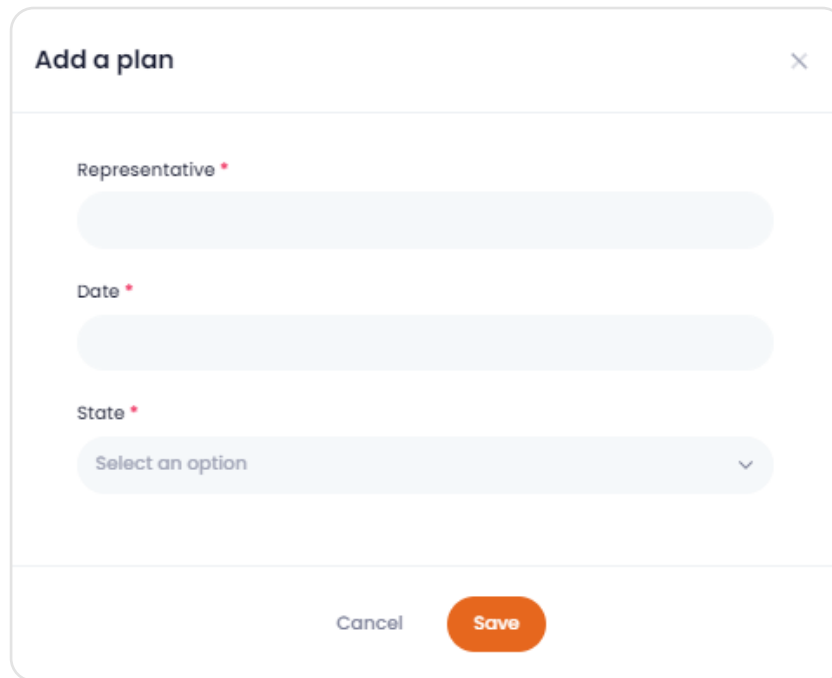
7.2. Creating a new plan

To start the co-drafting of the action plan or work, press “Action Plan”:



Then, you will be redirected to a new view where you can create a plan by pressing “Create Plan”. The creation of a plan requires the completion of the assessment development. If the assessment has been partially carried out, you can update the plan again to reorganize the resulting actions.





