Effectory

Product Roadmap

Q2 2024– Q4 2025

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

Contents

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!

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.
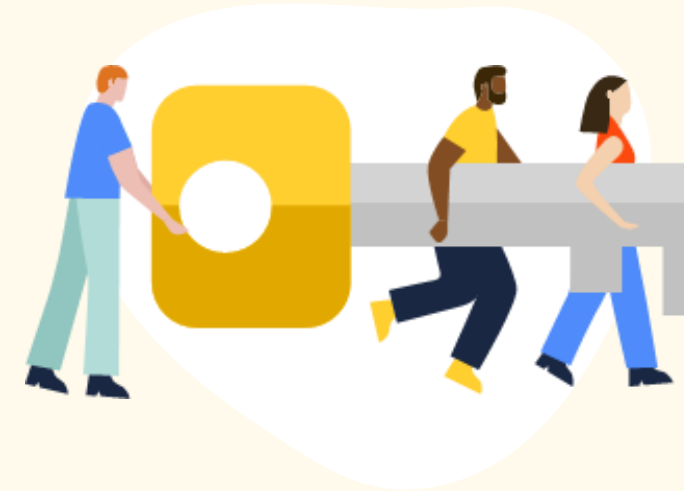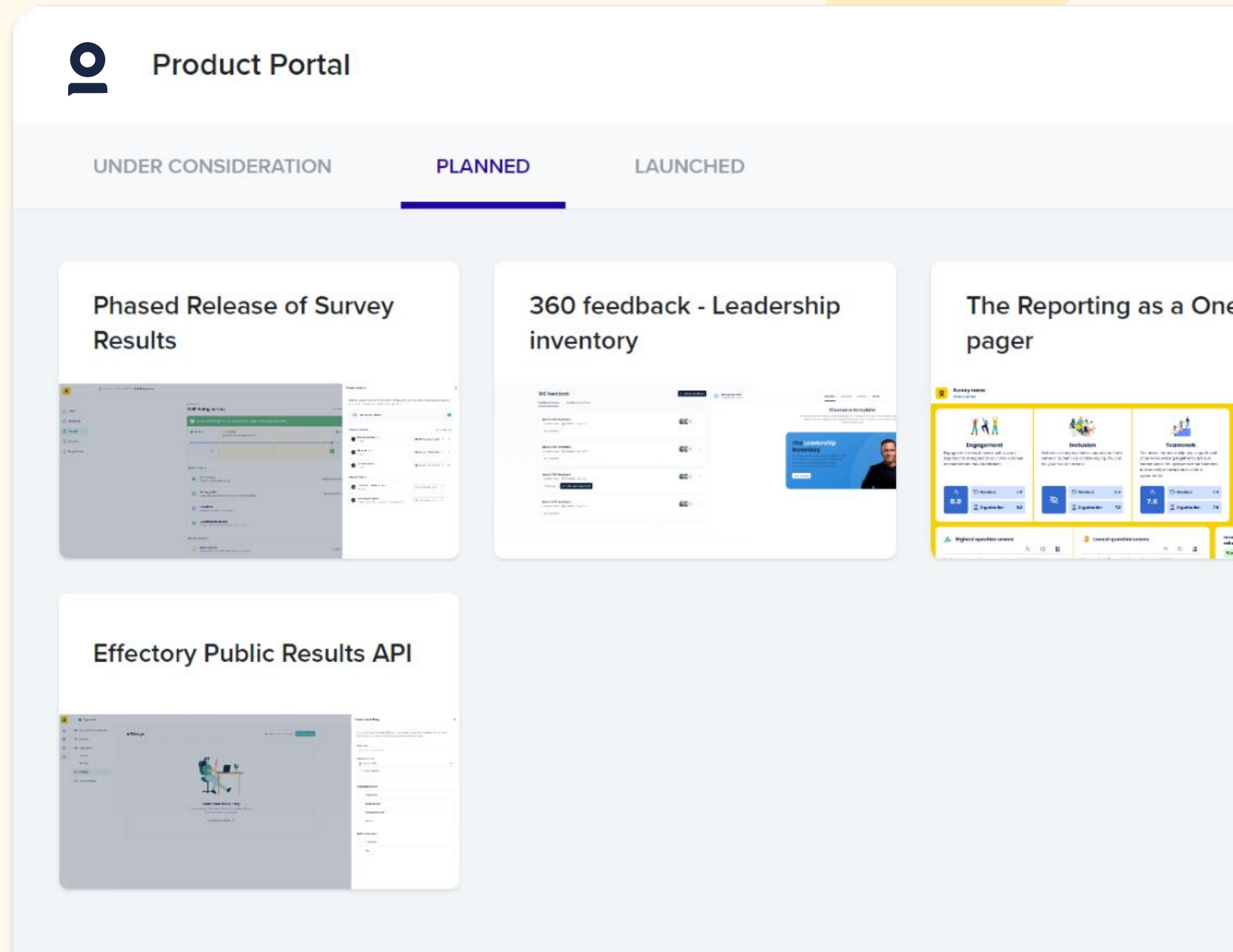

Fully ISO certified since 2015

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**!

Learn more ›

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.

