



INSTINCT-TO- INSIGHT

[I2I USER MANUAL](#)

Performalign's cloud-based assessment tool Instinct-to-Insight, or i2i, aids in identifying opportunities to improve and then generates the top programs to help make it happen. This user manual is a step-by-step guide to i2i and individualized performance improvement.

What Is i2i?

Instinct-to-Insight (i2i) is an assessment tool that quickly and easily customizes a plan detailing a series of tactics and actions to help individuals or organizations meet their business objectives. More than just an assessment tool, the i2i approach is a process to create alignment and then accountability. The output is designed to be a formalized plan, presented to the individual, and executed to improve objectives.

i2i is one tool in our quest to create alignment and to stay ahead of the competition. By formalizing our tactics and actions, we show the individual that not only do we understand their objectives and their needs, but we want to make the extra effort to provide them with essential resources.

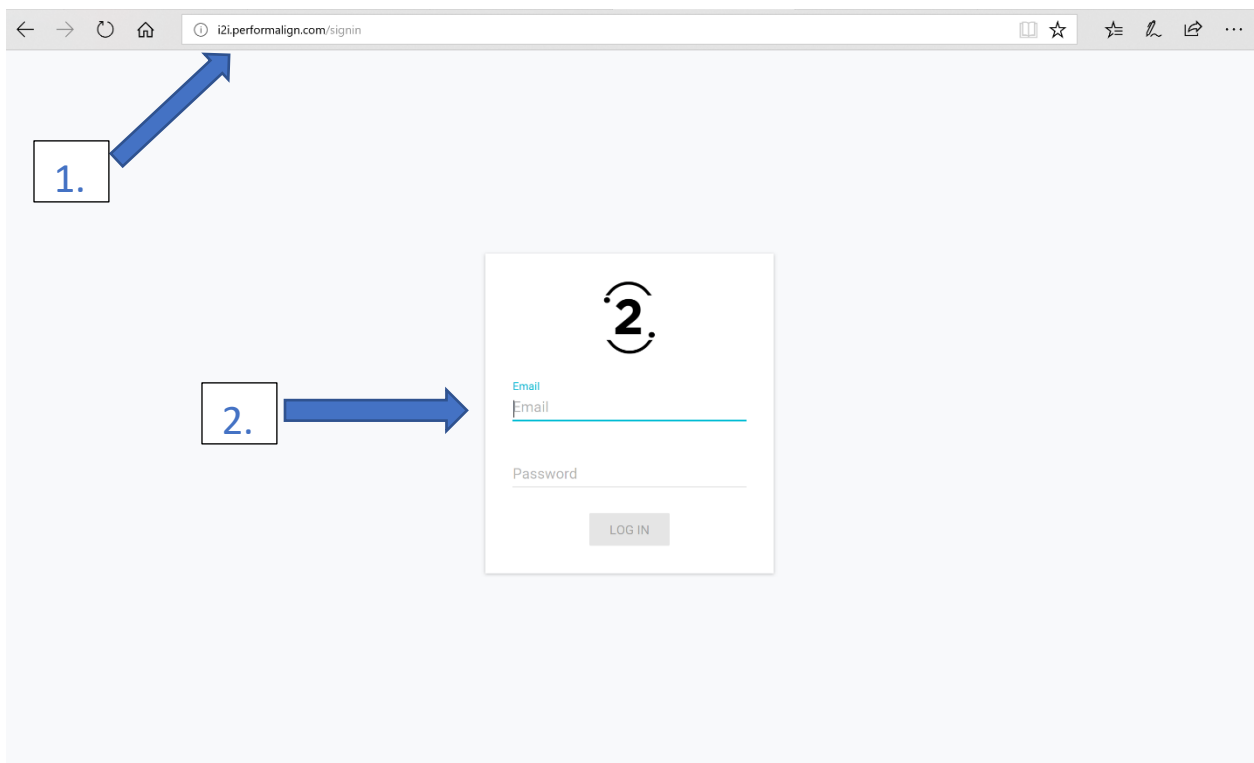
Your relationship with your individuals is important. At the same time, those same individuals are looking for added value from you. i2i helps you hold meaningful conversations with your individuals, and then present them with valuable targeted resources.

i2i allows you to customize a programming plan by following a few key steps.

