



**Professional Plan**

**Enterprise Plan**

# Evaluations

The tool that allows you to analyze  
how your team is feeling and how your team is doing.

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File for the administrator

# Hello!

Welcome to Sesame, the software that simplifies HR management.

In this file, we will explain you what “**Evaluations**” are and how you can install them in your dashboard.

We will take you step by step, so don't worry. We are here to help you with whatever you need!

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# 1. Performance evaluation: definition and purpose

Evaluations are questionnaires that you can send to your employees **individually** or **collectively** for them to answer in a certain period of time.

You will find out information that will help you to:



Identify and resolve conflicts



Improve communication between employees and managers



Find training and development opportunities



Encourage the professional growth of employees.



Acknowledge your employees' merits



Motivate your team

## 2. Installation

Click on the “**Apps**” button that you can find on the left sidebar and search for the “**Evaluations**” card.

Once you have downloaded it, you may find it in your menu along with the rest of functionalities. It will be in the “**Talent**” category.

### **Evaluations**

Send your team predefined 360 and 9box evaluations to discover their performance, enhance their talent, and identify areas for improvement.

[Install](#)

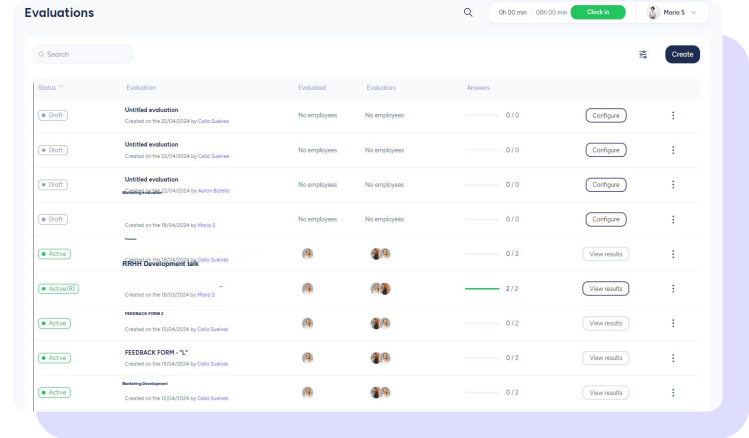
# 3. General view of evaluations

To help you keep track of your evaluations, you can access a summary of the most important information from your **evaluations** overview:

- Who created an evaluation and when.
- The workers evaluated and who evaluates (you can access to the employees profile by clicking on their avatars).
- The number of replies and pending responses.
- The evaluation status: draft, scheduled, active or inactive.
- Quick actions depending on the status of the evaluation: View results, Configure, Cancel sending.

By clicking on the three dots icon, you can **duplicate, activate, edit** or **delete** an evaluation.

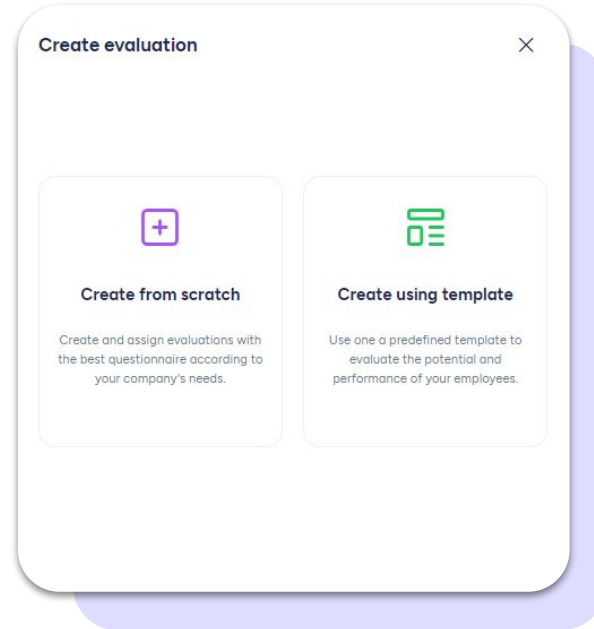
In addition, to streamline management, you can filter your evaluations by **results, status** and **type**.



## 4. Create an evaluation

Go to **Evaluations** and click on **“Create”**. You may create several types of evaluations. Here you can choose between create an evaluation from scratch or create an evaluation using template.