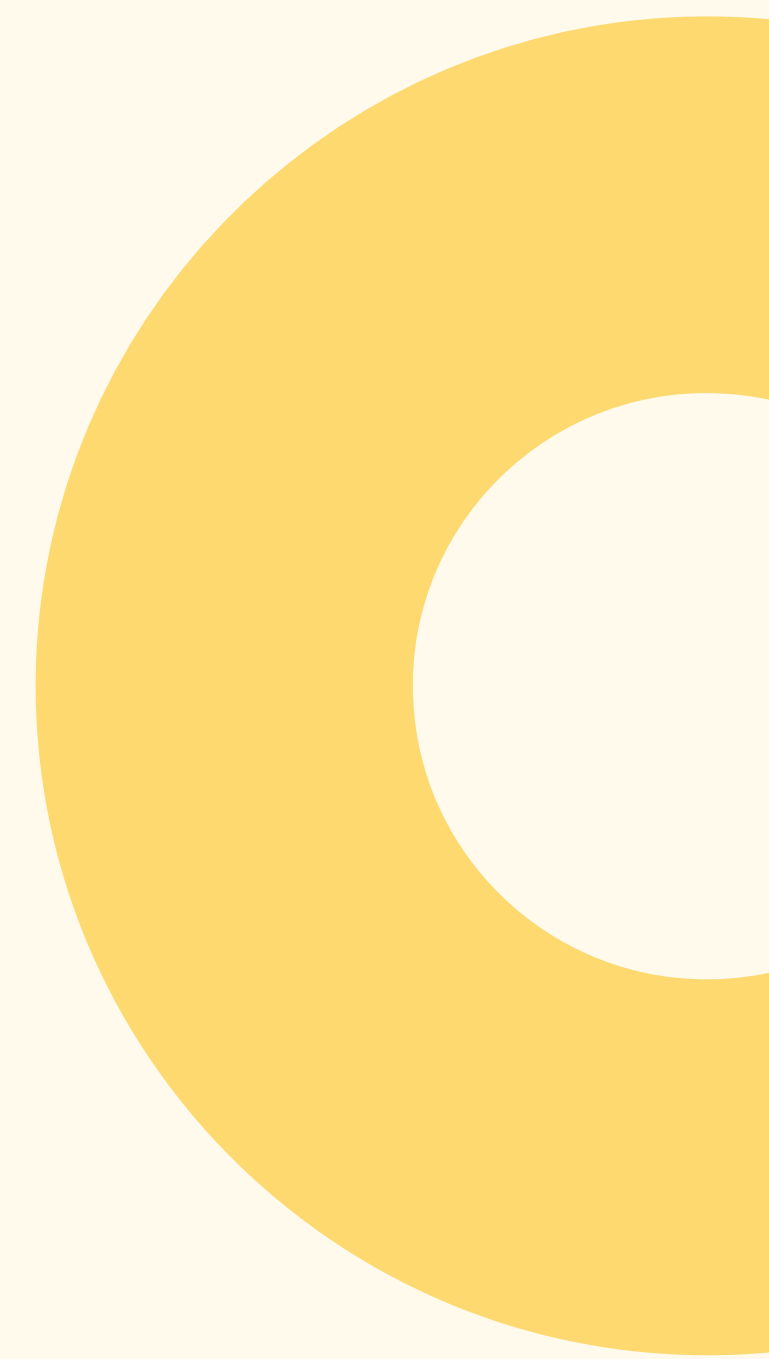- Learn everything about our latest feature releases.

To the portal ❯

○ **Product Portal**

UNDER CONSIDERATION   **PLANNED**   LAUNCHED

Phased Release of Survey Results

360 feedback - Leadership inventory

The Reporting as a One pager

Effectory Public Results API

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!

Learn more ›

We support the following HRIS integrations:

Personio	Eurécia
Workday	Officient
SAP successfactors	Charlie
Factorial	HRworks
AFAS	Breathe HR
BambooHR	AlexisHR
Kenjo	Rippling
HeavenHR	Sapling
HiBob	Nmbrs
Cezanne HR	PeopleHR
Sage HR	Lucca
Humaans	HaileyHR
	IRIS Cascade

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

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.

Learn more ⟩

Results release ✕

Select how you want to release the results. We will use e-mail notifications to let users know when results are available. Learn more ⬏

○ **Response rate only**
Results will not be released - Users with access can view the response rate

● **Release to everyone (estimated [date])**
Release results for all users that have access as soon as they are available

○ **Phased release to selected users**
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.

Release Phases   + Add phase

① **All users with results access**
   28 users

   | May 2023 ▾ | ‹ › | ⋮ |

   M   T   W   T   F   S   S

② **Participants**
   431 participants can view their results in My Fee

   2   3   4   5   6   7   8

   9   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!
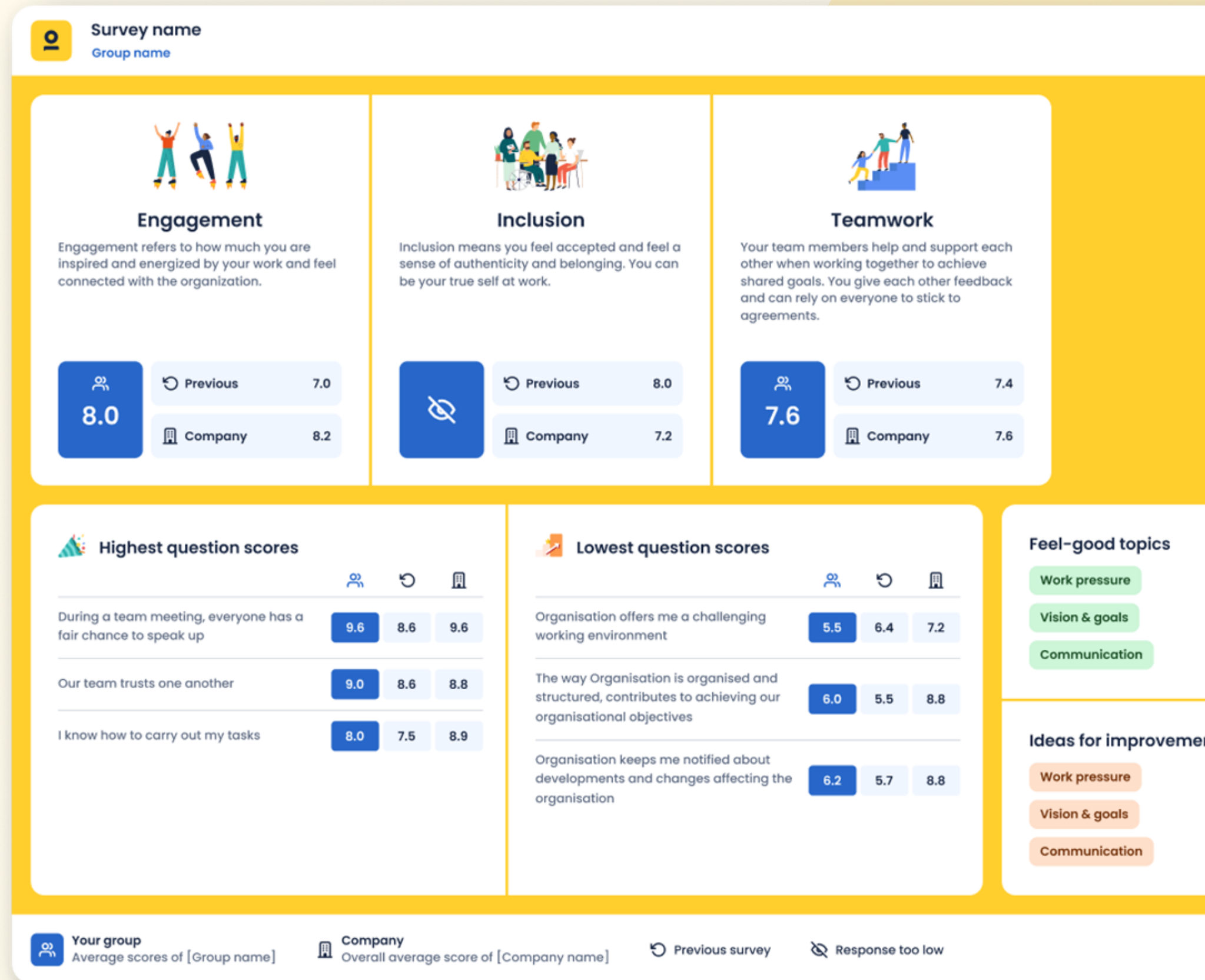
Org.mapper

