▲ APPEX360

Plant Excellence Intelligence Platform

Assessments Guide

Comprehensive guide to APPEX360 assessments. Covers creating assessments, completing them, interpreting results, and using findings to drive improvement.

Version 1 — September 29, 2026

APPEX360 Knowledge Centre

Confidential — Authorised Distribution Only

Assessment Guide

Comprehensive guide to APPEX360 assessments. Covers creating assessments, completing them, interpreting results, and using findings to drive improvement.

1. Overview

Purpose
This guide explains everything about APPEX360 assessments — from creation through completion to analysis. Assessments are the foundation of your organisation's intelligence data.

Who should use it
All users who create, complete, or analyse assessments. This includes administrators configuring templates, analysts completing assessments, and executives reviewing results.

Expected outcome
After reading this guide you will understand the full assessment lifecycle and be able to create assessments, complete them effectively, and interpret the results.

---

2. Quick Start

☐ Open an assessment from the Executive Homepage or Assessments section.
☐ Read each question carefully.
☐ Rate your organisation's capability on the 1–5 scale.
☐ Add notes or evidence to support your ratings where appropriate.
☐ Submit the assessment.
☐ Review your results immediately on the Executive Homepage.

---

3. Detailed Walkthrough

Creating an Assessment

Administrators create assessments from the Admin panel. Navigate to Admin → Assessment Templates and click "New Template".

Each template consists of:
Sections — High-level categories (e.g., Operations, Financial, Governance)

Questions — Specific capability statements rated on a 1–5 scale
Scoring Rules — How section scores are calculated

Completing an Assessment

Click "Start Assessment" from the Executive Homepage. The assessment wizard guides you through each question.

The 1–5 scale:
1 — Not addressed: No capability exists
2 — Initial: Basic awareness, ad hoc approach
3 — Defined: Standardised approach documented
4 — Managed: Measured and monitored
5 — Optimised: Continuously improving

Take your time. Each response contributes to your organisation's intelligence picture. Adding evidence notes strengthens the analysis.

Reviewing Results

After submission, results are available immediately:
Executive Homepage — Shows your health score and category breakdowns
Boardroom — Visual dashboards across all categories
Category Reports — Detailed views of each assessment area

Scope and Scoring

The reason sections like Operations - Cost Management map to specific boardroom categories like Operational Excellence is that the platform uses a multi-layer mapping engine to connect assessment responses to intelligence dimensions. This ensures every assessment response contributes to the right part of your organisation's profile.

---

4. Best Practices

Assess collaboratively. Gather input from multiple team members before finalising responses.

Be honest. The platform is designed to identify improvement areas. Inflated scores reduce the value of your intelligence.

Add evidence. Notes and supporting evidence make your assessment more actionable and provide context for future reviews.

Assess regularly. Quarterly assessments provide trend data that is more valuable than any single assessment.

---

5. Common Mistakes

Rushing through questions. Quick assessments miss nuance. Take 10–15 minutes minimum.

Rating inconsistently. Use the full 1–5 scale. Scoring everything 3 or 4 reduces differentiation.

Assessing alone. Single-perspective assessments miss blind spots. Involve cross-functional input.

Not revisiting assessments. An assessment is a point-in-time view. Regular updates track real progress.

---

6. Troubleshooting

Cannot find the right assessment: Check with your administrator. They control which assessment templates are available.

Assessment progress lost: Partial responses are saved automatically. Return to the assessment from the Executive Homepage.

Results do not appear: Verify the assessment was submitted. Unsubmitted assessments do not generate results.

Score seems incorrect: Review your individual responses. A single low score can pull down a category average.

---

7. Related Features

Administrator Guide — creating and managing assessment templates.
Executive Guide — interpreting assessment results at the leadership level.
First 30 Minutes Guide — completing your first assessment.
Boardroom Guide — visual reporting of assessment data.
APPEXi Guide — AI analysis of assessment patterns.

---

8. Frequently Asked Questions

How long does an assessment take?
Most assessments take 10–15 minutes. Comprehensive assessments may take 20–30 minutes.

Can I change my responses after submission?
Contact your administrator. Assessments can be retaken, which creates a new set of responses.

What happens if I do not submit?
Partial responses are saved but not analysed. Only submitted assessments contribute to your organisation's intelligence.

How often should we assess?
Quarterly is recommended for tracking progress. Monthly assessments provide finer-grained trend data.

Download PDF
Use the Download PDF button at the top of this page to save this guide for offline reference.