Add a plan ✕

Representative *

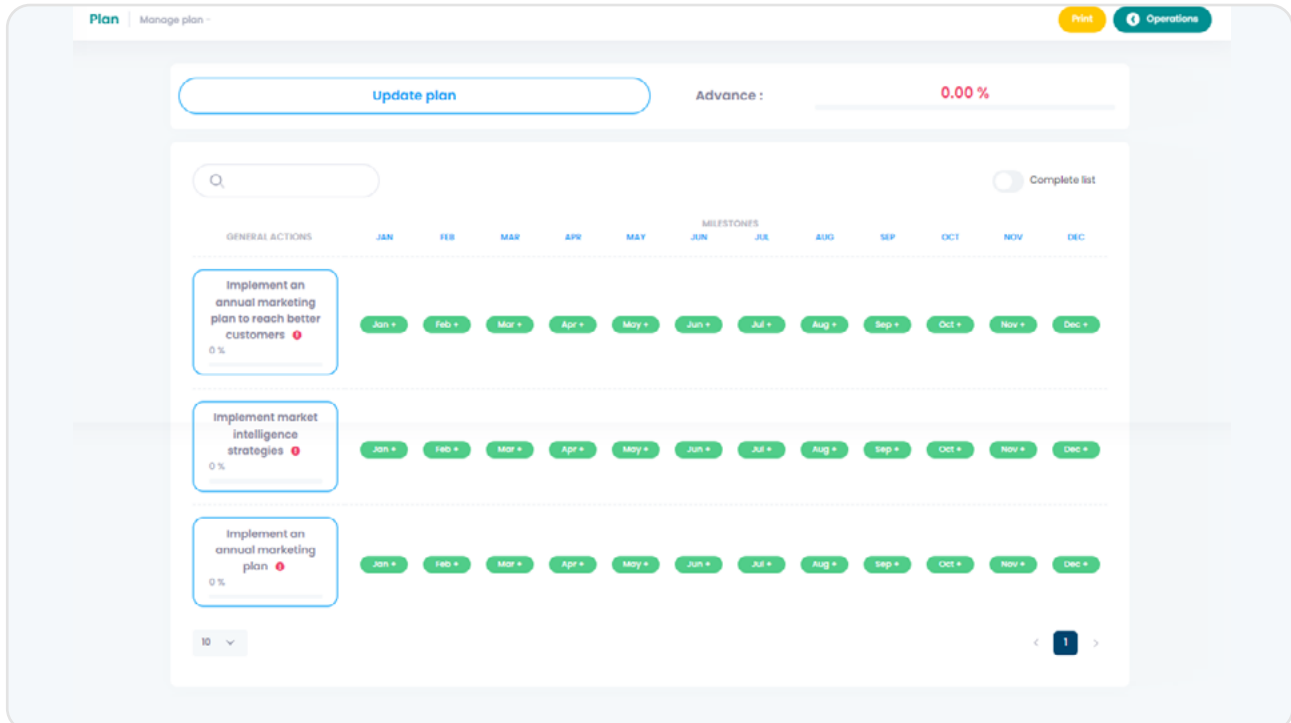
Date *

State *

Select an option ▼

Cancel Save

After the creation of the plan you will be redirected to the following view:



Plan | Manage plan | Print Operations

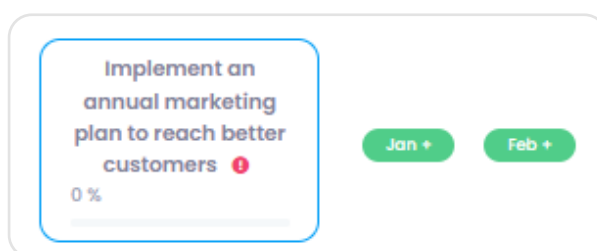
Update plan Advance : 0.00 %

Complete list

GENERAL ACTIONS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Implement an annual marketing plan to reach better customers 0 %	Jan +	Feb +	Mar +	Apr +	May +	Jun +	Jul +	Aug +	Sep +	Oct +	Nov +	Dec +
Implement market intelligence strategies 0 %	Jan +	Feb +	Mar +	Apr +	May +	Jun +	Jul +	Aug +	Sep +	Oct +	Nov +	Dec +
Implement an annual marketing plan 0 %	Jan +	Feb +	Mar +	Apr +	May +	Jun +	Jul +	Aug +	Sep +	Oct +	Nov +	Dec +

10 ▼ < 1 >

General actions will be shown in this view. A general action is visible because of the answer given to a qualitative question. The tool will show the most relevant actions for implementation purposes.



7.3. Updating information on an existing plan

It is possible to update the general information of the plan by pressing "Update Plan"



Then the following form will be submitted:

A screenshot of a form titled 'Update plan information' with a close button (X) in the top right corner. The form contains several input fields: 'Representative' with the value 'ENRIQUE TAFUR', 'Date de inicio' with the value '2022-10-21', 'State' with a dropdown menu showing 'Preliminary' and a red asterisk indicating it's required, and 'Aproved' with an unchecked toggle switch. At the bottom, there are two buttons: 'Cancel' and 'Save' (which is orange).

By updating the general information of the plan, it is possible to modify the information entered through the form and also update the general actions in the event that the assessment has been modified and the answers to the qualitative questions changed.

7.4. Indicate the status of an action plan

To indicate that the action plan has already been finalized by the organization, you must select the options of the state, “preliminary” or “final”. The “preliminary” status means that changes may be made to the general information, actions, milestones or assessment that will cause an update of the general actions. The “final” status means that it has already been finalized and approved by the organization, so no further changes will be made, except for the modification of the actions progress percentage or the status of the milestones. This information will be used as an indicator to determine the number of plans in “preliminary” or “final” status.

7.5. Information update of the general actions of the plan

By updating the general information of the plan as explained above, the general actions are also updated, in case the assessment has been modified and the answers to the qualitative questions changed. This behavior is useful when it has not been possible to complete the assessment completely and the plan needs to be developed in parallel.

