

Training Guide – How to run an ExCurS Assessment

To understand one's own tasks in the ExCurS Assessment ([GOA-WorkBench® portal](#)) it is helpful to understand the roles of different persons involved in the ExCurS assessment.

The **Project Owner** is the license holder, who requested the license for one or more assessments of one or different assessment types (Business Areas)

The **ATL (Assessment Team Leader)** is responsible to invite other assessors to participate in the assessment.

After all assessors' feedback has been collected, the individual assessment results must be consolidated. This is also task of the ATL.

The **assessors** are the ones who run the assessment by scoring questions and adding notes (evidences or suggestions for improvement). They can produce reports of their own assessment data, but they do not have access to the consolidated Team results. The ATL can also act as an assessor and do own scoring.

All involved persons will receive once a "**welcome email**" with their Log-in access data, when their email addresses have been registered for the first time in the system.

The assessors additionally receive by email the invitation to participate at the specific assessment with the direct link to the assessment.

Access to the assessment

- Training need assessment: that uses a simplified approach to self-assessment for non- experienced SMEs (aprx. 20 questions)
- fully EFQM based 'Easy Assessment' which offer the complete assessment (aprx 108 questions)

Access to the tools:

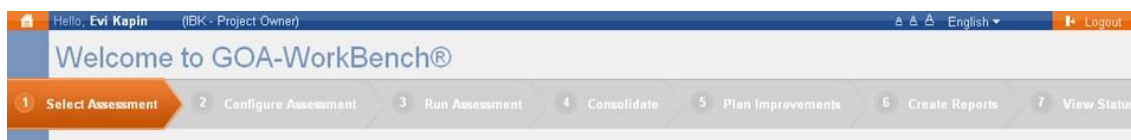
Open URL <https://goa-test.ibk-software.eu/>

Registration is needed in order to obtain the access code.

Interface Layout

The dark blue bar at the top of the windows shows

- your Name and User Role,
- the possibility to change text size and **Interface language** (the language applies only to the interface, not to the questionnaire)
- the Logout/company switch (orange part in the right top corner)



The navigation bar:

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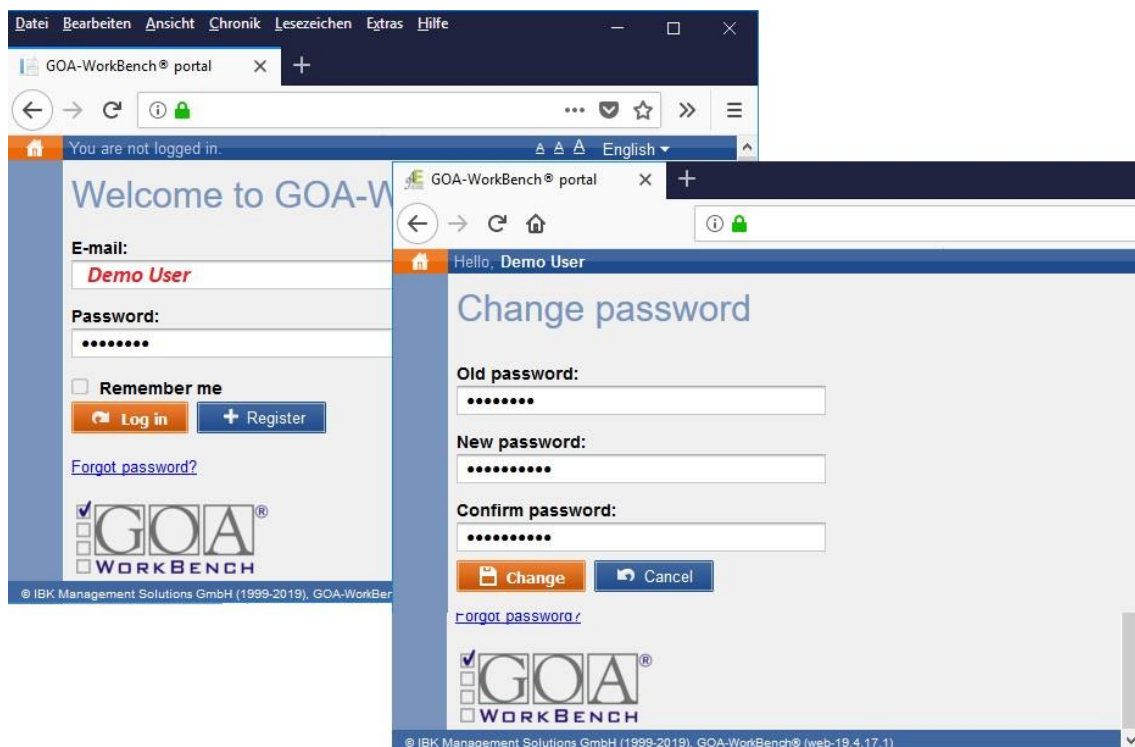
Blue coloured segments represent available steps, the current step you are working on is indicated by the colour orange.

