

Training

Evaluation and canvas

Aims and objectives

This exercise enables to cover these features:

- Revision of the **steps, clusters, filter views**
- Discover new view tab: the **canvas and the bubble chart**
- Discover new features: **ratings/evaluation**

Please note that the terms ratings and evaluation refer to the same feature in the Workshop.

Instructions - short version

This workshop will focus on “What actions should we take?” and you will have to create three steps:

1. A first step during which participants can add cards with ideas of actions in a three-column canvas. The titles of the columns/clusters are : HR, IT and R&D. They can only see all participants' cards. We are on the Canvas view.
2. A second step during which participants can evaluate the different actions according to three criteria: Feasible, Useful and New. So participants cannot add cards but they can still see all cards in a random order. They cannot see the results of the evaluation yet.
3. A third step during which we debrief the evaluation session with a bubble chart. So participants cannot evaluate anymore but they can see the results of the evaluation and can comment on cards.

➤ Customise the title of each step and add instructions.



- You can try to make the workshop by yourself with this first brief or you can follow the detailed instructions below if you need more guidance.

Instructions - detailed version

1. On your dashboard, create a workshop from scratch
2. Name it "What actions should we take?" and confirm the creation
3. In the settings, go to the step builder
4. Add a **Create cards** step. Rename it, add instructions and customise the settings:
 - Permissions: nothing to modify
 - View:
 - FIRST - Clusters: Click on **Manager clusters** and create the three clusters
 - THEN - Tab: Click on **Canvas**, then **Manage canvas**. In the new window, click on **Create canvas** and select the **3 columns** option and **Save**. *Note: Stormz should automatically match the three first clusters of your workshop with the three columns. If not, click on the pen button in the Manage canvas window and select the clusters by yourself, don't forget to hit **Save**.*
1. Save this step
5. Add a **Evaluate cards** step. Rename it, add instructions and customise the settings:
 - Permissions > Ratings:
 - Click on **Manage criteria** and add the three criteria: Feasible, Useful, New and close the modal window
 - View
 - Tab: Select **Canvas** and Stormz should automatically select your **3 columns** canvas - check that it is highlighted in blue



- Sort by: Select **Random**
- 6. Save this step
- 7. Create another **Display evaluation results** step:
 - Permissions > ratings: Tick the boxes of the three criteria you want to display
 - View: Nothing to change
- 8. Save this step
- 9. Launch your first step before to start facilitating

➤ Import the .stormz provided for the correction to your own dashboard to check the expected configuration

Go further...

- Change the colour of the clusters
- Use markdown to format your instructions

Reflect on...

- Why is the random order particularly useful in step 2?
- What advantages do you identify to use the canvas view instead of the cluster view?
- When would you use the vote rather the rating and when would you use the rating rather the vote?

Resources

About configuring evaluation : <https://help.stormz.me/ratings-configure/>

About visualizing evaluation results: <https://help.stormz.me/ratings-visualizing-results/>

Facilitation modes: <https://help.stormz.me/facilitation-mode/>

About filtering and displaying cards: <https://help.stormz.me/filter-cards/>

Configuring the canvas: <https://help.stormz.me/canvas-configure/>

Modify the name of each step and add some instructions:

<https://help.stormz.me/workshop-sequence/>



Change the colour of the clusters: <https://help.stormz.me/cluster-color/>

How to markdown : <https://help.stormz.me/how-to-use-styles-inside-cards-or-instructions/>

More generally, check our Help section: <https://help.stormz.me>