Understanding the Survey Process
Survey Process

**Step 1**

A consultant from Arthur J. Gallagher & Co. (Gallagher) meets with a steering committee of leadership team members for the purpose of:

- Customizing the survey instrument to meet the needs and goals of the organization, including any custom survey statements
- Developing a coding format to provide results by department groupings
- Providing planning assistance, advice, and instructions for administering a successful survey process
- Sharing ideas for promoting the survey to maximize participation

**Step 2**

The voluntary survey is administered to individuals within the organization. The process guarantees confidentiality of survey results throughout the entire survey process.

**Step 3**

Gallagher organizes survey access capabilities through the KnowledgeNow online platform to ensure all entities, department groupings and demographic breakouts are available for client usage and manipulation. Regression, Cluster, Linkage or other advanced analyses are also completed at this time.
**Step 4**

A senior consultant presents the survey results in leadership sessions to assist leaders on the following:

- Interpreting the survey results, both statistical and written
- Prioritizing identified issues
- Presenting the results back to their team
- Soliciting ideas for resolution to identified issues
- Formulating action plans for the work unit
- Implementing action plans to maximize involvement
- Tracking changes made within the work unit or organization
- Communicating the next steps in the process
- Maintaining the process over the next 12 months

**Step 5**

Results are presented to participants in small group meetings. Issues are prioritized, and individuals are asked for their ideas regarding the resolution or improvement of those issues.

**Step 6**

Action plans are formulated and implemented at both the organizational and work unit level. These action plans are designed to be ongoing in the months following the survey. Progress is then tracked and communicated throughout the organization at regular intervals.
Gallagher’s surveys are primarily composed of statements to which individuals are asked to respond by indicating their level of agreement or disagreement, according to the following scale:

<table>
<thead>
<tr>
<th>Positive Response</th>
<th>Negative Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree (6)</td>
<td>Strongly Disagree (1)</td>
</tr>
<tr>
<td>Agree (5)</td>
<td>Disagree (2)</td>
</tr>
<tr>
<td>Somewhat Agree (4)</td>
<td>Somewhat Disagree (3)</td>
</tr>
<tr>
<td>Does Not Apply</td>
<td></td>
</tr>
</tbody>
</table>

For each individual survey statement, responses are averaged using this scale. Any “7” (Does Not Apply) data is not used in calculating scores. This scale should be interpreted as follows:

<table>
<thead>
<tr>
<th>Score</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.20 – 6.00</td>
<td>Very Positive Attitude</td>
</tr>
<tr>
<td>4.40 – 5.19</td>
<td>Moderately Positive Attitude</td>
</tr>
<tr>
<td>3.51 – 4.39</td>
<td>Slightly Positive Attitude</td>
</tr>
<tr>
<td>3.50</td>
<td>Neither Positive nor Negative</td>
</tr>
<tr>
<td>2.70 – 3.49</td>
<td>Slightly Negative Attitude</td>
</tr>
<tr>
<td>1.90 – 2.69</td>
<td>Moderately Negative Attitude</td>
</tr>
<tr>
<td>1.00 – 1.89</td>
<td>Very Negative Attitude</td>
</tr>
</tbody>
</table>
Occasionally, a survey may include negatively worded statements. Responses for negatively worded statements will be interpreted by Gallagher’s survey team to ensure the data is reported consistently with the responses for all other survey statements. The higher the score is on any survey statement, the more positive the perception is for that item. The statement, “During the past six months, I have seriously considered leaving this organization for another job” is an example of a negatively worded statement. While an individual may strongly agree with this statement and select a “6”, the score is actually reported as “1”, indicating the individual’s negative attitude toward the statement.
Using KnowledgeNow
Logging Into KnowledgeNow

KnowledgeNow is the online survey report center for Arthur J. Gallagher & Co. It is intended for use by clients in order to gain electronic access to current survey reports and develop action plans based on those results.