Grey colour in the navigation bar indicates that still some data must be entered in the previous steps before this step becomes available.



Log in

When you enter the GOA-WorkBench for the first time (with your preliminary password), you will see the password setting window where you will be asked to enter a permanent password.

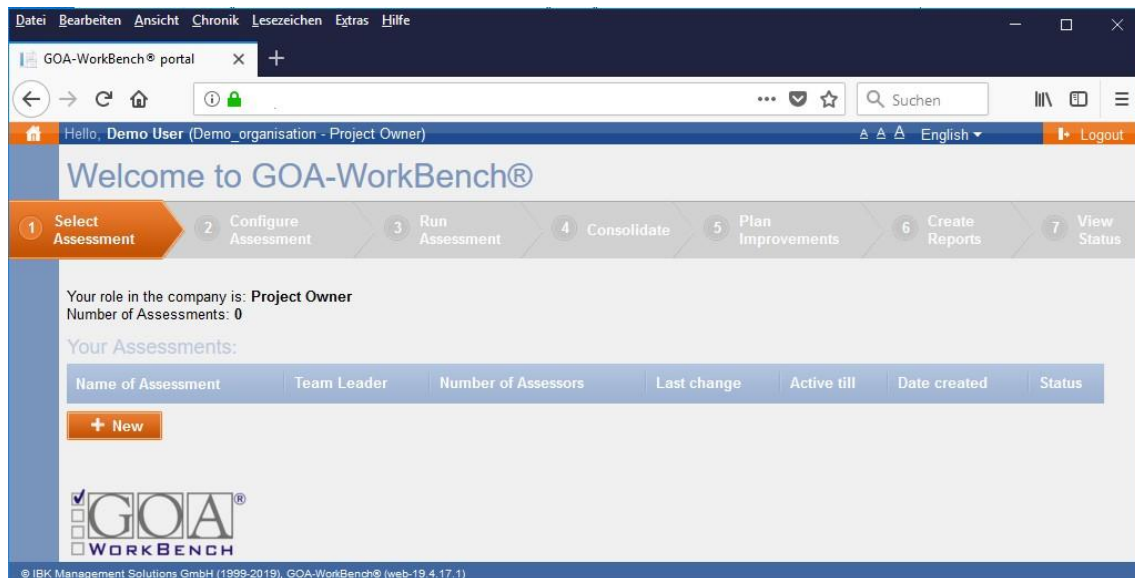


If forgotten, the password can be reset from the GOA Login page at any time. The required link to set a new password will be sent automatically to your email address.