We explain below the features of each option, what their function is and how you can configure them.

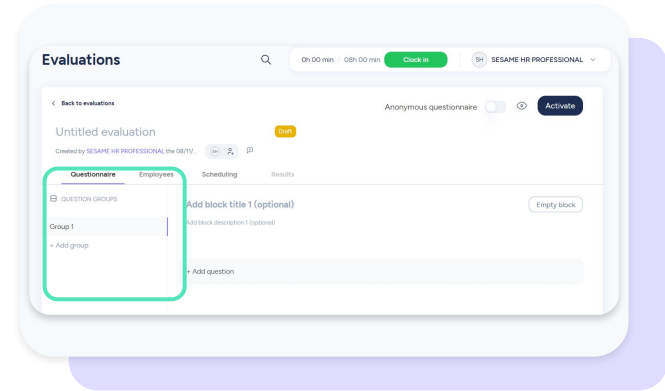


# 5. Create an evaluation from scratch

Do you need very specific information about your employees?

If you decide to create a questionnaire from scratch, you can create as many questions as you want to and choose among the answer types that we offer.

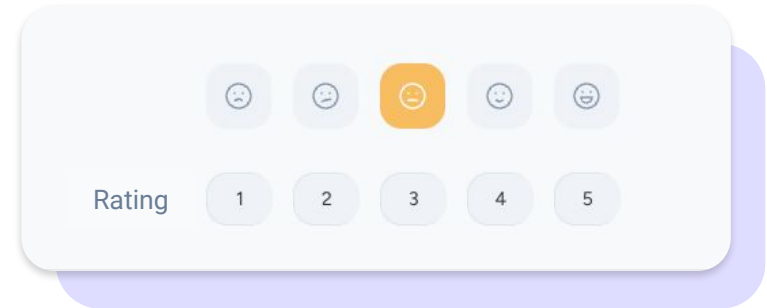
Keep in mind that you can **group questions** according to topics. You can even **create sub-groups in the thematic groups**. This will allow you to deal with specific aspects more deeply and **to get a more complete understanding** of the opinions and experiences of the evaluated.



## 5.1 Types of answer

There are up to 7 answer types for each question in Sesame.

1. **Single answer:** you can create different answers and employees must pick one.
2. **Multiple answers:** you can create different answers and employees may choose as many as they want to.
3. **Text response:** employees type their answers in a text box.
4. **Range:** employees pick from a range from 1 to 6, being 1 the lowest (completely disagrees) and 6 the highest (completely agrees).
5. **Satisfaction:** among the 5 available emojis, your staff can choose their satisfaction level.

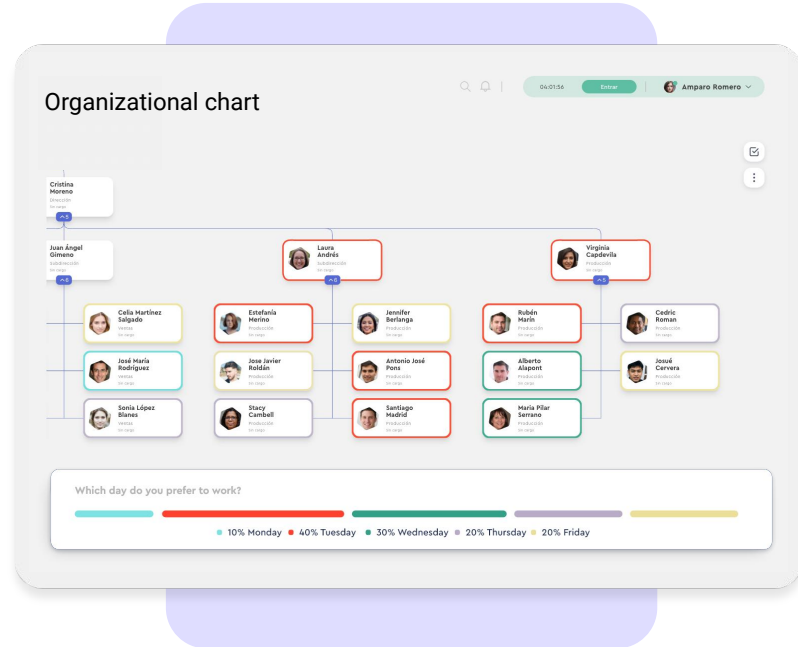




6. **Star rating:** employees will rate with stars, picking from one (low) to maximum five (high).



