

**In Brief:** This Learning Guide provides a short background on the Prosci ADKAR® Model in addition to context and instructions for using this game-changing tool to empower your change management work and put your finger on the pulse of how impacted individuals are processing a change. Uncover barrier points and trends, and begin to understand how change is truly being understood, processed and embraced on *your* project.

## How are employees adopting your change project?

The Prosci ADKAR Model provides a framework for understanding and managing individual transitions. ADKAR is an acronym that describes five building blocks for successful individual change:

- **A**wareness of the need for change
- **D**esire to participate and support the change
- **K**nowledge on how to change
- **A**bility to implement required skills and behaviors
- **R**einforcement to sustain the change

An individual must have **Awareness** for the need to change. To move past this step, an individual needs to understand the *why* of a change: Why now? What if we don't? The next step is **Desire**. The individual must want to participate and support the change. The **Knowledge** step is concerned with the "how to" of the change; how to change and how to act in the future state. Knowledge is commonly associated with training on the change. **Ability** encompasses practical applicability of knowledge. This is the "doing" or "ability to do" that follows training. The last building block, **Reinforcement**, occurs post-change. This step helps keep and maintain the change. Thousands of leaders, managers, and change practitioners have used ADKAR as a lens through which they view individual change and as a guide for helping the people in their organizations adapt to changes.

## About the ADKAR Dashboard

### What is it?

The ADKAR Dashboard is a cloud-based survey creation and distribution platform that allows you to measure how well individuals are adapting to a change. It measures an individual's level of *awareness*, *desire*, *knowledge*, *ability*, and *reinforcement*® on a change with real-time scoring to determine where they are in the Prosci ADKAR model and identify any barrier points. Scores can also be aggregated by group and project for a broader organizational view.

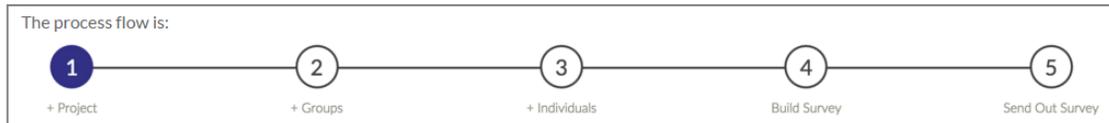
## Getting Started

To get started, there are two distinct paths to choose from:

### 1. Create a trackable survey.

Creating a trackable survey means that a custom survey URL is generated, and sent to each and every selected individual per survey. To accomplish this, complete the following process, starting at the homepage:

- a. Under Quick Navigation, click on the **Add a Project** button to create a project
- b. Create groups
- c. Add individuals to each group
- d. Create survey(s) and send them to the groups and individuals you've created

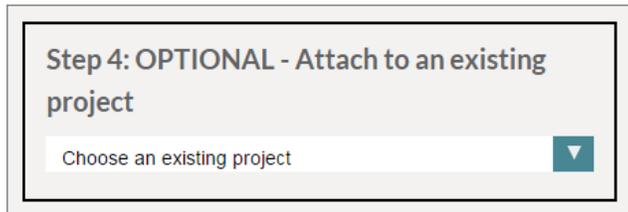


### 2. Create an Anonymous Survey.

Creating an anonymous survey does not require the project infrastructure like a trackable survey. One survey URL is generated at the survey level, and can be sent to as many or as few individuals as needed. Because the URL remains fixed, you can email it from your inbox, post it on your intranet, SharePoint, virtual newsletters, etc. No names or emails are ever tracked. Responses come in under "Anonymous User 1", "Anonymous User 2", etc.

### What if you want to do both?

You can! When creating the anonymous survey, select the optional step 4 "Attach to an existing project" to link your anonymous survey with a project that contains trackable surveys.



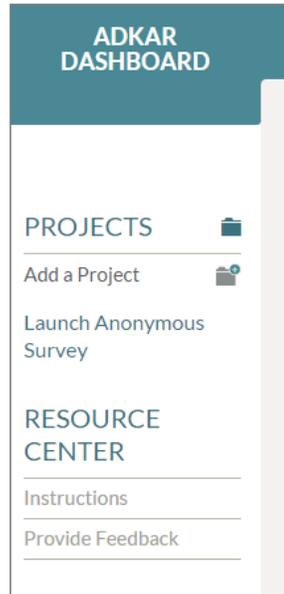
## Navigation

Here are some quick tips on navigating through the ADKAR Dashboard:

### Left Hand Navigation Menu

This menu is accessible from every page, and provides access to:

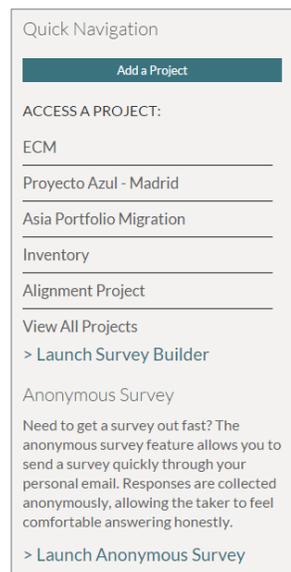
- Projects
  - Add a Project
  - Access open projects
  - View All Projects Page
- Launch Anonymous Survey
- Resource Center
  - One Page Instructions
  - Learning Guide
  - Feedback – Tell us what you think!
  - App Overview Video



### “Quick Navigation” Menu

This menu displays on the welcome page. It provides quick start access to:

- Add a Project
- The last five most recently accessed projects
- View All Projects Page
- The Survey Builder
- The Anonymous Survey section



## Help

Many of the pages have specific help lightboxes. Look for the  icon in the upper right hand corner of the page.



The following pages have specific help lightboxes available:

- Welcome Page
- "Add a Project" Page
- Project Dashboard Page
- "View Individuals" Page
- "Add Individuals" Page
- Survey Builder Page
- Survey Builder – Messaging and Delivery Page
- View All Projects (Current Projects) Page

Does something still not make sense? Contact Prosci's Product Support at [support@prosci.com](mailto:support@prosci.com) for technical assistance.