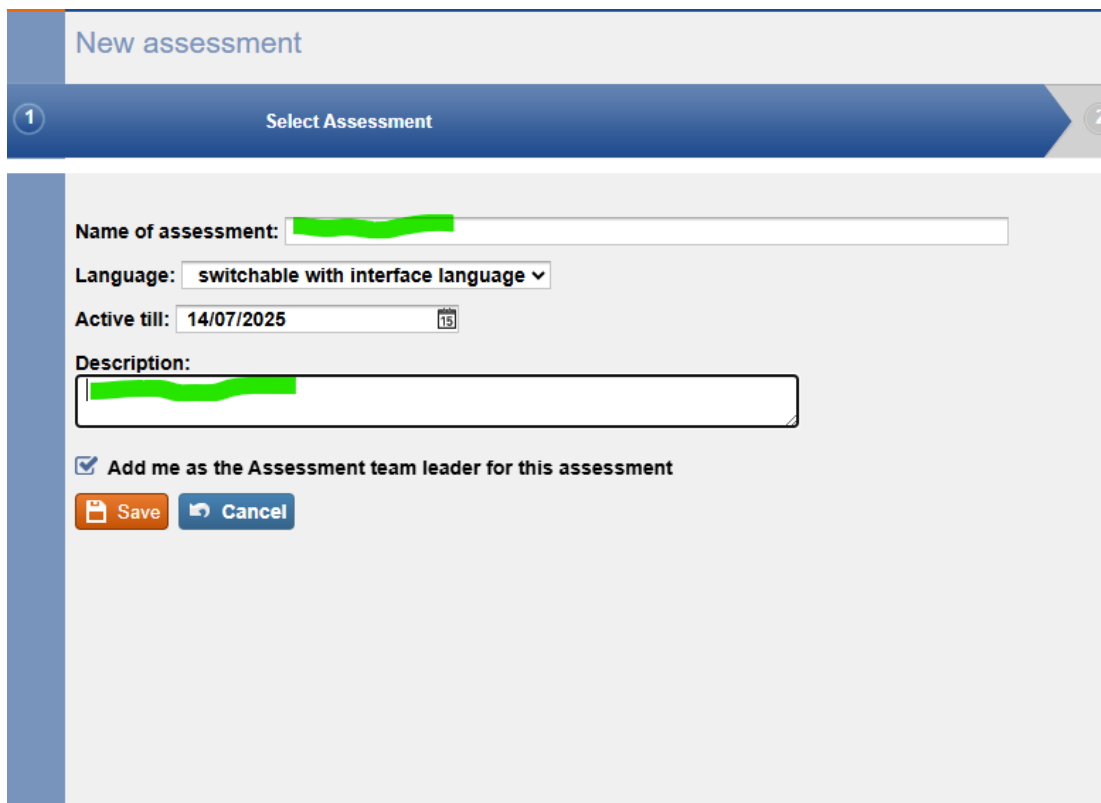
Create a new assessment (Project Owner)

After your successful Log-in, you will see the list of already created assessments (as a repeated user), and the button **New** to create a new assessment.

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Fill in the assessment name and description in the fields below and click "save".



Assign Assessors

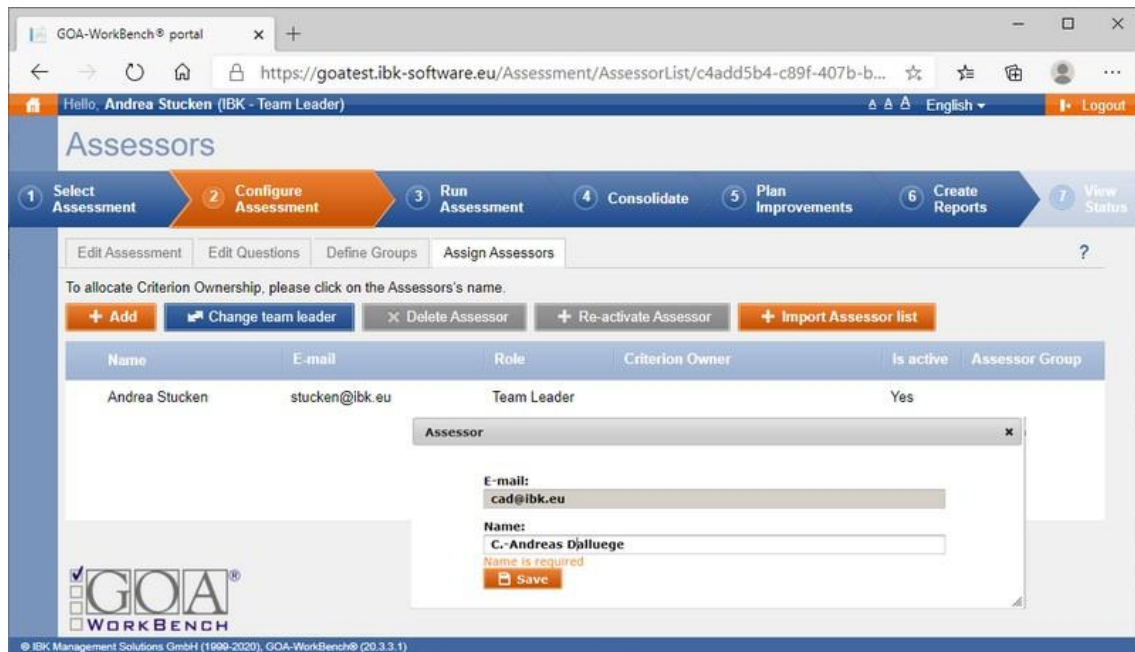
All participating assessors must be registered in GOA to be able to log-in and work repeatedly on their assessment. So it is necessary that you identify all persons by name and email address. Both will be used by the system to send out invitation emails with the link to your assessment.