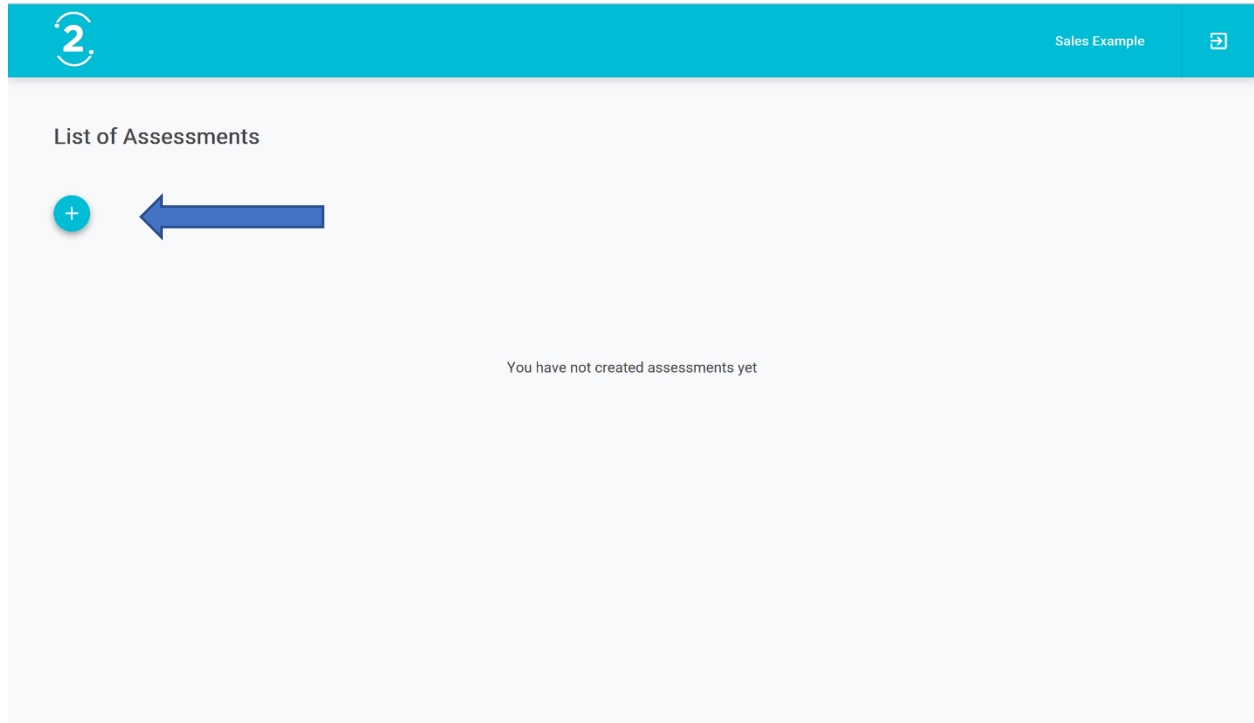
NOTE: There is some upfront data gathering and development that needs to be done by the user first. The program plan output will only be as powerful as the front-end work done by the user.

Creating a New Plan

- 1) Visit i2i.performalign.com to access the i2i assessment tool.
- 2) Login – Using your Login ID and Password, you will initiate the Instinct-to-Insight Application. If you cannot remember your login or password email: support@performalign.com or call 847-343-6116.



- 3) Create New Assessment – Click on the “+” Button in the upper left – underneath the **List of Assessments** descriptor, to create a new assessment.



