



**Effactory**

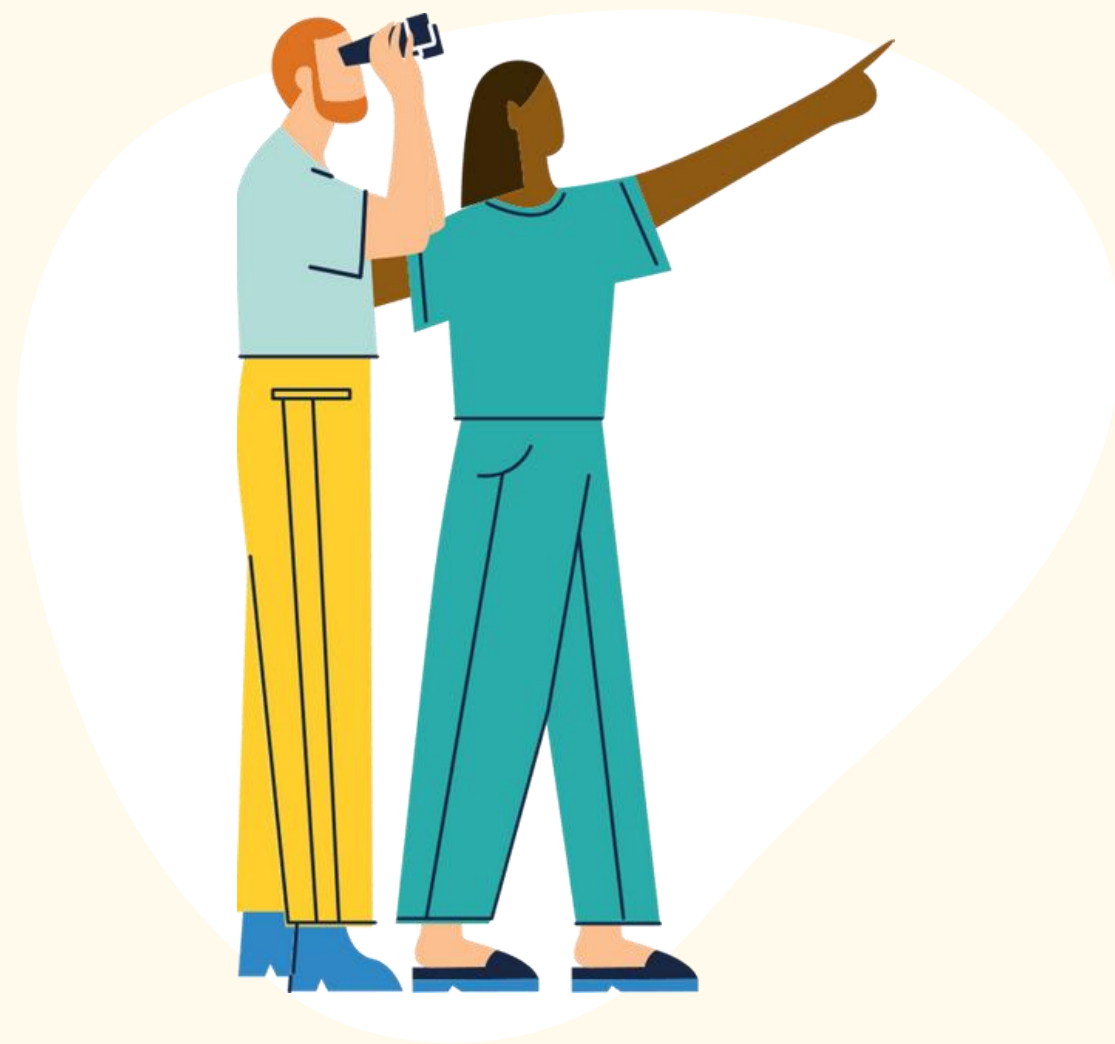
# Product Roadmap

**Q2 2024– Q4 2025**

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



# Contents



- **Our Product vision**
- **What we've done**
- **What's coming**

# Our Product vision

## Empowering organizations with intelligent feedback solutions.

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

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