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.
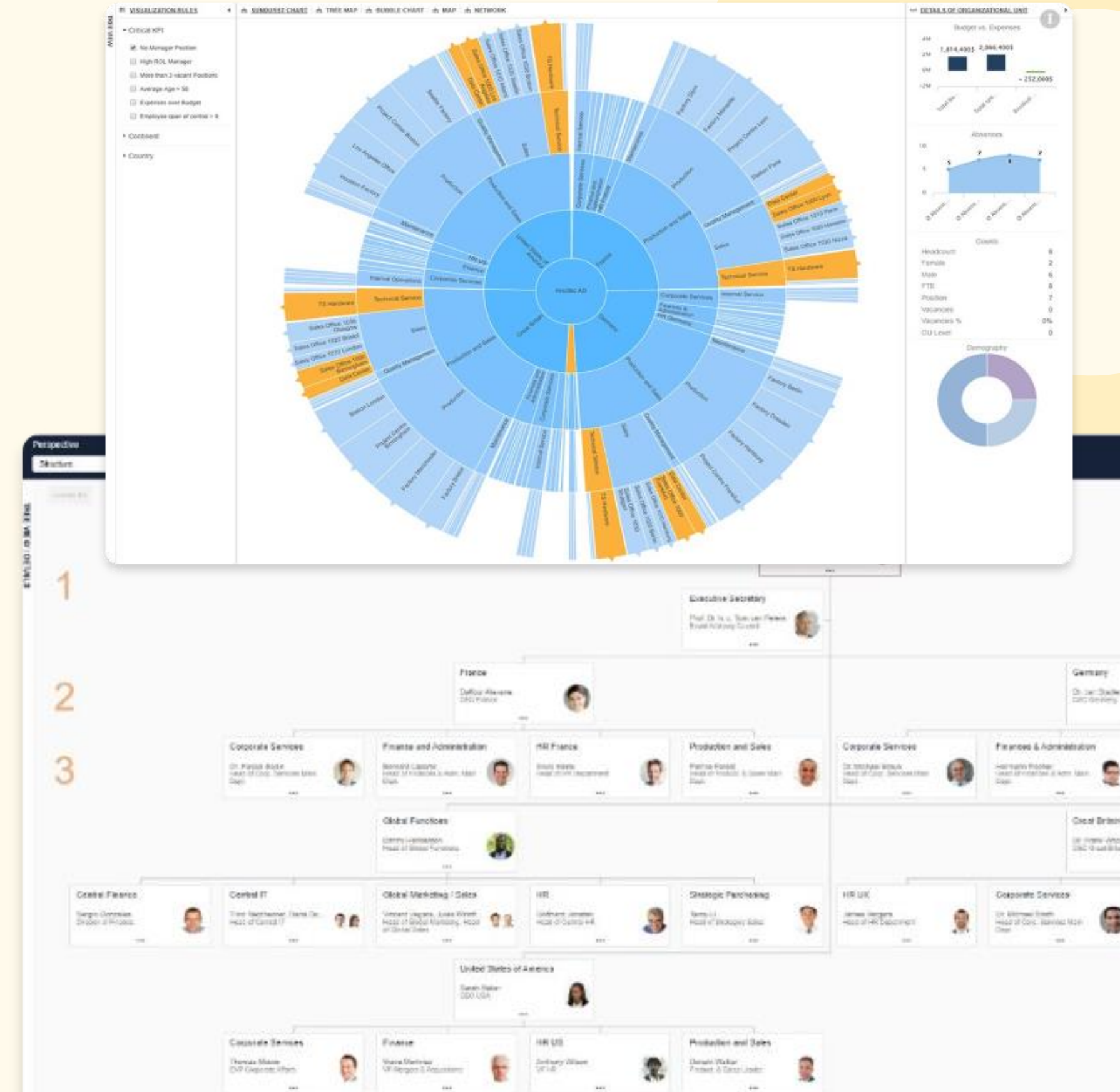
Advanced analytics

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.

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

Learn more ❯

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.

Learn more ›

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.

Learn more

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.

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

✓ You manage a team of 5 or more employees

✓ You want to promote effective leadership

✓ You want to improve the manager-employee relationship

✓ You want to gain a comprehensive view of your leadership from both your and your team's perspective

You will gain

✓ A unique role profile of yo... ...n how well it fits your team's context, rather than just a......

Use template →

JK **Jane's leadership inventory**
The Leadership Inventory

Questions   Feedback circle   Settings   **Results**

📊 Results   📄 Answers   📖 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

Compare ◆ Idea of Leadership to ● Employee Feedback ∨

LEADERSHIP ROLES

Boss
Directs and makes decisions by themselves

Partner
Shares responsibility through collaboration

Learn more >

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!

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.

