



 **Effector**

Product Roadmap

Updated March 2026

Don't miss out on any future updates.
Sign up to our community newsletter [here!](#)





What we've done

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





AI summary

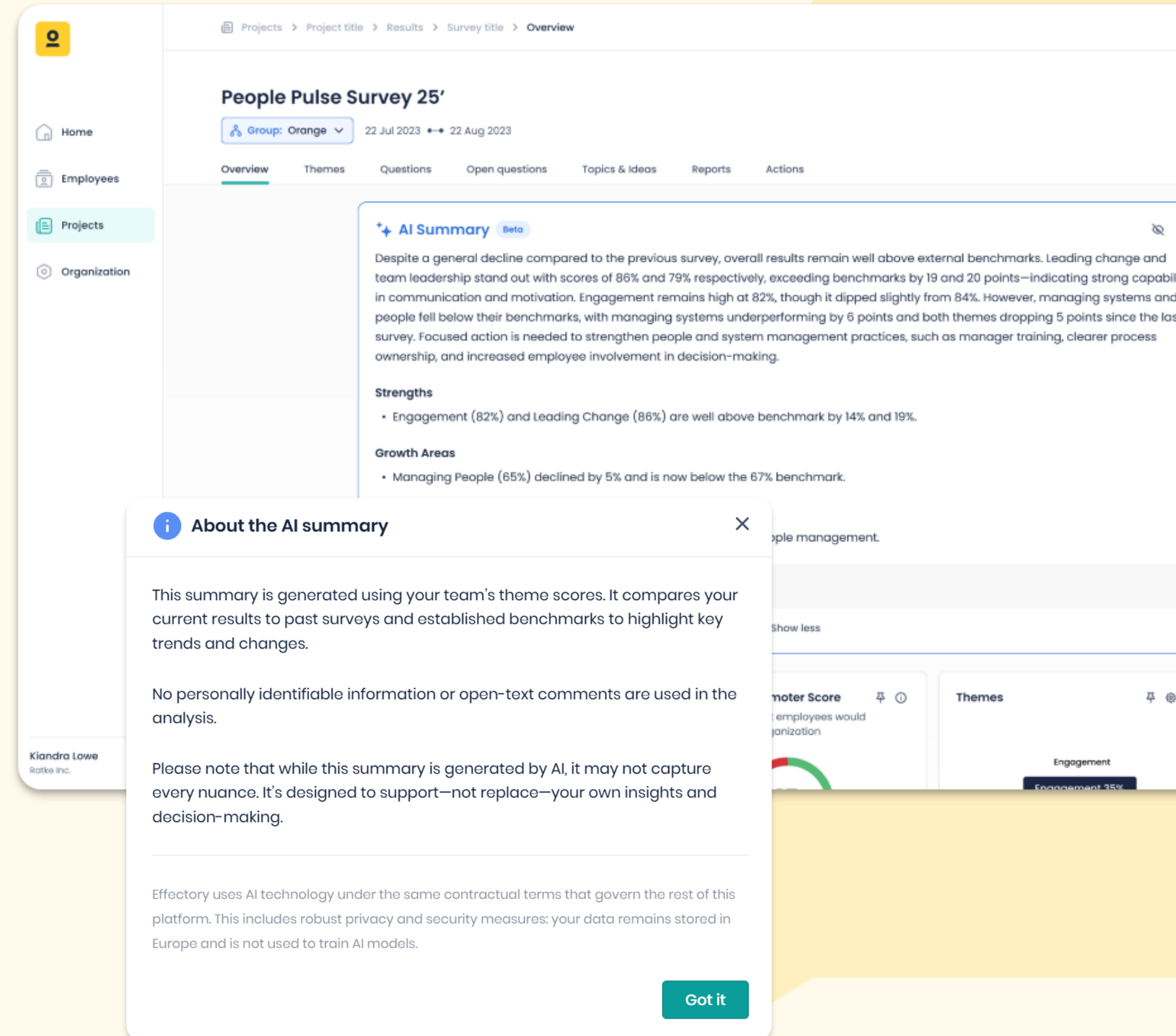
Get instant, AI-driven guidance directly in your results dashboard as soon as your results are in.

What you get:

- A clear overview of your results, highlighting key themes and risks
- Benchmarks to put your results into context
- Tailored next steps to guide you toward meaningful action
- Direct connection with the action planner to help you close the loop

Release timeline:

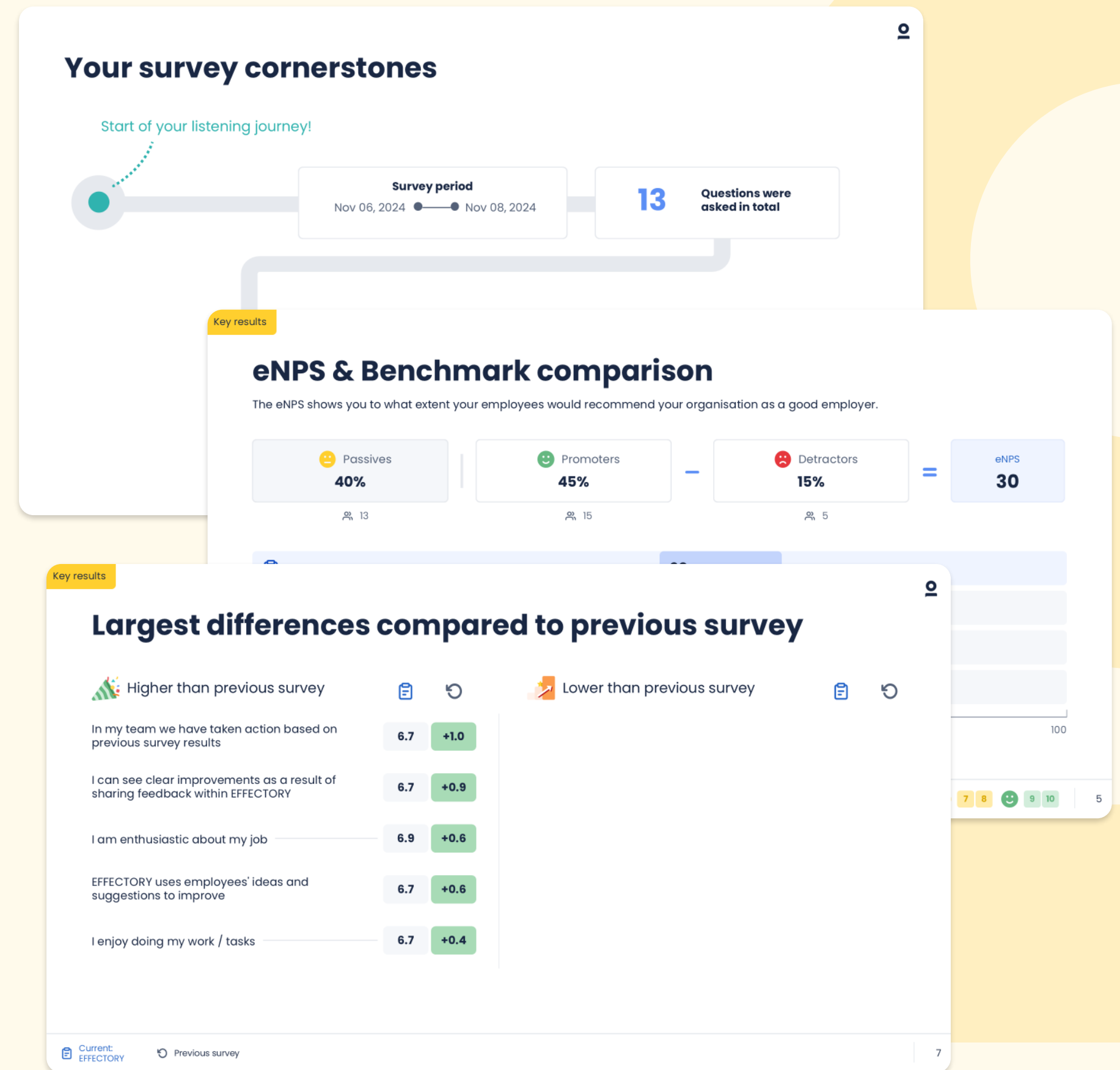
- **End of Q2:** Engagement-based recommendations go live
- **Q3:** Summary on all themes released



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



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.