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

## Our platform should be:

- Effortless
- Stable & safe
- Reliable

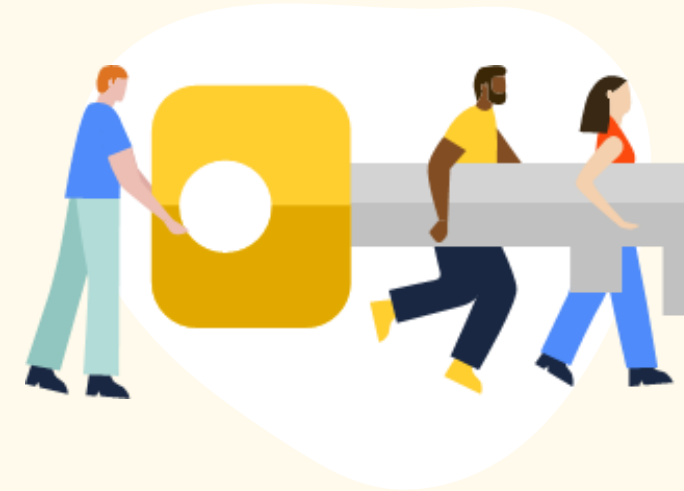
**Surveying should be a no-brainer!**

# 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.

**Learn more** >



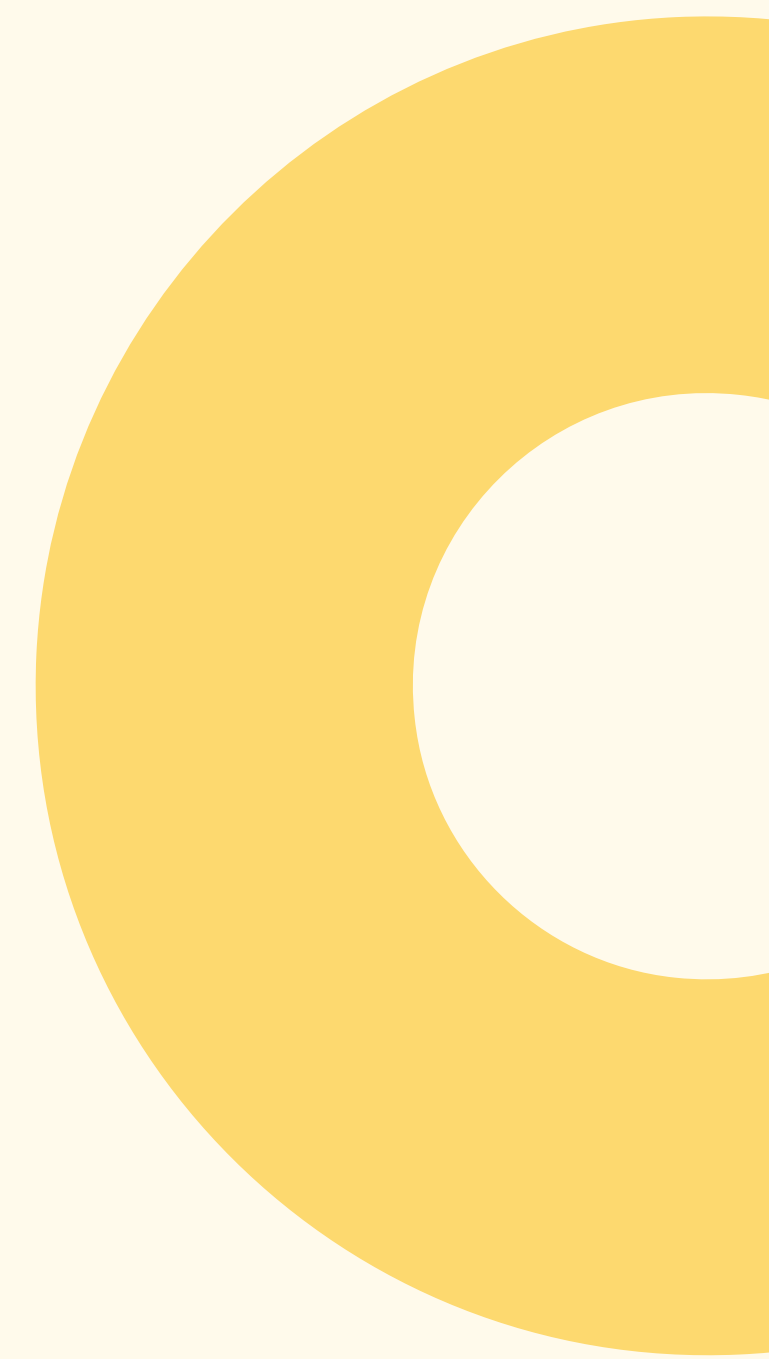
## Fully ISO certified since 2015

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**!