Allowed email domains ✕

Control which email domains coordinators can use to sign up

○ **Allow all email domains**
Free e-mail domains like gmail.com, hotmail.com etc. are excluded

● **Restrict registration for specific domains**
Only allow registration of specific email domains

Allowed domains

@ Enter a domain (e.g., effectory.com). 🗑

Cancel   Save

Learn more ›

Management Summary

Available for all users at every group level, the Management Summary helps you:

- **Save time** with a ready-to-use format built for speed and clarity
- Drive real change by focusing on **insights that matter most**
- Empower managers and teams to **take ownership** of results and start conversations
- **Accelerate follow-up** with a shared understanding of what needs attention

Your survey cornerstones

Start of your listening journey!

| Survey period | | 13 | Questions were asked in total |
| Nov 06, 2024 | Nov 08, 2024 | | |

Key results

eNPS & Benchmark comparison

The eNPS shows you to what extent your employees would recommend your organisation as a good employer.

| 😐 Passives **40%** | 😊 Promoters **45%** | — | ☹️ Detractors **15%** | = | eNPS **30** |
| 13 | 15 | | 5 | | |

Key results

Largest differences compared to previous survey

🎉 Higher than previous survey			📉 Lower than previous survey	
In my team we have taken action based on previous survey results	6.7	+1.0		
I can see clear improvements as a result of sharing feedback within EFFECTORY	6.7	+0.9		
I am enthusiastic about my job	6.9	+0.6		
EFFECTORY uses employees' ideas and suggestions to improve	6.7	+0.6		
I enjoy doing my work / tasks	6.7	+0.4		

Current: EFFECTORY　　Previous survey　　7

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.

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.

- **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 security.

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

Intelligent survey automation & continuous insights 1/2

Stay connected without the hassle. Our smart survey automation recommends the best timing and rotation based on your questions and audience; capturing critical insights without fatigue. Continuously monitor key metrics and make proactive decisions with fewer interruptions and smarter planning; spotting risks early and staying ahead of change.

Release timeline:

- **Q3** first step; plan recurring surveys in one go
- **H1 2026**: Automated onboarding and exit surveys

Set up your survey

Follow this step-by-step guide and activate your People Pulse survey

✅ Participants

➡️ Scheduling

◯ Questions

◯ Results

◯ Survey Schedule Activation

← Back

Scheduling

Customize your survey schedule here. These dates will be used to send survey invitations and reminder emails.

✈ Survey Scheduling
Choose a time to send out the survey

Launch Date

📅 24.04.2025 ⌄

Frequency

🔄 Weekly ⌄

Survey Start Date ⓘ

📅 Monday

Survey Duration ⓘ

🕐 12 days (recommended) ⌄

📋 Survey Length
Choose the right survey length with our smart survey generator

Number of Questions ⓘ

6 questions (recommended) ⌄

Save & Continue

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.

2025

End of Q1 2025
Sign partnership agreement

Q2 2025 – End of 2025
Enable Open Answer Analytics in the partner's tool.

