

Assessments

05/05/2026 1:59 pm CDT

Overview

With Assessments, you can gather data at the Agile Capability level for each **team, system, and organization**. The Assessment view allows authorized users of P2ANav to create new and manage existing assessments.



For details on facilitating capability assessments, see [Facilitating Agile Capability Assessments for Systems and Organizations](#).

For details on **Polling for Business Outcomes and Agile Outcomes**, see [Facilitating a Poll](#)

Key User Interface Elements



Access to the Assessment view user interface elements is managed by individual P2ANav user permissions. Your screen may vary from the details displayed below.

Assessments View

No Assessments in Progress

1. If there are no assessments in progress, you'll be able to use the "New Assessment" button in the upper right corner of the screen.

The screenshot shows the 'Assessments' view. At the top left is the title 'Assessments'. At the top right is a dark blue button labeled 'New Assessment'. Below the title is a search bar with the placeholder text 'Assessment'. Below the search bar is a table with one row of assessment data. The table has columns for 'Date', 'Period', 'Status', and 'Actions'. The data row shows '17-Sep-25', 'Q4 2025', 'Published', and a dropdown arrow. To the right of the table are three buttons: 'Edit Name/Date', 'Delete', and 'Reopen'.

Date	Period	Status	Actions
17-Sep-25	Q4 2025	Published	▼

2. Click "New Assessment" to create an assessment for all levels of the company - organization, system, and team
3. Fill out the new assessment creation form:

New Assessment

Name: Q4 2025

Date: 09/29/2025

Buttons: Cancel, Create

- o **Name:** A short descriptive name
- o **Date:** Click to access a data selector
- o **Create**

4. You will then be guided to the Assessment Dashboard.

Assessments New Assessment

Assessment: 29-Sep-25 Quarter 4 2025 In Progress Edit Name/Date Delete Publish

All Organization Systems Teams Include archived nodes

<p>0% completed</p> <p>0 of 6 organization, systems, and teams</p>	<p>0% in progress</p> <p>0 of 6 organization, systems, and teams</p>	<p>100% not started</p> <p>6 of 6 organization, systems, and teams</p>
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Assessment in Progress

Only one assessment can be in progress at a time.

A single assessment includes all levels of the company: Organization, System(s), and Team(s)

Users with appropriate permissions can manage details of an assessment in progress:

Assessments

New Assessment

Assessment

29-Sep-25 Quarter 4 2025 In Progress ▼

Edit Name/Date Delete Publish

All Organization Systems Teams Include archived nodes

- **Name and Date:** Click on "Edit Name/Date"
- **Delete Assessment:** All data for all levels in the company for this assessment will be deleted. This cannot be undone.
- **Publish Assessment:** This assessment will be published for all levels: organization, System(s), and Team(s). The results will be published to the [Map](#) and [Capabilities](#) views, and will be used to update P2A index calculations on the [Prioritization](#) view.

Managing and Launching Assessments

Users can navigate to view polls by clicking the tab view that they want to see (ie Organization or Teams).

Assessments New Assessment 29-Sep-25 Quarter 4 2025 In Progress ▼

Edit Name/Date Delete Publish

All Organization Systems Teams Include archived nodes

What is the assessment progress for the teams (3 total)?

● 0% Completed ● 67% In progress

Team	System	Status	
Newman	Importing	Not Started	New
Jerry	Exporting	In Progress	Continue <a>Async Poll Details ▼
Elaine	Exporting	In Progress	Continue <a>Live Poll Details ▼

Use the "toggle" to expand or collapse level children view

Team	System	Status	
Newman	Importing	Not Started	New
Jerry	Exporting	In Progress	Continue <a>Async Poll Details ^
	Facilitator	Created On	Updated On
	shelby.turk@agilelevel... 📄	29-Sep-25	29-Sep-25
	# of Participants	0	<a>Go to capabilities 🔗
Elaine	Exporting	In Progress	Continue <a>Live Poll Details ▼

Each level has Interface elements that impact only that level. These elements are described below.

Launch an Assessment



If an assessment **has not been started**, clicking the "New" button next to a level opens the Agile Capability Assessment Setup Option for that layer

- **Included Stages:** Chose from [Path to Agility stages](#)
- **Assessment Options**
 - Live Poll – See [Facilitating a Live Poll](#)
 - Async Poll – See [Facilitating an Async Poll](#)
- **Assign host:** Available for Live Polls only. Optional. Enter the email address of another P2ANav user who will host the assessment. These users will be able to Pause and Re-start the poll.
- **Start:** Starts the assessment for that level. For details see [Facilitating a Live Agile Capability Assessment Poll](#)

Setup Assessment for Newman

Live or Async

Live Poll
In a live poll the group discusses and votes on one capability at a time all online together in the same session

Assign host to another person
Host email

Async Poll
The poll link is sent to the participants so they can assess all the capabilities at their own pace and then the facilitator conducts a group session to review the results together to set final values

Select Stages

Align Learn Predict Accelerate Adapt

Advanced Options

22 of 34 capabilities selected

Cancel Start



If the assessment for a level **has been started**, the button text will read **Continue**, and clicking the Continue button brings the host to the assessment facilitation view.

View Data

Clicking on "Go to Capabilities" will open the corresponding [Capability Heatmap](#)

Publishing Assessment

When your organization has finished assessing all of the capabilities you want to assess at each level, click "Publish" to mark the organization's assessment complete.

New Assessment

Edit Name/Date Delete Publish

Publish Quarter 4 2025


This assessment will be published for the entire organization.

Are you sure you want to publish this assessment? It will no longer be the active assessment.

Cancel Publish Assessment

Published assessments will then be selectable via the assessment filter drop for use on:

- [Capabilities Heatmap](#)
- [Capability Prioritization](#)
- [Path to Agility Map](#)

 For details on facilitating assessments, see [Facilitating Agile Capability Assessments for Systems and Organizations](#)