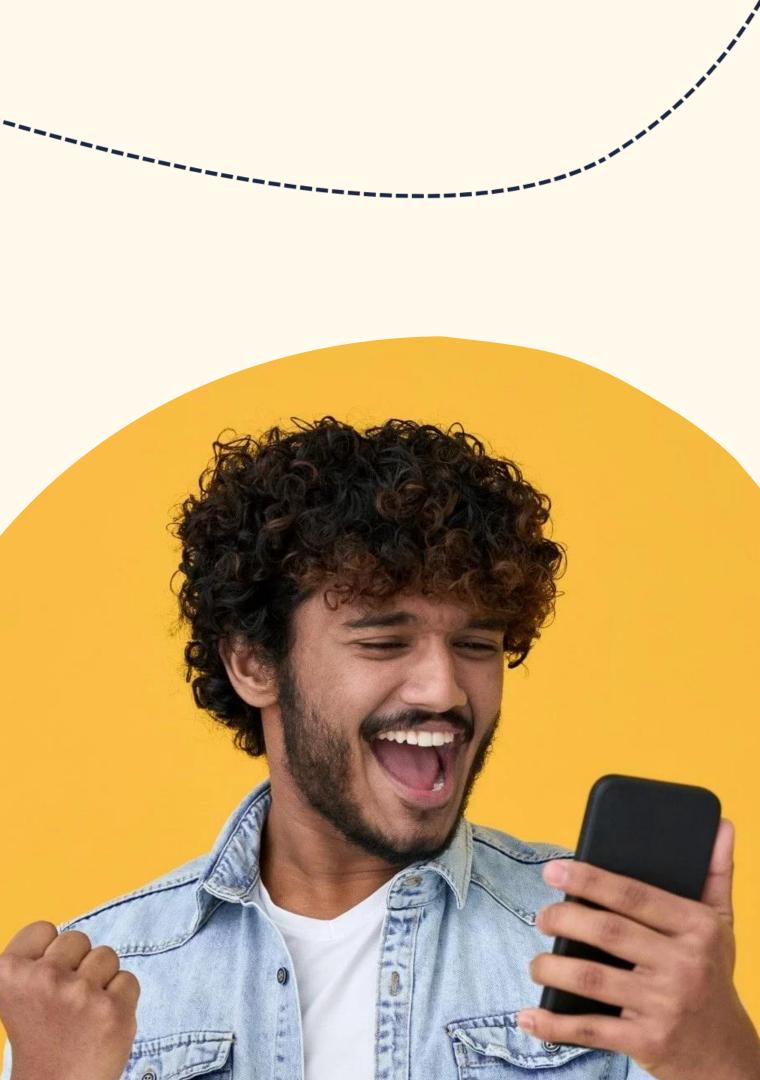
# © Effectory **Product Roduct Roduce**

Q2 2024 – Q4 2025

Don't miss out on any future updates. Sign up to our community newsletter here!







## > Our Product vision

- > What we've done
- > What's coming

# **Our Product vision**

Empowering organizations with intelligent feedback solutions.

Our platform empowers organizations to not only listen to their employees but also to learn from their feedback and lead based on gathered insights.

Shifts in HR focus from satisfaction to engagement and from engagement to a broader **employee lifecycle** shape our product and platform decisions.

Future developments will focus on **Intelligence**, adding predictive elements, and **Automation**, building smart automations for effortless usage.

## Our platform should be:

- Effortless
- Stable & safe
- Reliable

## Surveying should be a no-brainer!

## **Our Product vision**

# World-class data security

Effectory takes its responsibility of keeping your organization's and employees' confidential information secure very seriously. How?

- We are fully GDPR compliant.
- We support and encourage the use of secure practices, such as Single Sign-On and Multi-Factor Authentication.
- All our employees must pass a mandatory annual assessment on information security and privacy awareness.



### **Fully ISO certified since 2015**

We have been fully **ISO-certified since 2015**. Now we are proud to announce that, as of April 2023, we are one of the first organizations in Europe to have transitioned to the **ISO 27001:2022 standard**!



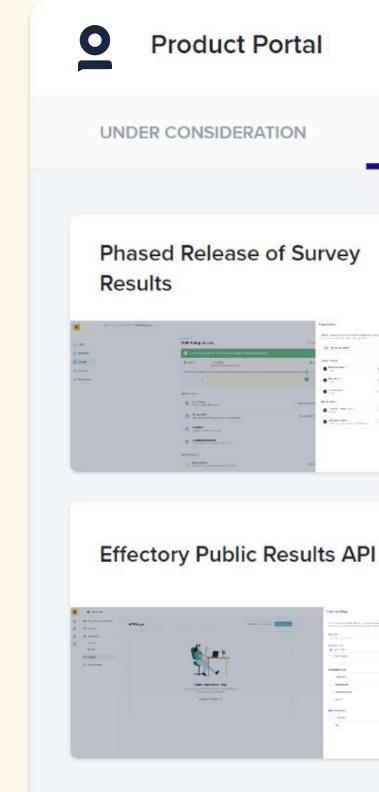


## **Our Product vision**

## **Product portal**

Share your feedback with us directly via our interactive Product portal!