2026
Fully integrated experience within My Effectory.

2026
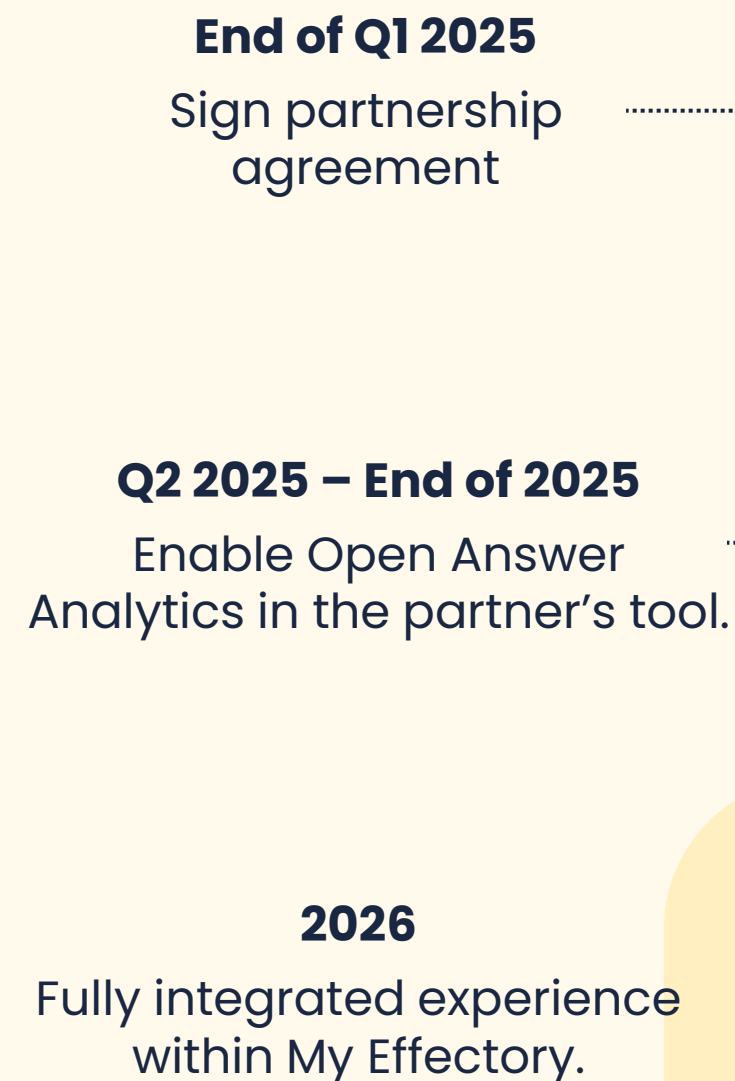
Question library

More question management features are coming to My Effectory:
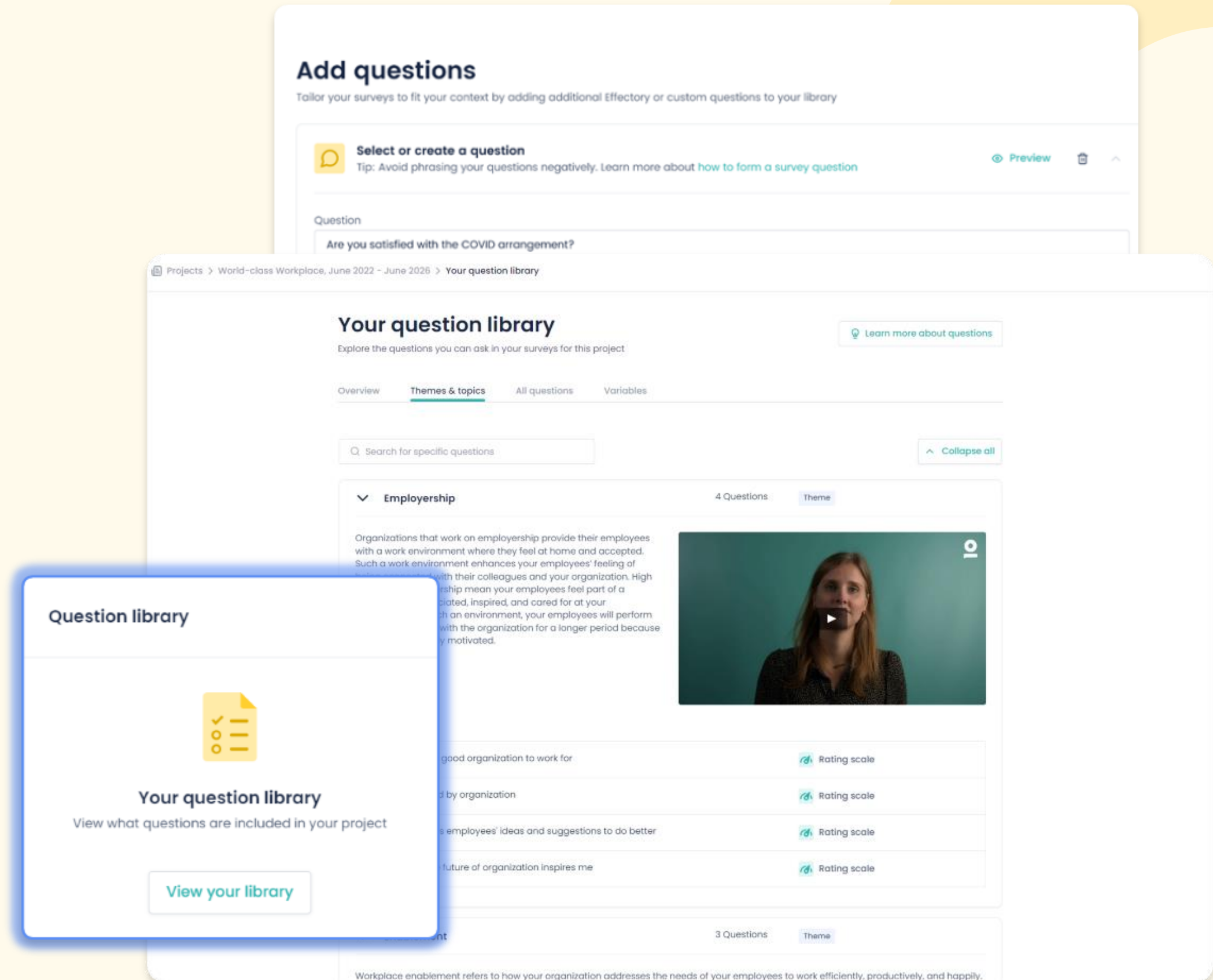
- Make each question truly yours by customizing merge fields with your organization's information.

- Create custom questions tailored to your organization's specific needs.

- Manage question translations.

- Templates enable you to customize your question library with ease.

Learn more ▸

Turn insights into action with AI-powered recommendations

Get instant, AI-driven guidance as soon as your results are in. Spot risks, benchmark performance, and receive tailored next steps. These insights feed directly into the Effectory Action Planner, helping you close the loop and drive real impact.

Release timeline:
- **End of Q2**: Engagement-based recommendations go live
- **Next**: Retention- and eNPS-based recommendations to follow
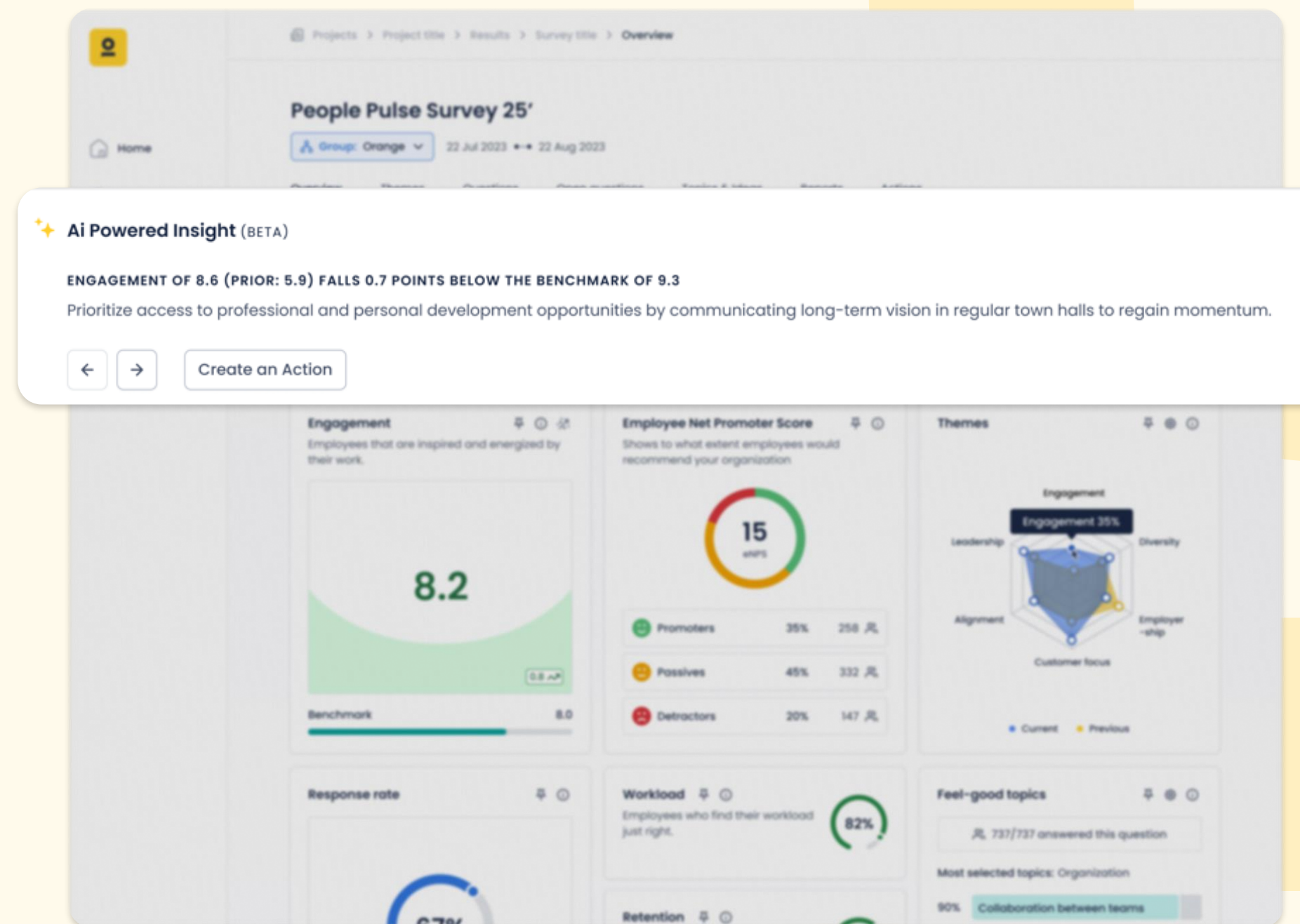
AI-powered open answer analytics

Quickly transform thousands of open-text comments into clear summaries, key themes, and actionable recommendations. Spot sentiment trends across teams. No guesswork, just focused insights to guide your next step, faster than ever.