Sort

Themes ⌵ ☰ Compare: Groups & 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

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

PREVIOUS SURVEY

6.0

BENCHMARK

7.7 *

Enhanced project flexibility

We've added more ways to tailor your project setup in My Effactory, so you can adjust key details without needing extra support.

- **Change your project name** to keep your overview organized
- **Edit default project settings** like primary language and benchmarks

Project settings

The primary settings for this project have been confirmed by **Janna Klopper** on **Apr 12, 2024**.



Project name Fixed for your plan

A project name to easily find your project.

Employee listening



Language(s) for invites & surveys

The language for your participants' invitations, questionnaires and My Feedback results.

[Learn more](#) >

English (United Kingdom)

Dutch (Netherlands)

German (Germany)

... and 1 more language

[View all or add new](#)



External benchmarks

The benchmark(s) to view how you're performing compared to organizations in similar situations.

[Learn more](#) >

Country benchmark: Effactory Index

Country benchmark: Global Index

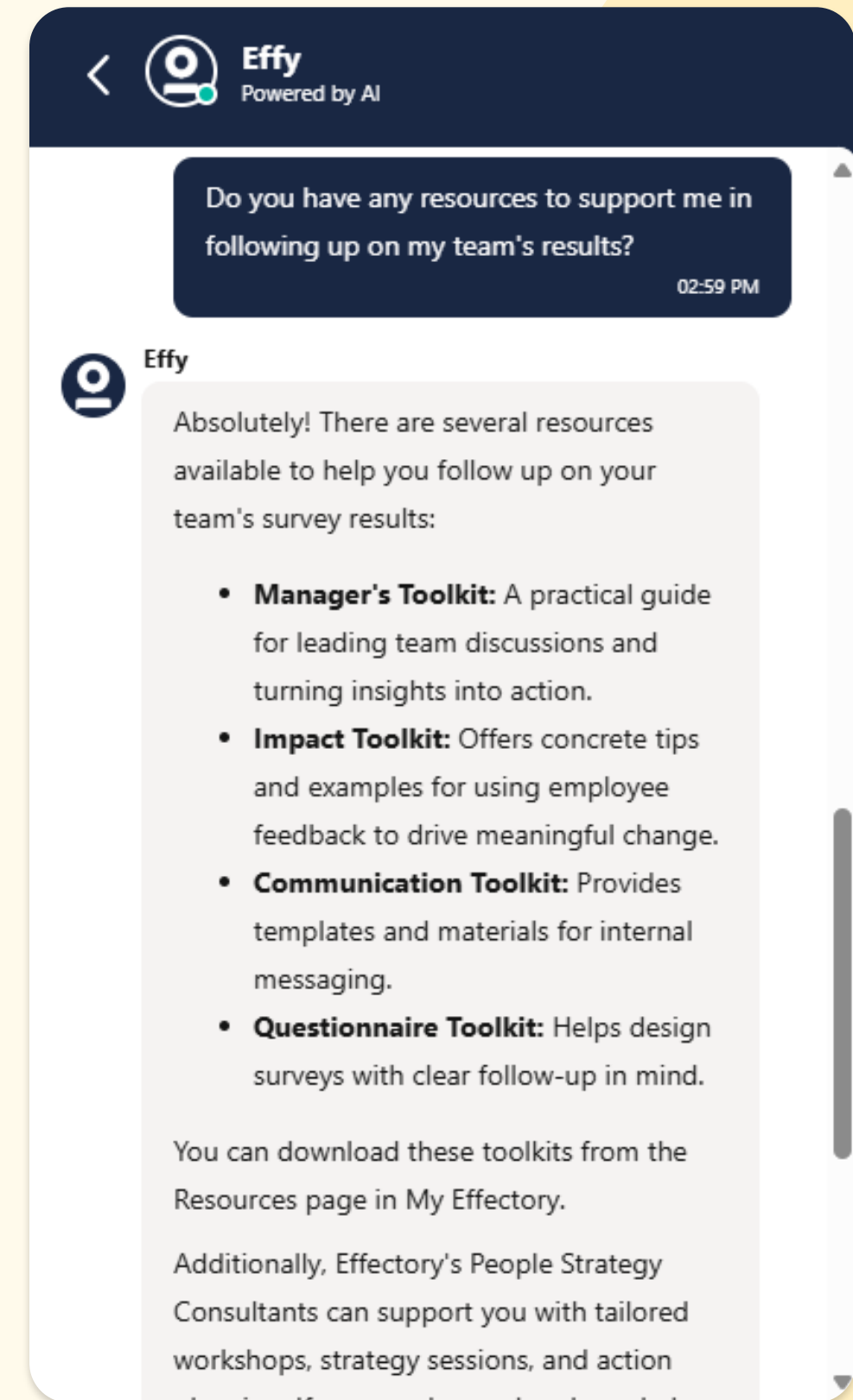


Meet Effy, our AI assistant

Effy is our new AI-powered chatbot, built to give you instant answers to all your questions about My Effectory.

Whether you're setting up a survey, troubleshooting an issue, or just looking for a quick explanation, Effy is here to help – 24/7.

- **Instant answers:** No need to search or wait: just ask
- **Powered by our full knowledge base:** From support articles to internal expertise, Effy has it all
- **Available where you need it:** Use Effy directly in My Effectory and on our support page
- **Here to make your life easier:** Less back-and-forth, more time to focus on what matters



Meet Effy >

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!

The screenshot shows a user dashboard for 'Mariëlle'. At the top, there's a navigation bar with 'Activity' and 'Getting ready' (6 items). Below this is a section titled 'What to expect' with three cards:

- 01 Kickoff session** (Online call): Meet your dedicated Customer Success Manager, discuss your first survey, and get your questions answered.
- 02 Ensure surveys avoid spam** (Article): Make sure everyone receives their surveys without it being marked as spam, or being blocked by your firewall.
- 03 Prepare**: Increase preparing and why.

Below this is a 'Tasks' section with a progress indicator '0/3 Completed' for the 'Organisation' category:

- Invite team**: Team members can help conduct research. (Search, Arrow)
- Import employees**: Get feedback from the people you care about. (Arrow)
- Technical setup**: Copy instructions and send them to your technical team. (Copy, Eye)

Below that is a 'Survey preparations' section with a progress indicator '0/2 Completed':

- Decide which questions to ask**: (PDF, Arrow)

In-platform enablement resources

We're adding key resources directly into My Effectory to support you at every step of your survey journey. No need to search elsewhere: everything is right at your fingertips.

- **Communication toolkit** with ready-to-use templates and tips to help you inform, involve, and engage employees
- **Questionnaire toolkit** to help you choose the right questions and build surveys that deliver meaningful insights
- **Follow-up toolkit** with practical guidance to turn results into action and keep the momentum going
- **Example reports** that give you a clear picture of what your results will look like and how you can use them



Enhanced survey flexibility

We've made it easier than ever to manage your surveys in My Effactory. With new flexible options, you're in control from start to finish:

- **Plan repeating surveys** by setting a recurring schedule
- **Stop a survey** at any time if something changes
- **Archive closed surveys** to keep your project overview clean and focused
- **Launch a survey immediately** without scheduling it in advance
- **Add or remove employees** while a survey is live

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	Frequency	Survey Start D
<input type="text" value="24.04.2025"/>	<input type="text" value="Weekly"/>	<input type="text" value="Monday"/>

Survey Duration ⓘ

Survey Length

Choose the right survey length with our smart survey generator

Number of Questions ⓘ

[Save & Continue](#)


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

 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 ▼

More mailing functionalities (1)

We're adding new functionalities to the mailings in My Effactory, so you can manage your survey communication with more precision and ease.