- 1) Quadrant – the Instinct-to-Insight Application is designed to produce evaluation results into one of four quadrants based on your two Categories. You should pre-determine the action(s) to be taken for each quadrant. For instance, in this example:
- a. Lower Left: Poor Performance, Poor Capability -> Action = Eliminate from the Organization.
 - i. Why do you have this individual? There may be a good reason such as: “They are New” or “They serve a strategic competitive purpose” If there is no such good reason, terminate the individual from the long-term strategy
 - b. Upper Left: High Performance, Low Capability -> Action = Institute Training Program(s) and Strategy in order to boost their overall capability.
 - i. This quadrant is about the individual knowledge-base. This individual may exist in a large market where they would be able to accelerate growth or grab more share of the market if they had a better working knowledge of the business. Product or Service training most likely is required for this individual.
 - c. Lower Right: Low Performance, High Capability -> Action = Sales Strategies in order to boost their overall sales hit rate and growth targets

- i. This quadrant is about market activity and action. The individual is well-trained, has been in business awhile, and/or has a tremendous grasp of the business; however, performance activity (i.e., sales growth targets, quoting, sales calls) is lacking. A designed plan to make more sales calls or focus on a specific target audience may improve their overall performance.
- d. Upper Right: High Performance, High Capability -> Action = Strategic Thinking / Business Plan Development.
 - i. These are your stars. These individuals will require a more in-depth review of their business plan in order to continue to accelerate growth. These individuals often require unique approaches or are deserving of unique opportunities – such as pre-launching products to better understand the markets’ reactions. Their approach should also be shared and understood in order to replicate it in non-competing markets and help those in other quadrants accelerate in their categories.
- e. Each New Assessment is pre-populated with Category and Criteria information in order to guide you through the process. Every piece of content can be changed and customized to fit your individual program.

- 2) Categories – Determine the categories that you intend to measure the individual against. i2i is pre-populated with Performance and Capability as a guide.

The screenshot shows the 'Set Up Categories' interface for an assessment named 'Performance'. A blue arrow points to the 'Performance' header. The table below lists four criteria with their respective weights and bubble sizes.

Criteria	Name	Weight %	Bubble size	Actions
1	Sales in Product Category A	25	<input type="checkbox"/>	Enter text
2	Sales in Product Category B	40	<input type="checkbox"/>	Enter text
3	# of Quotes Generated	15	<input type="checkbox"/>	Enter text
4	# of Sales Calls Given	15	<input type="checkbox"/>	Enter text

At the bottom, there is a progress bar with three steps: 1. Set Up Categories (active), 2. Set Up Quadrants, and 3. Enter Subjects. Navigation buttons include 'CANCEL', 'BACK', and 'NEXT'.

The screenshot shows the 'Set Up Categories' interface for an assessment named 'Capability'. A blue arrow points to the 'Capability' header. The table below lists six criteria with their respective weights and bubble sizes.

Criteria	Name	Weight %	Bubble size	Actions
1	# of Years in Business	40	<input type="checkbox"/>	Enter text
2	Level of Training Completed	15	<input checked="" type="checkbox"/>	Enter text
3	# of Member Associations	15	<input type="checkbox"/>	Enter text
4	# of Months Opened the Newsletter	15	<input type="checkbox"/>	Enter text
5	# of Trade Shows Attended	15	<input type="checkbox"/>	Enter text
6			<input type="checkbox"/>	Enter Text

At the bottom, there is a progress bar with three steps: 1. Set Up Categories (active), 2. Set Up Quadrants, and 3. Enter Subjects. Navigation buttons include 'CANCEL', 'BACK', and 'NEXT'.

- 3) Criteria – Determine the criteria that the individual is measured against within each category. (All of this information may be imported from a CSV file. See the section on Importing a CSV.) You may have as few as one criteria and as many as you think applicable. For each criteria that you determine relevant you will need to:
- Name the criteria
 - Provide a weighting within that category for the criteria; some criteria are more important and relevant than others and you have the ability to set the weights. NOTE: the total of the weights for each category must equal 100%
 - Select the Primary criteria. ONE Primary Criteria must be selected out of the entire combined category criterias. The Primary Criteria is used to determine the size of the bubble output (“Bubble size”.) For instance, if you would like to use Sales Revenue as one of the Performance Criteria but not have it skew the results (see note below), you populate its weight as 0% but select it as the Bubble size. You then have the possibility of getting a large bubble (representative of the revenue) in one of the poor quadrants.
 - Determine the action based on the criteria. This gives you the ability to specifically address certain areas of concern and truly individualize the program plan. For instance, if one of the areas is measuring a “Specific” Product Knowledge, the action to be taken would be Product Training 101 for that “Specific” product.