KnowledgeNow allows for:

- Quick Access to Reports – The capability to effectively gain access to survey reports
- “Going Green” – As an environmentally friendly resource, KnowledgeNow provides the capacity to print hard copies of only those reports deemed necessary by that user
- Individualized Report Access – Each user receives their own login information (user name and password) via email in order to have access to their specific set of results

(** Please note that Adobe Reader is required for opening reports and Google Chrome, Mozilla Firefox, or Internet Explorer 8 or better is recommended for accessing KnowledgeNow)
**Accessing the Reportal**

The login site for KnowledgeNow is: [www.ihsKnowledgeNow.com](http://www.ihsKnowledgeNow.com)

Your login information was provided in an email sent to you from [GallagherKnowledgeNowKC@AJG.com](mailto:GallagherKnowledgeNowKC@AJG.com).

Next click on the login button to the right in order to proceed to the site.

**Forgot Password**

If you have forgotten or lost your KnowledgeNow password, you can request that it be sent to you directly from the website ([www.ihsKnowledgeNow.com](http://www.ihsKnowledgeNow.com)). Once at the login page, you may notice the “Forgot Password” link in the bottom right hand corner of the login screen (see above). Once you click on the “Forgot Password” link, a box will appear on the screen and ask for your email address (user name). Type in the work email address used for KnowledgeNow purposes. Once you type in your email address, click on “Email Password”. An email will be sent to that account containing your user information for accessing KnowledgeNow.

The “Forgot Password” email containing your login information will come from [GallagherKnowledgeNowKC@AJG.com](mailto:GallagherKnowledgeNowKC@AJG.com). If you requested but did not receive a password reset email, please check your spam or junk mail folder. If you still cannot find the email, please submit an inquiry to directly to [GallagherKnowledgeNowKC@AJG.com](mailto:GallagherKnowledgeNowKC@AJG.com).
Accepting the User Agreement

First time users to KnowledgeNow will need to accept the Client User Agreement. This contains information on what Arthur J. Gallagher & Co. does to protect the privacy of users and other information regarding the site. Once you accept the user agreement, you will not be prompted again. If the user agreement is updated or changed, you may be prompted to review and accept the agreement at that time.

To proceed to your reports, check the box at the bottom of the page and click the “Continue” button.
Getting Around in KnowledgeNow

Survey Selection

Once you have logged into KnowledgeNow, you will see an overview of your most recently conducted survey. You will also be able to view all of the surveys and reporting features that you were assigned access to by your organization.

To select a different survey, go to the menu in the top right of the screen. Hover over the name of the current survey (“Sample Employee Survey” in this example). A list of the surveys conducted by your organization will appear. Select the survey that you want to view. Depending on your access level, you may only have some of the features available on the list below.
Reportal Features

Once in the KnowledgeNow Reportal, there are several options to navigate to from the menu in the top-right corner for accessing reports and creating action plans.

**Dashboard**: See a brief overview of survey participation, results by facility and category, and action planning status.

**Quick Reports**: View detailed reports of the survey results by department, facility or demographic. Compare against past surveys and normative data. Identify key drivers of engagement and other helpful insights into the survey.

**Interactive Data**: Drill into survey results, identify areas of concern or strength and view department or demographic breakdowns.

**Action Planning**: Create action plans and identify steps for completing the plans.*

**Documents**: Download survey related documents or static reports.

**Tools & Resources**: Additional system tools administrative functions.

*For Additional Information on Action Planning, please see our [Action Planning Guide](#) from within KnowledgeNow
About Quick Reports

**Using Quick Reports**

Quick Reports is a dynamic tool that allows users to build survey reports based on either departmental or demographic preferences. Upon signing into KnowledgeNow, select Quick Reports from the menu or dashboard to begin building your department/work unit’s custom Summary and Detail Reports.

Users will be redirected to the Quick Reports page below.
KnowledgeNow allows for full customization in the creation of departmental or demographically based survey results. This begins with the user’s ability to name a report consistent in a manner they believe best describes the report content. Simply click in the “Report Title” box and type in a name. Next, refer to the “Report By” box and using the drop down option, select either Department(s) or Demographic(s) to designate the desired data cut.

Ensuring Participant Confidentiality

To protect the confidentiality of participants, and to enhance the statistical validity of the results, reports are provided for groups with five or more respondents only. If a particular department/work unit has fewer than five respondents, the results of that group are combined with the results of another similar work unit, when applicable.
Creating Custom Data Cuts

*Departmental Report Cuts*

If a user is interested in a departmental cut, users are free to select and de-select any departments they want to include in the desired reports. Simply click in the boxes to the left of the departmental groups to either include (check) or exclude (uncheck) for generated reports.