# 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:

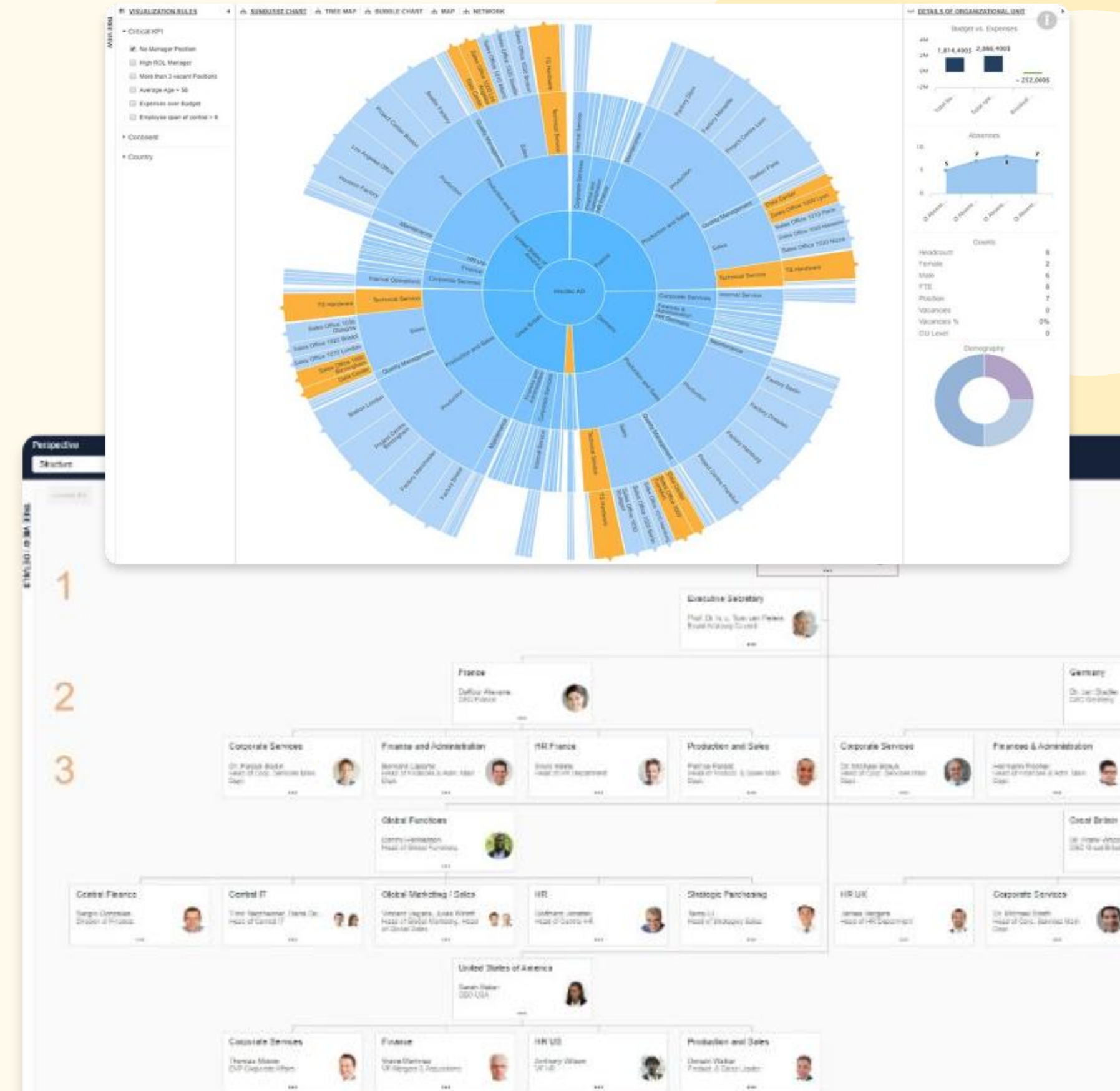
|                    |              |
|--------------------|--------------|
| Personio           | Eurécia      |
| Workday            | Officient    |
| SAP successfactors | Charlie      |
| Factorial          | HRworks      |
| AFAS               | Breathe HR   |
| BambooHR           | AlexisHR     |
| 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!**

