



Product Roadmap

July 2026

Updated quarterly

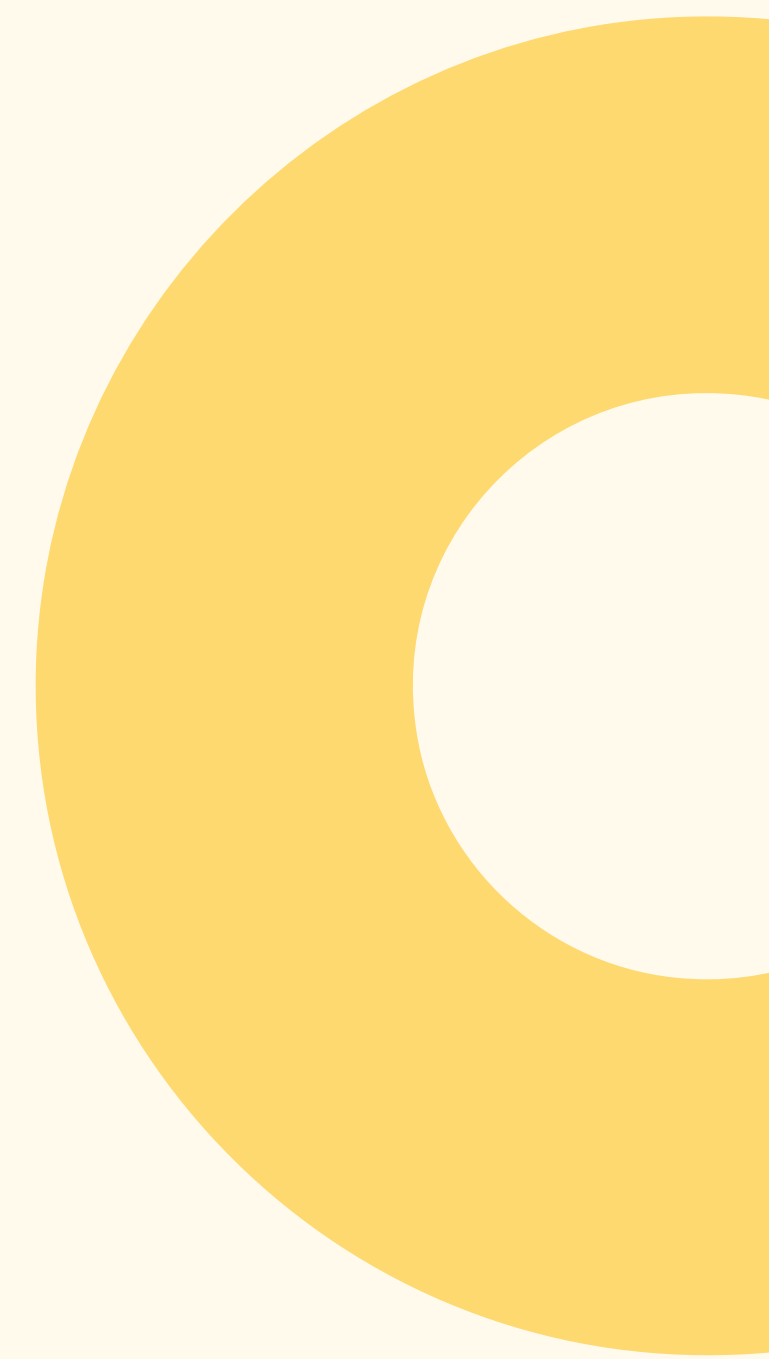
Don't miss out on any future updates.
Sign up to our community newsletter [here!](#)





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

The screenshot displays the 'People Pulse Survey 25' dashboard. The left sidebar contains navigation links for Home, Employees, Projects, and Organization. The main content area shows the survey title, a date range from 22 Jul 2023 to 22 Aug 2023, and tabs for Overview, Themes, Questions, Open questions, Topics & ideas, Reports, and Actions. The 'Overview' tab is active, showing an 'AI Summary' section with a 'Beta' badge. The summary text states: 'Despite a general decline compared to the previous survey, overall results remain well above external benchmarks. Leading change and team leadership stand out with scores of 86% and 79% respectively, exceeding benchmarks by 19 and 20 points—indicating strong capabilities in communication and motivation. Engagement remains high at 82%, though it dipped slightly from 84%. However, managing systems and people fell below their benchmarks, with managing systems underperforming by 6 points and both themes dropping 5 points since the last survey. Focused action is needed to strengthen people and system management practices, such as manager training, clearer process ownership, and increased employee involvement in decision-making.' Below this, 'Strengths' are listed: 'Engagement (82%) and Leading Change (86%) are well above benchmark by 14% and 19%.' 'Growth Areas' are listed: 'Managing People (65%) declined by 5% and is now below the 67% benchmark.' An 'About the AI summary' modal is open, explaining that the summary is generated using team theme scores, compares current results to past surveys and benchmarks, and notes that while generated by AI, it may not capture every nuance. It also states that Effectory uses AI technology under the same contractual terms as the rest of the platform, with data stored in Europe and not used for AI model training. A 'Got it' button is at the bottom right of the modal.

Projects > Project title > Results > Survey title > Overview

People Pulse Survey 25'

Group: Orange 22 Jul 2023 - 22 Aug 2023

Overview Themes Questions Open questions Topics & ideas Reports Actions

AI Summary Beta

Despite a general decline compared to the previous survey, overall results remain well above external benchmarks. Leading change and team leadership stand out with scores of 86% and 79% respectively, exceeding benchmarks by 19 and 20 points—indicating strong capabilities in communication and motivation. Engagement remains high at 82%, though it dipped slightly from 84%. However, managing systems and people fell below their benchmarks, with managing systems underperforming by 6 points and both themes dropping 5 points since the last survey. Focused action is needed to strengthen people and system management practices, such as manager training, clearer process ownership, and increased employee involvement in decision-making.

Strengths

- Engagement (82%) and Leading Change (86%) are well above benchmark by 14% and 19%.

Growth Areas

- Managing People (65%) declined by 5% and is now below the 67% benchmark.

About the AI summary

This summary is generated using your team's theme scores. It compares your current results to past surveys and established benchmarks to highlight key trends and changes.

No personally identifiable information or open-text comments are used in the analysis.

Please note that while this summary is generated by AI, it may not capture every nuance. It's designed to support—not replace—your own insights and decision-making.

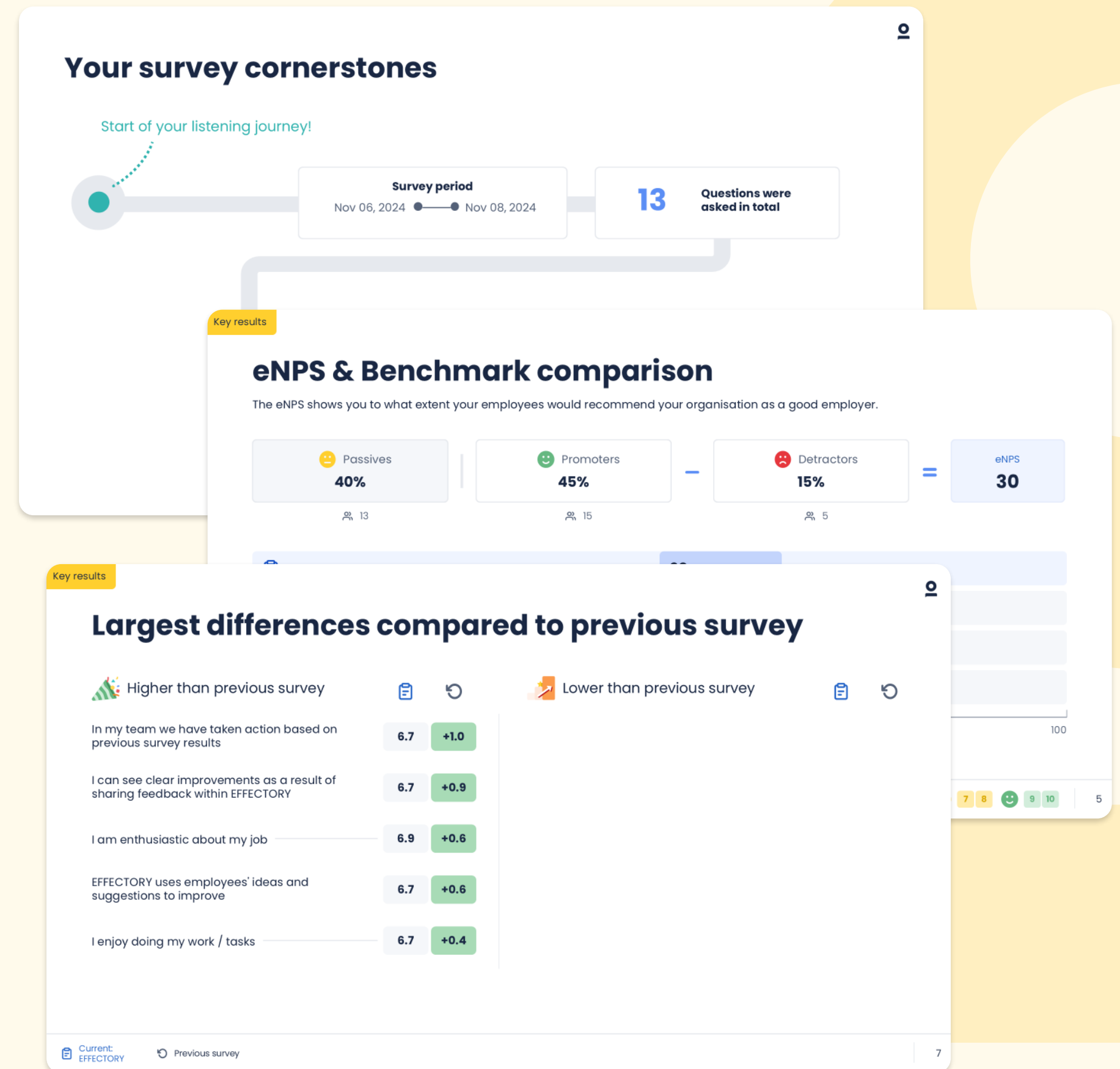
Effectory uses AI technology under the same contractual terms that govern the rest of this platform. This includes robust privacy and security measures: your data remains stored in Europe and is not used to train AI models.

