# Data Drives Insight Assessment Process (PSI360)

The following is intended to support practitioners in planning and executing a successful project using our assessments. These are highly recommended activities based on our experience, however the final approach is ultimately agreed between yourself as the practitioner and your client.

Further information is available via the DDI Sharepoint Portal and by contacting Carla@datarivesinsight.com.au or 1300 121 030.

| Step | Activities | Supporting Documents In Sharepoint |
|---|---|---|
| Quotes & Proposals | **Practitioner to:**<br>• Confirm scope of project: how many participants, reports required.<br>• Provide an accurate costing to the client.<br>• Factor in both the cost of the assessments, reports AND your debrief time, project management etc. | • Brochure PSI360<br>• Website<br>• DDI Quotes template - Accredited Practitioner Calculator Jan 2023 |
| Prepare | **Practitioner to:**<br>• Complete a communication plan in partnership with the client<br>• Draft and finalise emails, presentations, etc<br>• Complete and send order to assessments@datadrivesinsight.com. | • DDI 360 Assessment Order Form.xlsx<br>*Assessment Planning Tool for Practitioners – Checklist, communication plan template*<br>• How to complete a PSI360 Order Form<br>• Comms Email Templates PSI360<br>• Comms Email Templates PSI 360 2 |
| Communicate | **Practitioner to:**<br>• Host Information Session (record)<br>• Send emails<br>• Respond to enquiries | • PSI360 Launch Presentation Slides |
| Survey Open | **DDI will:**<br>• Launch the survey on requested date<br>• Manage email bounce backs<br>• Send Reminders<br>• Provide a progress update to you<br>• Close the survey on requested date<br>*Note: Surveys are generally open for 2 weeks.* | • The emails participants receive when the survey is launched are shown in the Assessment Order Form |
| Reporting | **DDI will:**<br>• Produce all reports<br>• Email reports to you<br>• Send the link to access the Online Self-Development Guide (360 assessments only) to participants<br>*Note: Reports are generally available 2 weeks after the survey closes.* | |
| Debrief | **Practitioner to:**<br>• Arrange the debrief times with the participants.<br>• These can be conducted when the reports are available.<br>• If you want to refer to the Self-Development Guide during the debrief – a pdf version can be downloaded from Sharepoint. | • Self-Development Guide PSI360 |

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