Add Assessors

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To build your assessment team, you first invite assessors via the „Assign assessors" tab and the „+Add" button.



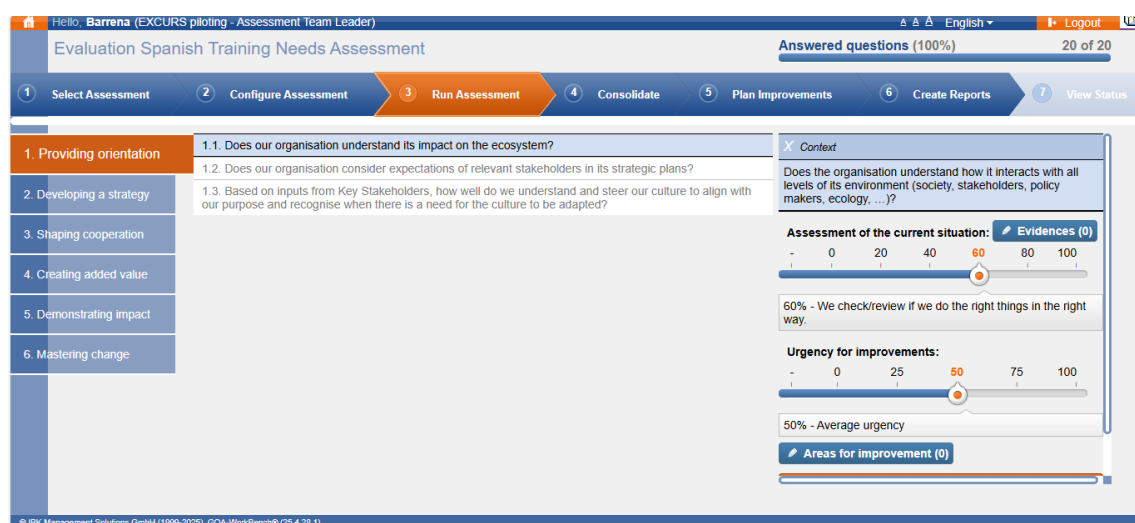
Add the names and email addresses of the colleagues who will take the assessment with you.

All defined assessors will receive an automatic generated email with the invitation/link to the ExCurS Assessment.

Once the Assessor is logged in, it is time to run the assessment.

Assessor Task

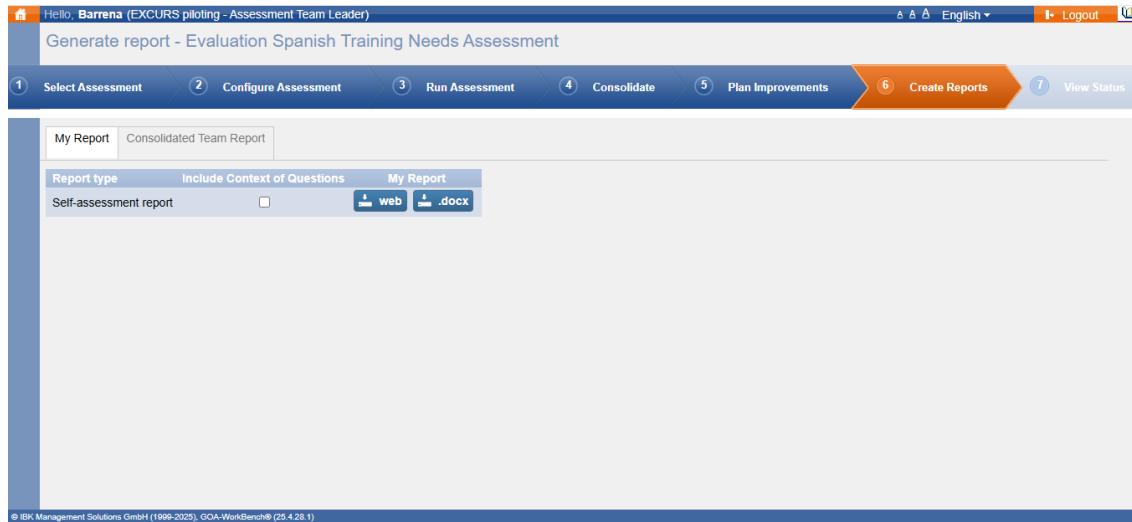
Complete the self-assessment under "Run Assessment" (for each question read the question and context and give an answer under "assessment of the current situation" and "urgency for improvements" by reading the question on the right and the context on the left.