## Instructions

There are only five main steps to begin creating and sending ADKAR® surveys to impacted groups. To get started, from the welcome page of the ADKAR® Dashboard, click on the “Add a Project” button.

The screenshot shows the ADKAR Dashboard interface. At the top, there is a navigation bar with 'ADKAR DASHBOARD', a home icon, 'Return to the Prosci Portal', 'Logout', and the 'Prosci' logo. On the left, there is a sidebar with 'PROJECTS' (containing 'Add a Project' and 'Launch Anonymous Survey') and 'RESOURCE CENTER' (containing 'Intro Video', 'Instructions', 'Learning Guide', and 'Provide Feedback'). The main content area is divided into three columns. The first column contains a welcome message and a list of bullet points under 'The ADKAR Dashboard leverages the Prosci ADKAR® Model for individual change:'. The second column, titled 'Get Started', contains a numbered list of four steps. The third column, titled 'Quick Navigation', contains a red-circled 'Add a Project' button, a link to '> Launch Survey Builder', and a section for 'Anonymous Survey' with a link to '> Launch Anonymous Survey'.

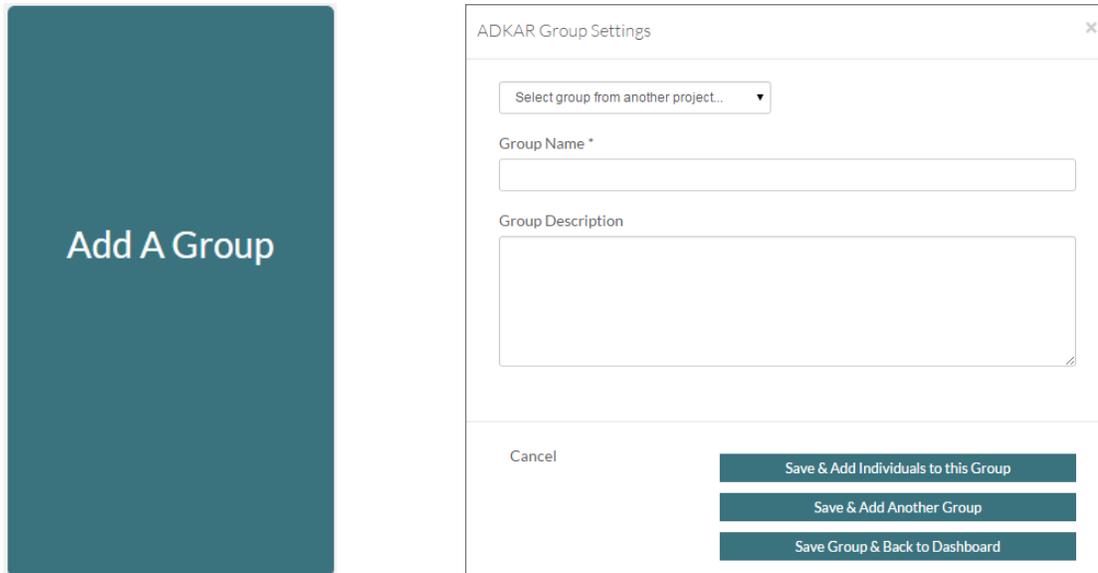
## Step 1: Select or Add a Project

The ADKAR Dashboard is a project-oriented tool, and you may carry over active projects from other Portal project tools like the CMROI Calculator, eBest Practices Audit or PCT Analyzer into the ADKAR Dashboard. You can also create a new project.

The screenshot shows the 'Add a Project to the ADKAR Dashboard' form. The form is titled 'Add a Project to the ADKAR Dashboard' and has a 'Back >>' link. It contains a text input field for 'Project Name'. Below this, there is an 'or' separator. Underneath, there is a section titled 'Choose Existing Project' with a dropdown menu labeled 'Choose an existing project' and 'Choose One...'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons. The sidebar and navigation bar are identical to the previous screenshot.

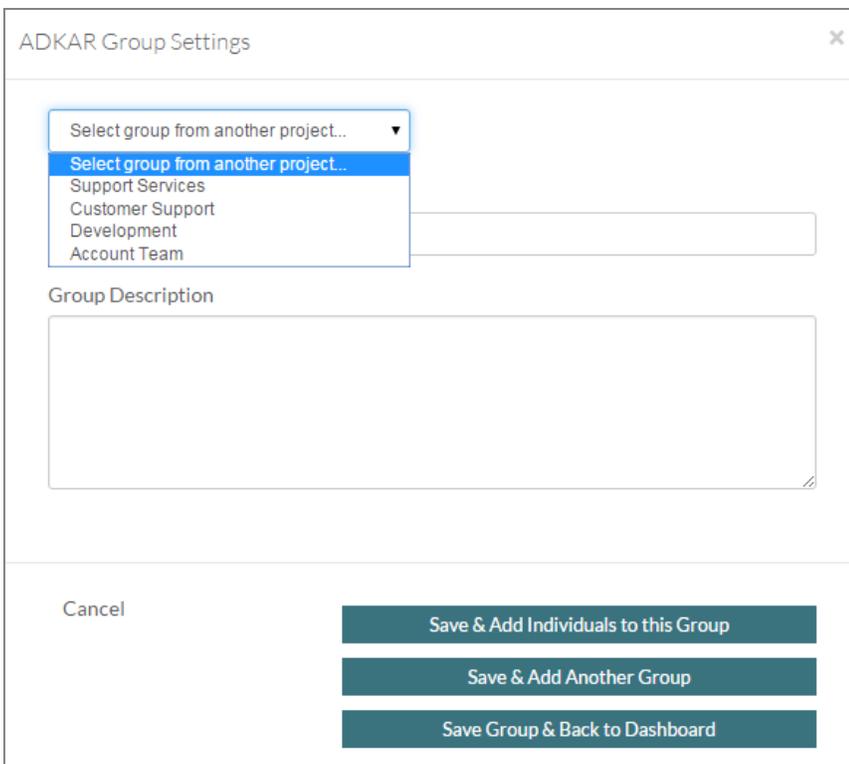
## Step 2: Add a Group

Once you create a project, you will be in that project page. Add any groups you want to survey by using the "Add a Group" button or link. Add as many groups as you like.