# 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.



# 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

2

Participants

431 participants can view their results in My Fee

May 2023

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| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |

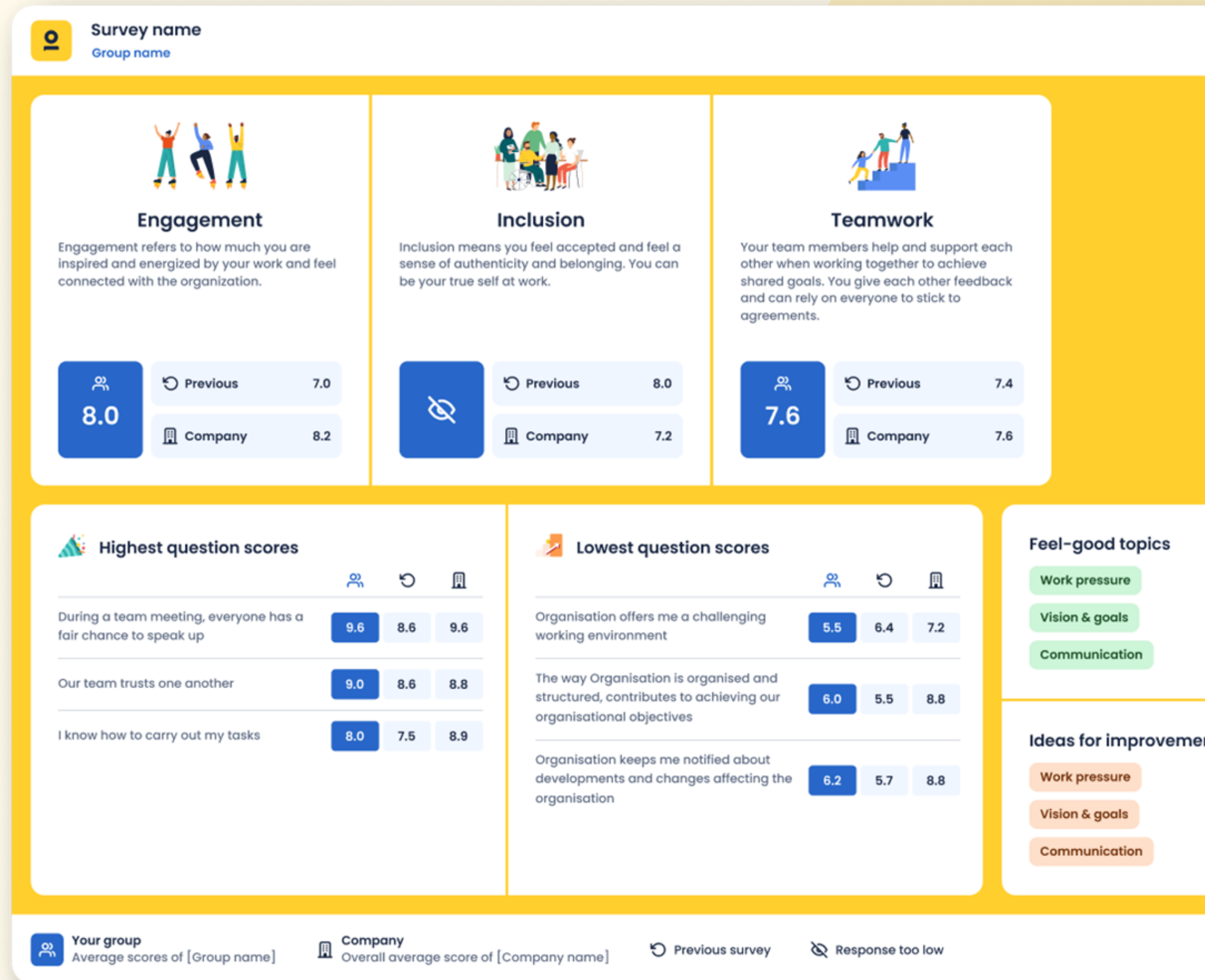


# One-pager

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!