Got it

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 Effectory, 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 Kloppe** 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: Effectory Index

Country benchmark: Global Index

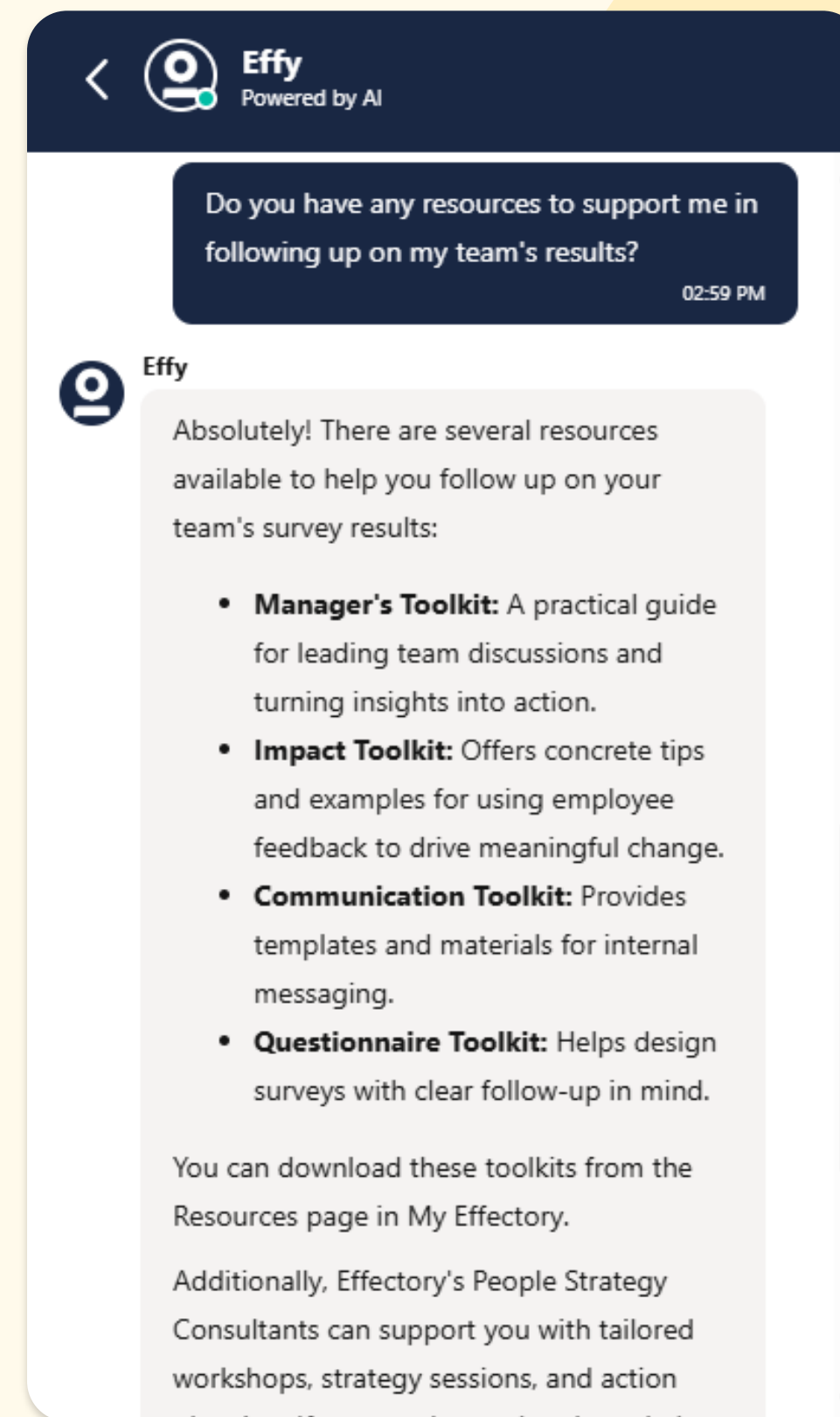


Meet Effy, our AI assistant

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



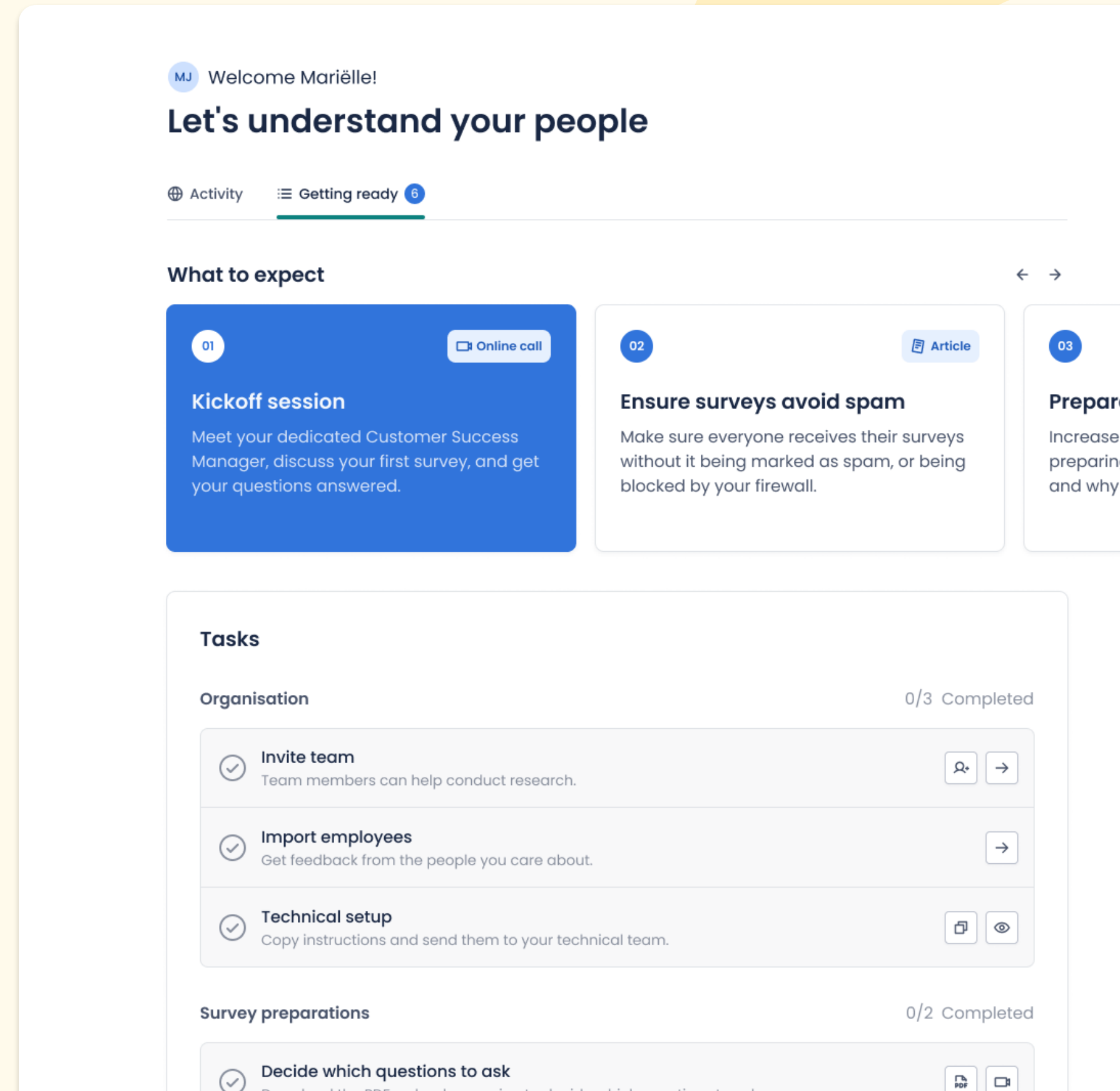
Meet Effy >

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!