A user can also expand and collapse facilities in the case that they have access to multiple departments across different facilities. Simply click the square to the left of the facility with icons of (-) or (+) to expand or collapse the respective facility. This option simply makes it easier to see departments when a user has access to numerous departments/work units.

*Demographic Report Cuts*

If a user selects to explore their reports demographically, the interface changes and provides three drop-down options to guide and narrow down the user’s desired report.

**Step 1**

*What demographic question would you like to filter with?*

Select demographics will be made available for data filtering. Simply check the box of the respective demographic you would like included in the survey results. Users are limited to one demographic question at a time, though selection options may be combined within the demographic question.
**Step 2**
Which items would you like to include in the report?

Based on the demographic selected in the first drop-down, users are provided the ability to select a single or multiple options for the respective demographic of interest.

**Step 3**
Which facilities do you want to report against?

Whether there is one facility that was surveyed, or multiple, simply select those to be included in the generated reports.

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**Running Reports**

Once the desired demographic or departmental choices have been selected, depending on the options provided by your organization, the user has the ability to create several different reports. These include Summary Report, Detail Report, Demographics Report, Comments Report, and Key Driver Report. Simply click on the respective report icon. A description of each reports features are highlighted below.
Summary Report

Sample Report

SURVEY RESULTS AT A GLANCE
Survey Results Summary

Report Title: Summary
Date of Survey: February, 2017

OVERVIEW
Respondents: 60

Overall Score: 4.82
(max: 6.00)

National Percentile Rank: 61st
(max: 100)

Strengths: These areas are your biggest strengths
I feel I am a part of the mission of this organization.
I have enough opportunities to participate in departmental decisions affecting my job.
When decisions are made in my department, we are informed of those decisions.
I often leave work with a feeling of satisfaction about my job.
My supervisor recognizes my accomplishments.

Needs Attention: These areas need improvement the most
My department director sets clear goals for our department.
I am willing to put in effort beyond what is expected to help this org be successful.
My workload is reasonable.
Important information regarding this organization is communicated effectively.
I have ample opportunity to use my abilities at this organization.

COMPARISONS IN OVERALL SCORE

Compared to last survey: -0.29
Compared to national norm: +0.16
Compared to facility average: -0.01
Compared to system average: -0.03

COMPARISONS IN ENGAGEMENT AREAS

<table>
<thead>
<tr>
<th>Engagement Area</th>
<th>National Average</th>
<th>Facility Average</th>
<th>System Average</th>
<th>Previous Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFFINITY</td>
<td>+0.10</td>
<td>-0.04</td>
<td>-0.03</td>
<td></td>
</tr>
<tr>
<td>CAREER GROWTH</td>
<td>+0.14</td>
<td>+0.03</td>
<td>+0.01</td>
<td>+0.21</td>
</tr>
<tr>
<td>COMMUNICATION</td>
<td>+0.11</td>
<td>-0.62</td>
<td>-0.01</td>
<td>-0.13</td>
</tr>
<tr>
<td>DEPARTMENT DIRECTOR</td>
<td>-0.33</td>
<td>-0.16</td>
<td>-0.19</td>
<td>-0.59</td>
</tr>
<tr>
<td>ENGAGEMENT</td>
<td>+0.18</td>
<td>+0.04</td>
<td>0.00</td>
<td>-0.46</td>
</tr>
<tr>
<td>HR PROGRAMS</td>
<td>+0.23</td>
<td>-0.04</td>
<td>-0.06</td>
<td>-0.24</td>
</tr>
<tr>
<td>IMMEDIATE SUPERVISOR</td>
<td>+0.17</td>
<td>+0.07</td>
<td>+0.04</td>
<td>-0.24</td>
</tr>
<tr>
<td>LEADERSHIP TEAM</td>
<td>+0.31</td>
<td>-0.04</td>
<td>-0.08</td>
<td></td>
</tr>
<tr>
<td>QUALITY CARE</td>
<td>+0.09</td>
<td>+0.02</td>
<td>+0.01</td>
<td></td>
</tr>
<tr>
<td>TEAMWORK</td>
<td>+0.28</td>
<td>-0.03</td>
<td>-0.06</td>
<td>+0.18</td>
</tr>
</tbody>
</table>

Interpreting the Survey Results 18
Reading the Summary Report

A survey Summary Report is a high level analysis of a selected group or facility with the most applicable results summarized on a single page. This report is meant to provide leaders with a starting point for identification, interpretation, and communication of organizational and departmental objectives.