7. **Organizational chart:** you will be able to see on the organizational chart the response rate of each employee. Each answer will be assigned a colour to make it easier to identify.



## 5.2 Rating system

In the evaluations, you can activate the scoring system to obtain an overall result to set strategic and growth objectives.

Using it is very simple, activate the "Add Scoring" switch. As you add answer options you can add the score with a value from -100 to 100.

When the evaluation is completed, you will be able to see the score achieved by your employees and compare it with the maximum possible score.

The screenshot displays the 'Skills and abilities' evaluation interface. At the bottom left, a green 'Add scoring' switch is highlighted with a blue arrow. The main content area shows a question titled 'Question 1' with two answer options. Each option has an 'Add scoring' button next to it. A 'Rating' popup is shown in the top right corner, displaying the value '50'. A blue arrow points from the 'Add scoring' button of the second option to the 'Rating' popup.

## 5.3 Assign evaluations

To assign the evaluation, you must go to the following tab.

If you have created an **evaluation from scratch or using a template**, you have to assign both **Evaluated** and **Evaluators**:

- **Evaluated:** Employees who are evaluated.
- **Evaluators:** Employees who receive and respond the questionnaire.

Click on **Add employees >> Add**. To make it easier you can filter by **Department or Workplace**. You can also manually select each of the employees you want to evaluate.

Assign

1 Evaluated 2 Evaluators 3 Summary

Indicate the types of evaluators participating and select the employees who will respond to the questionnaires in each case:

Self-evaluation

Colleagues

Antonio Latorre Escorza X Clara Navero Cid X

Team in charge

Rodrigo Pámpara Fernández X

Line managers

Other employees

Return Continue

## 5.4 Schedule evaluation

You will be able to apply this logic to all the assessments available in Sesame.

Schedule the evaluation. Choose the type of sending: **Single or recurring**.

If you choose **recurring sending**, you should:

- Complete the data next to "**Schedule first sending**".
- Select the **type of recurring sending** (every day, week, month, year, etc.).
- Configure the day and time of the sendings.
- Decide how many days the evaluation will be active every time it is published again.

If you choose **single sending**, you will be able to:

- Schedule when the evaluation will be published and how long it will be active for.
- Click on "Save" and then on "Activate".

**Scheduling**

Schedule when the evaluation will be published and how long it will be active for. Recurring sending

Schedule first sending 10/04/2024 00:00

Cancel upcoming delivery

**Sending**

Recurring sending Every week

The evaluation will be sent automatically to assigned employees every

Date: Monday

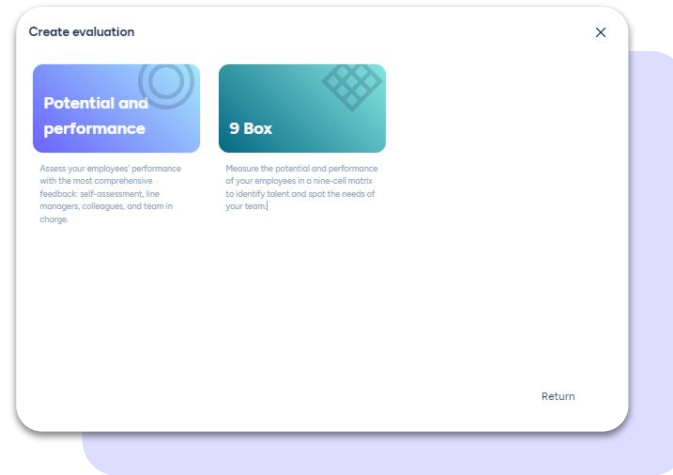
Hour: 08:00

**Closing**

6 days after its sending at 23:59

## 6. Create an evaluation using a template

If you decide to create an evaluation using one of the templates available on the platform, we tell you below what their function is and how you can configure each one:



## 6.1. Potential and performance

Assess the potential and performance of employees based on feedback from managers, colleagues and their own self-evaluation.