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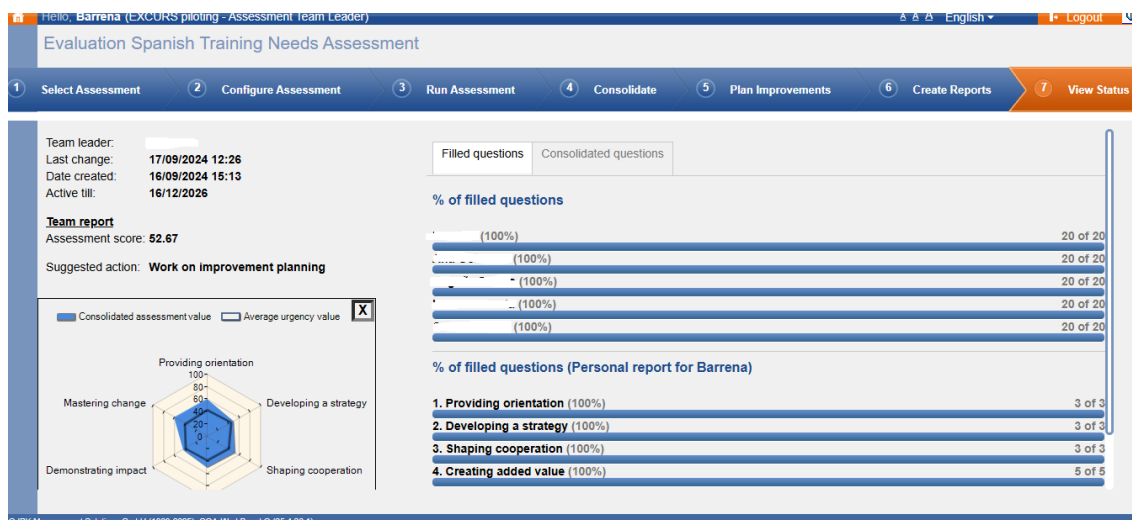
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Assessors can obtain their individual report once they complete the questionnaire, clicking in section **“6 Create Report”** and download the generated Self Assessment Report.

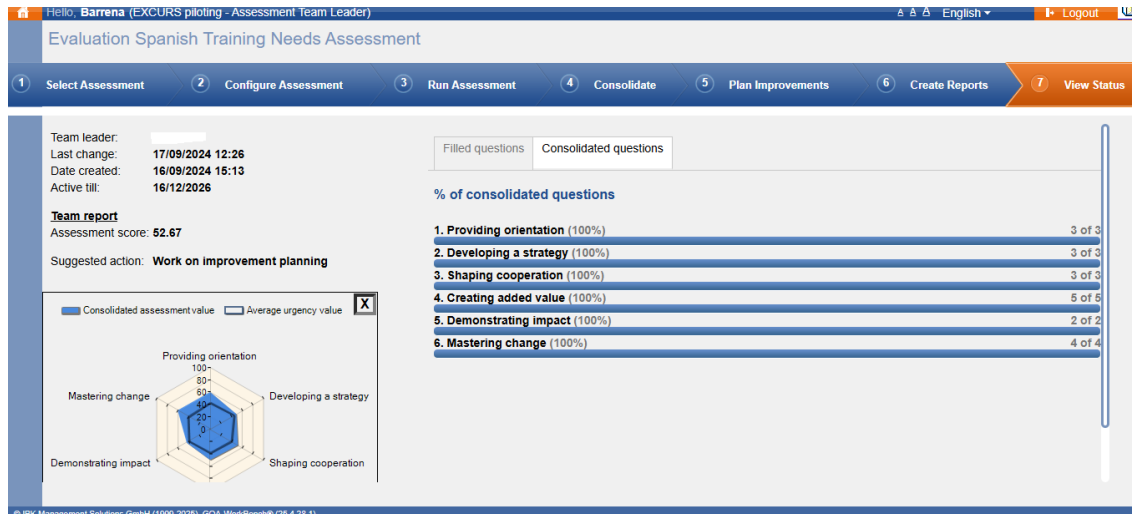


After all assessors' feedback has been collected, the individual assessment results must be consolidated. This is also task of the ATL.