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 Effectory. 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

📅 24.04.2025

Frequency

🔄 Weekly

Survey Start D

📅 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

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

▼

More mailing functionalities (1)

We're adding new functionalities to the mailings in My Effectory, 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

Enter an 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

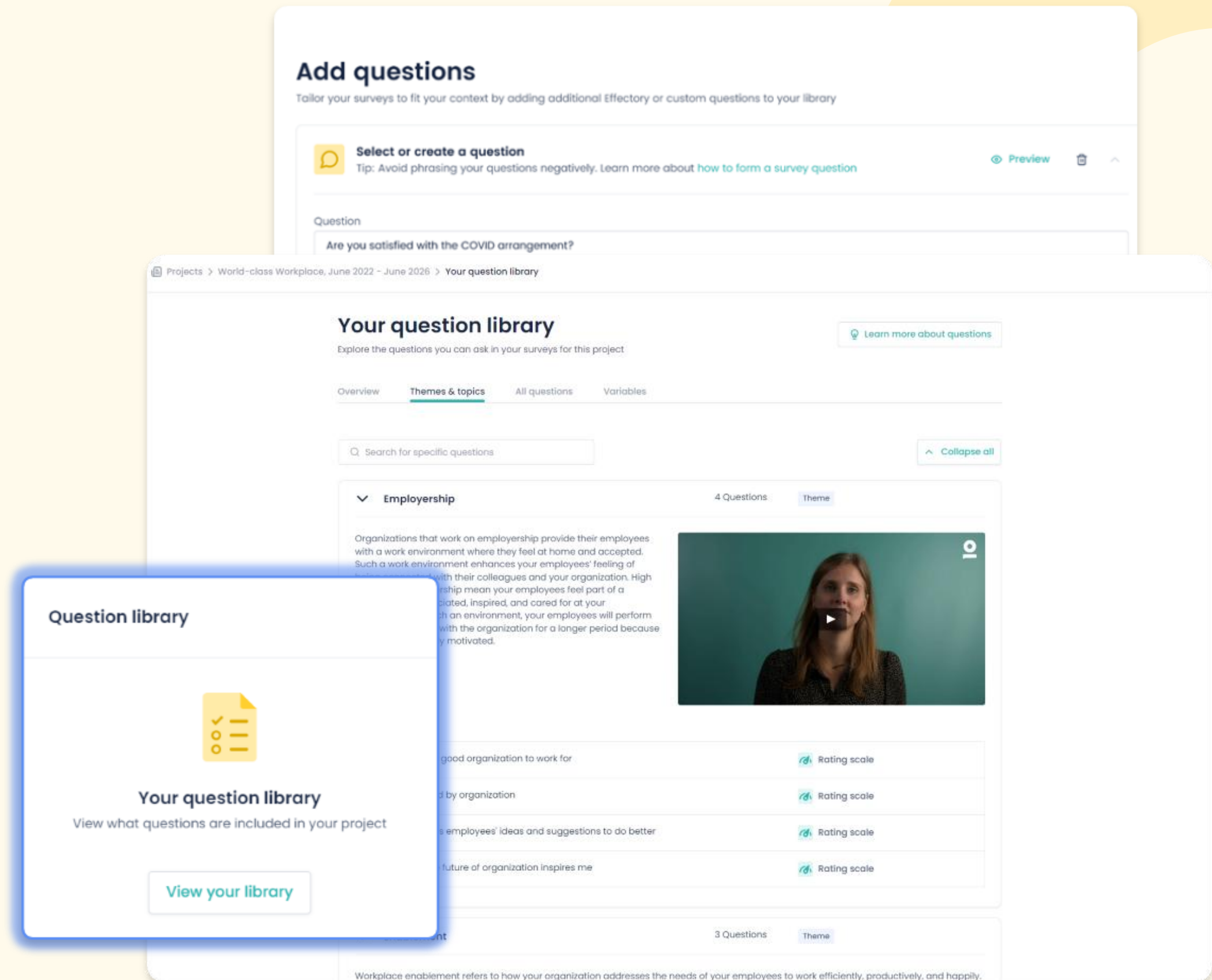
Cancel

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.

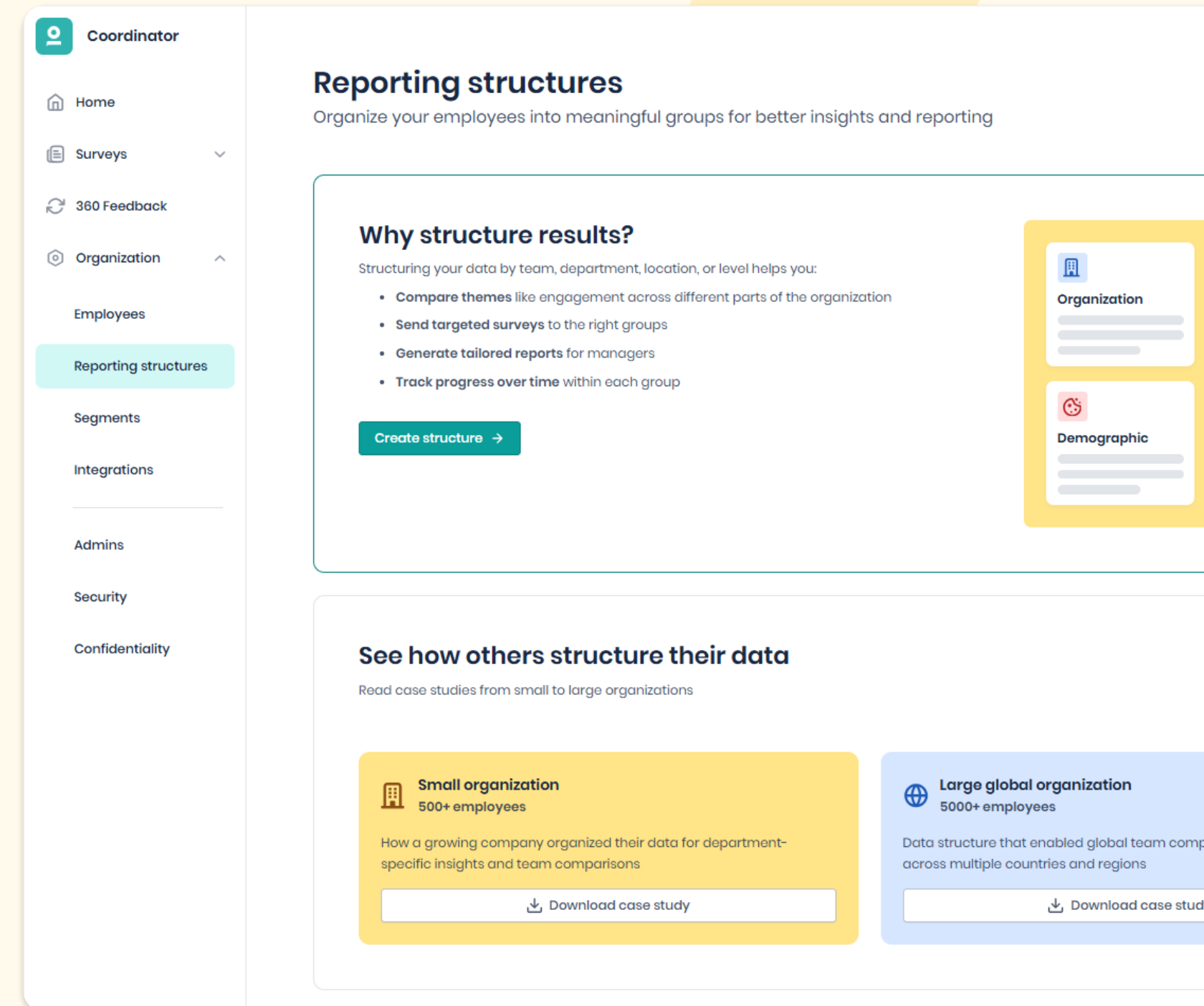
[Learn more >](#)