The image shows a dark teal button labeled "Add A Group" on the left. To its right is a white dialog box titled "ADKAR Group Settings" with a close button (X) in the top right corner. The dialog contains a dropdown menu with the text "Select group from another project..." and a downward arrow. Below this is a text input field labeled "Group Name \*". Underneath is a larger text area labeled "Group Description". At the bottom of the dialog, there are four buttons: "Cancel" on the left, and three teal buttons on the right labeled "Save & Add Individuals to this Group", "Save & Add Another Group", and "Save Group & Back to Dashboard".

You may also select groups previously created.



This image shows the "ADKAR Group Settings" dialog box with the dropdown menu open. The dropdown menu lists the following options: "Select group from another project..." (highlighted in blue), "Support Services", "Customer Support", "Development", and "Account Team". The rest of the dialog box, including the "Group Name" field, "Group Description" area, and the bottom buttons, is the same as in the previous screenshot.

### Step 3: Add Individuals to Group(s)

Once groups are created, start adding individuals that you want to survey for each group. Click on the “Save and Add Individuals to this Group” button directly when adding a group or click on the “Add Individuals” button from the Project Dashboard page.

ADKAR Group Settings ✕

Select group from another project.. ▾

Group Name \*

Group Description

Cancel

Save & Add Individuals to this Group

Save & Add Another Group

Save Group & Back to Dashboard

Project: Alignment Project
Return to the Prosci Portal Logout **Prosci**

Help
Meter View List View

Overall ADKAR Results

A D K A R


Barrier Points:

0	0	0	0	0
0%	0%	0%	0%	0%

View All Individuals

View Survey History

Survey Builder

Score Legend:

- Poor (1 - 2)
- Fair (2.1 - 3)
- Good (3.1 - 4)
- Great (4.1 - 5)

Group 1  
0 individuals in group

A D K A R


+ Add Individuals
Survey Group

View Individuals
View Survey History

Group 2  
0 individuals in group

A D K A R


+ Add Individuals
Survey Group

View Individuals
View Survey History

Group 3  
0 individuals in group

A D K A R


+ Add Individuals
Survey Group

View Individuals
View Survey History

Add A Group

From the Add Individuals page, you can add individuals to each group singly and manually or via batch upload.

To add individuals manually, click on the "Add Individuals Manually" radio button, and input first name, last name, and email address for every individual you want to add.

Project: Alignment Project  
Group: Group 1  
Choose how you will add individuals to this group.

Add Individuals Manually  Batch Upload

First Name \*

Last Name \*

Email Address \*

Cancel

To add individuals via a batch upload, begin by clicking on the "Batch Upload" radio button:

1. Click on "click here" link for CSV template
2. Complete the CSV template
  - a. Do not change the text in the top row
  - b. Replace sample data with first name, last name, and email address for each individual
  - c. **Please Note:** ensure there are no empty spaces in fields, as they may cause upload errors.
3. Save the template as .csv file
4. Back in the Dashboard, click on "Choose File" button to link to saved csv
5. Click on "Upload CSV" button to complete the upload

Return to the Prosci Portal Logout Prosci

Help ?

Project: Alignment Project  
Group: Group 1  
Choose how you will add individuals to this group.

Add Individuals Manually  Batch Upload

Batch Upload Users

On this page you can complete a batch upload and quickly add multiple individuals to a single group using a .csv file.

Please note that the batch upload happens at the group level, and any individuals you upload on this page will be related to the group shown above. To add individuals to other groups, the batch upload should be performed for each separate group.

To complete a batch upload:

1. [Click here](#) to download the batch upload template.
2. Fill it in with the individuals in the group. Required fields are "first name", "last name", and "email address".
3. Save the template as a .csv file.
4. Click the "Choose File" button below to select the saved file.
5. Click into the "Upload CSV" button to complete the adds.

