

# | Birkman Managed Services

## ■ Birkman Managed Services

Birkman now offers client organizations the additional service of managing the administration of Birkman within their organization. We call this new service “Managed Services.”

Organizations using our **Managed Services** program will provide the required information for a Birkman project using an agreed upon format/form, etc. Birkman International will then issue Birkman Questionnaire links, send reminder emails, generate and email required reports.

This service is particularly helpful for organizations that do not have the required administration staff to effectively manage multiple ongoing projects. An example process is described below. Specific details are determined at time of contracting the service.

## ■ Managed Services Steps

1. A client organization contact person provides Birkman with all required information for a project. Required information can include: name of project, main contact person for project, list of participants, email addresses for all participants, date Questionnaire links should be sent, date Birkman reports are needed, payment information/approach, etc. Final requirements are determined at time of contracting Managed Services.
2. Birkman Managed Services creates the project and sends unique Q links on the requested date.
  - a. If the participant has not completed the Birkman Questionnaire, a general Birkman email will be sent to the participant with a unique Questionnaire link included.
  - b. If the participant has already completed the Birkman Questionnaire, there is no need for the participant to retake the assessment.

3. Completion Reminder Email(s) is sent.

a. Birkman Managed Services will send one completion reminder email (if necessary) to ensure all participants complete the Q within the stated time period.

b. The agreement to send additional completion reminder emails may be contracted for during contract negotiations.

4. On the required date, requested reports will be generated and emailed to participants and/or the main contact person as requested. It is possible to arrange to have individual reports available at time of completion of the Q.

## Notes

- If the client organization has employees who access our BirkmanDirect system, Birkman results will be accessible in that database.
- All Managed Services activities require processing time and requests must be made within the agreed upon timeframe.
- Billing structure and payment procedures are determined at time of contract.
- As part of a Managed Services Agreement, Birkman will NOT be responsible for:
  - Any hard (paper) copies of reports. Participants, facilitators and team leaders will access all Birkman reports electronically.
  - Any additional outreach to respondents to ensure the timely completion of the Birkman Questionnaire other than the emails stated above.
  - Last minute generation of group reports based on missed deadlines, etc.
  - Identifying / correcting incorrect information provided on the initial request. It is the client organization's responsibility to ensure the accuracy of the information provided to Birkman



## About Birkman

Birkman International is a behavioral and occupational assessment company headquartered in Houston, Texas with an extensive global reach. The company began assessing personality through a proprietary methodology founded by innovative organizational psychologist Dr. Roger W. Birkman in 1951.

The Birkman Method remains a preferred instrument to better understand interpersonal dynamics and achieve higher performance through positive psychology. It is used widely in the fields of career coaching, leadership development, human resources management, and organizational design today.