Users who are allowed access to online reporting in KnowledgeNow will have the ability to work with the interface called Quick Reports. This interface allows users to create PDF formatted reports based on desired criterion (data cuts either by demographic or specific department groupings). Once the desired grouping is selected and a name for the report is entered, a user must click on the Summary Report icon to produce a PDF report. The survey results are then presented in a simple to read report format. See page 18 for an example of the Summary Report.

Report Title and Date of Survey

The Summary Report is identifiable by the SURVEY RESULTS AT A GLANCE header in the top left corner of the report. Below said header is the Report Title (**Enter Appropriate Title Here**) designated by the user prior to creating the PDF. Users are encouraged to customize their report titles however best to describe the data being summarized. In the upper right corner of this report is the survey date for your organization’s current survey period.
**Overall Score**

Based on the criteria chosen for the respective report, an Overall Score is calculated, which summarizes into one value all questions asked in the survey. In this case the calculated average is 4.82. Typically, survey question responses are on a 6-point response scale, represented by the \( \text{max: 6:00} \). However, in cases where the responses are on a different scale (5 or 7-point scale), the highest response score will be identified next to \( \text{max} \).

**National Percentile Rank**

The National Percentile Rank compares your respective group’s Overall Score against Gallagher’s extensive database of survey results. The values range from 1 to 100, where any score that falls above 50 are considered to be above the national norm of comparable organizations or work units. The example provided illustrates a group falling at the 1\(^{st}\) percentile, whereby 61% of the organizations measured in Gallagher’s database fall below the group’s respective overall score – 39% above.
Strengths

Gallagher provides a list of the top five scoring survey statements for your respective group labeled as “Strengths”. These strengths are ranked highest overall when incorporating the item’s norm comparison, the difference from the organization’s overall score for the question, and the percent of top box responses. Top box responses are the most positive responses (6’s) to questions asked in a survey. The survey statement at the top of the list is the greatest strength, while the item at the bottom of the list is the lesser of strengths.

Needs Attention

Gallagher also provides a list of the bottom five scoring survey statements for your respective group labeled “Needs Attention”. Similar to the calculation of Strength, these items are ranked lowest overall when incorporating the norm comparison, the difference from the organization’s overall score for the question, and the lowest percent of top box responses. The survey statement at the top of the list is the greatest item in need of attention, while the item at the bottom of the list is the lesser of items that need attention.
**Comparisons in Overall Scores**

The following section is a summary of all relevant Overall Score comparisons between previous surveys, comparisons to the Gallagher national norm, and comparisons to the facility and system averages. A colored bar extends to the point on the scale reflecting the value of your comparison score. The scale ranges from 1 to 6, depending on the survey’s response scale. For the case of the examples below, the group’s overall score is 4.82, represented by the gray line across all comparisons.

**Compared to Last Survey**
The first comparison is for applicable organizations that conduct annual or semi-annual surveys. The previous survey score is calculated at 5.11, with a difference of (-0.29). Both figures are illustrated to the right. For scores that have decreased from a previous survey, the bar line is represented with a purple fill color, whereas those that have an increase are represented with a green fill color; occurrences of no change are indicated with a tan fill color.

**Compared to National Norm**
The next comparison of Overall Score is to the Gallagher National Norm. Referring to the example to the right, the national norm score is 4.66, with a difference of (+0.16). Again, positive differences are represented with a green fill color, negative differences in a purple fill color, and no difference in tan.