- **Send preview versions** of invitation and reminder emails to see exactly what participants will receive
- **Adjust the time and date of reminders** to match your internal planning
- **Schedule additional reminders** to boost response rates when needed

Send test email





email address

email language
🇺🇸 English (united States) ▾

Survey Reminders

Reminders will be sent to participants who haven't completed the survey. The email will include the survey link and time remaining to complete it.

Reminder schedule

 Reminder 1	📅 Jun 23, 2025 - 10:00 ▾	
 Reminder 2	📅 Jun 28, 2025 - 10:00 ▾	

+ Add new reminder

Cancel Save reminders

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](#) >

The image displays three overlapping screenshots of the My Effectory question management interface. The top screenshot, titled "Add questions", provides instructions on tailoring surveys and includes a "Select or create a question" section with a tip: "Tip: Avoid phrasing your questions negatively. Learn more about how to form a survey question". The middle screenshot, titled "Your question library", shows a search bar and a list of questions under the "Employership" theme. The bottom screenshot is a modal titled "Question library" with a checklist icon and a "View your library" button.

Add questions
Tailor your surveys to fit your context by adding additional Effectory or custom questions to your library

Select or create a question
Tip: Avoid phrasing your questions negatively. Learn more about how to form a survey question

Question
Are you satisfied with the COVID arrangement?

Your question library
Explore the questions you can ask in your surveys for this project

Overview **Themes & topics** All questions Variables

Search for specific questions

Employership 4 Questions Theme

Organizations that work on an employership provide their employees with a work environment where they feel at home and accepted. Such a work environment enhances your employees' feeling of belonging with their colleagues and your organization. High employership mean your employees feel part of a team, related, inspired, and cared for at your organization. In an environment, your employees will perform better with the organization for a longer period because they are more motivated.

good organization to work for Rating scale

by organization Rating scale

employees' ideas and suggestions to do better Rating scale

future of organization inspires me Rating scale

Question library

Your question library
View what questions are included in your project

[View your library](#)

3 Questions Theme

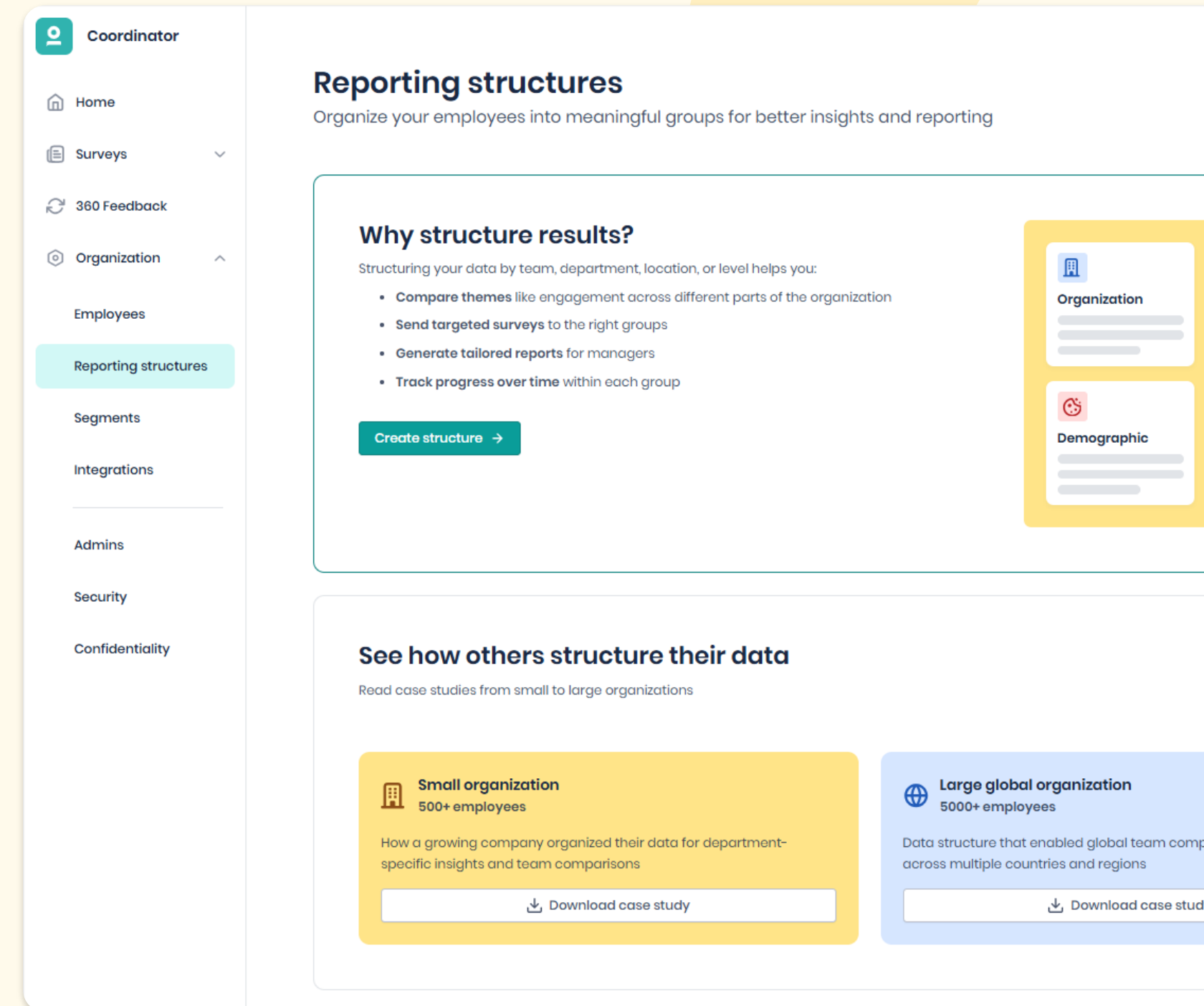
Workplace enablement refers to how your organization addresses the needs of your employees to work efficiently, productively, and happily.

Smarter reporting structures navigation

Uploading employee data now guides you straight into setting up group structures, with clearer explanations and practical support along the way.

- **Success message** that leads directly into group structure setup
- **New account-level page** explaining why structures matter
- **Downloadable case studies** and the option to start your first structure
- **Overview of all structures** across projects once at least one exists

