Assessments

09/30/2025 3:25 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.

> ℹ️ 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.

Assessments

New Assessment

Assessment

| 17-Sep-25 Q4 2025 Published ▾ | Edit Name/Date Delete Reopen |

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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:

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New Assessment

Name

Q4 2025

Date

09/29/2025 📅

Cancel   Create

- ○ **Name**: A short descriptive name

- ○ **Date**: Click to access a data selector

- ○ **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

0% completed	0% in progress	100% not started
0 of 6 organization, systems, and teams	0 of 6 organization, systems, and teams	6 of 6 organization, systems, and teams

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).
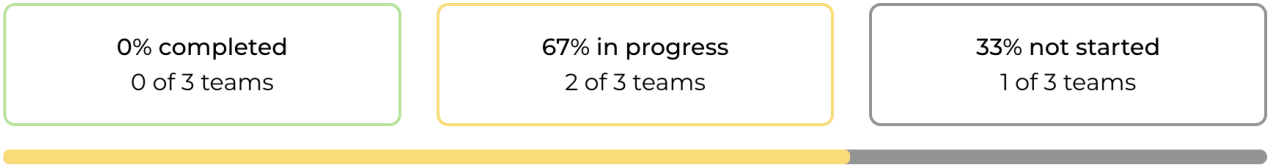
Assessments

New Assessment

Assessment

| 29-Sep-25   Quarter 4 2025   In Progress   ⌄ |

Edit Name/Date   Delete   Publish

All   Organization   Systems   **Teams**   ☐ Include archived nodes

| 0% completed
0 of 3 teams | 67% in progress
2 of 3 teams | 33% not started
1 of 3 teams |

Team ⌃	System ⇅	Status ⇅			
Elaine	Exporting	In Progress	Mark complete	Continue	Live Poll Details ⌄
Jerry	Exporting	In Progress	Mark complete	Continue	Async Poll Details ⌄
Newman	Importing	Not Started	Mark complete	New	

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

Team ⌃	System ⇅	Status ⇅			
Elaine	Exporting	In Progress	Mark complete	Continue	Live Poll Details ⌄
Jerry	Exporting	In Progress	Mark complete	Continue	Async Poll Details ⌃

Facilitator	Created On	Updated On	# of Participants	Poll Results
shelby.t... ⧉	29-Sep-25	29-Sep-25	0	Go to capabilities ⧉

| Newman | Importing | Not Started | Mark complete | New | |

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

Launch an Assessment

New

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

🔔 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.

Assessment Completion

During an assessment facilitation session, the host can mark that level's assessment as complete.

Assessment completion status can also be changed from the assessment view screen (provided at least one capability has been scored) using the "Mark Complete" button:

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