**Compared to Facility and System Average**
The final comparisons of Overall Score are to the current year’s Facility and System Averages. In the examples to the right you will notice a positive difference with both comparisons. The Facility average score is 4.83 (Diff = -0.01), while the System average is 4.85 (Diff = -0.03). Being negative differences, the fill color is in purple for both the Facility and System average.
Comparisons in Engagement Areas

During the development of Gallagher surveys, individual statements are grouped into various categories by a logical process, and specific to an organization’s survey intent. Some examples of categories are Teamwork, Employee Engagement, Department Director, etc.

The final section of the Summary Report is an illustrated breakdown of the current year’s attitudinal score in comparison to the Gallagher National average, Facility and System average, and to the Previous Survey scores, when applicable. This simple breakdown provides a green arrow indicating a positive difference between averages, yellow arrow indicating a negative difference between averages, and a blank circle representing equal averages. See the breakdown below.

In cases where an applicable match to the previous survey scores is not available, no icon will be represented. See Leadership Team in the example above.
ITEMS IN DEPTH
Responses to Item Statements

Engagement

Statement: This organization helps keep me passionate about practicing medicine.
Score: 4.43
max: 6.00
National Percentile Rank: 45th

Compared to last survey: N/A
Compared to national average: -0.64
Compared to facility average: 0
Compared to system average: 0

Respondents: 63

Statement: I feel a strong sense of belonging to this organization.
Score: 4.84
max: 6.00
National Percentile Rank: 86th

Compared to last survey: N/A
Compared to national average: 0.09
Compared to facility average: 0
Compared to system average: 0

Respondents: 63

Statement: I would recommend this organization to others.
Score: 5.03
max: 6.00
National Percentile Rank: 50th

Compared to last survey: N/A
Compared to national average: 0.09
Compared to facility average: 0
Compared to system average: 0

Respondents: 63

Previous Survey Strength Needs Attention Key Driver

Interpreting the Survey Results 24
Reading the Detail Report

A survey Detail Report is a more exploratory analysis of a selected group or facility’s individual survey statements. This report is meant to provide leaders with a more precise perspective of what survey items require attention in shaping future organizational and departmental objectives. Users who are allowed access to online reporting in KnowledgeNow will notice the *Detail Report* icon within Quick Reports.

This interface allows users to create PDF formatted reports based on desired criterion (data cuts either by demographic or specific department groupings). Once the desired grouping is selected and a name for the report is entered, a user must click on the Detail Report icon to produce a PDF report. The survey results are then presented in a simple to read report format. See Page 24 for an example of the Detail Report.
The Detail Report is identifiable by the ITEMS IN DEPTH header in the top left corner of the report. Below said header is the Report Title (**Enter Appropriate Title Here**) designated by the user prior to creating the PDF. Users are encouraged to customize their report titles however best to describe the data being summarized. In the upper right corner of this report is the survey date for your organization’s current survey period.

Beneath the report title and survey date is the attitudinal area reported on that respective page. In the example above, Employee Engagement is the topic of item summary.
Survey Statement and Results

Beneath the attitudinal area summarized on a specific page is a group of survey statements that encompass the attitudinal area. Each statement is identifiable by the label, Statement. The survey statement summarized below is, “My performance/effort directly affects the success of this organization.” To the right of the survey statement is the number of participants who responded to this particular question for your department/work unit. In this case there were 143 respondents.

The Detail Report provides a number of metrics to assist leaders in gauging where a particular group is, where they were in previous measurements, and how organizational and departmental objectives should align for each survey statement. Many of these metrics can be interpreted much like those found in the Summary Report.
**Overall Score**

For each survey item, an Overall Score is calculated, which summarizes into one value all responses in aggregate form. In this case the calculated average is 5.24. Typically, survey question responses are on a 6-point response scale, represented by the \( \text{max: 6:00} \). However, in cases where the responses are on a different scale (5 or 7-point scale), the highest response score will be identified next to \( \text{max} \).

In some cases, additional icons are included with the Overall Score. For items that have been identified as Strengths or items that Need Attention, their respective icons will be represented along with the Overall Score. These icons are identical to those found in the Summary Report.

Advanced analysis conducted by Gallagher often identifies survey statements integral to improving overall employee engagement. These items are known as Key Drivers. When a particular item is identified as a Key Driver, a key icon is included with the Overall Score.