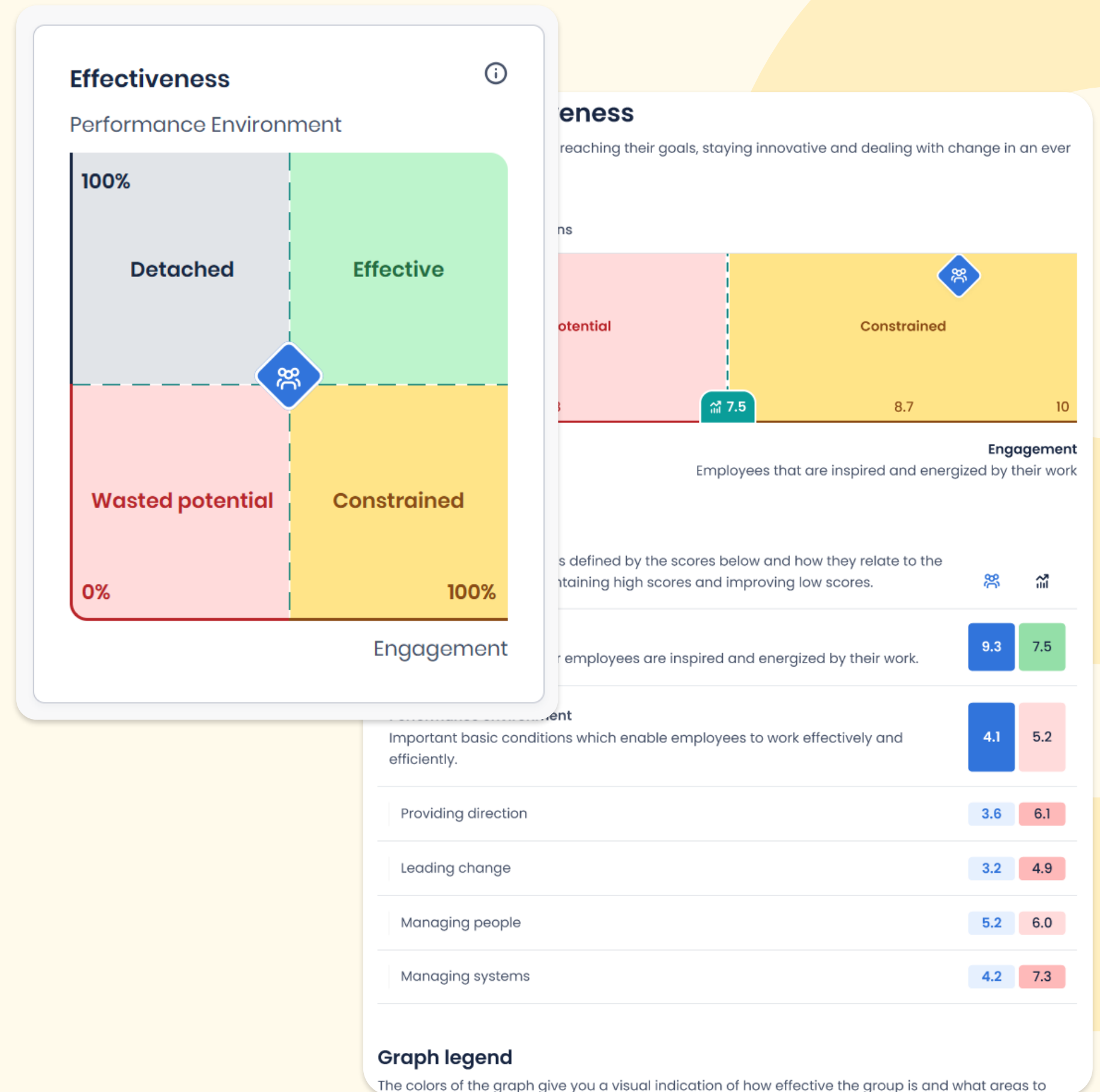
This update makes the process smoother, clearer, and easier to complete independently.



Effectiveness matrix

Understand how effective your team is at reaching goals, staying innovative, and adapting to change in an ever-evolving organization.

- This tile appears on the results dashboard when an organization uses the **Smart Organization Survey**.
- Gain insights into **key areas** to focus on in order to maximize your team's performance and engagement.
- The **group's position on the graph** is determined by five theme scores and how they compare to the benchmark.



Automated segments

Automated segments streamline how key employee attributes are calculated and assigned. This reduces manual work and ensures more consistent, reliable reporting.

- **Automatic assignment** of gender, age group, and tenure bucket based on employee data
- **Scheduled updates** to age and tenure values for up-to-date reporting
- **Standard segment definitions** to ensure consistency across projects. Customers can check if these ranges fit their organizational size
- **Customize** the categories of standard segments, or create entirely new ones based on your organization's needs

Standard Segment | X





Age

[[usedColumnName]] [Edit segment](#)

24 years and younger	942 employees
25 to 34 years	942 employees
35 to 44 years	942 employees

Segments

[+ Create segment](#)

 Gender	Standard segment	3 categories	→
 Tenure	Standard segment	6 categories	→
 Age	Standard segment	5 categories	→
 Salary scales	Custom segment	6 categories	→

Dynamic comparisons of results

Compare results across teams, departments, or locations of your choice within the same or different surveys. View results side by side and see how different parts of the organization are doing.

- **Identify differences and similarities** to better understand organizational dynamics
- **Gain context and benchmarking** that make results more meaningful
- **Stay fully compliant** with privacy and authorization rules
- **Spot patterns**, share insights, and drive more focused conversations across your organization