The screenshot shows the 'Set Up Categories' interface. The table below is a representation of the data shown in the interface:

Criteria	Name	Weight %	Bubble size	Actions
1	Sales in Product Category A	25	<input type="checkbox"/>	Enter text
2	Sales in Product Category B	40	<input type="checkbox"/>	Enter text
3	# of Quotes Generated	15	<input type="checkbox"/>	Enter text
4	# of Sales Calls Given	15	<input type="checkbox"/>	Enter text

Annotations in the image:

- a.** Points to the 'Criteria' column.
- b.** Points to the 'Weight %' column.
- c.** Points to the 'Bubble size' column.
- d.** Points to the 'Actions' column.

At the bottom of the interface, there is a progress bar with three steps: 1. Set Up Categories (active), 2. Set Up Quadrants, and 3. Enter Subjects. There are also 'CANCEL', 'BACK', and 'NEXT' buttons.

- 4) The Quadrants Default is the Average of the Category Criteria Results.
- a. You always have the option to go back in and edit the criteria.
 - b. You always have the option to delete the criteria line item.
 - c. You may Customize the Quadrants Setting.
 - i. This may be useful to comparing a previous year plan to a new assessment in order to see if growth occurred.

The screenshot shows a software interface for configuring quadrants. At the top, there is a teal header bar with a large number '2' on the left, the text 'Sales Example' on the right, and a small square icon with a plus sign. Below the header, the main content area is titled 'Set Up Quadrants'. Underneath this title, the text 'Quadrant Threshold' is followed by two radio button options: 'Automatic (threshold is calculated as average value across all subjects)' which is selected, and 'Custom'. At the bottom of the screen, there is a navigation bar. On the left is a 'CANCEL' button. In the center is a progress indicator with three steps: 'Set Up Categories' (checked), 'Set Up Quadrants' (active, highlighted with a teal circle), and 'Enter Subjects'. On the right are 'BACK' and 'NEXT' buttons.

- 5) Data Input or Enter Subjects – Input the Individuals being assessed and their information relevant to each specific criteria. (All of this information may be imported from a CSV file. See below.) This consists of the bulk of the upfront work that needs to be accomplished. This data is critical to the output program planning results.

Bulk Upload.

If your data is stored on a CSV file you can import it through the “BULK UPLOAD” option. Simply click on the “BULK UPLOAD” button on the Enter Subjects page. Select your CSV file (Microsoft Excel files CANNOT upload) and click “Open”. The data will be imported.

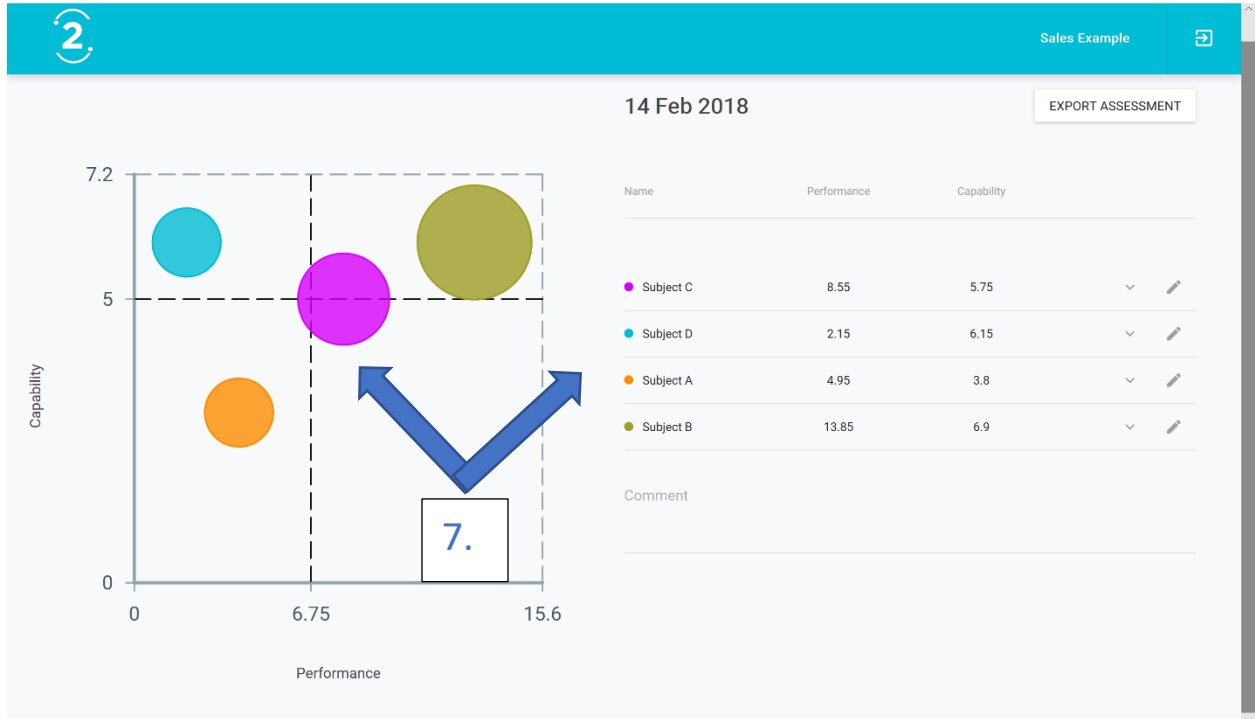
NOTE: Only enough data for available criteria will be uploaded. For instance, if you have data for six (6) criteria but have only created four (4) rows of criteria the application will only import the four (4) rows of data.