Release timeline:
- **Q3**: First available in presentation format (offline)
- **Q4–Q1 2026**: Fully integrated into the platform
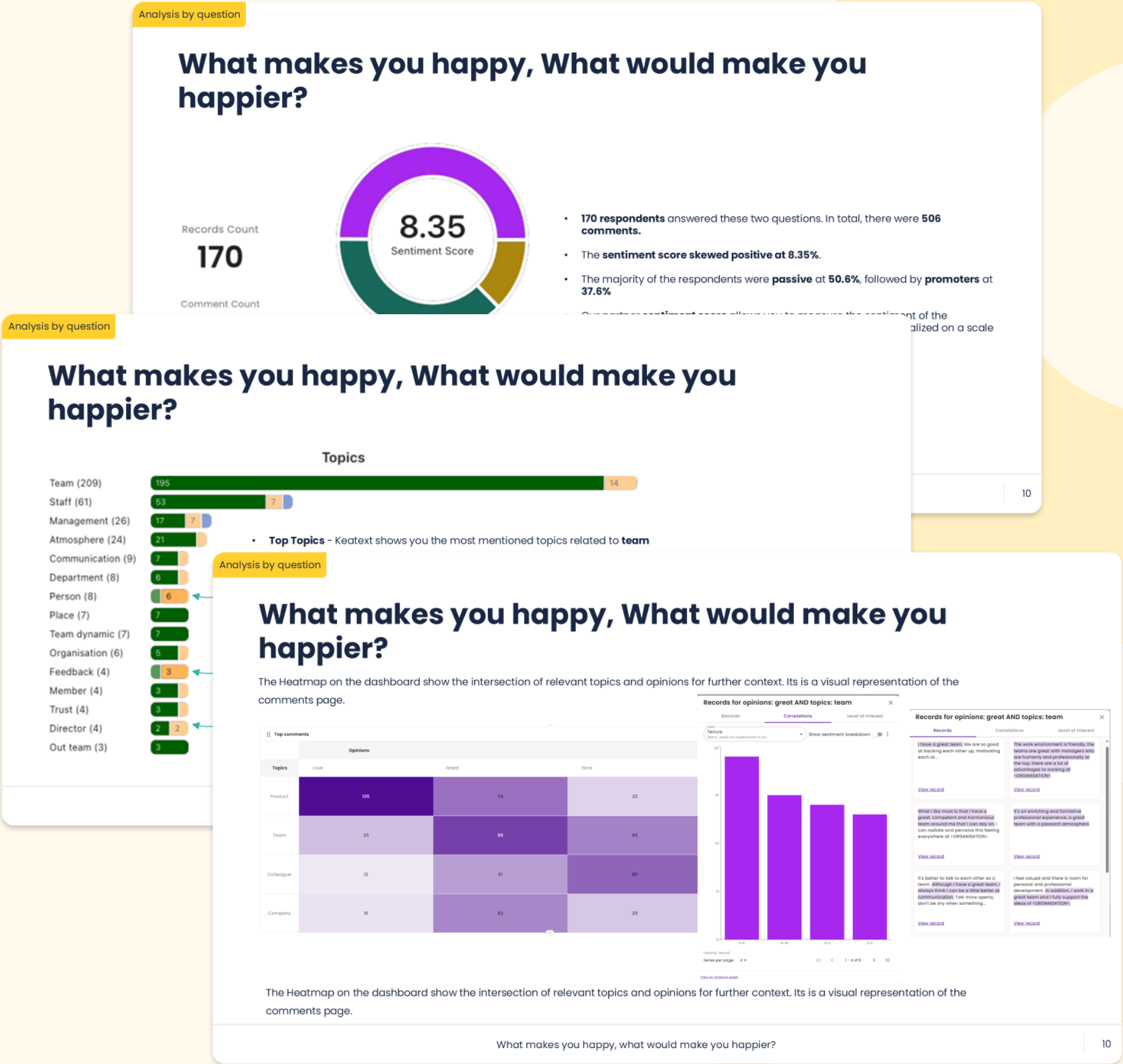
AI-driven support chatbot

Your always-on assistant, ready to help anytime. From sharing information on how to write and add survey questions to how to read the results, the chatbot makes it easy to get the most out of the platform. It's like having an HR expert by your side, powered by 30 years of Effectory knowledge.

Release timeline:

- **Phase 1:** Trained on the full Effectory knowledge base
- **Ongoing:** Expanded with expert insights over time
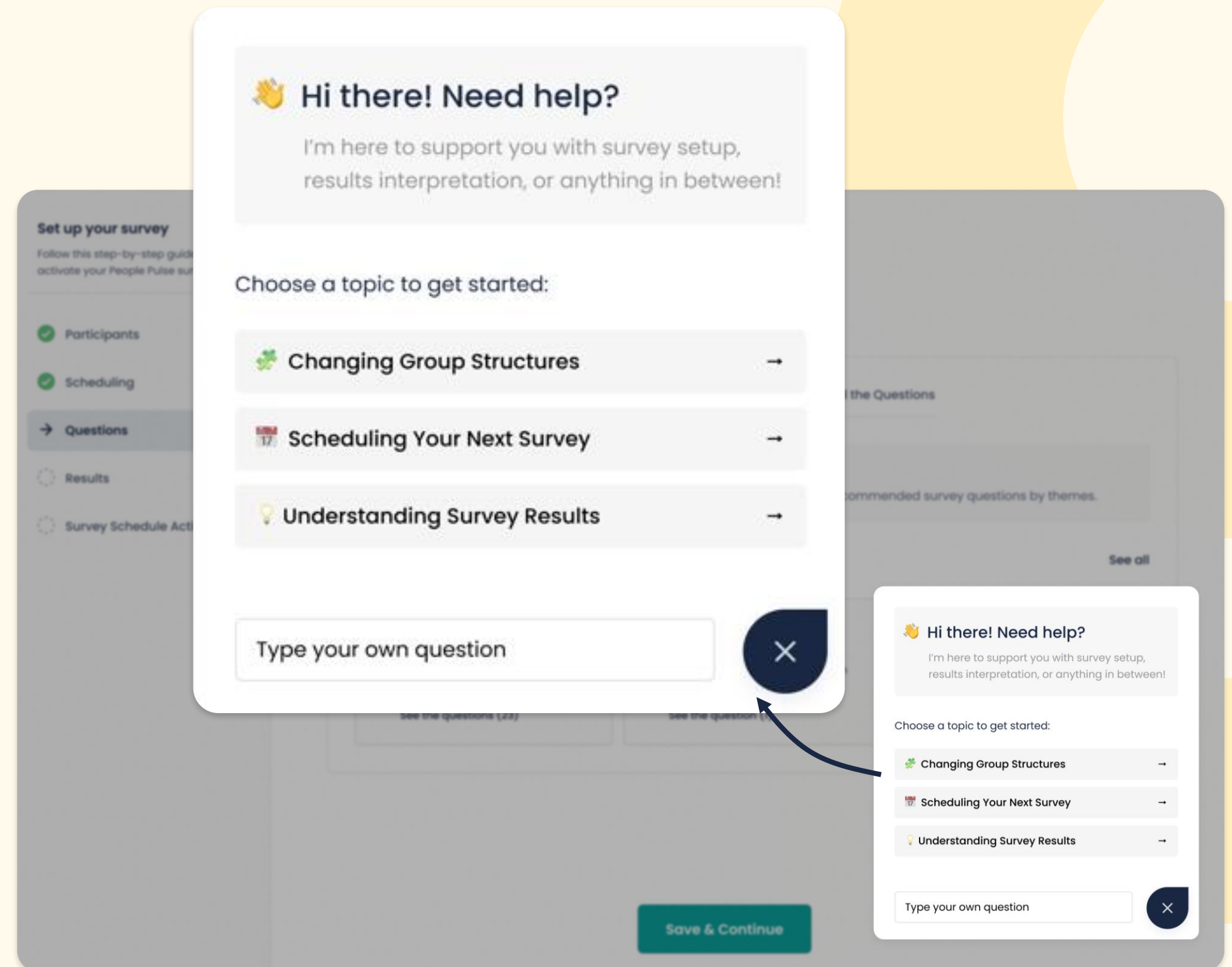
Onboarding Task List