Quick comparisons

Group level below Effortory Index

Previous survey

All comparisons

Groups Segments Benchmarks

...from this survey

...from another survey

1 applied

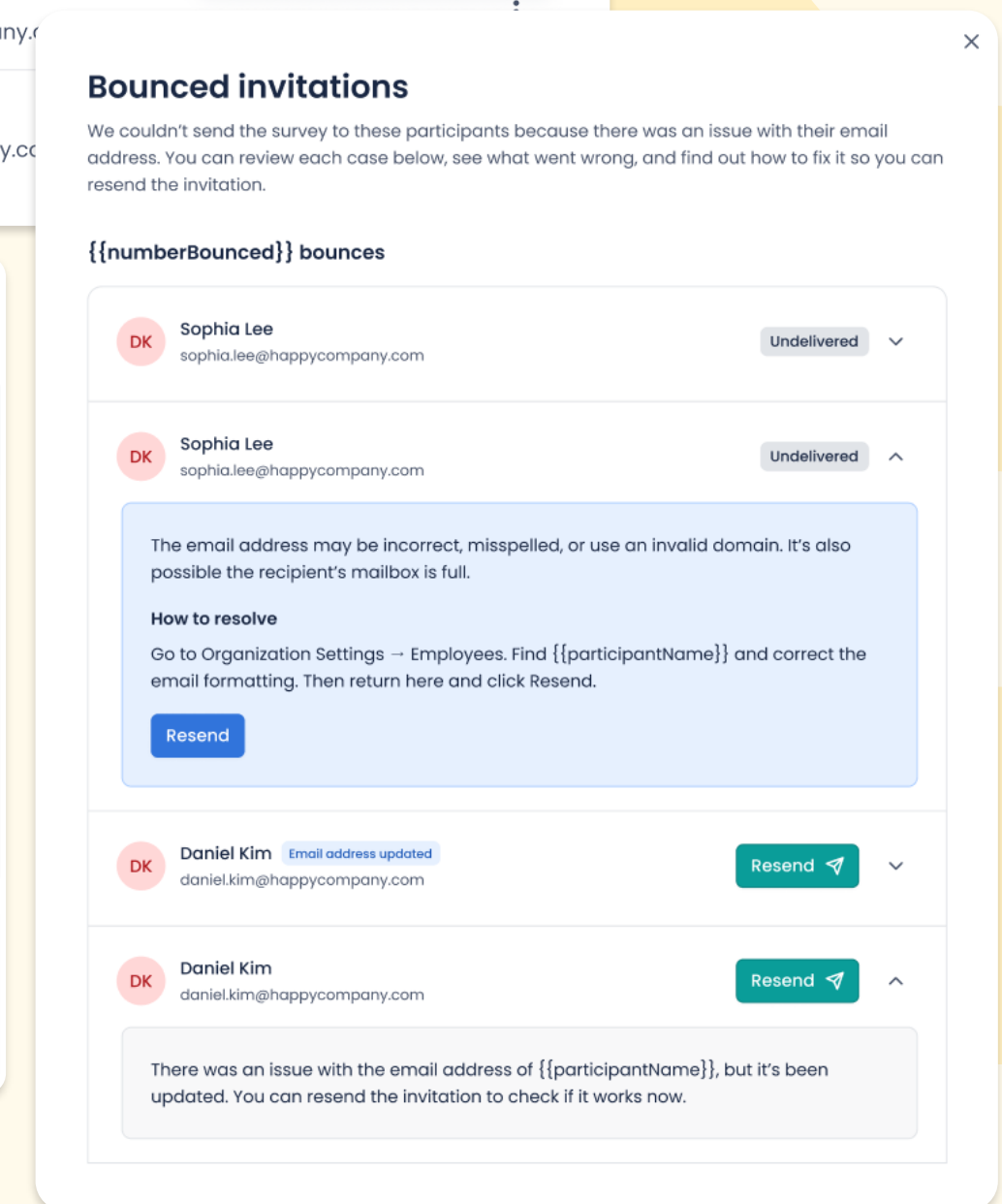
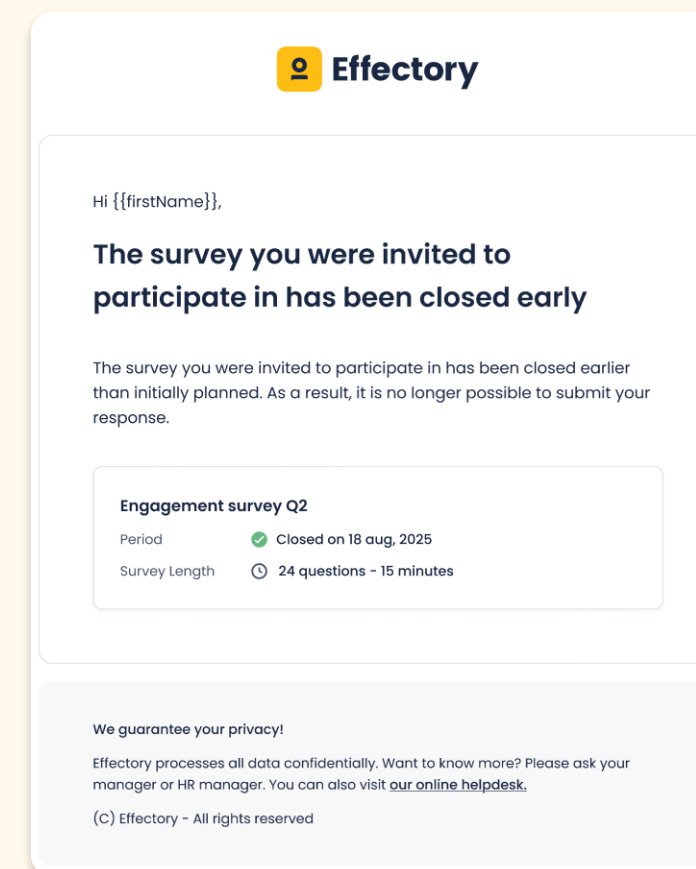
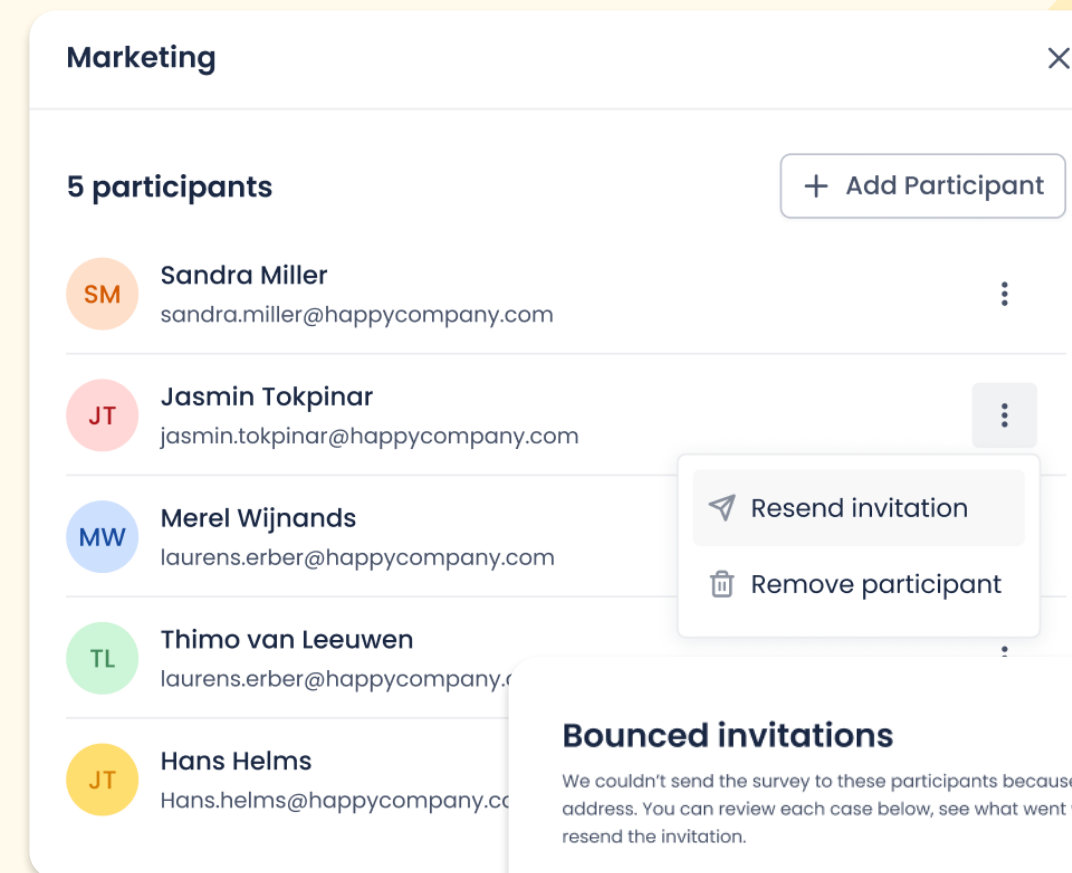
My Job	Orange	Previous survey	Customer success
I understand what is expected of me in my role	88%	80%	86%
I have the resources and tools I need to do my job effectively	82%	73%	73%
My workload is manageable and realistic	70%	57%	62%
I find my work engaging and meaningful	81%	65%	81%
I have the autonomy to make decisions in my role	72%	64%	66%

More mailing functionalities (2)

We're expanding the mailing options in My Effactory to give you more control and flexibility when managing survey communication.

- **Adjust the text** of invitation and reminder emails to match your tone of voice
- **Automatically notify participants** when a survey is stopped early or extended
- **Resend invitations** to participants who may have lost or never received their original invite

With these new options, you can communicate more effectively, reduce confusion, and boost participation in your surveys.





AI-generated summaries of Topics & Ideas answers

Get instant, focused summaries that show you what participants are proud of and where they see room for improvement.

- **Clear summaries** that capture the main themes across all answers
- **Save time** by reducing the need to read every comment
- Makes it easier to **spot what's going well and what needs attention**
- **Helps you focus** your conversations and actions
- **Built into the results dashboard**, no extra steps needed

What really stands out for you in a positive way?

My organisation as an employer

AI Summary BETA

Employees appreciate the organisation's transparent culture, collaborative environment, and encouragement to innovate and take risks. The supportive work atmosphere and commitment to diversity and inclusion are also valued. Work-life balance and trust in managing time contribute positively to employee sentiment. The company's response during challenging times, investment in employee growth, community involvement, and leadership's responsiveness to feedback are highlighted. However, there are concerns about inconsistencies and inefficiencies in internal processes and basic functions across teams, which can affect workflow and accumulate impact over time. These issues are more noticeable during busy periods or shifting priorities and sometimes require employees to find workarounds.

This summary was helpful Not really helpful

We summarized the survey results for you, but AI may miss details or misread trends. Verify with the original survey data before making decisions. [Learn more](#)

Search

[Open answers](#) [Bookmarks](#)

17 answers

Survey templates

Survey templates make it easier to create surveys, even when you combine multiple solutions in one project. Start from a clear structure and adapt it to your needs.