### How to create a 360 evaluation?

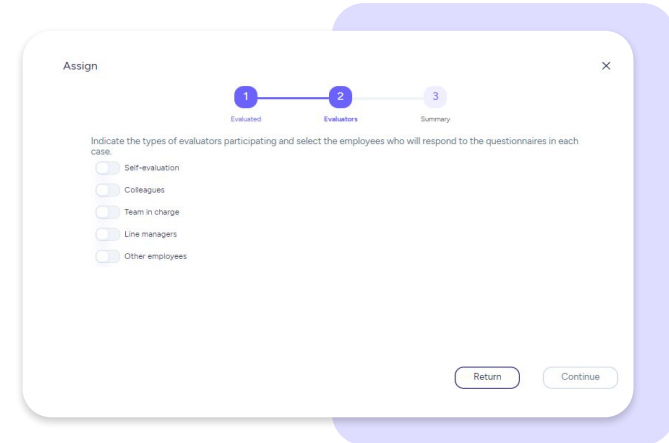
First of all, enter a title and a description to your evaluation. Then, review the pre-set questions one by one and make the necessary changes to fit your company.

Next, add the employees you wish to **evaluate** and their **evaluators** (establish evaluators based on their professional relationship with the evaluated employees).

In the **summary** section you will be able to review the assignment and continue with the evaluation configuration.

Once you have added the evaluators, go back to the “Questionnaire” tab and assign them in each question clicking on “**Select evaluators for this question**”. If you don’t assign an evaluator in each question, you won’t be able to send the evaluation

Finally, schedule the sending.



## 6.2. 9box

When preparing a 9box evaluation, remember that you are assessing potential as well as performance.

In order to speed up the process, you will find created the **potential and performance questionnaires**. All you have to do is set them up:

- Questionnaire title
- Who will you evaluate?
- Who will be the evaluators?
- Scheduling

You can also preview the evaluation before submitting it.

This screenshot shows the configuration interface for a 'Potential' questionnaire. At the top right, there is an 'Empty block' button. The main section is titled 'Question 1' and includes a 'Mandatory' toggle switch. Below this, there are three input fields: 'Title' (containing 'Easily adapts to change'), 'Type' (set to 'Single choice'), and 'Group' (set to 'Potential'). Under the 'Answer options' section, there are two options: 'Never' with a rating of 1, and 'Rarely' with a rating of 2.

This screenshot shows the same 'Potential' questionnaire configuration screen, but with a sidebar on the left. The sidebar contains a 'QUESTION GROUPS' section with three items: 'Potential', 'Performance', and 'Comments'. The main configuration area is identical to the previous screenshot, showing the 'Question 1' configuration with the title 'Easily adapts to change', type 'Single choice', group 'Potential', and two answer options: 'Never' (rating 1) and 'Rarely' (rating 2). At the bottom left, there is an 'Add scoring' button.

## 6.2.1 9box: Results. What is their basis?

The results are obtained by **totaling the points obtained in each block (potential and performance)**. The result is calculated based on the **arithmetical average** of points per group of all the evaluators if several evaluators are involved in the evaluation of an evaluated person.

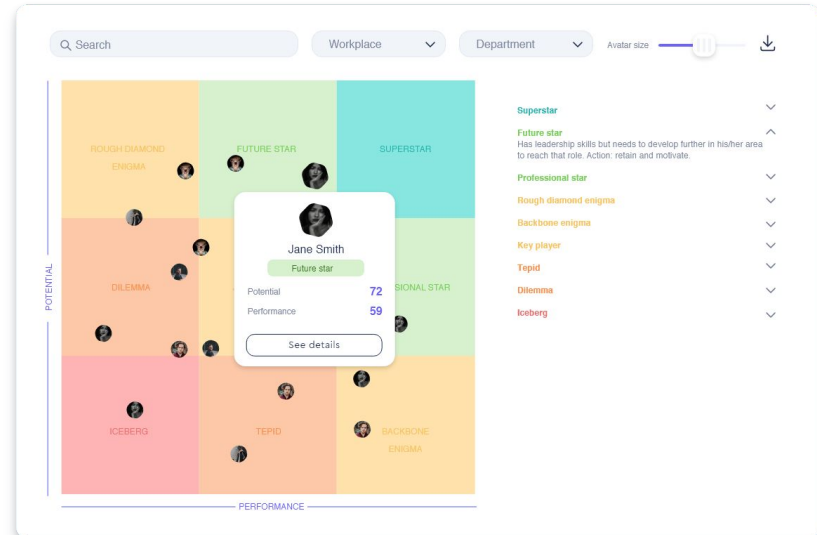
### How can I interpret the 9box?