- Help us define our roadmap by letting us know which features are most important to you.
- Explore in detail the platform developments we currently have planned.
- Learn everything about our latest feature releases.





#### PLANNED

LAUNCHED

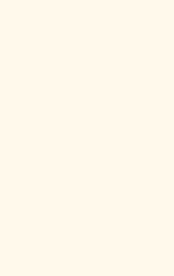
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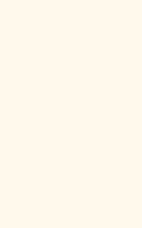


## What we've done

See what's been rolled out to all eligible users.













# New HRIS integrations

My Effectory now offers native integrations with over 20 HR Information Systems!

You can configure one in just a few easy steps directly from our Integrations Marketplace in **Organization > Integrations**.

- Set up your new integration directly in My Effectory with few easy steps.
- Instructions manual and step-by-step guide.
- Never have to update your employee data manually again!

## We support the following **HRIS integrations:**

Personi Workda SAP suc Factoric

**AFAS** BambooHR Kenjo HeavenHR

HiBob Cezanne HR Sage HR Humaans

Is your HRIS not listed here? Get in touch with your CSM to explore possibilities!



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Eurécia Officient Charlie HRworks

Breathe HR **AlexisHR** Rippling Sapling

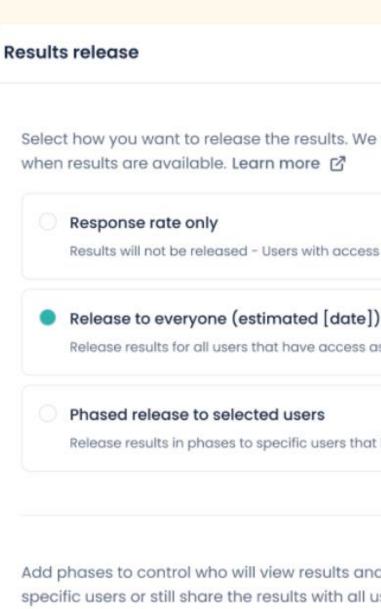
**Nmbrs** PeopleHR Lucca HaileyHR **IRIS** Cascade

#### **Coordinators & rights**

## **Results release** settings

Tailor the sharing of survey results precisely to your organization's needs, ensuring that the relevant insights reach the right people at the best time.

- Customize when and how your survey results are shared, if at all.
- Phased release options for targeted sharing.
- Automated notifications ensure stakeholders are always in the loop.



Re	eas	e P	has	es	





#### **Release: Q2 2024**

×

Select how you want to release the results. We will use e-mail notifications to let users know

Results will not be released - Users with access can view the response rate

Release results for all users that have access as soon as they are available

Release results in phases to specific users that have access

Add phases to control who will view results and when. You can add phases to share results with specific users or still share the results with all users and participants on a date of your choice.

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esults access	Мау	2023	•				< >	:
	м	т	W	т	F	S	S	
								:
an view their results in My Fee								•
		10	11	12	13	14	15	
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	

## **One-pager**

We're making it easier than ever to share your survey results with your entire organization!

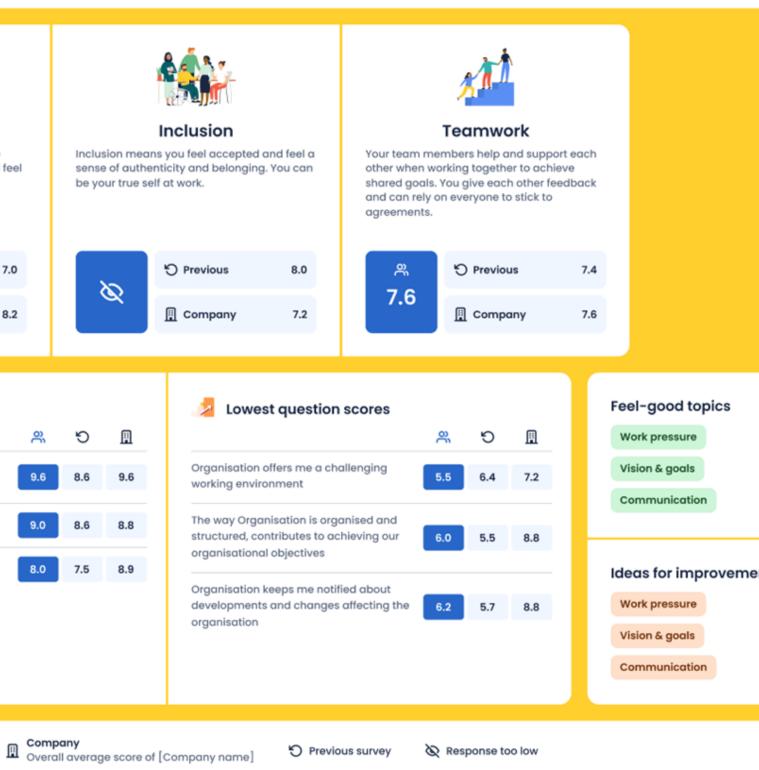
E-mail, print, or hang our new one-pager to provide your audience with all the most relevant insights. This includes:

- Scores on themes.
- Highest and lowest scoring questions.
- Feel good topics.
- Ideas for improvement.
- And much more!

Survey Group na		
Engagement re inspired and er	<b>Ingagement</b> afers to how much yo nergized by your work in the organization.	
م 8.0	Previous Company	7.0
Mighe	st question scor	es م
During a team fair chance to s	meeting, everyone h speak up	as a 9.6
Our team trust	s one another	9.0
I know how to c	carry out my tasks	8.0



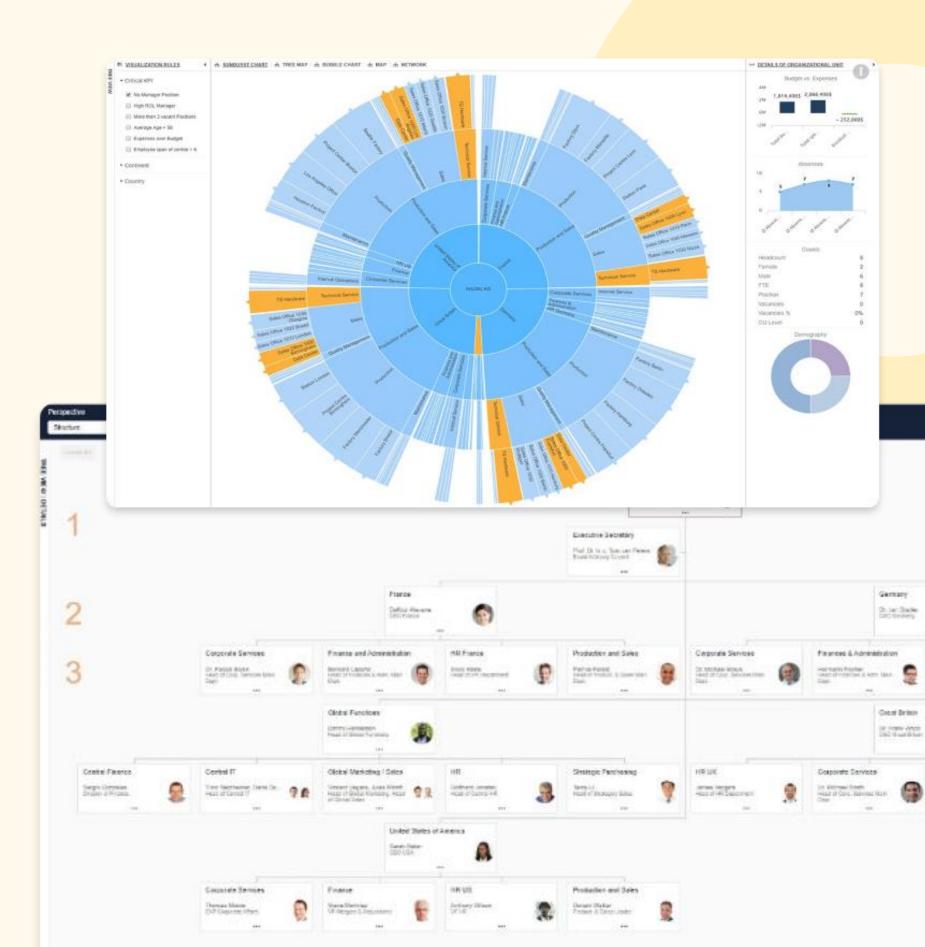
#### **Release: Q2 2024**



## **Org.mapper**

Effortlessly create accurate reporting structures and fix data inconsistencies early on with org.mapper. Less manual effort will save you time and drastically reduce errors and inconsistencies.

- Visualize organizational hierarchies, merge teams, and ensure data accuracy.
- Set up reporting structures directly from your HRIS.
- Integrate various data sources, whether it's different HRIS systems or business unit locations.
- Enhance security by eliminating the need for local Excel file exchanges via email.



#### **Participant management**

#### **Release: Q2 2024**

## **Advanced analytics**

Transform your data into actionable insights and identify the most effective strategies you can employ to benefit your organization.

- Correlation visualization: Uncover the connections among questions.
- Key driver analysis: Pinpoint which themes serve as the most influential predictors of engagement, employer excellence, eNPS, etc.