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

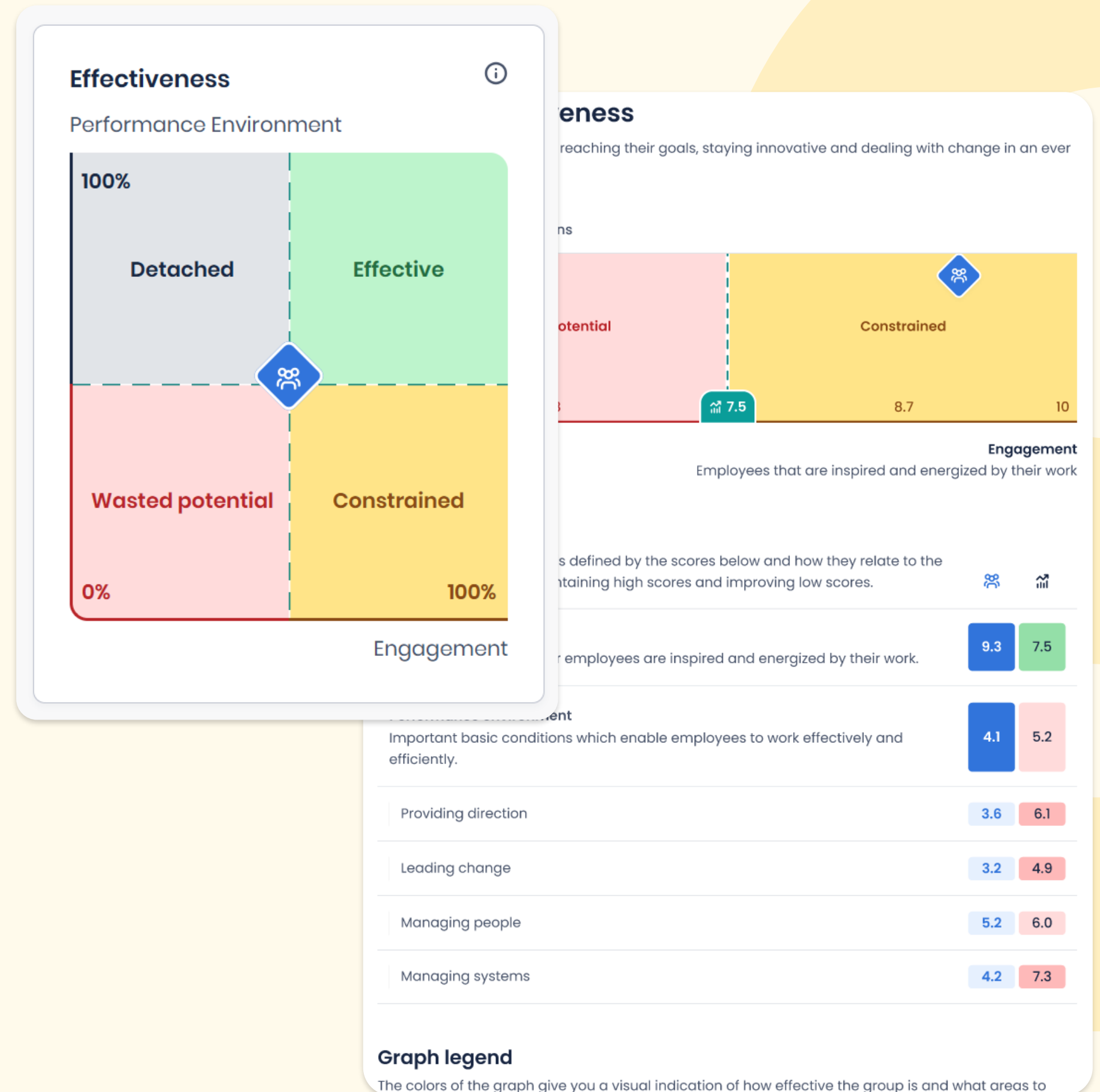
This update makes the process smoother, clearer, and easier to complete independently.



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 | ✕

Age

⌵ {{usedColumnName}}

Edit segment

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

Segments

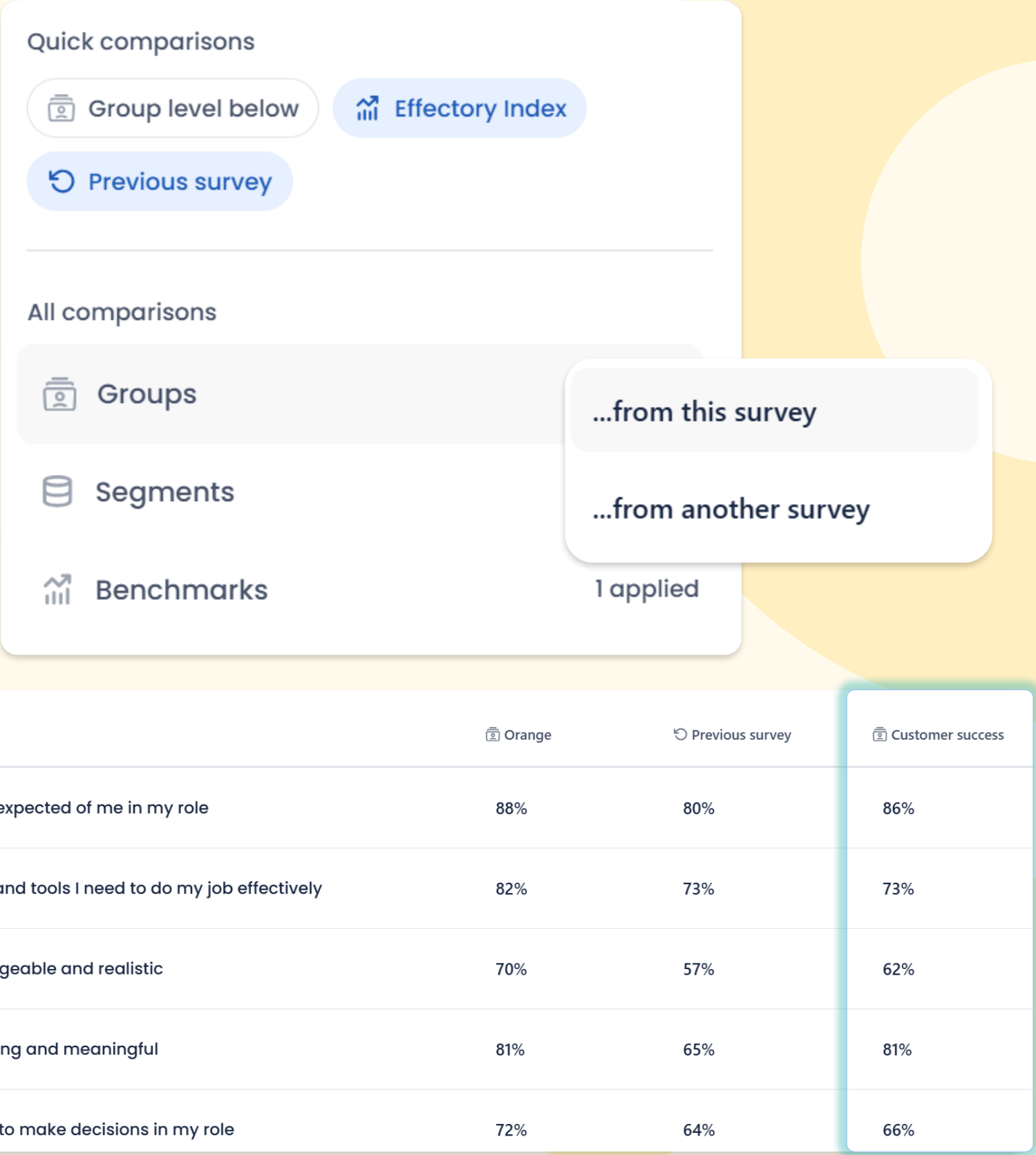
[+ Create segment](#)

♂ 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



More mailing functionalities (2)

We're expanding the mailing options in My Effectory 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.

Marketing

5 participants + Add Participant

- SM** Sandra Miller
sandra.miller@happycompany.com
- JT** Jasmin Tokpinar
jasmin.tokpinar@happycompany.com
- MW** Merel Wijnands
laurens.erber@happycompany.com
- TL** Thimo van Leeuwen
laurens.erber@happycompany.com
- JT** Hans Helms
Hans.helms@happycompany.com

Resend invitation
Remove participant

Bounced invitations

We couldn't send the survey to these participants because there was an issue with their email address. You can review each case below, see what went wrong, and find out how to fix it so you can resend the invitation.

{{numberBounced}} bounces

- DK** Sophia Lee
sophia.lee@happycompany.com Undelivered
- DK** Sophia Lee
sophia.lee@happycompany.com Undelivered

The email address may be incorrect, misspelled, or use an invalid domain. It's also possible the recipient's mailbox is full.

How to resolve

Go to Organization Settings → Employees. Find {{participantName}} and correct the email formatting. Then return here and click Resend.

Resend

- DK** Daniel Kim Email address updated
daniel.kim@happycompany.com Resend
- DK** Daniel Kim
daniel.kim@happycompany.com Resend

There was an issue with the email address of {{participantName}}, but it's been updated. You can resend the invitation to check if it works now.