Each page of the Detail Report contains a legend at the bottom of the report to identify what each icon represents.
**National Percentile Rank**

The National Percentile Rank compares the question’s respective score against Gallagher’s extensive database. The values range from 1 to 100, where any score that falls above 50 are considered to be above the national norm of comparable organizations or department/work units. The example provided illustrates a survey item falling at the 71st percentile, whereby 71% of the Gallagher database falls below the organization’s respective score – 29% above.

**Comparisons in Overall Scores**

**Compared to Last Survey**
The first comparison is for applicable organizations that conduct annual or semi-annual surveys. The previous statement score is calculated at 5.45, with a difference of (−0.21). Both figures are illustrated to the left. For statement scores that have decreased from a previous survey, the bar line is represented with a purple fill color, whereas those that have an increase are represented with a green fill color; no change are a tan fill color. The current survey score (5.24) is represented by a line across the bar at the value.

**Compared to National Norm**
The next comparison of a survey statement’s score is to the Gallagher National Norm. Referring to the example to the left, the national norm score is 5.43, with a difference of (−0.19). Again, positive differences are represented with a green fill color, negative differences in a purple fill color, and no difference in tan.
**Compared to Facility and System Average**

The final comparisons of a survey statement’s score are to the current year’s Facility and System averages for that particular item. In the examples to the left you will notice a positive difference in comparison to the Facility average, whereas there is no difference when compared to the System average. The facility average score is 5.41 (Diff = 0.04), while the system average is 5.45 (Diff = 0). The positive difference to the Facility average is represented with the green fill color, while the System comparison is in tan because there is no difference.

**Distribution of Responses**

Item responses are also represented by a distribution table which illustrates the percentage of responses for each scale point in the survey. Gallagher utilizes a 6-point scale for the majority of its surveys. The table below contains a fair distribution of responses – the far left representing responses of 6 (Strongly Agree), decreasing in favorability as the scale moves to the far right, representing responses of 1 (Strongly Disagree). Favorable responses are colored in green while unfavorable responses are colored in purple.

Included above each bar is the percentage of responses that correspond with each response option for that survey item. In the example below, 6.1% of the population responded to this survey item with a “Strongly Agree”, indicated by the bar on the far left in green.
Demographic Reports

Sample Report

DEMOGRAPHIC REPORT
Survey Demographic Distributions

Report Title: Demographics
Date of Survey: May, 2013

Age Range
- 20 - 29: 64 (16.4%)
- 30 - 39: 54 (14.7%)
- 40 - 49: 44 (12.1%)
- 50 - 59: 37 (10.9%)
- 60 - 64: 13 (3.6%)
- 65 or over: 7 (2.0%)

Continue Employment
- 10 or More Years: 124 (34.5%)
- 5 - 9 Years: 84 (23.3%)
- 1 - 4 Years: 60 (16.8%)
- 6 Months to 1 Year: 13 (3.6%)
- Less Than 6 Months: 0 (0.0%)

Education
- Four-year college, complete: 104 (24.5%)
- Two-year college, complete: 48 (11.8%)
- Business/technical/professional school, complete: 36 (9.3%)
- College, incomplete: 24 (6.2%)
- High School, complete: 22 (5.8%)
- Graduate school, complete: 18 (4.7%)
- Graduate school, incomplete: 0 (0.0%)
- Business/technical/professional school, incomplete: 5 (1.3%)
- High School, incomplete: 3 (0.8%)

Interpreting the Survey Results
**Demographics Percent Breakdown**

Based on the demographic information collected during survey administration, users will have the ability to see the specific groups which encompass their organization or department/work unit.

Each demographic item is labeled with a header describing the information portrayed. The response options for the respective demographics are then listed beneath the header. In the case above, education has nine distinct response options.

Each option is summarized with a count value (N) and its respective proportional percentage. For example, at the top of the list there are 104 individuals with a completed Four-year college education. This group thus represents 34.3% of the total population surveyed in the organization. There were also 28 individuals indicating a graduate degree who responded to the survey, representing 9.2% of our total population.
Each response is then represented by a colored box. These colored boxes correspond to the row of colored bars beneath the list of demographic responses.