#### **Release: Q2 2024**

 Group differences: Categorize respondents based on specific scores and analyze their impact on other work-related topics.

## **Correlations report**

Gain deeper insights with our new Excel export!

- Easily access all correlation analyses in a consistent Excel format.
- View correlations for each theme and related questions organized across multiple tabs
- Questions are sorted from strongest to weakest correlation, ensuring a clear view of key relationships.



	ing my work gives me energy	enjoy doing my work / tasks	skills and abilities fit in well with my job	decide how I carry out my work	know what results are expected of me at work	ortant information is readily accessible for m	lam provided with good work resources (tools, devices, software, materials, etc.) to do my job well	I have good opportunities to develop myself professionally and personally	Nheni do a good jab, i receive praise and ecognition	be myself around everyone I work with	In my team we collaborate well	My team understands what needs to be done to contribute to the success of Effectory	My team continuously develops good ideas for Improvement	n my team, we have taken action to improve on wr feedback results	e confidence in my team lead	team lead motivates me in my work	My team lead encourages my development	regularly given useful performance feedbac	am teod supports ma in gchleving mv
	Doinç	lenjo	My 8	Ican	Ikno	admi	lam pro devices, well	Ihav profe	Whe	Icanbe	(m m	My te cont	My te impr	ln my our fe	thav	Myte	Myte	am	ALV LO
g my work gives me energy	1	0,89	0,40	0,29	0,20	0,08	0,16	0,33	0,30	0,23	0,32	0,36	0,27	0,20	0,40	0,41	0,36	0,31	
y doing my work / tasks	0,69		0,51	0,21	0,11	0,10	0,18	0,27	0,16	0,15	0,26	0,26	0,24	0,18	0,33	0,37	0,28	0,28	4
cills and abilities fit in well with my job	0,40	0,51	l.	0,24	0,14	0,14	-0,02	0,18	0,10	0,15	0,27	0,16	0,20	0,14	0,26	0,22	0,13	0,24	
decide how I carry out my work	0,29	0,21	0,24	4	0,35	0,22	0,21	0,16	0,12	0,21	0,16	0,12	0,14	0,14	0,30	0,23	0,21	0,14	
w what results are expected of me at work	0,20	0,11	0,14	0,35	T,	0,32	0,12	0,19	0,31	0,23	0,23	0,43	0,30	0,30	0,39	0,30	0,29	0,32	:
rtant information is readily accessible for me	0,08	0,10	6,14	0,22	0,32	a,	0,42	0,22	0,30	0,09	0,23	0,33	0,21	0,15	0,33	0,27	0,26	0,32	£
provided with good work resources (tools, .es, software, materials, etc.) to do my job well	0,16	0,18	-0,02	0,21	0,12	0,42	Ţ	0,31	0,32	0,16	0,11	0,25	0,13	0,19	0,38	0,25	0,31	0,29	
e good opportunities to develop myself	208	93	1000	8779	1	and a		111	(संहर्ण)		370	27.0	0.072		0.383.8	8177.0		1990	
ssionally and personally	0,33	0,27	0,18	0,16	0,19	0,22	0,31	3	0,48	0,24	0,20	0,27	0,29	0,23	0,37	0,29	0,41	0,28	i
n I do a good job, I receive praise and recognition	0,30	0,16	0,10	0,12	0,31	0,30	0,32	0,48	— a.	0,20	0,27	0,35	0,27	0,29	0,49	0,55	0,47	0,53	ŧ
be myself around everyone I work with	0,23	0,15	0,15	0,21	0,23	0,09	0,16	0,24	0,20	E.	0,30	0,26	0,16	0,22	0,27	0,17	0,24	0,16	1
r team we collaborate well	0,32	0,26	0,27	0,16	0,23	0,23	0,11	0,20	0,27	0,30	3	0,53	0,58	0,44	0,40	0,35	0,39	0,34	
am understands what needs to be done to ibute to the success of Effectory	0,36	0,26	0,16	0,12	0,43	0,33	0,25	0,27	0,35	0,26	0,53	ī,	0,58	0,49	0,45	0,37	0,43	0,36	
am continuously develops good ideas for	0.07	0.24	0.00		0.20	0.00	010	0.00	0.02	010	0.50	0.50	6	0.50	0.00	0.00	0.97	0.07	
ovement / team, we have taken action to improve on our	0,27	0,24	0,20	0,14	0,30	0,21	0,13	0,29	0,27	0,16	0,58	0,58		0,50	0,39	0,32	0,37	0,27	1-
back results	0,20	0,18	0,14	0,14	0,30	0,15	0,19	0,23	0,29	0,22	0,44	0,49	0,50	1	0,41	0,42	0,33	0,34	
e confidence in my team lead	0,40	0,33	0,26	0,30	0,39	0,33	0.38	0,37	0,49	0,27	0,40	0,45	0,39	0,41	1	0,73	0,62	0,56	-
am lead motivates me in my work	0,41	0,37	0,22	0,23	0,30	0,27	0,25	0,29	0,55	0,17	0,35	0,37	0,32		0,73	1	0,63	0,64	
am lead encourages my development	0,36	0,28	0,13	0,21	0,29	0,26	0,31	0,41	0,47	0,24	0,39	0,43	0,37	0,33	0,62	0,63	1,	0,57	
ran Josh zhan waful na farmona fa albank	0.22	0.00	0.24	014	0.92	0.30	0.90	0.38	0.53	016	0.24	0.26	0.27	0.24	0.50	0.84	0.57		
regularly given useful performance feedback	0,31	0,28	0,24	0,14	0,32	0,32	0,29	0,28	0,53	0,16	0,34	0,36	0,27	0,34	0,56	0,64	0,57		
am lead supports me in achieving my	0,41	0.56	0.22	0,23	0,39	0,29	0,31	0.96	0,44	0,29	0,41	0,44	0,32	0,38	0,74	0,73	0,65	0,67	
am lead leads changes in an exemplary	0,44	0,36	0,27	0,23	0,38	0,28	0,31	0,31	0,44	0,28	U/41	0,44	0,32	0,30	0,74	0,75	0,05	0,07	
ner	0,31	0,27	0,23	0,29	0,38	0,33	0,29	0,24	0,39	0,27	0,33	0,37	0,40	0,31	0,72	0,64	0,49	0,55	
am lead sets a good example for my team	0,34	0,26	0,23	0,25	0,30	0,33	0,25	0,35	0,35	0,27	0,33	0,37	0,40	0,37	0,72	0,04	0,49	0,66	
proud to work at Effectory	0,34	0,26	0,40	0,27	0,30	0,37	0,38	0,35	0,47	0,22	0,35	0,38	0,30	0,37	0,29	0,30	0,55	0,00	
that I fit in at Effectory	0,45	0,46			0,19					0,18			0,20			0,30	0,26	0,35	-
			0,34	0,10		0,22	0,19	0,28	0,27		0,19	0,28		0,16	0,31				
tify with the culture of Effectory	0,26	0,23	0,19	0,01	0,32	0,22	0,20	0,24	0,26	0,35	0,18	0,28	0,11	0,21	0,29	0,15	0,14	0,25	/