7.6. Edit a general action

By pressing the box containing the general action you can update the main data:

Update action information ✕

Percentage of completion * 0%

Priority *
1 - Urgent and important ▼

Representative

Activate ☒

Cancel Save

The following describes all the fields that are required:

Progress percentage

Refers to the implementation percentage estimate of the general action, this estimate is proposed by the interviewee.

Priority

It is the estimation of the importance and urgency that is determined in the general action.

Responsible party

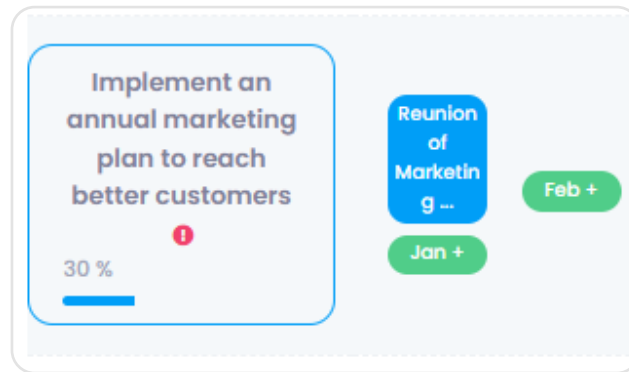
Person who will be in charge of implementing the general action.

Enable

Allows the action to be visible to the assessor, when it is deactivated the general action remains hidden but not deleted, it is possible to re-activate it.

7.7. Add, update and complete a milestone

To determine deadlines for the implementation of the general actions proposed by the application, it is necessary to create milestones, these are more specific actions or concrete results that must be met in the month they are established.



To add a milestone you must press the green buttons that are located to the right of each general action, these are 12 buttons that represent one month from the creation date of the plan, considering the creation month and the following eleven months.



Each button displays a form that contains a field for the milestone description and another field for any observation.

Add a milestone

January

×

Description of the milestone *

Observation *

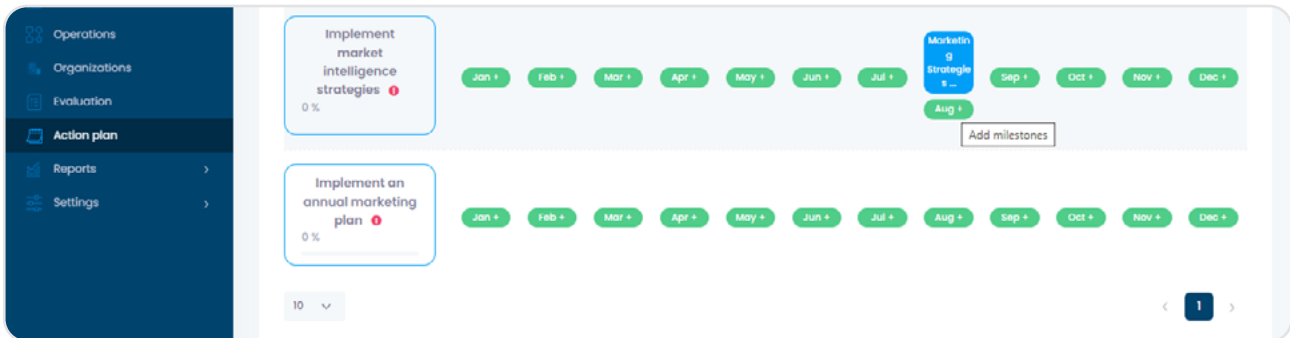
Cancel

Save

7

Management of action plans

When saving the form a new milestone will be added which is represented on a button in an abbreviated form:



To edit a milestone press the blue button representing the milestone, then a form will be displayed as shown in the following image:

Update milestone

Description of the milestone *

Marketing Strategies Plan

Observation *

Completed

☐

Cancel

Delete

Save

In addition to editing the description and the observation of the milestone you can also mark it as completed, this will cause the milestone to change color which will indicate that it has been fulfilled for implementation.



7.8. Additional actions

The additional actions are those actions that were not included in the corresponding assessment template and therefore do not automatically appear among the “general” ones. These are actions that are not shown in the general actions list. These may respond to some particularity of the organization on which it is necessary to carry out an improvement action. Thus, an additional action can be generated from a very obvious need but that is not considered in the assessment.