5.

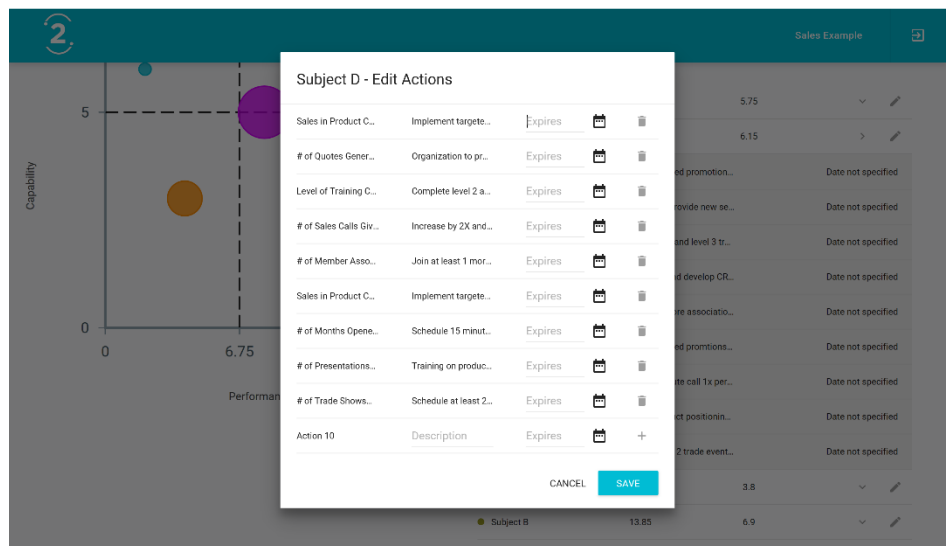
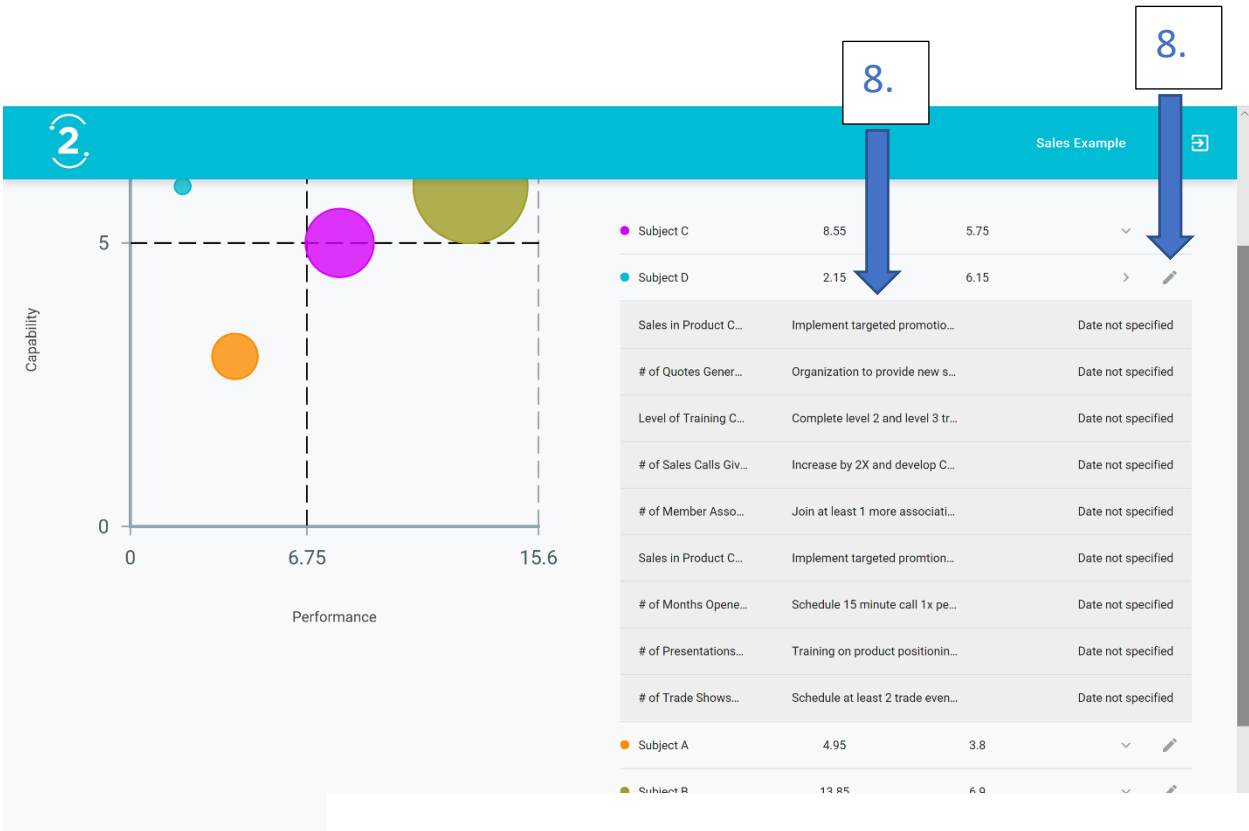
6.