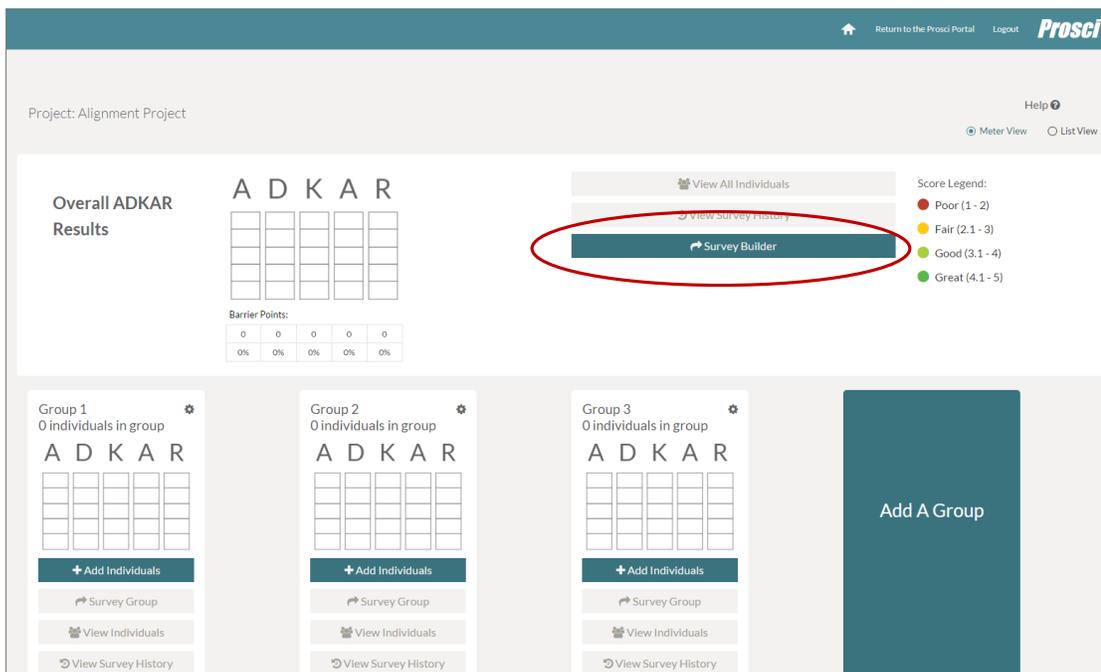
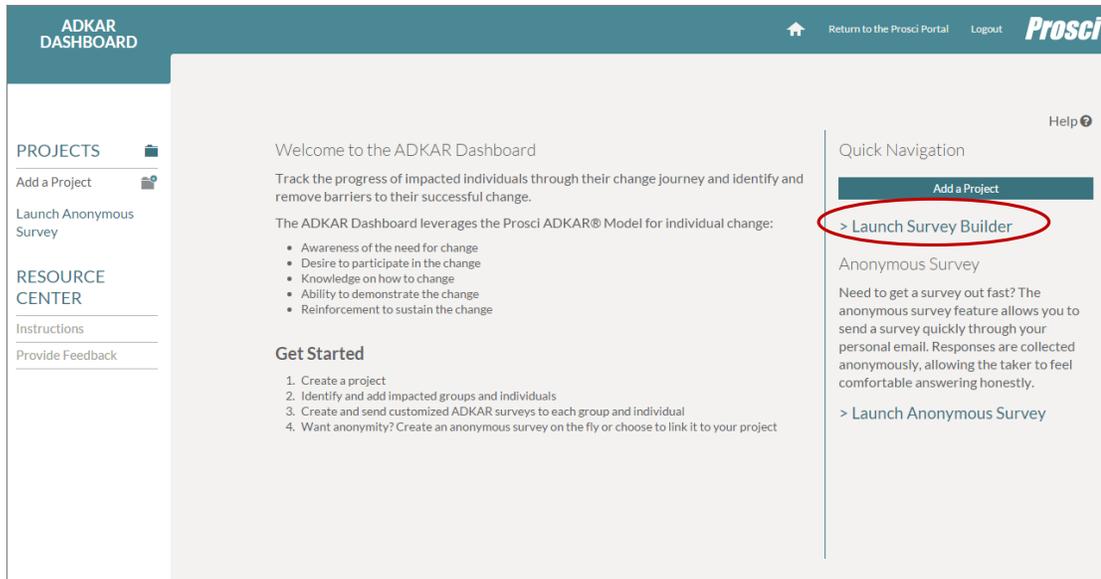
Upload New File:

Choose File

## Step 4: Survey Builder – Create an ADKAR Survey

Build your ADKAR Survey quickly and simply and survey impacted individuals directly from the ADKAR Dashboard. Surveys can be tailored to single or multiple groups.

When a project, group(s), and individuals are created, those groups and individuals can be surveyed in the Survey Builder. You can launch the Survey Builder from the welcome page, the project dashboard page, or the “View All Projects” page. Click on the “Survey Builder” link or button as shown in the images below:



You can also create a survey ahead of creating a project, adding groups and individuals. You will not be able to complete the messaging and delivery preferences because they are linked with the individuals and groups that are being surveyed. You can save the survey as a draft, and link it to your project later once you are ready to submit the survey.

The screenshot shows the ADKAR survey builder interface. It includes a list of statements with checkboxes, a section for naming the survey, and a table showing the distribution of statements across the ADKAR acronym. A button at the bottom is circled in red.

Statements:

- I could explain why this change is happening to a colleague.
- The person who has explained the need for change is credible.
- All the questions I have about why the change is happening have been answered.
- I understand the nature of the change's impact on me, my work and my group.
- Communications about why the change is happening have been effective.

+ Add another statement

Show statements in order  Randomize statements

**Step 3: Name your survey so you can use it again\***

Survey Name\*

Survey Statement Spread

Total Statements	A	D	K	A	R
10	2	2	2	2	2

[Save this survey as a draft to use later](#)

## Step 5: Survey Builder – Select Recipients, Create Messaging and Send Survey

The sub-steps for selecting your survey recipients, creating and modifying the messaging, previewing and sending the survey are outlined in depth as part of the survey creation steps below:

Create your ADKAR<sup>®</sup> survey, step-by-step:

### Survey Page Step 1: Select your survey build.

- Build a new survey: Here you can use preloaded statements, or enter your own statements, or both, to create a truly customized survey for your project
- Start with Prosci pre-built survey: We have added a selection of pre-built surveys of varying length, depth, and areas of focus.
- Start with previously sent survey: If you've already sent a survey and want to resend, this option allows you to view and select a previously used survey.
- Complete an existing draft (as applicable): This option is only available if you have previously started and saved a draft of a survey.

**Survey Page Step 2:** Customize the survey.

Once you have selected your starting point of a survey, you can select or enter your own statements across the ADKAR tabs.

**Step 2: Make any customizations to your survey you would like**

Awareness	Desire	Knowledge	Ability	Reinforcement
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

+ Add another statement

**Survey Page Step 3:** Name your survey, and proceed to messaging and delivery, or save as draft.

Name the survey and check the Statement Spread to ensure you are weighting the survey to your needs ahead of proceeding to the messaging and recipient selection, or saving the survey as a draft to access later.