- **Use Effortory default templates** in the Question Library and during survey creation
- **Create your own templates** by copying or building from scratch
- Easily **add, remove, reorder questions** and themes
- **Publish templates for reuse** or archive them when needed
- **Start survey planning** directly from a template

Your question library
View and manage the questions used in your surveys

Learn more about questions

Overview **Templates** All questions Themes & Topics Variables Translations

Q Search + Create template

	Work-Class Workplace Standard template	24 questions	Published	⋮
	Strategic Fitness Standard template	10 questions	Published	⋮
	Team development scan Standard template	9 questions	Published	⋮
	Diversity, Equity & inclusion Standard template	16 questions	Published	⋮
	My first template Custom template			
	Exit Custom template			

Add questions from library
Choose questions from pre-defined topics and themes to add to your template.

Theme All

- (Select all) Select all
- Work enjoyment
- Employer excellence strengths well Standard
- Leading change
- Managing people strengths well Standard

My role utilizes my strengths well Standard

My role utilizes my strengths well
Theme: Employment Standard



AI-generated summaries of open answers

Get quick, clear insights from all open answers without having to read every single response. For each open question, you'll see an AI-generated summary at the top of the results, followed by all individual answers as you know them today.

- **Instantly understand** the main themes across all open answers
- **Spot recurring signals**, concerns, and opportunities more easily

The screenshot displays the 'Engagement Survey - Sep. 2024' interface. At the top, there's a filter for 'EFFECTORY' and a date range from 'Oct 1, 2024' to 'Oct 3, 2024'. Below this is a navigation bar with tabs for 'Overview', 'Open Answers', 'Topics & Ideas', 'Scores', 'Action Planner', and 'Reports'. The 'Open Answers' tab is selected, showing the title 'Open Answers | Written answers to open-ended questions'. There are search bars and buttons for 'Open Answers' and 'Bookmarks'. The main content area shows a question: 'If you could give EFFECTORY one tip, what would it be?' with '20 answers'. Below the question is an 'AI Summary BETA' box containing a generated summary: 'The responses highlight a desire for increased autonomy, better communication, and enhanced collaboration within EFFECTORY. Employees emphasize the importance of trust, clearer expectations, and recognition of both individual and team efforts. There is also a call for improved tools, career development opportunities, and support for work-life balance and'. A 'Show more' button is at the bottom of the summary box. Below the summary, a user's answer is visible: 'Give people more ownership over their projects. When we feel trusted to take the lead, we're more motivated and engaged.'

View upcoming and past webinars

View past and sign up for upcoming webinars directly in-platform

- **Find and access all Effactory webinars directly in My Effactory**, so you can easily sign up for sessions or rewatch recordings whenever it suits you
- **Stay up to date on new features and best practices faster**, helping you get more value from the platform with less effort
- **Learn independently without needing one-to-one support**, giving you a smoother, more predictable experience with Effactory.

The screenshot displays a user interface for viewing and signing up for webinars. At the top, a welcome message reads "Welcome {{ userFirstName }}!". Below this is the heading "Let's understand your people". A navigation bar includes "Activity", "Resources", "Getting ready", and "Webinars", with "Webinars" being the active tab. The main content area lists five identical webinar entries. Each entry features a yellow placeholder image on the left, followed by the title "My Effactory essentials: Tools, tips, Wat is nieuw" and a brief description: "In deze webinar helpen we je weer vertrouwd te raken met My Effactory. We lopen samen door de belangrijks...". Below the description is the date and time: "September 12, 2025" and "10:00". To the right of the text, the duration is displayed as "1 day 19 hours 24 minutes". A teal "Sign up" button is positioned at the bottom right of each entry.

Duplicate a survey

You can now duplicate any survey in My Effectory, whether it's a draft, planned, or completed one. Create a new survey in just a few clicks, with all key settings carried over.

- Save time by reusing existing survey setups
- Ensure consistency across surveys by keeping the same questions and structure
- Avoid manual work when creating recurring or similar surveys
- Get to your next survey faster with a proven starting point
- Duplicating surveys makes it easier to build on what works and keep your survey process efficient

Duplicate Smart Organization Scan - 2026

✔ Duplicated settings

- Participants
- Questions
- Survey period
- Layout
- Email communication

✘ Not duplicated settings

- Participants

Changes made to participants while the survey was running

Edit survey name

Smart Organization Scan - 2026 (copy)

Good to know

- Some information could be changed over time and can only be partially duplicated.

Cancel Duplicate as draft

Effectiveness Matrix improvements

We've added new functionalities to our Effectiveness Matrix, making it easier to **compare Effectiveness across teams** and providing you with **meaningful follow-up advice** directly in the dashboard.

- See how teams one level below are distributed across the areas of the matrix to quickly identify where attention is most needed.
- Spot patterns across teams and recognise where improvement or reinforcement will have the greatest impact.
- Get in-platform guidance based on each team's situation, helping you focus your efforts where it matters most and apply the right level of follow-up across teams.

Effectiveness

How effective is a group in reaching their goals, staying innovative and dealing with change in an ever changing organization.

Insights Actions

Your team is Not fully utilized

People are motivated and involved, but something in the way the team is organized or supported may be holding them back. The Performance Environment may not be providing the clarity and support needed to make use of the energy that is already there.

Comparisons 3 selected Matrix List

Benchmark Engagement 55% Benchmark Performance environment 55%

Effective
2 groups

Not fully utilized
4 groups

Detached
3 groups

Ineffective
2 groups

- The Netherlands
Engagement: 92% • Performance environment 45%
- Revenue Operations
Engagement: 92% • Performance environment 45%
- Sales
Engagement: 92% • Performance environment 45%

Manager's hub

We're testing a new Manager Hub in the results dashboard to bring all **guidance and follow-up support together in one place**, right where managers review their results.


- Access resources for analyzing results, taking action, and follow-up in one central place
- Find relevant guidance without searching across different parts of the platform
- Discover additional solutions like the Leadership Role Compass
- Share feedback through a short in-product survey to shape future improvements

This experiment helps us learn how to better support managers and make guidance easier to find and use.

← Back

Manager's Hub

Find all the relevant resources in one centralized place.

**Manager Toolkit**


Get practical guidance on how to use survey results to drive meaningful conversations and actions with your team.

For online meetings
Useful when remote or hybrid working is the norm.

Download


For offline meetings
Useful for meeting with the team in person.

Download

**Example report**


Get a feel of what to expect from your results

Download

**Follow-up guide**


Turn insights into action with a follow-up plan tailored to your goals

Download

**Leadership Roll Compass**

Transform the way your managers lead with easy-to-run, insightful 360° feedback surveys

- ✓ Develop your managers into better leaders
- ✓ Align leadership with team expectations
- ✓ Boost team dynamics, engagement, and retention



Learn more [Get in touch](#)



What's coming

Take a peek 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.