Depending on the results, you will see the avatar of each evaluated person placed in a matrix of 9 cells.

Each cell has a different meaning. According to the results you get, we will tell you what each cell means and how to act in each situation:

- **Future superstar leader**
- **Future rising star**
- **Future professional star**
- **Enigma rough diamond**
- **Enigma backbone**
- **Key player**
- **Tepid**
- **Dilemma**
- **Iceberg**

In addition, by hovering your mouse over your employees' avatars, you will be able to see the points per group. Click on "**View detail**" for more extensive information.



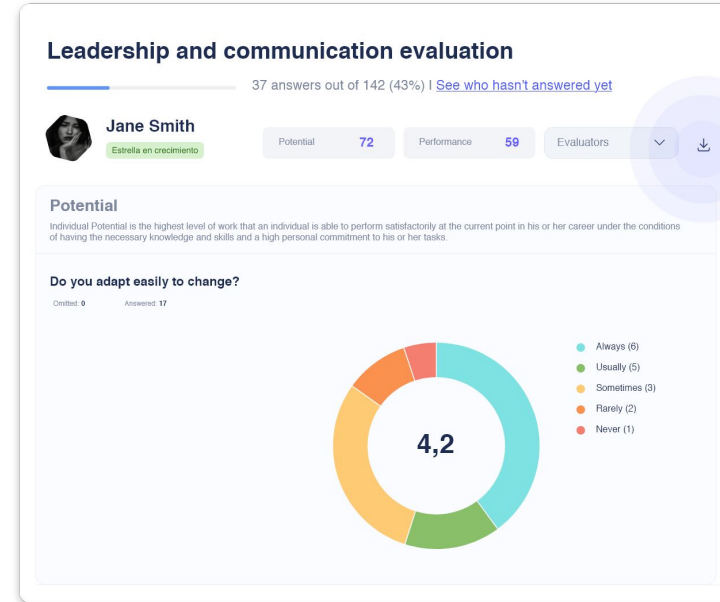


## 6.2.2. 9box: Detailed results

By clicking on "**View detail**", you will access the results of that specific evaluation. As you have seen before in Sesame, the results will be reflected in visual and intuitive graphs.

From here you will also be able to see who has not yet answered the evaluation and send them a reminder.

Finally, to download the results (Excel, PDF, or CSV), just click on the **download icon**.



# 7. How will your employees view evaluations?

## Dashboard

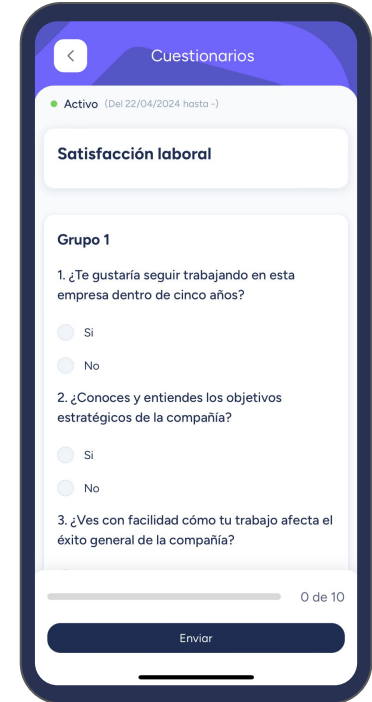
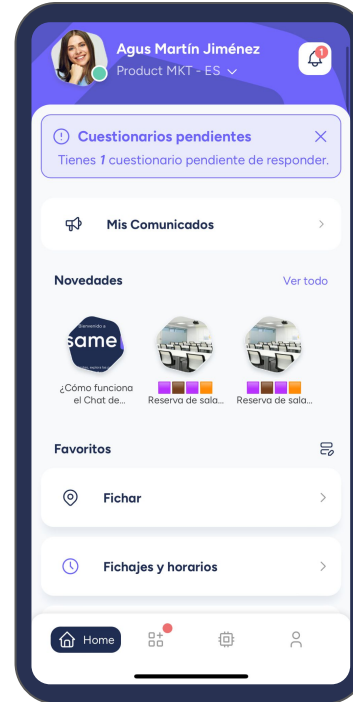
When you send evaluations, users will receive a notification in their dashboard (🔔).