#### **Release: Q3 2024**

## **Your Feedback**

The new personal portal integrates My Feedback into My Effectory, enabling survey participants to view and compare their scores effortlessly.

- The new design makes feedback accessible and engaging, helping employees quickly act on insights and keep feedback relevant over time.
- Each question type displays individual and comparison scores uniquely, with some showing answer distributions for deeper insights.
- Choose which teams or benchmarks you want to compare your answers to, and see how your own team compares to the rest of the organization.

All the o	company wide surveys you've been invited to provide Your Feedback			
	<b>vey is open, not filled in yet, shorter than a week</b> agement	<b>(</b> ) Cit	oses today at 15:00	Participate
	<b>vey is open, not filled in yet, longer than a week</b> <sup>agement</sup>	<b>()</b> 15	days left	Rearticipate
E Back Feam Chec Team Development  Fr Your answers			🥑 Clo:	sed on 22 Aug, 2023
Q Search			Chang	ge comparison   ~
Topic / Theme		Your Answer	Group Comparison	
l enjoy doing my work / to	asks	Strongly Agree		
I feel strongly supported growth within the organiz	by my direct supervisor in my professional development and ation.	Agree		J
I am proud to work for Or	ganisation	Agree		IL
I feel that I fit in at Organi	sation	Strongly Agree		II.
Topic / Theme		Your Answer	Group Comparison	
l enjoy taking on new or a	lifferent responsibilities	Agree		
How many bananas can	you eat every day?	<ul> <li>I-2 banana's</li> <li>Other, namely</li> <li>I don't have a set number, but I usually</li> </ul>	1-2 bananas 3-4 bananas	33%
		grab a banana whenever I feel hungry between meals.	earn more	55%

### **Your Feedback**

#### **Release: Q4 2024**

#### **Your Feedback**

## Leadership Role Compass

Our **Leadership Role Compass** tool provides managers with comprehensive insights aimed at fostering personal development.

- It helps managers improve leadership through self-reflection, alignment with team expectations, and open communication.
- Emphasizes leadership within specific contexts, focuses on manager-team dynamics, and adapts to diverse environments.
- Offers a space for managers to develop skills that fit their specific environment, leadership philosophy, and team relationships.