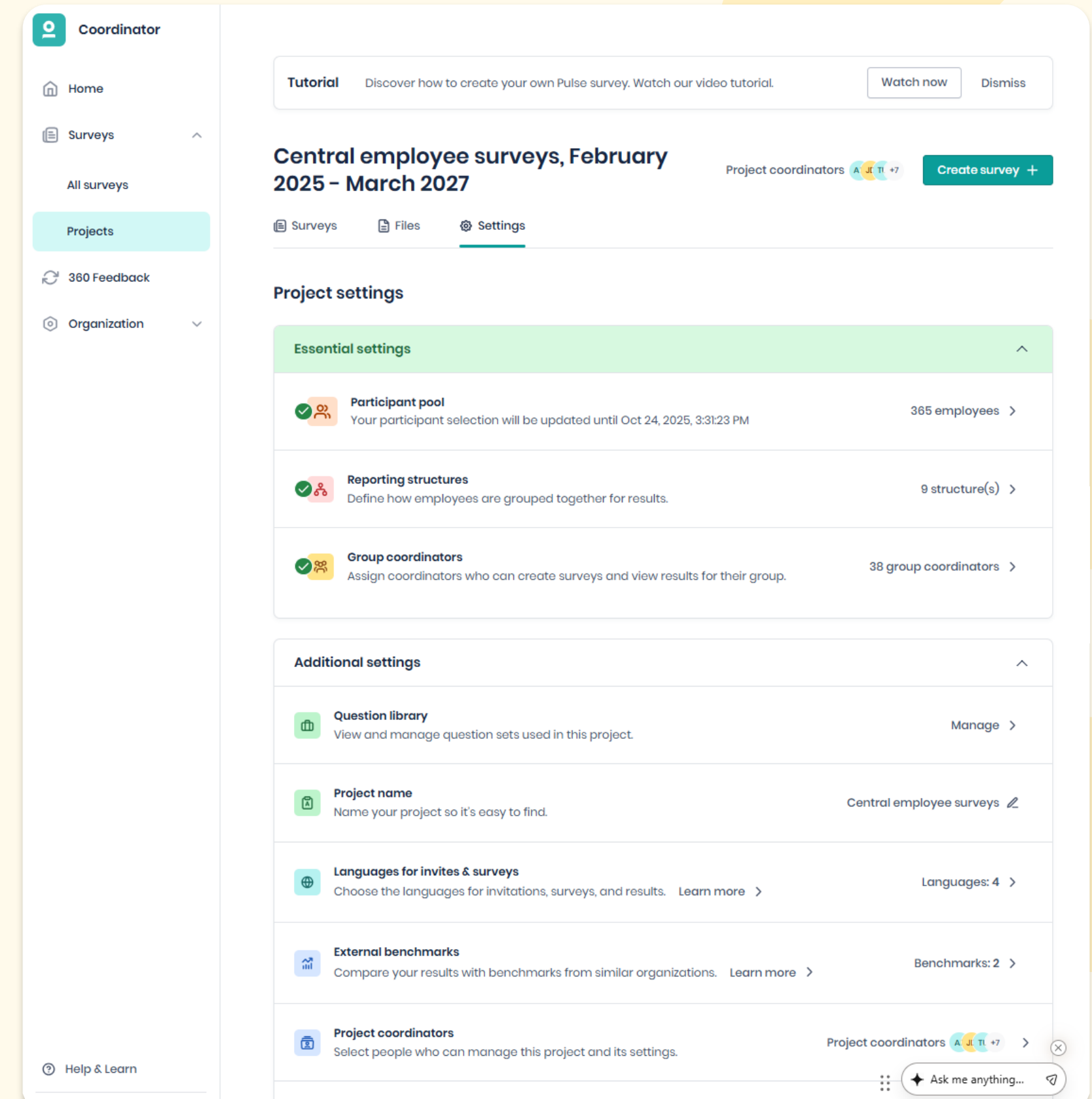
Redesigned project page & settings

We're simplifying the project page to make it clearer what belongs to your project and where to manage its settings.

What's new:

- **Clear separation** between project information and project settings
- **Surveys more visible**, with a better overview by status
- All **project settings** grouped in one place
- A more **prominent question library** with clearer actions

This redesign makes working within your projects more intuitive and efficient.

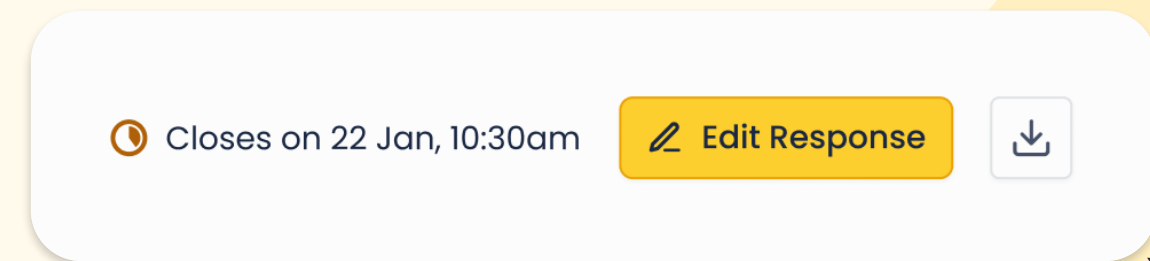


Edit your survey response

Respondents can now reopen and edit their submitted survey responses directly in Your Feedback, without needing to contact Helpdesk.

- Let respondents update their answers while the survey is still open
- Reduce dependency on Helpdesk for simple changes
- Improve the overall respondent experience and trust
- Ensure responses stay accurate and up to date

This update makes participation more flexible and reduces manual support effort.



← Back

Team Check-in

🌐 Survey language: English (UK)

📄 Your Answers 🗑️ Group Results

🔍 Search Change comparison ▾

Topic / Theme	Your Answer	Design Team
I enjoy doing my work / tasks	🟢 Strongly Agree	Results not available yet
I feel strongly supported by my direct supervisor in my professional development and growth within the organization.	🟢 Agree	Results not available yet
I am proud to work for Organisation	🟢 Agree	Results not available yet
I feel that I fit in at Organisation	🟢 Strongly Agree	Results not available yet

Topic / Theme	Your Answer	Design Team
I enjoy taking on new or different responsibilities	🟢 Agree	Results not available yet
How many bananas can you eat every day?	🟢 1-2 banana's	1-2 bananas Results pending
	🟢 Other, namely...	3-4 bananas Results pending
		5-6 bananas Results pending
		I dont know

New and improved reports

We're improving our reports to make it easier to analyze and share insights.

- **Harmonised reports:** Clearer, more consistent reporting for Smart Organization Scan and Strategic Fitness results, avoiding duplicate reports and aligning terminology
- **Trend analysis report:** A downloadable PowerPoint showing how theme and question scores evolve over time, available when multiple surveys can be compared
- **Segments report:** A new report that enables you to compare scores across segments,

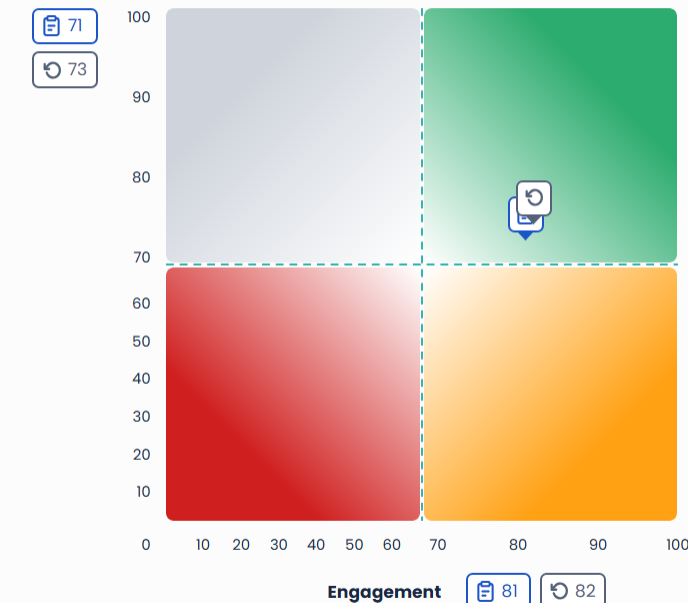
Organizational Effectiveness - Overall profile

Where you stand

Employee engagement and the quality of the performance environment are crucial for top performance, innovative strength, and high adaptability.