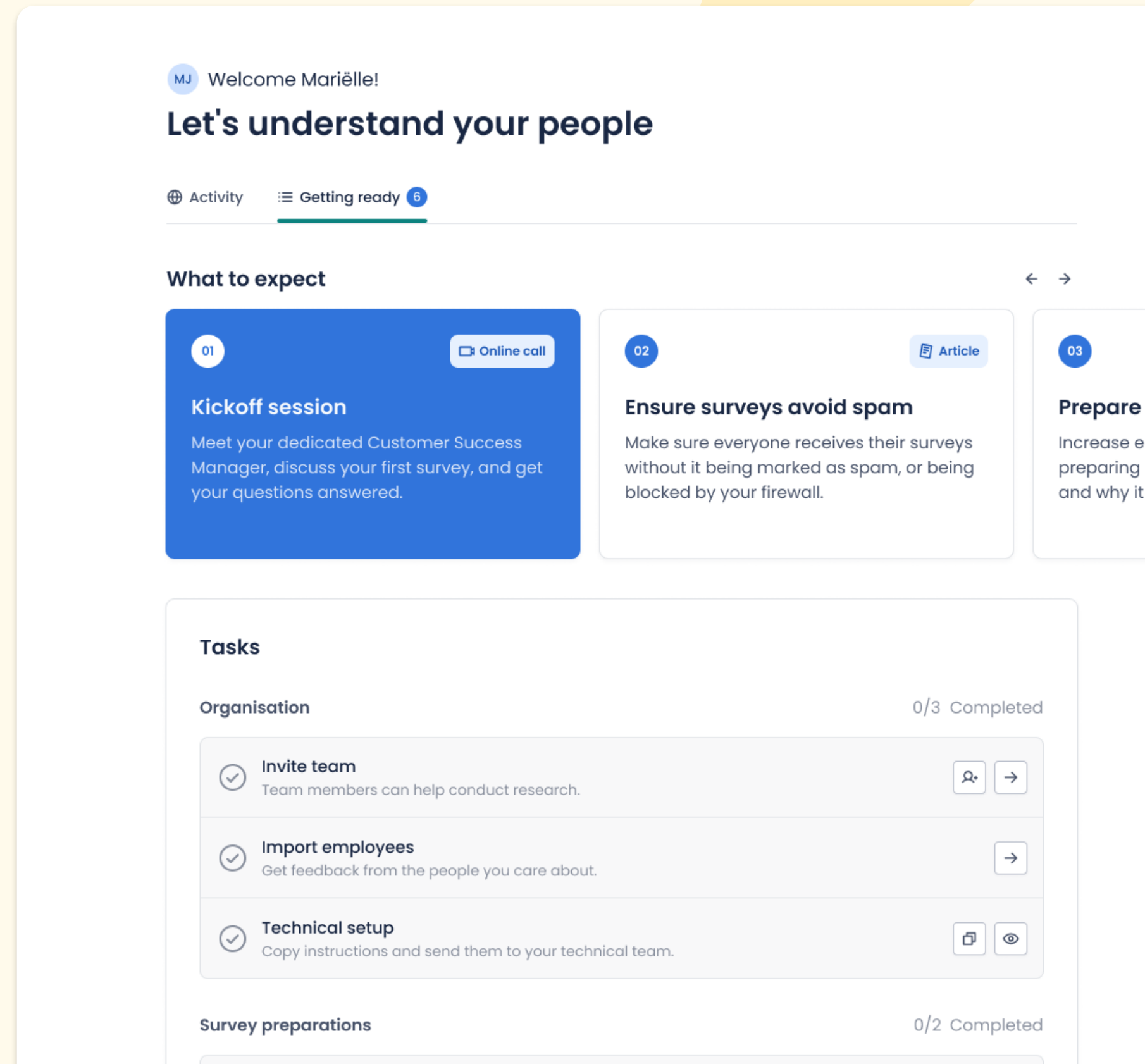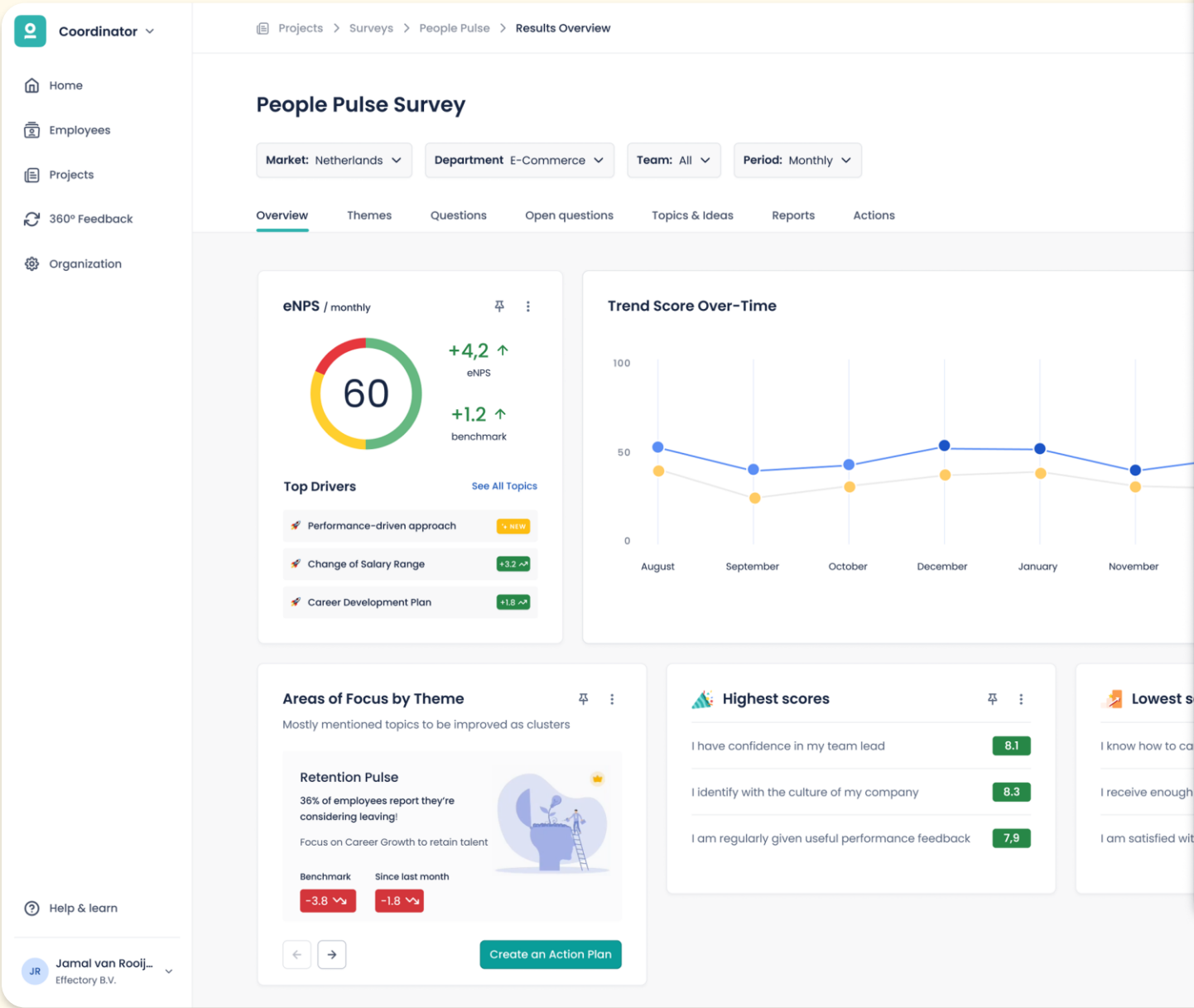Easily launch your first survey with our new **onboarding task list**. This step-by-step checklist guides you through the entire setup, ensuring a smooth and confident start.

- 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!

MJ Welcome Mariëlle!

Let's understand your people

🌐 Activity   ≔ Getting ready 6

What to expect   ← →

01   📹 Online call   **02**   📄 Article   **03**

Kickoff session   **Ensure surveys avoid spam**   **Prepare**

Meet your dedicated Customer Success   Make sure everyone receives their surveys   Increase e
Manager, discuss your first survey, and get   without it being marked as spam, or being   preparing
your questions answered.   blocked by your firewall.   and why it

Tasks

Organisation   0/3 Completed

⊘ **Invite team**   👤₊ →
    Team members can help conduct research.

⊘ **Import employees**   →
    Get feedback from the people you care about.

⊘ **Technical setup**   🗐 👁
    Copy instructions and send them to your technical team.

Survey preparations   0/2 Completed

Intelligent Survey Automation & Continuous Insights 2/2

AI-Driven Question Recommendation

Ask the right questions, effortlessly. Our AI-powered engine suggests tailored question sets using your company data, industry benchmarks, and past trends thereby ensuring timely, meaningful feedback with minimal effort.

Release timeline:
- Question templates will be released as part of the **Question Library** updates in **Q4**
- This feature to follow as an add-on

Set up your survey
Follow this step-by-step guide and activate your People Pulse survey

- ✅ Participants
- ✅ Scheduling
- → Questions
- Results
- Survey Schedule Activation

← Back

Questions
Choose the questions to be included in your People Pulse survey

Question set   Single questions   All the Questions

Ai Recommended Survey Types
Based on your company and employee characteristics, here are the recommended survey questions by themes.

25 questions selected   See all

Strategic Fitness
Unlock insights with science-backed surveys to align teams and boost performance
See the questions (23)

eNPS
Identify why employees stay or leave and what would make them more likely to stay longer
See the question (1)

Retention
Measure employee loyalty and likelihood to recommend your organization as a place to work
See the question (1)

Save & Continue

Ai Recommended Survey Types
Based on your company and employee characteristics, here are the recommended survey questions by themes.

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

4 / 316 respondents selected
A minimum of 5 respondents is required to calculate new results

+ Filter by

Groups

2 Groups selected Product & Development

AND

Manager

Is   Select value

Thank you!

Questions or feedback?

Get in touch with our Helpdesk
or with your CSM!