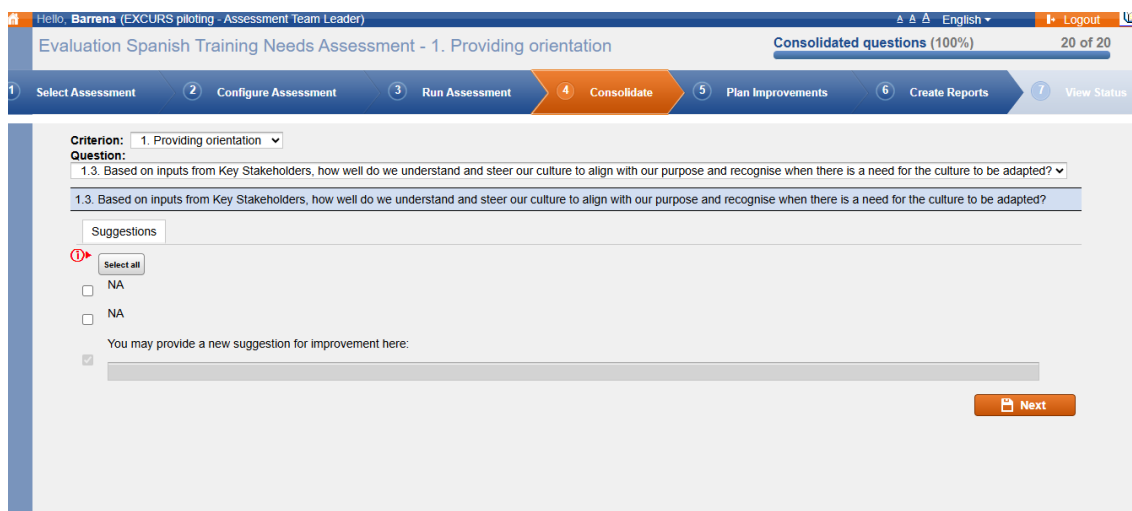
The status of the Assessment can be checked by the ATL in the section **“View Status”**



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Once the % of consolidated questions reaches 100%, the report can be generated. Click section **“4 Consolidate”** and follow the indications, marking the suggestions offered by the assessors and then press **“Next”**



Once all suggestions are gathered, the consolidated report is generated in section **“6 Create Report” / Consolidated team report**, where can be download with the results of the Assessment and the list of recommended ExCURS Training Modules.

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Hello, Barrena (EXCURS piloting - Assessment Team Leader) English Logout

Generate report - Evaluation Spanish Training Needs Assessment

1 Select Assessment 2 Configure Assessment 3 Run Assessment 4 Consolidate 5 Plan Improvements 6 Create Reports 7 View Status

My Report Consolidated Team Report

Report type	Consolidated Team Report
Self-assessment report	.docx
Areas for improvement - not (yet) consolidated	.xlsx
List of improvement suggestions to prioritise	.xlsx
List of improvement projects	.xlsx
Group Scoring Report	.xlsx

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Example of downloaded Training Assessment Report with the recommended training modules based on the results of the questionnaire:



Training Needs Assessment

Team report

26/01/2026 18:51

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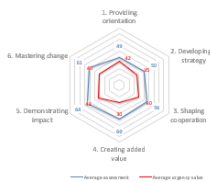
Name of assessment:

Date created: 30/07/2025 13:13

Active till: 31/12/2025

Team leader:

Assessment score: 56.67%



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Training recommendation

1. Providing orientation

Based on the calculated score, the following training modules should be considered:

Introduction training available in language Croatian, English, German, Romanian, Spanish

- Brainstorming
- Collective leadership
- Communication and relationships
- Manager as a Coach

Management tools and techniques you might also consider:

- Diagnosing Alliance Challenge
- Leadership

2. Developing a strategy

Based on the calculated score, the following training modules should be considered:

Introduction training available in language Croatian, English, German, Romanian, Spanish

- KPI Analysis
- Process identification and mapping
- Benchmarking

Introduction training available in English

- 360 feedback
- Balanced Scorecard
- GROW Model
- Strategy/Value Matrix
- Scenario Management
- SWOT Analysis
- Target setting

Management tools and techniques you might also consider:

- Strategy Forecast/trends

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