**Step 3: Name your survey so you can use it again\***

**Survey Name\***

Alignment Project - Mid-Project

**Survey Statement Spread**

Total Statements	A	D	K	A	R
10	2	2	2	2	2

Proceed to customize your message and select recipients | Or, just save this survey as a draft to use later

**Survey Page Step 4:** Select the recipients.

Groups that contain individuals are eligible to receive surveys, and they will display in this section. Choose the groups, and individuals in each group you wish to receive the survey.

Step 4: Select your recipients	
Groups	Individuals
<input checked="" type="checkbox"/> Group 1	<input checked="" type="checkbox"/> Send to all in group ▼ Expand to select individually
<input checked="" type="checkbox"/> Group 2	<input checked="" type="checkbox"/> Send to all in group ▼ Expand to select individually
<input type="checkbox"/> Group 3	<input type="checkbox"/> Send to all in group ▼ Expand to select individually

**Survey Page Step 5:** Choose how "Sender Name" is displayed.

This field allows you to edit how the sender name appears in the survey recipient's email inbox. If left blank, the sender name will appear as "Prosci".

Step 5: Display SENDER NAME as:
<input type="text" value="John Smith"/>

**Survey Page Step 6:** Customize "Reply To" email address.

This field allows you to edit what email address a "reply" to the survey will go to. Please ensure an appropriate "Reply To" email is input in this field. If blank, the default email is [portal@prosci.com](mailto:portal@prosci.com).

Step 6: Customize your REPLY TO email address
<input type="text" value="johnsmith@email.com"/>

**Survey Page Step 7:** Customize the survey email "Subject Line".

If left blank, the Subject Line of the email will read "ADKAR Survey"

Step 7: Customize your email SUBJECT LINE
<input type="text" value="Alignment Project Survey - Please Complete by Friday"/>

**Survey Page Step 8:** Customize the body of the email.

Please note that any text entered in this field will follow the salutation, which is hardcoded into the email structure. If left blank, the default email will read:

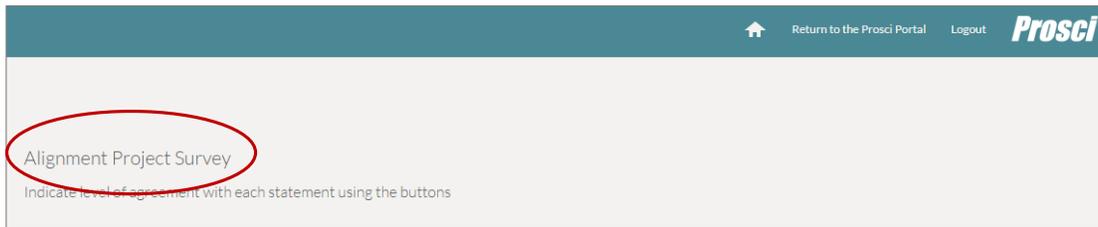
Dear {first name} {last name},

You are receiving this survey as part of a change management initiative. Your honest feedback in response to these questions about change will help the team support you more effectively.

Please follow this link to complete this short survey: <http://adkar.prosci.com/surveys/view/xxxxxx>  
If the link does not work, please copy and paste it into your browser's URL address bar.

**Survey Page Step 9:** Customize the Header of your Survey Page.

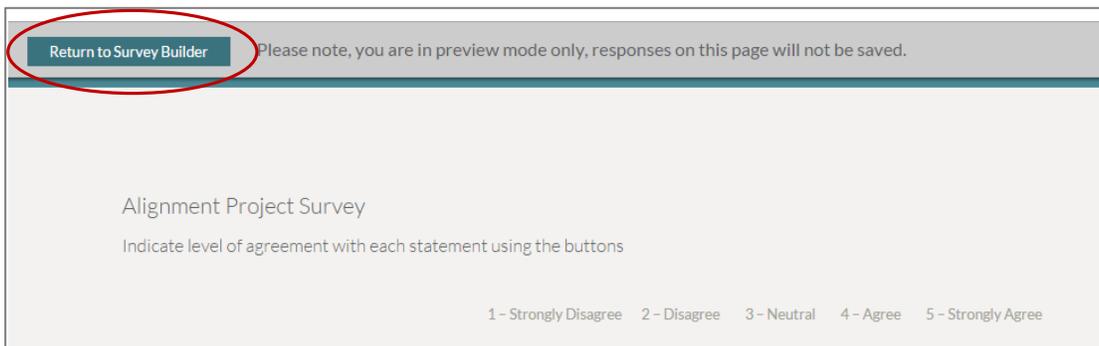
This field allows you to edit the title the survey taker sees.

**Survey Page Step 10:** Customize the "Thank You Page"

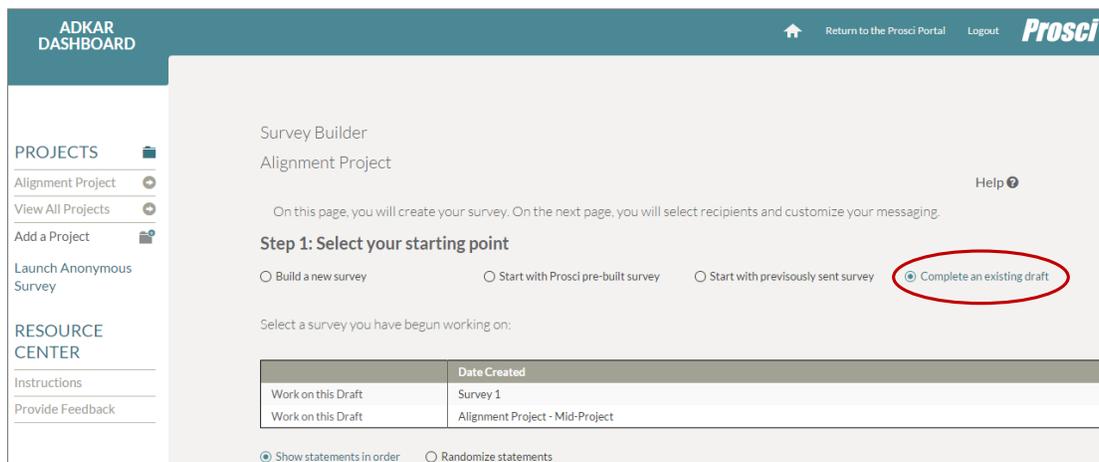
This field allows you to edit the message on the Thank You Page a survey taker sees, after submitting the survey. If left blank, the default message reads "Thank you for completing the survey!"