The screenshot shows the 'GENERAL ACTIONS' table interface. It includes a search bar, a 'New additional action' button, and a table with columns for months (JAN to DEC) and 'MILESTONES'. The table is currently empty, displaying 'No data available in table'. There is a pagination control showing '10' and navigation arrows.

To create a new additional action press “New Additional Action”, then the following form will be displayed:

The screenshot shows the 'Add additional action' form. It has a title bar with a close button. The form contains three fields: 'Description of additional action' (a dropdown menu), 'Priority' (a dropdown menu), and 'Representative' (a text input field). At the bottom, there are 'Cancel' and 'Save' buttons.

By pressing save you will be able to create a new additional action, as in the general actions, the additional actions can be edited and even deleted, you just have to press the box containing the name of the additional action of which the following form will show.

Update additional action information

Percentage of completion *

0%

Priority *

1 - Urgent and important

Representative

Admin

Cancel

Delete

Save

To add a new milestone to an additional action, similar steps are taken to create milestones in the general actions, just press the green buttons and complete the form that will allow adding a milestone.

Add a milestone

March

Description of the milestone *

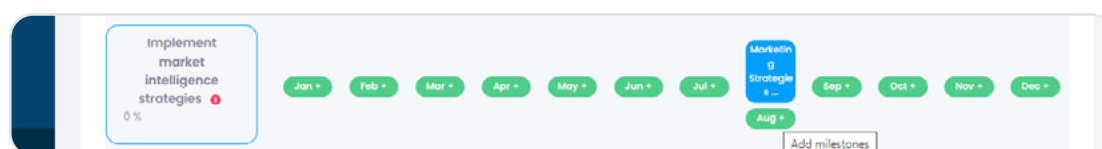
Observation

Cancel

Save

7 Management of action plans

After finishing the creation of the milestones for the additional actions it is also possible to edit or delete them by just pressing the blue buttons that contain the abbreviated name of the milestone, additionally you can mark the milestone as completed.



Update milestone

Description of the milestone *

Observation *

Completed
☐

Cancel

Delete

Save

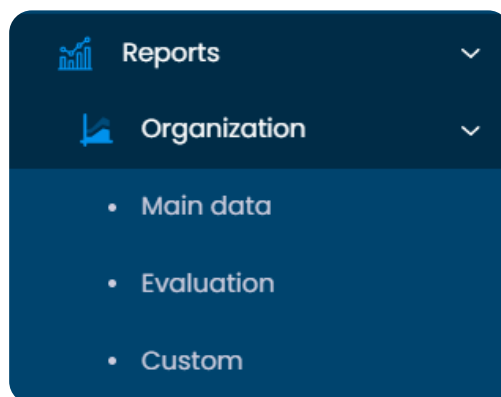
7.9. Print an action plan

Whether or not the action plan has been finalized, you can print a report of all the general and additional actions entered using “Print” located at the top right of the application.

Print

The information that appears can be exported as a PDF to share with the assessed organization.

The main menu on the left side of the application shows the options of different reports types available:



8.1. Report of the main data of the organization



8 Organization Report

8.2. Assessment report of the organization

See above, which is the same as if you press “Results” of an assessment.

8.3. Personalized report of the organization

This report shows defined groups of qualitative questions related to qualitative questions that define a common theme. It is necessary to select the required assessment fields and name of the custom report group.

Comparative analysis of the evaluation

Evaluation

Select an option

Group of questions

Select an option

After selecting the data will allow to see the following screen:

Comparative analysis of the evaluation

Evaluation

2022-07-22 - 2022

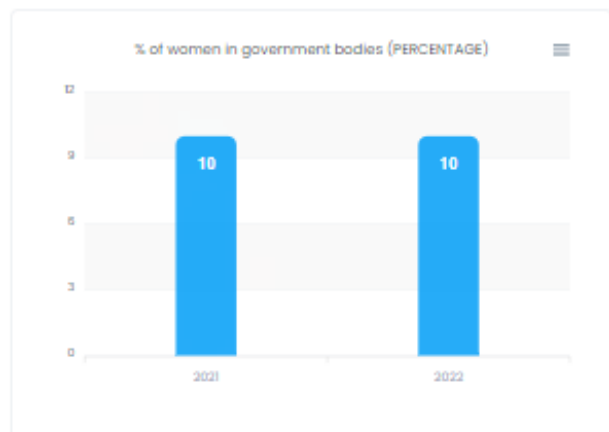
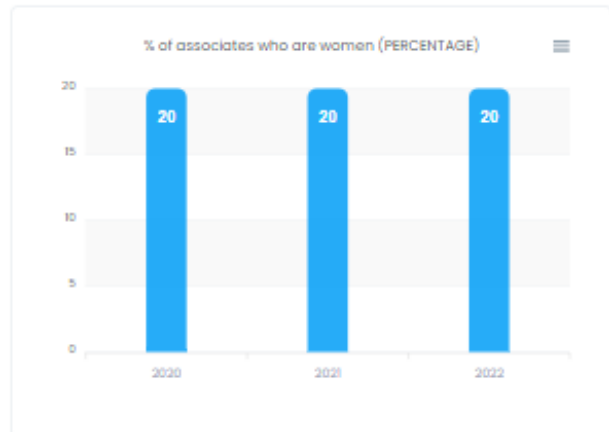
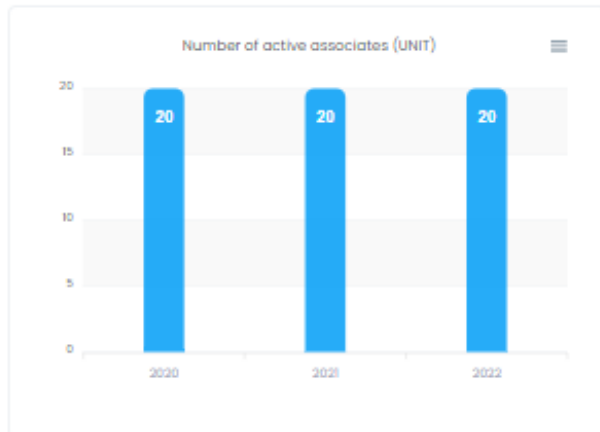
Group of questions

Membership

Qualitative questions

Do you have statistical information on women and youth in the membership and governing bodies? Yes they have on both (4 Pts.)	Are there women in the governing bodies, at least in proportion to their participation in the membership? Yes, more than 10% and less than 20% (2 Pts.)	Are there young people in government bodies? No (0 Pts.)
Are you implementing a plan to incorporate women into the organization and strengthen their capacities to occupy management positions (including training on gender equality)? There is a plan but there is no manager and budget (2 Pts.)	managerial succession or generational change plan to renew managers? No (0 Pts.)	

Quantitative questions



10.1. Projects

They represent the different projects that are developed according to their characteristics, scope or field.

10.2. User

They are the people in charge of using the application according to the role they were assigned.

10.3. User management

Section where it is possible to create, modify or delete users, this section depends on the role assigned to the user it manages.

10.4. User roles

Are the set of permissions enabled or disabled for one or more users, which provides them with access to the different functions of the application. There are four types of users explained below: observer, assessor, administrator and super administrator.

10.5. Observer

User who has access only to see the organization's data to which they have been assigned, their assessments and corresponding work plans, as well as the reports corresponding to their organization.

10.6. Assessor

The User who has access to create a new organization, assess it, execute the action plan and have access to some reports corresponding to the organizations that they have created or have been assigned.

10.7. Administrator

They have access to the entire application, except for the creation of global parameters in the application (projects, location, templates, assessment measurement parameters, global parameters of the organizations), the administrator according to the project to which they belong, has control over the assessors belonging to the same project.

10.8. Super administrator

You have access to all the functions of the application without exception.

10.9. Organizations

This section shows the quantity of products according to the filters selected at the top of this section.

10.10. Dimensions

They group the levels of the qualitative and quantitative questions and services, they can have a variable weight associated with the qualitative questions that affects the final score of the assessments of the organizations.

10.11. Levels

It groups the qualitative questions, the levels are only used as a reference for grouping questions.

10.12. Actions

They group the levels of the qualitative and quantitative questions and services, they can have a variable weight associated with the qualitative questions that affects the final score of the assessments of the organizations.

10.13. Milestones

They are the tasks scheduled to finish in a defined month, at the time of being implemented they must be edited and set as completed.



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