#### **Release: Q4 2024**

#### **The Leadership Role Compass**

 By Armin Trost

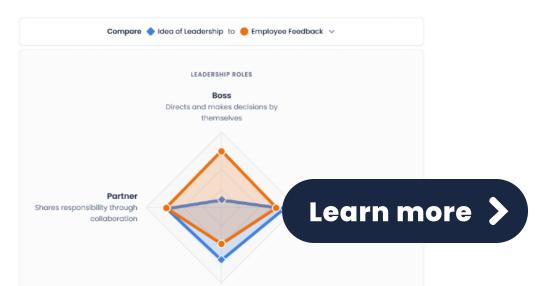
Find out what kind of leader you want to be. Compare how your leadership goals match with your current behaviors and what your team needs from you.

About Questions for you Questions for your team	
The Leadership Role Compass is a 360-degree survey developed by HR industry expert Prof. Armin Trost and brought to you by Effectory! It allows you to understand your role as a manager in relation to the expectations of your employees. By identifying whether you exhibit traits of a Boss, Enabler, Coach, or Partner, you can improve communication and alignment with your team and respond more effectively to their needs.	
This survey is for you if	
<ul> <li>You manage a team of 5 or more employees</li> </ul>	
✓ You want to promote effective leadership	
<ul> <li>You want to improve the manager-employee relationship</li> </ul>	
<ul> <li>You want to gain a comprehensive view of your leadership from both your and your team's perspective</li> </ul>	
You will gain	
✓ A unique role profile of your team's context, rather than just descently a second profile of your team's context.	
Questions Feedback circle Settings <b>Results</b>	ଡ଼ି ହ
ll Results (目 Answers 常 Guide	-

#### Find your leadership role

Compare how your idea of leadership matches your current behaviors and what your team needs from you.

Report created on 22 August, 2024



# Survey Planner Template

Easily manage your survey timelines with our new Survey Planner Template. It provides a structured overview of key phases and milestones, helping you stay on track from setup to results.

- Clear timeline covering all standard sessions with your CSM or PSC.
- Key milestones divided into four phases.
- Helpful notes and direct links to our Help Center for each step.
- Auto-calculated dates based on your survey start and end date.

Want to get started? Reach out to your CSM to start using the template!

	Survey Timeline							Su
	Activity	Date	Week 1	Week 2	Week 3	Week 4	Week 5	We
	Kick-off session							
ç	Configure project settings		Legend	<u>l:</u>				
Setup & preparation	Technical setup – Confirm system requirements		• Sess	ions with	your CSM	PSC		
ebai	Organizational structure session				nunication		tion)	
& br	Import employee data & define group structure(s)		$\subseteq$					
tup	Question library session (optional)							
Se	Determine survey questions							
-	Translations of custom questions (optional)							
	Announcement to managers							
	Announcement to employees							
	Platform onboarding session							
tion	Create survey							
survey creation	Link group coordinators							
veyo	Group linking – Set up internal benchmarks							
	Second announcement to managers & employees							
۵	Review survey with your CSM (optional)							
	Finalize & plan survey							
	Survey setup freeze – No more changes allowed 12h before start							
D	Survey start	ENTER DATE						
monitoring	Survey invitations sent to participants		-					
onit	Invitation for managers to follow survey response		Entory		start and	and data	a in	
	Configure release of survey results		· · · ·	,	mplate wi			
h	Survey reminder at 50% of duration				ns automa			
Survey launch &	Survey reminder at 90% of duration		them a	s needed	to fit your	timeline!		
Lve)	Extend survey until 8h before end (optional)							
Su	Survey end	ENTER DATE						
	Thank you e-mail to managers & employees							
	Results available							
ŝ	Results presentation (optional)							
& results	Invitation for managers to explore survey results							
Ş Ş	Invitation for participants to explore personal and own team scores							
	Extra workshops (optional)							
-	Success review & evaluation							

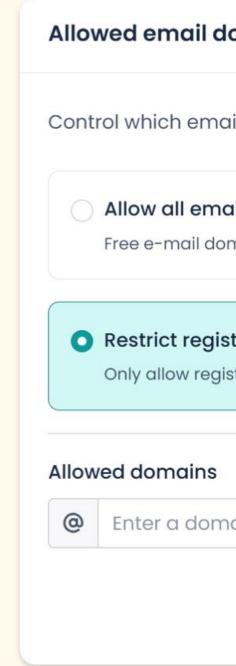
### **User Experience**

#### **Release: Q1 2025**

## Allowed e-mail domain settings

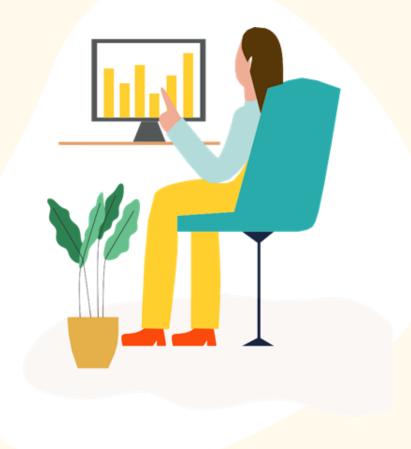
Keep coordinator access secure by controlling which email domains can be used in My Effectory. This feature helps you ensure that **only** trusted, company-approved email addresses are used when assigning coordinators.