- 6) Click Finish.

- 7) A Four Quadrant Bubble Chart and Individual Results Chart are produced. Clicking on the Individual Bubble or the Actions ">" on the Individual Results Chart will provide the top actions that are recommended for that individual.



8) You have the ability to customize the action plan. You may Delete or Add specific actions based on the results and/or the unique situation of the individual. i2i is a customizable application which gives you the flexibility to develop the best program for your business.



9) Add a Date for the deliverable action to be completed.

The screenshot displays a software interface with a central modal window titled "Subject D - Edit Actions". The modal contains a list of actions with columns for "Description" and "Expires". A date selection calendar is overlaid on the modal, showing the month of August 2018. The date "Thu, Aug 16" is highlighted in a blue box. The calendar grid shows days from 1 to 31. Below the calendar are "CANCEL" and "OK" buttons. The background interface is dimmed, showing a graph on the left and a list of actions on the right. The graph has a y-axis labeled "Capability" with values 0 and 5, and an x-axis with values 0 and 6.75. The list of actions on the right includes items like "Sales in Product C...", "# of Quotes Gener...", "Level of Training C...", "# of Sales Calls Giv...", "# of Member Asso...", "Sales in Product C...", "# of Months Open...", "# of Presentations...", "# of Trade Shows...", and "Action 10".

10) You can export your customized plan to a CSV file for easier management. The “EXPORT ASSESSMENT” button is located in the upper right corner of the i2i application.



At this point you have completed the initial assessment of the i2i application.

From here you will want to have individual conversations on the action plan and target dates for completion. Provide a PDF or a document that creates accountability and schedule a follow up to assess the progress being made.