Effectory

Hi {{firstName}},

The survey you were invited to participate in has been closed early

The survey you were invited to participate in has been closed earlier than initially planned. As a result, it is no longer possible to submit your response.

Engagement survey Q2

Period Closed on 18 aug. 2025

Survey Length 24 questions - 15 minutes

We guarantee your privacy!

Effectory processes all data confidentially. Want to know more? Please ask your manager or HR manager. You can also visit our [online helpdesk](#).

(C) Effectory - All rights reserved



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

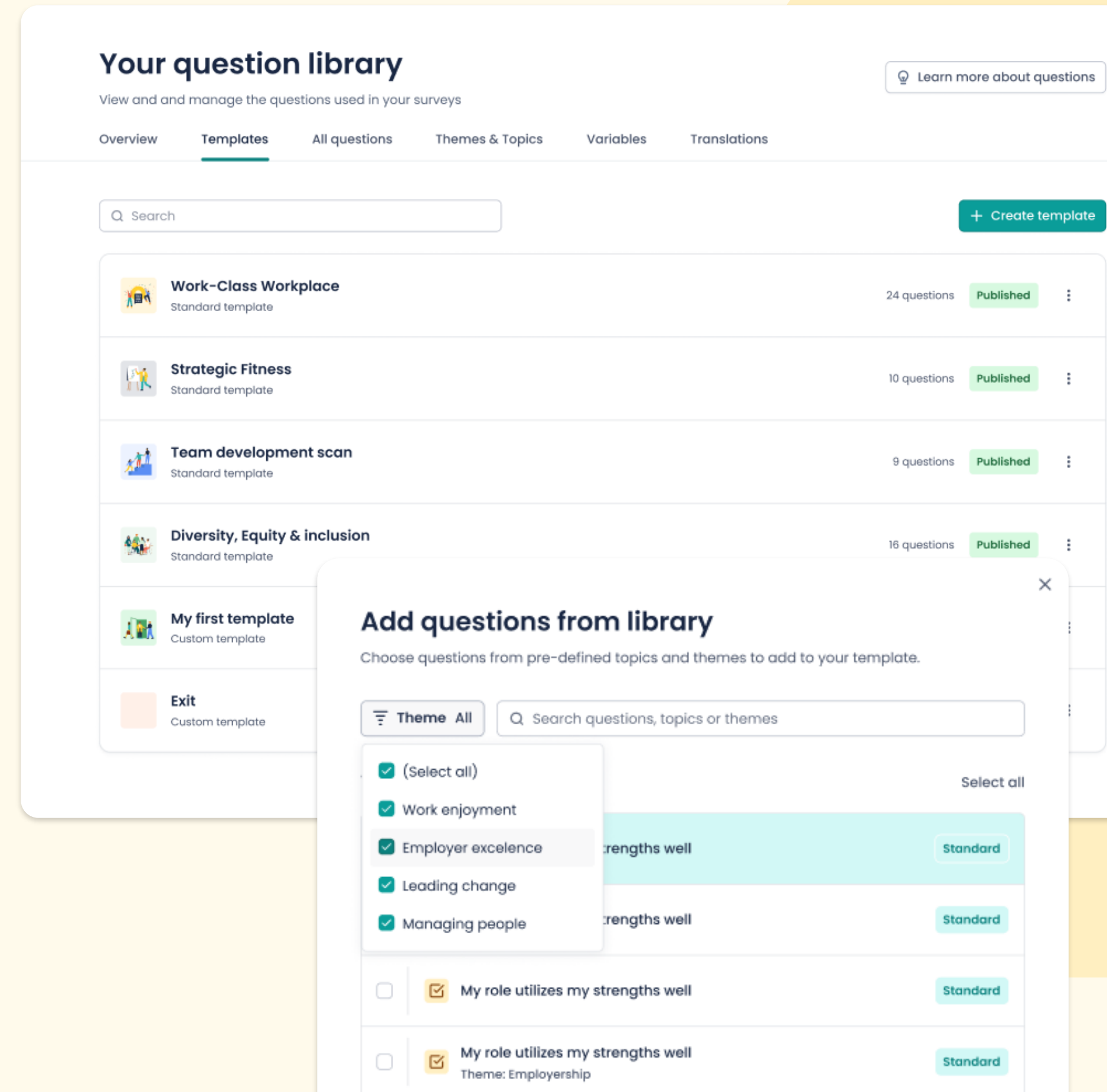
🔖 Bookmarks

🗨️ 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 Effectory 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





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.

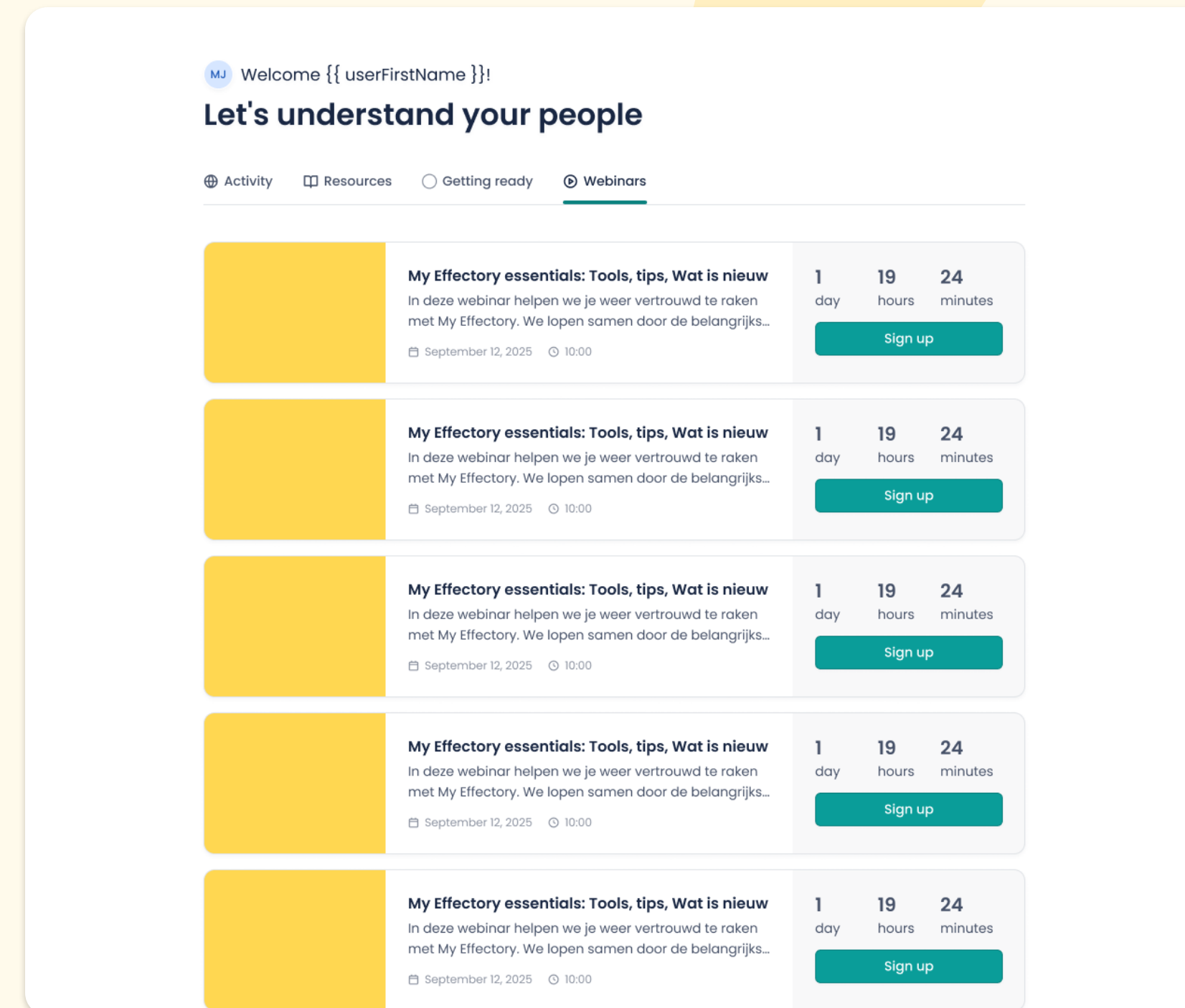
- **Instantly understand** the main themes across all open answers
- **Spot recurring signals**, concerns, and opportunities more easily

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: 'Overview', 'Open Answers' (which is selected), 'Topics & Ideas', 'Scores', 'Action Planner', and 'Reports'. The main section is titled 'Open Answers' with a subtitle 'Written answers to open-ended questions'. There are search bars and buttons for 'Open Answers' and 'Bookmarks'. A specific question is highlighted: 'If you could give EFFECTORY one tip, what would it be?' with '20 answers'. Below the question, an 'AI Summary' box is shown, labeled 'BETA'. The summary text reads: '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' link is at the bottom of the summary box. Below the summary, a user's response 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 Effectory webinars directly in My Effectory**, 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 Effectory.