This illustration is meant to provide leaders with a basic visual representation of the demographic proportions in relation to one another. As the proportions suggest, the largest group of our respective example are Four-year college graduates, represented by a large gray bar to the left, at 104 total individuals (34.3% of the population). The smallest group of the population is High School, non-graduates, represented by a much smaller bar to the far right, at 3 respondents (only 1.0% of the population).
Exploring Your Data (Interactive Data)
About Interactive Data

Using Interactive Data

Interactive Data is a powerful tool that allows users to drill deep into their survey results and take an in-depth look at their data. This enables the user to quickly identify trends among groups and search for meaningful differences in the data. Upon signing into KnowledgeNow, select Interactive Data from the menu or dashboard to begin exploring your data.

Users will be redirected to the Interactive Data page below.

KnowledgeNow’s Interactive Data tool allows for extreme flexibility in exploring the data. However, information is never provided for groups of less than five respondents. Groups with less than five respondents are flagged with “NA | Cnt < 5” and the data is suppressed for reporting.
Interactive data is a robust, data mining tool designed for exploration of your current survey data. Information regarding prior year or normative comparisons is limited to the Quick Reports section of KnowledgeNow.

**Selection Criteria**

Interactive Data has several filters which can be applied to the data to be able to see unique cuts for the survey data. Additionally, data can be sorted by any of these filter criteria. By default, all data is selected. Selected data is indicated with a checkbox to the left of the item. The filters include:

- Facility
- Department/Work Unit
- Category
- Survey Item
- Demographics

Once you have chosen the filters to be applied to the data select the Refresh button to calculate the scores based on the information you have selected. Select the Reset button to clear all current filters from the data.

**Selection Summary**

Once the data filters have been applied the Group Selection box is updated with the current average score of all survey items selected and the filtered response count. This allows the user to see an overall score for the criteria selected. Within the Group Selection box, you may also toggle between seeing Average Score or the Percent Response Distribution.
Creating Custom Data Cuts

**Facility Selection**

Users are able to choose which facility they would like to review by using the boxes to left of each facility.

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Score</th>
<th>Cnt</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Organization</td>
<td>4.83</td>
<td>976</td>
</tr>
</tbody>
</table>

**Department Selection**

In addition to Facility selection, users are also able to choose which department(s) they would like to explore. Users will only have access to the department(s) designated by the organization’s survey coordinator. Requests to view additional department or work unit breakouts will need to be directed to the survey coordinator for approval.

<table>
<thead>
<tr>
<th>Units</th>
<th>Score</th>
<th>Cnt</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Organization</td>
<td>5.47</td>
<td>12</td>
</tr>
<tr>
<td>Senior Leadership</td>
<td>5.40</td>
<td>11</td>
</tr>
<tr>
<td>Department Directors - NonClinical</td>
<td>5.39</td>
<td>6</td>
</tr>
<tr>
<td>Diabetes Center</td>
<td>5.37</td>
<td>10</td>
</tr>
<tr>
<td>Bed Management</td>
<td>5.35</td>
<td>20</td>
</tr>
<tr>
<td>Physical Therapy</td>
<td>5.33</td>
<td>26</td>
</tr>
<tr>
<td>Medical Records</td>
<td>5.32</td>
<td>17</td>
</tr>
<tr>
<td>Sterile Processing</td>
<td>5.18</td>
<td>22</td>
</tr>
</tbody>
</table>
**Category and Survey Item Selection**

Users may also select which aspects of the survey to include in their analysis. Category and Survey items are linked to one another within the system. This means that changing the selection of a category also changes the selection of the corresponding survey items. This is helpful if an individual wants to look at a select group of questions within the survey.

![Category and Survey Item Selection Table](image)

**Demographic Selection**

The demographic selection criteria allows the user to quickly and easily identify subgroups within their data which may be areas of concern or cause for celebration. The purpose of the demographic selection is to quickly slice your data and easily see information for the different groups side by side. There are two aspects to the demographic selection selection – Distribution Percentages and Detail Breakdown.

Remember that as a leader, the intent with the survey data should be to find themes and insights in the data, never to identify individuals based on demographic information. Arthur J. Gallagher & Co. has limited survey reporting to groups of at least five responses to ensure the anonymity of responses. If your filter criteria makes it difficult to achieve five responses, reset your filters and try looking at other information.
**Distribution Percentages**
The distribution percentages option of Interactive Data allows the user to see the proportion of responses associated with all remaining filter criteria. Remember to Refresh the data after you have made your selections.