**Survey Page Step 11:** Preview your survey

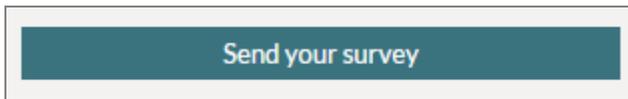
Preview your survey to see what the survey taker will see by clicking "Preview your survey". From this preview page, click on the "Return to Survey Builder" button at the top of the page to send your survey.



Note: if you close the browser tab in while in preview mode, you can find your survey in the Survey Builder, under "Step 1: Complete an Existing Draft"



**Survey Page Step 12:** Send your survey!



Click “Send your survey” to send it to the selected groups and individuals.

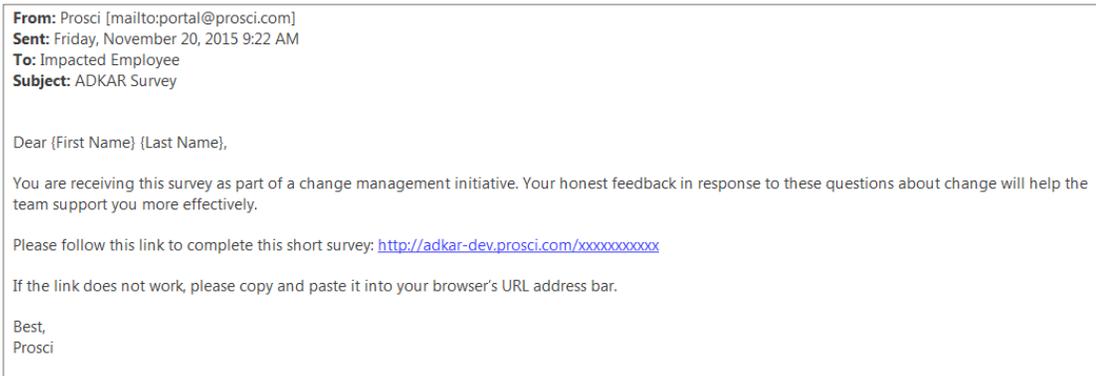
We use a third party email delivery service “Postmarkapp” to ensure a high rate of deliverability, which is the same delivery service used for the rest of the Prosci Portal messaging. If you encounter any delivery delays or issues, please contact [support@prosci.com](mailto:support@prosci.com).

Note: if you are sending the survey to a large group (several hundred to several thousand), please allow the system time to complete the request. It may take from a few moments to a few minutes to complete the send request. Do not click out of the screen, or interrupt the process or it will affect the send request.

## The Survey Taker Experience

### Tracked Survey

When a standard or tracked survey is sent to the selected group(s), the individuals selected in the group(s) will receive an email from [portal@prosci.com](mailto:portal@prosci.com) with the Sender Name that you designate. If Sender Name is left blank, the system will default to “Prosci”. The default email verbiage is depicted in the image below:



The link is associated to the individual survey instance created, meaning if there are 30 individuals in a group, each email will contain a custom link tied to that individual. As a result, **individual surveys should not be sent to email distribution groups**, unless a single response is desired, or if you are sending an Anonymous Survey which uses a single url to collect results. The trackable survey is designed to be a single take, one-time survey. Once a trackable survey is completed and saved, the link becomes inactive.

## Anonymous Survey

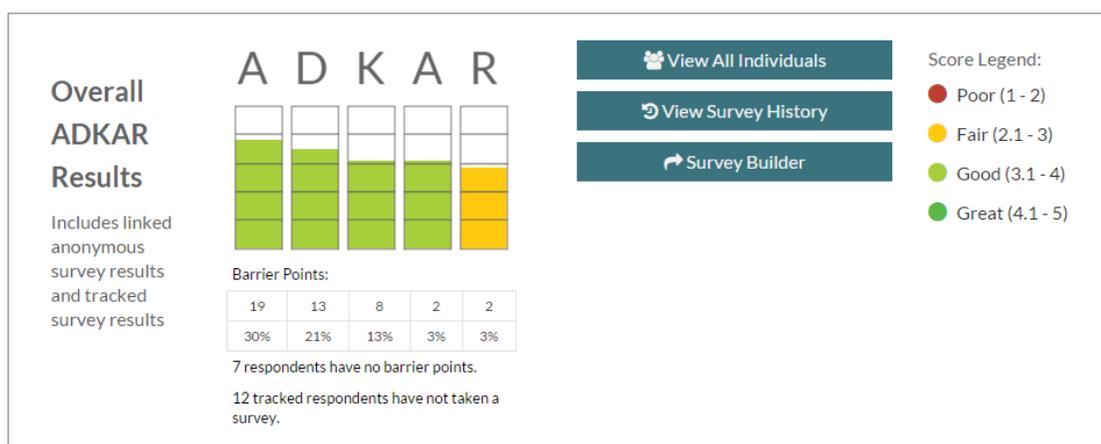
When an anonymous survey is created and sent, a single URL is created and linked to that survey. This URL can be sent out and reused as often as needed. Because individuals are not tracked, a single individual can take and re-take the survey as often as they wish. Each entry is registered separately as "Anonymous User".

## Analyzing the Results

The ADKAR Dashboard offers a wide array of results, from individual survey responses to project level summaries. Being that ADKAR is a process, the results for tracked surveys are designed to display the latest survey results captured at the group level. Anonymous surveys linked to a project are collected and averaged at the survey level.