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

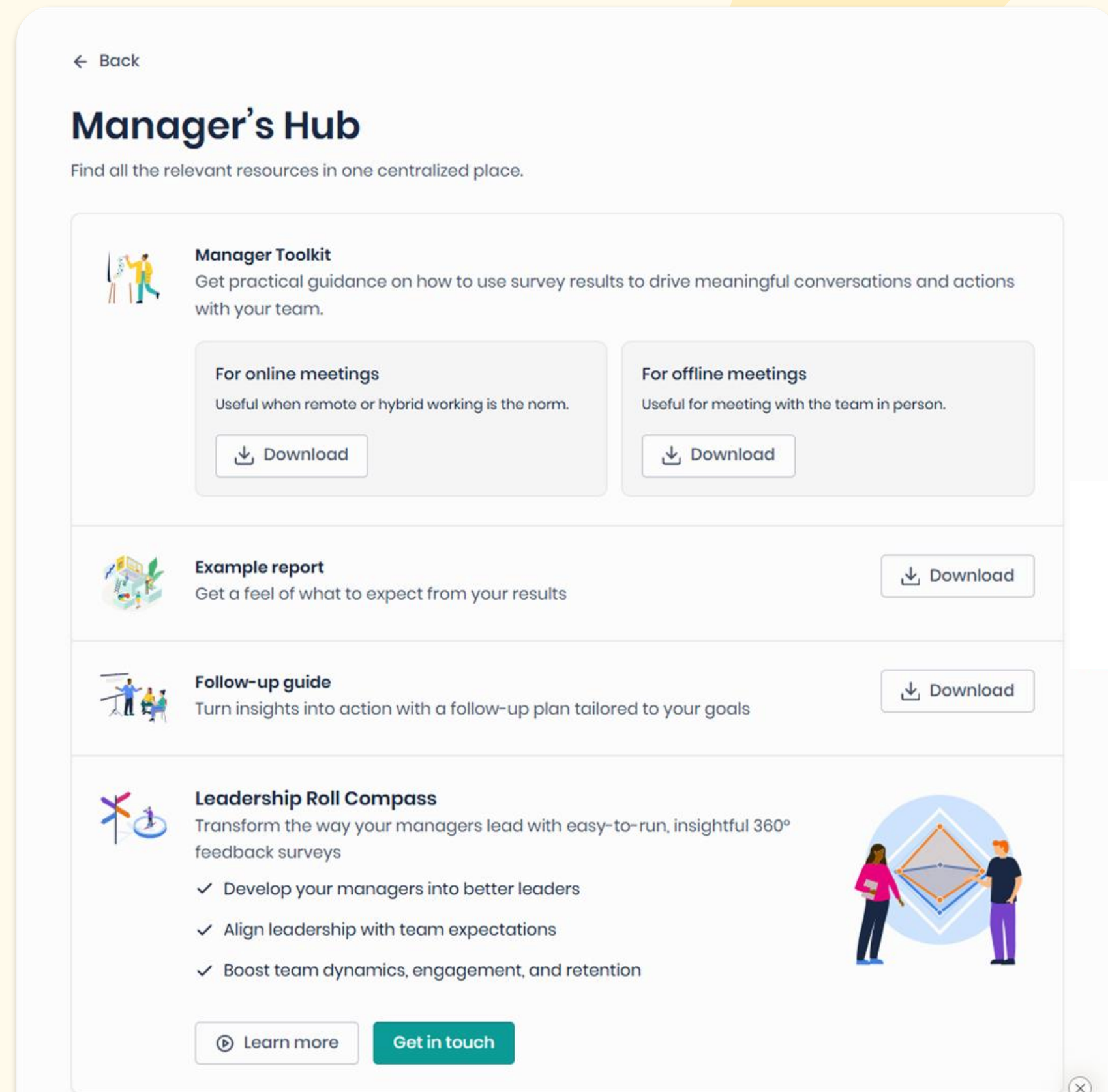
Duplicate as draft

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.



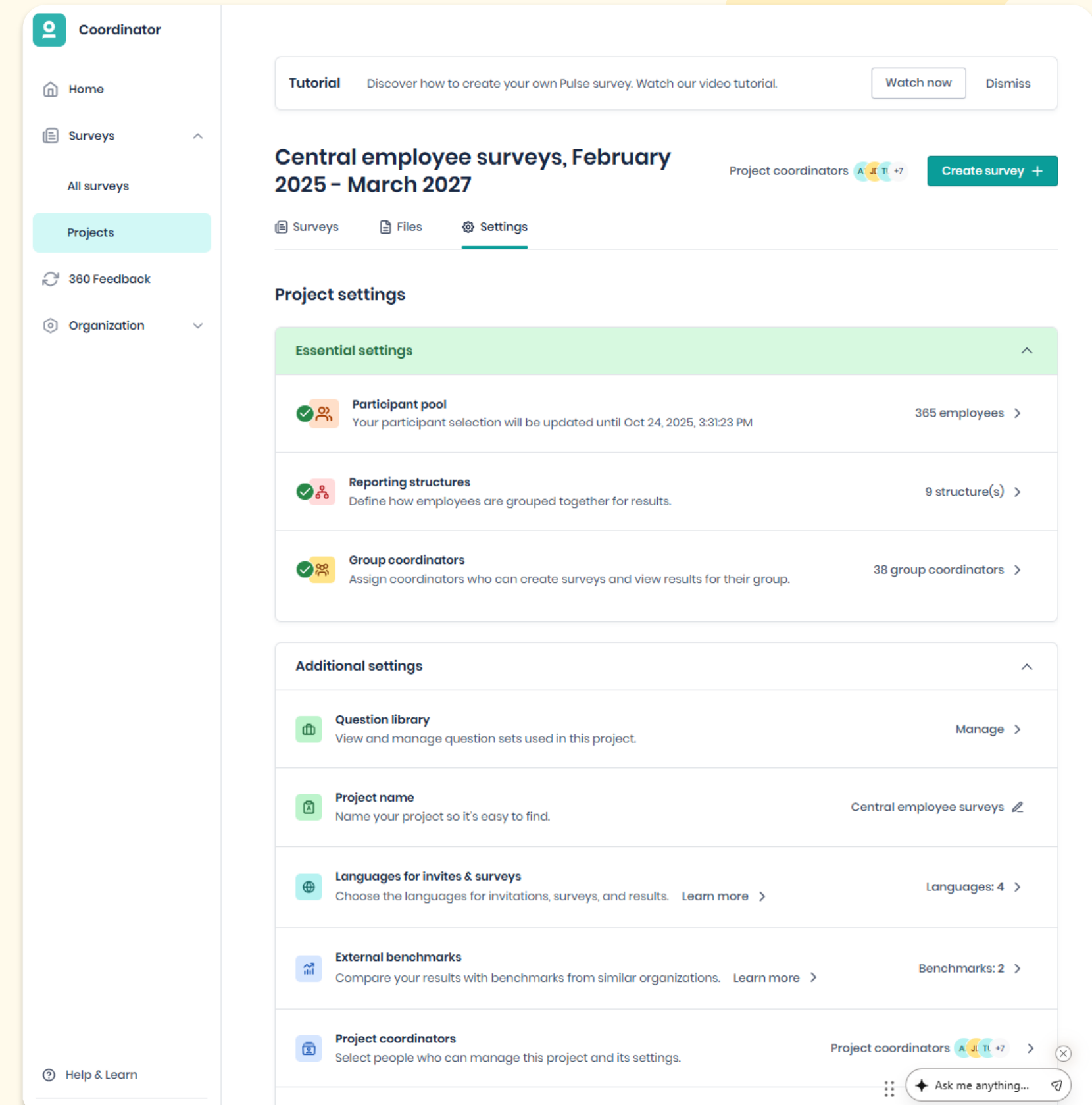
Redesigned project page & settings

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.