- Only approved domains can be used when linking new coordinators.
- Personal email domains like Gmail or Hotmail are blocked by default.
- Create a custom allowlist to define exactly which domains are permitted.
- Also applies to coordinator suggestions and automatic linking.
- Existing coordinators remain unaffected.



#### **Release: Q1 2025**

domains			×	
ail domains coordinators can use to	sign up			
<b>ail domains</b> omains like gmail.com, hotmail.com etc. are	e excluded			
stration for specific domains istration of specific email domains				
nain (e.g., effectory.com).	Cancel	1 Save		
	Learn	more		



# What's coming

Take a peak at what's on our roadmap.

**Please note:** This roadmap is intended to offer a glimpse into our future plans. All planned features and timelines may change as we adapt to new opportunities and challenges.

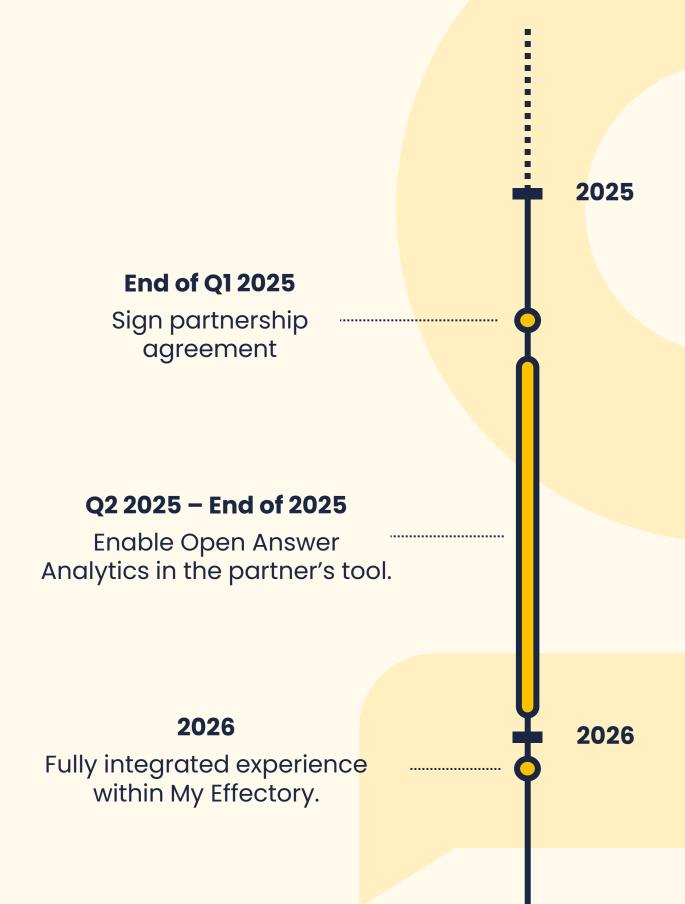
# Unlocking Deeper Insights from Open Answers

We're taking open answer analysis to the next level by integrating **advanced AI-driven tools** into our platform. To ensure the highest quality insights, we're partnering with a trusted external vendor.

### What to expect:

- **Seamless** integration with a top-tier analytics tool.
- **No data limits**—you can analyze all open answers across your surveys.
- Your data stays secure in EU data centers and won't be used for training purposes.

### Ongoing



# Significance in the Results Dashboard

We're reintroducing statistical significance to the results dashboard, so you can see whether score differences are meaningful or just random variation, helping you make more informed decisions.

- Significant differences will be marked with an asterisk (\*).
- Calculated using standard deviation, group size, and variability.
- A 95% confidence level ensures reliable insights.

Sor Th	

Significance (\*)

Significance helps identify whether the difference between two scores is meaningful and not due to random chance. A score marked with an asterisk indicates that the difference between this score and {{currentGroup}}'s score is considered significant. It reflects a real difference worth paying attention to.

CURRENT GROUP

5.5

#### **Release: Q2 2025**

ort			
Themes	~	- Compare: Gro	ups & Benchmarks
Demo Organisatie	Previous survey	Benchmark	Top 3 benchmark
5.5	6.0	* 7.7	8.0
6.1	7.5	7.9	8.2
6.6	6.9	7.8	8.0
8.8	* 6.9	7.8	8.0



# **Onboarding Task List**

Easily launch your first survey with our new onboarding task list. This step-by-step checklist guides you through the entire setup, ensuring a smooth and confident start.

- A clear checklist covering all steps of survey setup.
- Direct links to relevant platform sections or helpful information.
- Best-practice advice and in-depth guidance at every step.
- A structured overview from start to finish—so you always know what's next.