Besides, they will be able to view and answer to their assigned evaluations from their dashboard. They will also be able to reply to them from their employee profile:

[Profile >> Evaluations](#)

## App

Users will receive a notification from the App with their **pending questionnaires**, they will be able to answer them and evaluate their peers from their mobile phone.



# 8. Results

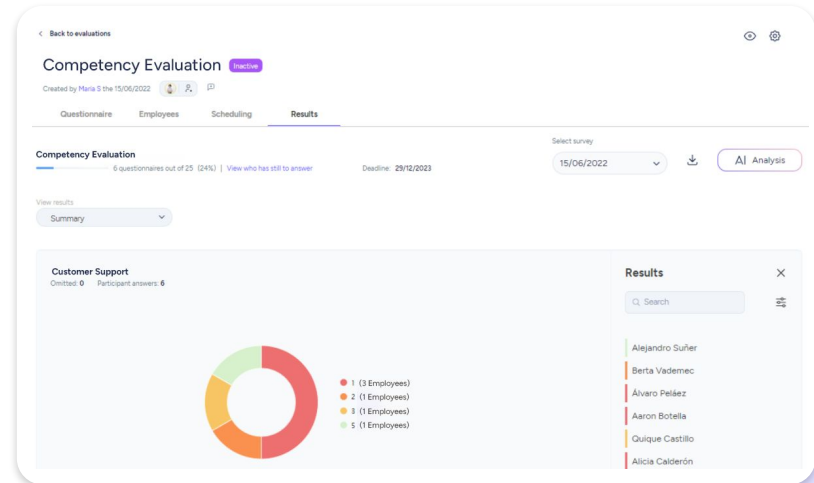
From the **Evaluations** tab you can view all active and scheduled evaluations and their progress.

## How can you check evaluations' results?

**Evaluations >> Choose the one you want to check >> View results**

Here you can see **who hasn't answered yet and send them a reminder** to prevent them from forgetting to reply.

Results will be displayed in a pie chart and by default general results will be shown. However, you may filter them by workplace, departments or employees. This way you won't miss any details. You also have the option to download **reports** with the results in PDF, CSV and Excel format.



# 9. Show evaluations results to the employees

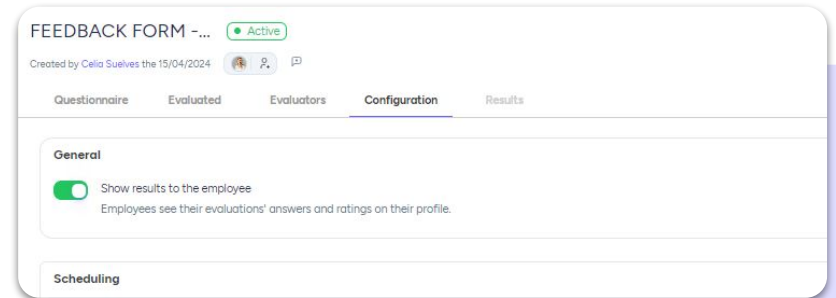
In Sesame there is an option to **show the results to your team**.

To configure this, activate the switch next to "**Show results to employee**" option from the synchronisation wheel.

By activating this configuration, the employee will see who their evaluators are, the questions, and the answers each of them has given. However, to comply with confidentiality standards, your employees will **only be able to see the results of their evaluations**.

In addition, as an administrator, you will be able to hide the results at any stage of the evaluation, simply by deactivating the option in settings.

In order for your employees to access their results, they will be able to do it from their profile **Employee >> Evaluations** once they have been completed.



# Grow your company. Empower your team!

Do you still have questions? In our [help center](#) you can find many resolved queries. If that's not enough, we'd love to hear from you!

Contact us, we are just one phone call away: [+34 96 062 73 51](tel:+34960627351).

Email us, we will reply as soon as possible: [soporte@sesametime.com](mailto:soporte@sesametime.com)