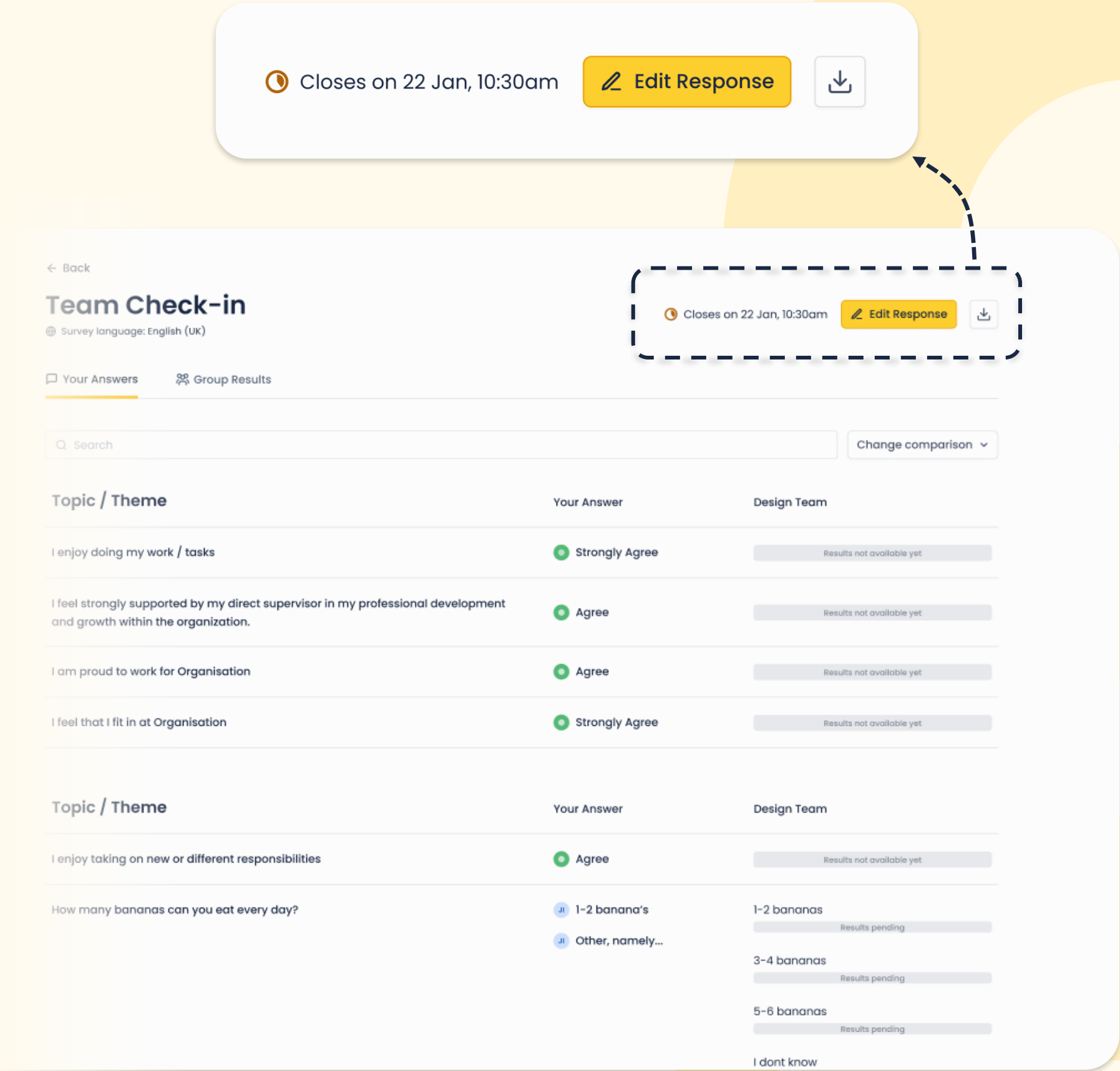


Edit your survey response

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

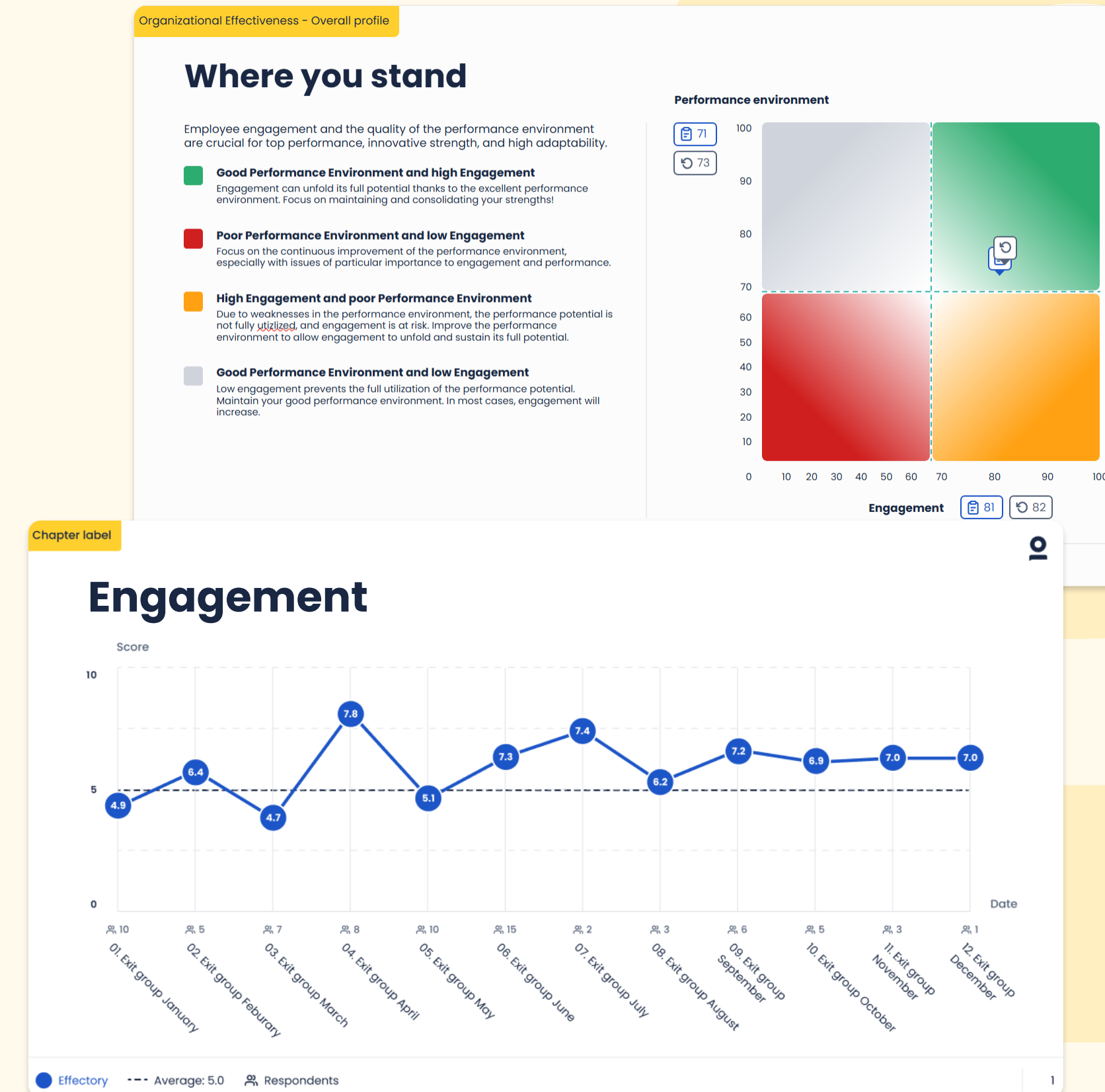
This update makes participation more flexible and reduces manual support effort.



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,



Participant sampling

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

- Select a sample (percentage) 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

×

Select groups

Select your preferred group structure and add the groups you want to invite. The structure you choose here will become the Inviting Structure of the survey. This means you will receive the most comprehensive results based on this structure. [Learn more](#)

☒ Random sample ⓘ

Inviting 91 of 365 participants

39 groups under Organizational Structure

Select sample size

25%

ⓘ Need help with random sampling? [Read our guide](#)