## Project's Overall ADKAR Results

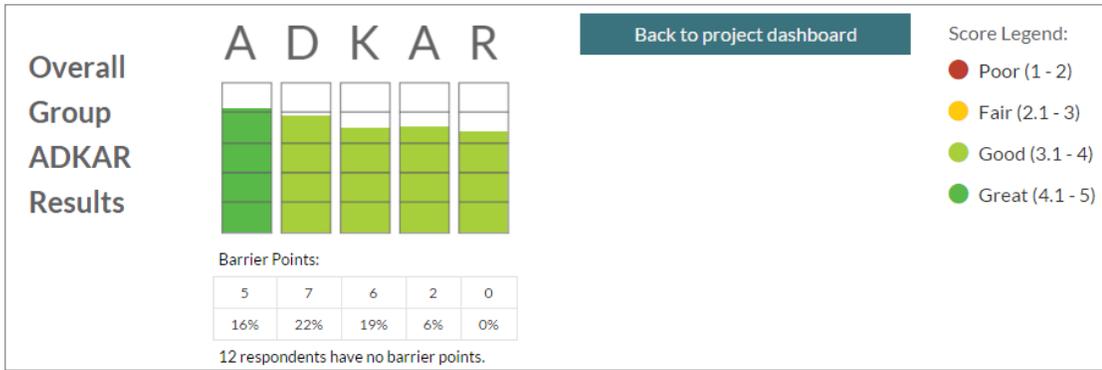
The "Overall ADKAR Results" section for your projects show results for both tracked surveys and any linked anonymous survey. The "Overall ADKAR Results" displays the average collected across the groups' last tracked survey sent, and the average of any and all anonymous surveys linked to that project.



The overall results will also display an ADKAR barrier point summary, in addition to the number of "tracked" individuals that have not yet taken the latest sent survey. An ADKAR barrier point is identified as any score average across A, D, K, A and R for a single individual that is a 3 or below. These barrier points provide an additional layer of insight into the collected averages. Please note that the barrier points for "Overall ADKAR Results" do include anonymous survey results.

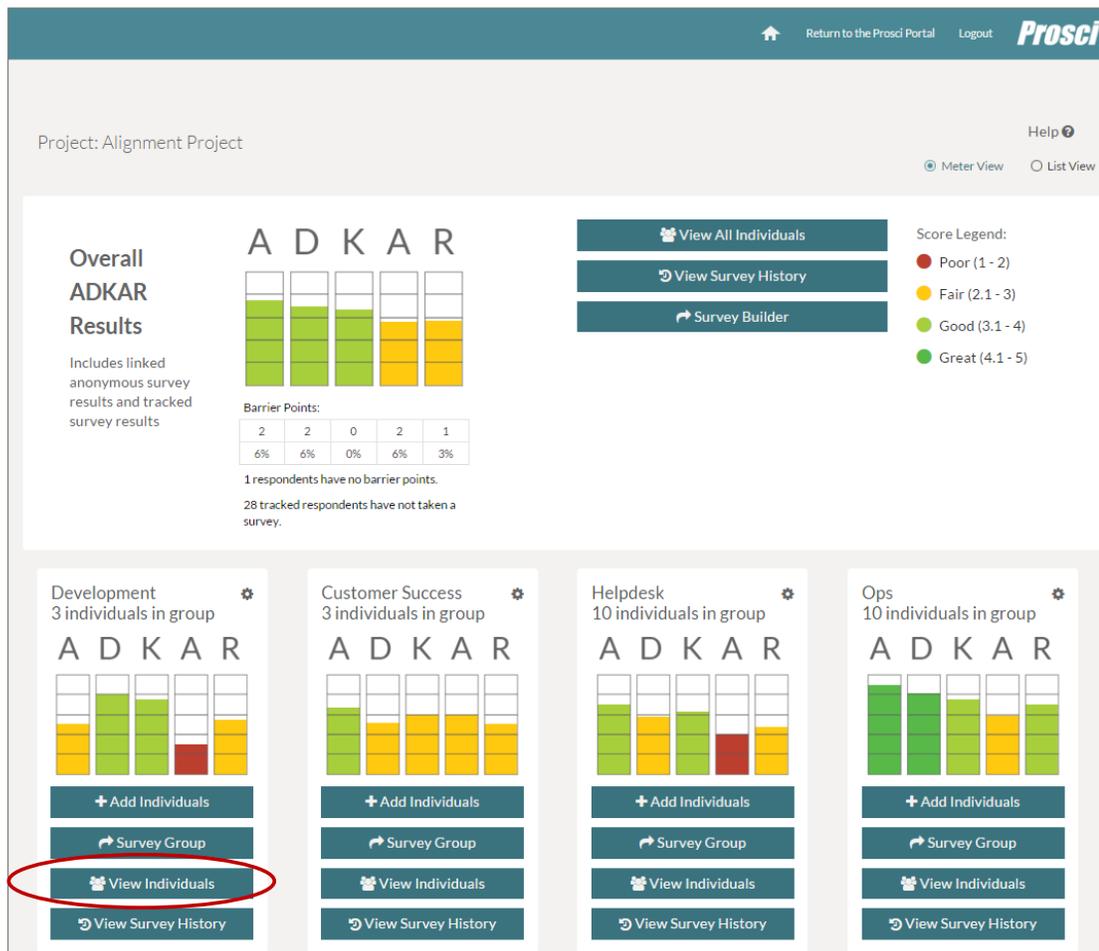
### View All Individuals

The project’s “View All Individuals” dashboard page displays the individual trackable responses across the project’s groups. The page also includes a barrier point analysis, but unlike the “Overall ADKAR Results”, it does not include anonymous survey results.



### Group Level Results

From the project dashboard page, access results for individuals at the group level by clicking into “View Individuals” for a specific group.