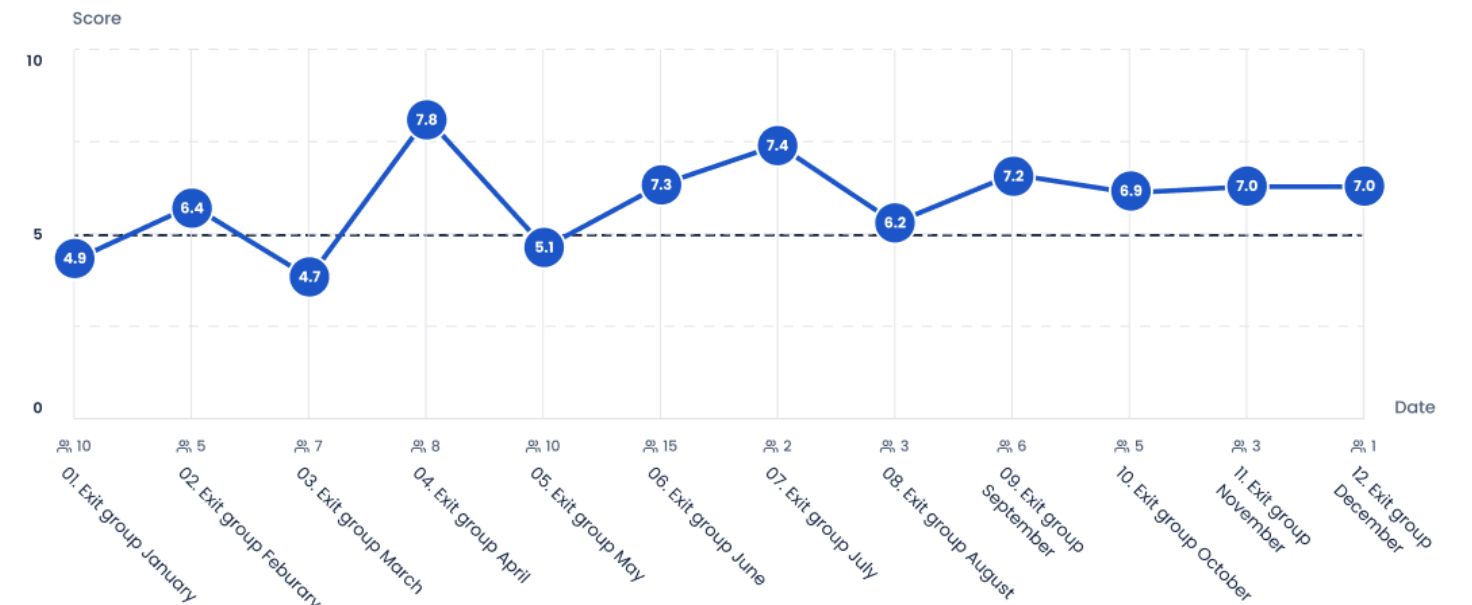
- **Good Performance Environment and high Engagement**
 Engagement can unfold its full potential thanks to the excellent performance environment. Focus on maintaining and consolidating your strengths!
- **Poor Performance Environment and low Engagement**
 Focus on the continuous improvement of the performance environment, especially with issues of particular importance to engagement and performance.
- **High Engagement and poor Performance Environment**
 Due to weaknesses in the performance environment, the performance potential is not fully utilized, and engagement is at risk. Improve the performance environment to allow engagement to unfold and sustain its full potential.
- **Good Performance Environment and low Engagement**
 Low engagement prevents the full utilization of the performance potential. Maintain your good performance environment. In most cases, engagement will increase.

Performance environment



Chapter label

Engagement



● Effactory --- Average: 5.0 👤 Respondents

Merge surveys

Unlock deeper insights across multiple surveys. This will help you combining results from separate surveys into one overview in My Effectory.

- Get a complete picture by combining multiple survey results into one overview.
- Spot trends across time and group, understanding how feedback evolves and where to focus.
- Easily manage access rights across merged results. Coordinator suggestions help you assign the right people quickly.

This is an early concept. The final experience may look different.

Merge surveys

1 Select surveys — 2 Choose structure — 3 Review & confirm

Select surveys to merge
Choose the project first, then select at least two surveys to merge.

Choose a project

Central Employee Listening

<input type="checkbox"/>	New office - Company wide survey	Completed on {{ date }}	100%
<input checked="" type="checkbox"/>	Team Indigo - Pulse Survey	Completed on {{ date }}	100%
<input checked="" type="checkbox"/>	Onboarding survey - January	Completed on {{ date }}	100%
<input type="checkbox"/>	Survey name	Completed on {{ date }}	100%
<input type="checkbox"/>	Survey name	Completed on {{ date }}	100%

Random participant sampling

We're introducing a simple way to **collect feedback from a random subset of employees**, helping you run shorter, more frequent surveys without overloading your organization.

- Select a random sample of participants based on your desired sample size
- Reduce survey fatigue by involving fewer employees per survey
- Increase engagement with lighter, more frequent feedback moments
- Gather quick insights to support a more continuous listening approach

The screenshot shows the 'Participants' management interface. At the top, there's a 'Participants' header with a toggle for 'Random sampling' (which is turned on) and an 'Edit selection' button. Below this is a 'Select sample percentage' section with a slider set to 50% and a note: 'We recommend a sample size between 30% and 60%'. A summary bar indicates '3 groups selected' and 'Inviting ~48 of 95 selected participants'. A green success message states: 'Looks good! Participants will receive ~1 survey on average across 1 round.' Below this is a search bar for groups and a table of selected groups.

Search groups	
Effactory B.V.	~48 / 95
> Mid markt	35 total ~18 invited
> Enterprise	30 total ~15 invited
> SMB	30 total ~15 invited

This is an early concept. The final experience may look different.

Create custom answer categories

You can now create your own answer categories in the question library, giving you more **flexibility to design surveys that fit your organization's language and needs.**

- Create custom answer scales beyond the standard options
- Align surveys with your internal terminology and context
- Build questionnaires that better reflect your organization
- Manage answer categories directly in the platform, without support

This is an early concept. The final experience may look different.

Create Category Set

Define a reusable set of answer options

Name *

Topic (optional)

Options

1	<input type="text" value="Option label"/>	<input type="text" value="1"/>	×
2	<input type="text" value="Option label"/>	<input type="text" value="2"/>	×

+ Add option

Include N/A option

Display

Horizontal Vertical

Preview

Reporting

Average score Percent distribution

Automated Onboarding and Exit surveys



We're introducing automated onboarding and exit surveys, so you can **capture feedback at key moments in the employee lifecycle without manual effort.**

- Automatically trigger surveys based on employee lifecycle events
- Reduce manual work and avoid errors or missed feedback moments
- Ensure consistent and timely data collection
- Gain insights from employees when it matters most

This is an early concept. The final experience may look different.




Participant targeting

This survey automatically targets employees based on their 'Date in service'. Set when the automation begins and apply filters to target specific groups.

 Trigger invitations based on	Date in service >
 Include employees starting from	March 12, 2026 v
+ Add a filter for more specific targeting	




Schedule

This survey batches participants based on your chosen frequency (e.g., a 'Monthly' schedule invites everyone who started in the previous month). Define your sending schedule, how and the participants response window below.

 Survey frequency	Quarterly v
 Send date and time	on the 1st at 09:00 v
 Response window	14 days v

Communication

Manage the design and content of the messages sent to participants.

 Email design	Happy company >
 Invitation email	Default email >
 Reminder email	Custom email >

Trends over time with group linking

We're bringing group linking to My Effactory, enabling you to **maintain accurate trend comparisons across surveys** even when your organization changes.

- Automatically link groups between surveys to preserve trend insights
- Get smart suggestions when structures or names have changed
- Review and adjust links directly in the platform
- Handle exceptions easily with clear visibility and control
- Reduce manual work and avoid broken or missing trends

This is an early concept. The final experience may look different.

Previous surveys

Compare this survey with a previous one to see how results changed over time. First, select the survey you want to compare with. Based on that survey, we'll match your current teams so their previous results can appear in trend lines. Review any suggested changes to ensure comparisons stay accurate



Select the previous survey

Pick a survey and confirm how your group structures map across surveys.



2025 Engagement Survey

Auto-detected based on survey history

Change

> View survey links (5 links)

2

Review group link suggestions

8 groups couldn't be linked automatically and need a quick review.

All structures

View all group links

POSSIBLE RENAME - Organizational

Customer Support → Customer Success

High confidence · 92% overlap · 85 → 91 members

Show details

Confirm match

Mark as new team



Thank you!

Questions or feedback?

Get in touch with our [Helpdesk](#)
or with your CSM!