Organizational Structure ▾

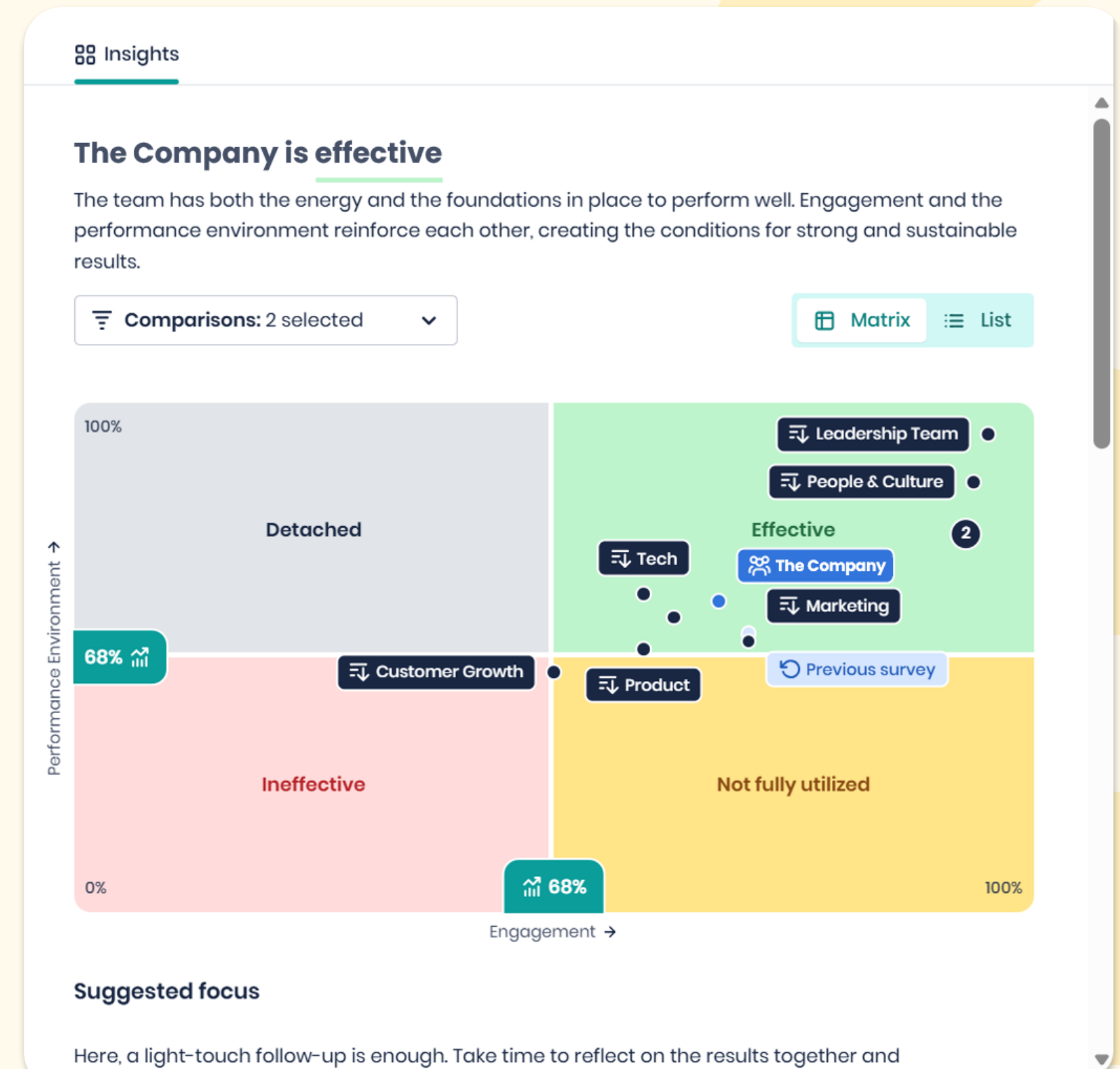
Name	Invited sample ⓘ	Participants
▼ EFFECTORY	91	365/365
> Communication	4	17/17
> Customer Success	36	141/141
> Finance	10	38/38
> Human Resources	4	25/25
> Marketing	4	25/25

Select 39 groups

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.





What's coming

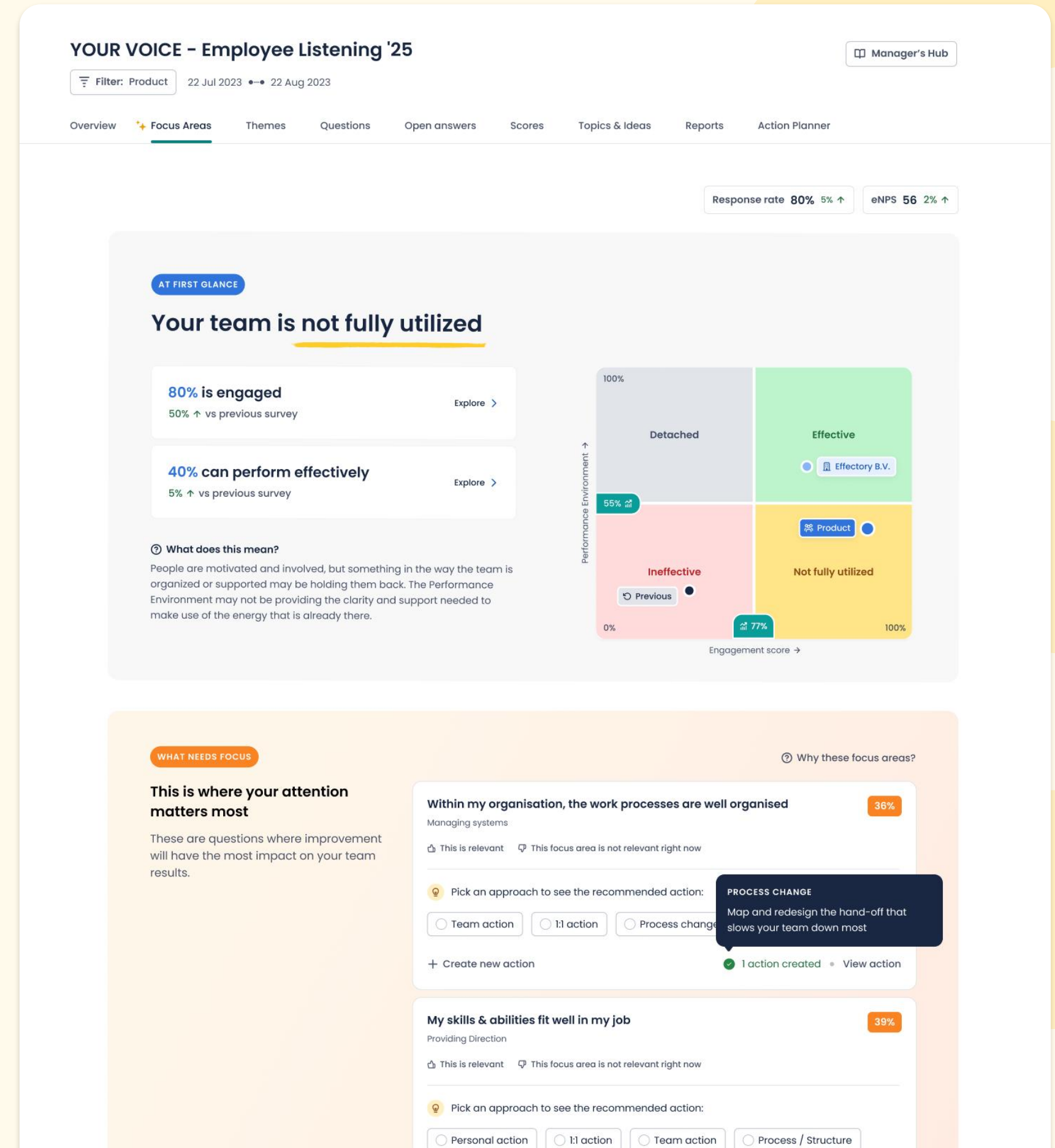
Take a peek at what's on our roadmap.

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.

Focus view

Focus View is a condensed view of the Results Dashboard designed to help managers quickly understand how their team is doing and where to focus – without having to interpret all results themselves.

- **Smart focus area identification:** Focus areas are computed using an Improvement Priority Score that factors in trend, gap, consistency, and performance against benchmarks – surfacing what matters most, not just what scored lowest.
- **Recommended actions, tailored to context:** Each focus area surfaces a menu of next-step so managers can choose what fits their team's situation, whether that's a team action, 1:1 action or a process change action.



Printable invitations

Download printable invitations for any participant, including employees who do have an email address.

- Ensure every employee can participate, regardless of email access.
- Easily reach employees who work on the frontline, share devices, or have limited access to a company inbox.
- Keep surveys inclusive and accessible, even when circumstances change after launch.
- Increase confidence that all employee voices can be captured.

The screenshot displays a 'Printable invitations' window with a search bar and a table of groups. The table has columns for 'Header', 'Participants', 'Without email', and 'Download options'. A dropdown menu is open for the 'Product' group, showing options to download invitations for participants without email addresses, the whole group, or to send download links to coordinators.

Header	Participants	Without email	Download options
▼ Effectory B.V.	200	13	Download
▼ Product	60	3	Download
UX	20		
Product managers	40	3	
▼ Customer success	100	1	Download
Scale	50		
Enterprise	50	10	Download
The rest	40		Download

DOWNLOAD OPTIONS

- Without email address
13 participants
- Whole group
200 participants
- Send download link to coordinators
Willem Jan-Jansen, Sarah de Boer

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

Trends over time with group linking

We're bringing group linking to My Effectory, 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

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 *

e.g., 5-Point Agreement Scale

Topic (optional)

No specific topic

Options

1

Option label

1

×

2

Option label

2

×

+ Add option

☐ Include N/A option

Display

Horizontal

Vertical

Preview

Reporting

☒ Average score

☐ Percent distribution

Cancel

Create

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

☐ New office - Company wide survey

Completed on {{ date }}

100%

☒ Team Indigo - Pulse Survey

Completed on {{ date }}

100%

☒ Onboarding survey - January

Completed on {{ date }}

100%

☐ Survey name

Completed on {{ date }}

100%

☐ Survey name

Completed on {{ date }}

100%

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 ▾
+ 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 ▾
 Send date and time	on the 1st at 09:00 ▾
 Response window	14 days ▾

Communication

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

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



Thank you!

Questions or feedback?

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