![Distribution Percentages](image)

**Detail Breakdown**
The detail breakdown option of Interactive Data allows the user to see the overall score for the selected survey items for each of the remaining subgroups of demographic breakdowns. This section is particularly powerful as an analysis tool in understanding where differences in your population lie. In the example below, you can quickly see individuals who are 65 or Over (Age) are substantially more positive than other groups.

![Detail Breakdown](image)
Taking Action
(Action Planning)
About Action Planning

Using Action Planning

Not only does KnowledgeNow allow your leaders to review their survey data (i.e. summary report, detailed report, interactive report, and key driver report) and understand what items to prioritize, it also hosts action planning activities. Users can select items to work on, set goals and targeted timelines for achieving these goals, draft, refine and finalize detailed action plans, and denote who is accountable for specific action planning activities outlined within the plan. To help your managers succeed, our system offers a library of suggested action planning ideas for the topics that leaders choose to work on with their team. The action planning ideas offered within our system are proven solutions being used by successful leaders at numerous organizations. Also, KnowledgeNow has been designed to allow leaders to monitor action planning activities, and review and comment on the action plans submitted by those they manage.
Creating an Action Plan

An action plan is a documented approach for tracking improvement with your survey scores. Every action plan contains action steps. Action steps are detailed tasks and activities you will complete on your path to improvement.

To create an action plan, first navigate to the “Action Planning” section of KnowledgeNow.

Once you get to the Action Planning screen, click on the “New” button to create a new action plan.

Once you click the “New” button, an information box appears.
THERE ARE 4 PARTS TO ADD AN ACTION PLAN

Facility: Choose the location for which you wish to create an Action Plan from the list provided. This list includes all the facility locations you have been assigned access. You will want to create a separate action plan for each location.

Unit: Choose the work unit you wish to create an Action Plan for from the list provided. This list includes all the departments you have been assigned access. You will want to create a separate action plan for each department.

Category: Type the name of the category needing improvement. This category can be found on your standard survey report. For example, “Immediate Supervision” is a category.

Survey Statement: Select the description of the survey item you will be working to improve. Each survey item you are working on should have a separate action plan. For example, “My Supervisor Has Effective Communications” is a survey statement.

If you have any questions about what you should be entering in each blank, clicking on the icon will bring up a detailed description of this item.
Adding Action Steps/Updating an Action Plan

Once an action plan is created, you can add specific steps to the plan. Begin by clicking the “New Step” button.

Once you click the “New Step” tab, an information box appears.
**ADDING AN ACTION STEP**

**Status:** Choose the status of your current action item from the list provided. The options include “Not Started,” “In Progress,” “Completed,” and “Cancelled.”

**Step:** Type a description of the specific task you are going to complete to improve your survey score. For example, “weekly meetings with staff team” would be one of the steps to improve communication within a department. If you and your team have difficulty identifying actions to improve a particular item, click the icon for best practice solutions to specific items.

**Note:** Type any notes regarding your step. This may include accomplishments or challenges you encounter while completing your action step.

**Responsible Party:** Type the name of the person in charge of completing the action step.

**Goal Date:** Click on the icon to choose your deadline for completing this action step.

**Save:** Click the “Save” button to save your changes.

**UPDATING AN ACTION PLAN**

Most action plans will require multiple action steps. In order to add more steps to an existing action plan, repeat the steps outlined above. The option to update existing action steps is available by selecting the “edit” feature on a particular step as shown below.
**Viewing an Action Plan**

Once action plans have been entered into the system, you may view a list of action plans by Status, Unit, User, Category, or Opportunity by clicking on the filter icon.
Exporting an Action Plan

To export an action plan, you must filter to the action plans you wish to export and select the “Export” option.

- To add a new action plan click the “New Plan” button to the right.
- Add the steps needed to complete your plan by clicking the “New Step” link.
- Once you have created a new action plan, you may update or edit your action plan by clicking “Edit” under the options field.
- Action plan status is automatically updated as the steps progress to completion.