Follow the task list in the platform and launch your survey with confidence!

Activity

01

Kick



Survey preparations

#### **Release: Q2 2025**

MJ Welcome Mariëlle!

#### Let's understand your people

≔ Getting ready 🙆

#### What to expect

off session		Ensure surveys	avoid spam
	🕞 Online call	02	E Article

Meet your dedicated Customer Success Manager, discuss your first survey, and get your questions answered.

#### Make sure everyone receives their surveys without it being marked as spam, or being blocked by your firewall.

#### $\leftrightarrow$ $\rightarrow$

### 03

#### Prepare

Increase e preparing and why it

#### 0/3 Completed Organisation Invite team Q∗ → Team members can help conduct research. Import employees $\rightarrow$ Get feedback from the people you care about. Technical setup ₫ © Copy instructions and send them to your technical team. 0/2 Completed

## Communication Toolkit

Set your employee survey up for success with our all-new **Communication Toolkit!** 

This comprehensive set of resources helps you inform, engage, and motivate employees and stakeholders before, during, and after your survey, ensuring high participation and impactful results.

- Ready-to-use templates: From teaser announcements to follow-up messages, we provide clear, customizable communication materials for every stage of your survey.
- Multi-channel approach: Email, intranet, flyers, video scripts-tailor your communication strategy to fit your organization's needs.

- security.

Best-practice recommendations: Learn what works best to drive engagement and encourage honest, valuable feedback.

 Confidentiality & privacy explained: Ensure employees feel secure about sharing their opinions with clear messaging on data

 Manager & works council guidance: Equip leaders and key stakeholders with the right information to support survey participation.

## **Advanced filters**

We are enhancing our dashboard to allow for more dynamic reporting. This will help you gain a deeper understanding of your respondents' feedback.

- Refine your results with advanced filters based on group, age, gender, and more.
- Gain more actionable insights by zooming in on specific respondent groups.
- Our algorithm ensures confidentiality is guaranteed at all times.

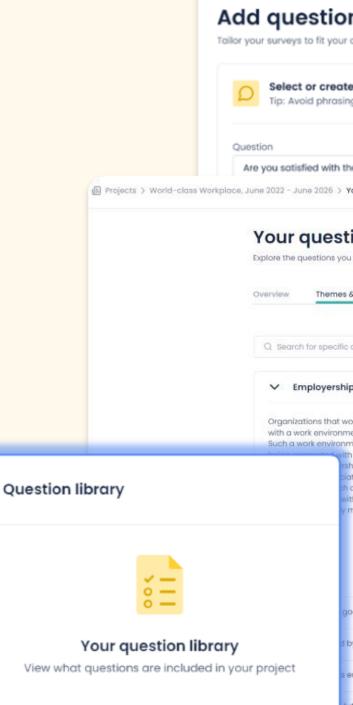
Create advanced filter			
Name		0/50	
Type a name			
<ul> <li>4 / 316 respondents selected</li> <li>A minimum of 5 respondents is required to calculate new results</li> <li>+ Filter by</li> </ul>			
comps	~	Ū	
2 Groups selected Product & Development			
AND			
Manager	~	创	

#### **Release: Q4 2025**

## **Question library**

More question management features are coming to My Effectory:

- Make each question truly yours by customizing merge fields with your organization's information.
- Create custom questions tailored to your organization's specific needs.
- Manage question translations.
- Templates enable you to customize your question library with ease.



View your library



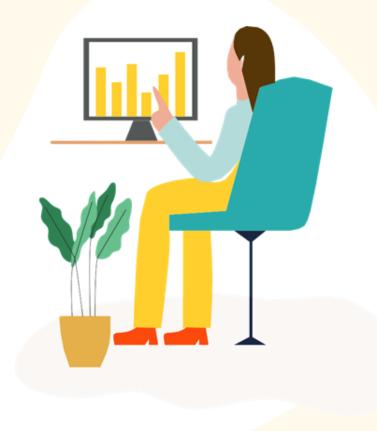
#### **Question management**

#### **Release: 2025**

ONS our context by adding additional Effectory or custom questions to	o your library	
nate a question asing your questions negatively. Learn more about how to form a	survey question	
h the COVID arrangement? > Your question library		
stion library you can ask in your surveys for this project	© Learn more about questions	
affic questions	∧ Collapse all	
A Questions at work on employership provide their employees onment where they feel at home and accepted, comment enhances your employees' feeling of with their colleagues and your organization. High ship mean your employees feel part of a ciated, inspired, and cared for at your th an environment, your employees will perform with the organization for a longer period because y motivated.	Theme	
good organization to work for	A Rating scale	
d by organization s employees' ideas and suggestions to do better	7 Rating scale	
future of organization inspires me	Rating scale	







## **Questions or feedback?**

Get in touch with our Helpdesk or with your CSM!