## Group Level Options

In addition to accessing individual responses at the group level, you have the ability to:

- Resend a survey - resends a trackable survey to participants that have not yet responded, without creating a new survey instance
- Create a new survey for this group – creates a new survey instance
- Add more individuals to group

## View Survey History

The Survey History Page allows you to review the results of each sent survey linked to your project. You can access the individual survey responses by clicking into the “Individuals” button for each survey. Any project-linked anonymous surveys are also listed and can also be accessed from this page.

## View All Projects

The “View All Projects” page provides a rolled-up view of, and access to, all of your open projects from one handy page. Access this page from the app’s welcome page or from the left hand navigation menu.

In addition to providing an overall score for the latest survey, plus the corresponding barrier point analysis of your project, this page allows you to inactivate and archive your open projects from the radio buttons in the upper right hand side of the Project name.

Alignment Project  Active  Inactive

+ Add a Group  
+ Go to Survey Builder

Project	A	D	K	A	R	No Barrier Point	Total # of tracked Individuals	Tracked Response Rate	Total # of Anon Received
Overall	4.1	3.9	3.4	3.4	3.5		180	3%	15
Barrier Point	2%	0%	14%	0%	0%	8			

You can also view and reopen Inactive projects from the link in the upper right hand of the page “View Inactive Projects”.

ADKAR DASHBOARD Return to the Prosci Portal Logout Prosci

PROJECTS

- Helpdesk Move
- Alignment Project
- View All Projects

RESOURCE CENTER

- Instructions
- Provide Feedback

Current Projects

Helpdesk Move  Active  Inactive [View Inactive Projects](#)

+ Add a Group  
+ Go to Survey Builder

Project	A	D	K	A	R	No Barrier Point	Total # of tracked Individuals	Tracked Response Rate	Total # of Anon Received
Overall	3.7	3.5	3.1	3.0	2.8		32	94%	31
Barrier Point	30%	21%	13%	3%	3%	7			

Alignment Project  Active  Inactive

+ Add a Group  
+ Go to Survey Builder

Project	A	D	K	A	R	No Barrier Point	Total # of tracked Individuals	Tracked Response Rate	Total # of Anon Received
Overall	4.1	3.9	3.4	3.4	3.5		180	3%	15
Barrier Point	2%	0%	14%	0%	0%	8			

## Editing and Deleting Data

### Surveys

#### Previously sent Surveys

To edit the survey name (viewable only by the account user, and not the survey taker), click into the gear icon next to the survey name, located in the project’s “View Survey History” page.

To permanently delete this survey instance (including any associated responses), click the red “Delete Survey” button.

Project Kickoff Survey

A D K A R

[View Individuals](#)

[Delete Survey](#)

## Survey Listings

To remove or delete survey listings, as they appear in the Survey Builder, click into the Survey Builder. You can remove a survey from your “Previously Sent Survey” or “Existing Draft” survey lists. Removing them from this page will not delete the collected survey data for any sent surveys, but only clean up the survey list view from this Survey Builder page.

Build a new survey   
  Start with Prosci pre-built survey   
  Start with previously sent survey   
  Complete an existing draft

Select a survey you have already created:

	Survey Name	Preview Survey	
<input type="radio"/>	Survey Test		<a href="#">Remove from list</a>
<input type="radio"/>	Anon Test		<a href="#">Remove from list</a>
<input type="radio"/>	test		<a href="#">Remove from list</a>
<input type="radio"/>	Surv test Oct 21		<a href="#">Remove from list</a>

## Groups

To edit a group name, click into the gear icon next to the group name.

To delete a group, simply click on the respective group’s red “Delete Group” button. Please note that deleting a group will permanently delete all associated individuals along with their survey responses.

Group 1

2 individuals in group

A D K A R


[+ Add Individuals](#)

[↻ Survey Group](#)

[👤 View Individuals](#)

[📅 View Survey History](#)

[Delete Group](#)

## Projects

To edit a project name, from within the project dashboard, click into the gear icon next to the project's name.

To delete a project, click on the red "Delete Project" button, located at the bottom of the project dashboard page. Deleting a project will permanently delete all data associated with this project including groups, individuals, surveys, and any collected survey responses.

Project: Implementation Project 

Help  Meter View List View

### Overall ADKAR Results

Includes linked anonymous survey results and tracked survey results

## ADKAR

1	1	0	2	0
11%	11%	0%	22%	0%

Barrier Points:

5 tracked respondents have not taken a survey.

View All Individuals

View Survey History

Survey Builder

Score Legend:

- Poor (1 - 2)
- Fair (2.1 - 3)
- Good (3.1 - 4)
- Great (4.1 - 5)

Project-linked anonymous surveys  
1 survey

### ADKAR

[View Surveys](#)

Group 2  
2 individuals in group

### ADKAR

[Add Individuals](#)

[Survey Group](#)

[View Individuals](#)

[View Survey History](#)

[Delete Group](#)

Group 3  
5 individuals in group

### ADKAR

[Add Individuals](#)

[Survey Group](#)

[View Individuals](#)

[View Survey History](#)

[Delete Group](#)

Add A Group

[Delete Project](#)

# Apply ADKAR on your project!

The ADKAR Dashboard is ground-breaking and exciting, not because of what it does but for what *you* can do with it. The ADKAR Dashboard is a survey vehicle that allows you to track and analyze how impacted groups are processing through a change on an individual, group and project level, then adapt your change management efforts to drive individual transitions.

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## Learn more about Prosci – Manage Change, Maximize Performance

### Prosci's uniquely integrated system of models,

tools and processes enables your organization to strategically execute change at three levels: 1) With individuals through the popular Prosci ADKAR® Model; 2) On projects through the robust Prosci 3-Phase Process; 3) As a competency across the organization through the cutting-edge Prosci Enterprise Change Management Suite. Prosci's sole focus is helping individuals and organizations build their own change management capability.

### Portfolio of Solutions:

Select from Prosci's suite of offerings to customize a solution for your organization

- Research
- Methodology
- Tool
- Training
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