# 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 >

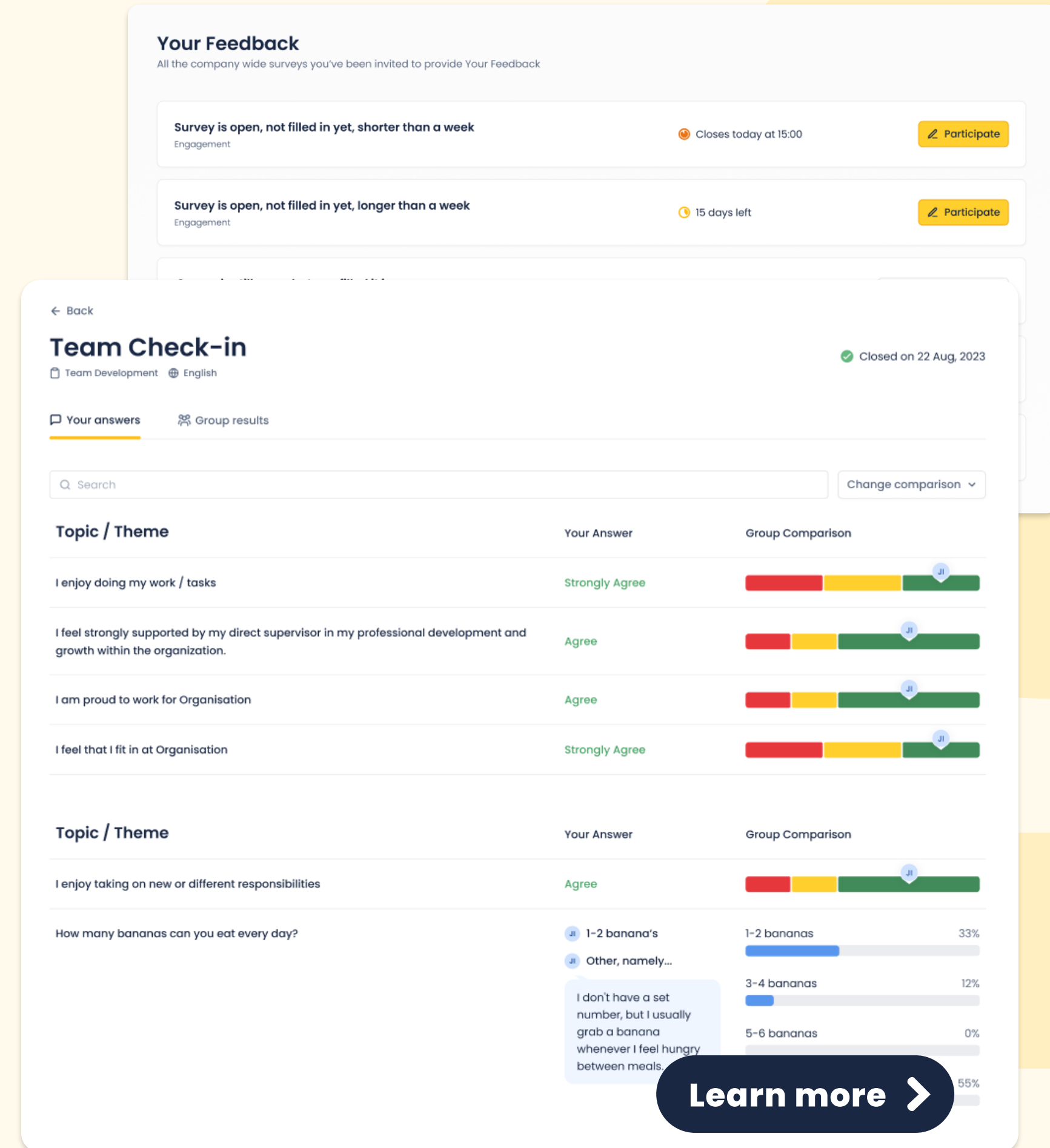
|                                                                                                      | Doing my work gives me energy | I enjoy doing my work / tasks | My skills and abilities fit in well with my job | I can decide how I carry out my work | I know what results are expected of me at work | Important information is readily accessible for me | I am provided with good work resources (tools, devices, software, materials, etc.) to do my job well | I have good opportunities to develop myself professionally and personally | When I do a good job, I receive praise and recognition | I can be myself around everyone I work with | In my team we collaborate well | My team understands what needs to be done to contribute to the success of Effectory | My team continuously develops good ideas for improvement | In my team, we have taken action to improve on our feedback results | I have confidence in my team lead | My team lead motivates me in my work | My team lead encourages my development | I am regularly given useful performance feedback | My team lead supports me in achieving my objectives | My team lead leads changes in an exemplary manner | My team lead sets a good example for my team | I am proud to work at Effectory | I feel that I fit in at Effectory | I identify with the culture of Effectory |
|------------------------------------------------------------------------------------------------------|-------------------------------|-------------------------------|-------------------------------------------------|--------------------------------------|------------------------------------------------|----------------------------------------------------|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|--------------------------------------------------------|---------------------------------------------|--------------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------|---------------------------------------------------------------------|-----------------------------------|--------------------------------------|----------------------------------------|--------------------------------------------------|-----------------------------------------------------|---------------------------------------------------|----------------------------------------------|---------------------------------|-----------------------------------|------------------------------------------|
| Doing my work gives me energy                                                                        | 1                             | 0,89                          | 0,40                                            | 0,29                                 | 0,20                                           | 0,08                                               | 0,16                                                                                                 | 0,33                                                                      | 0,30                                                   | 0,23                                        | 0,32                           | 0,36                                                                                | 0,27                                                     | 0,20                                                                | 0,40                              | 0,41                                 | 0,36                                   | 0,31                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I enjoy doing my work / tasks                                                                        | 0,89                          | 1                             | 0,51                                            | 0,21                                 | 0,11                                           | 0,10                                               | 0,18                                                                                                 | 0,27                                                                      | 0,16                                                   | 0,15                                        | 0,26                           | 0,26                                                                                | 0,24                                                     | 0,18                                                                | 0,33                              | 0,37                                 | 0,28                                   | 0,28                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| My skills and abilities fit in well with my job                                                      | 0,40                          | 0,51                          | 1                                               | 0,24                                 | 0,14                                           | 0,14                                               | -0,02                                                                                                | 0,18                                                                      | 0,10                                                   | 0,15                                        | 0,27                           | 0,16                                                                                | 0,20                                                     | 0,14                                                                | 0,26                              | 0,22                                 | 0,13                                   | 0,24                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I can decide how I carry out my work                                                                 | 0,29                          | 0,21                          | 0,24                                            | 1                                    | 0,35                                           | 0,22                                               | 0,21                                                                                                 | 0,16                                                                      | 0,12                                                   | 0,21                                        | 0,16                           | 0,12                                                                                | 0,14                                                     | 0,14                                                                | 0,30                              | 0,23                                 | 0,21                                   | 0,14                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I know what results are expected of me at work                                                       | 0,20                          | 0,11                          | 0,14                                            | 0,35                                 | 1                                              | 0,32                                               | 0,12                                                                                                 | 0,19                                                                      | 0,31                                                   | 0,23                                        | 0,23                           | 0,43                                                                                | 0,30                                                     | 0,30                                                                | 0,39                              | 0,30                                 | 0,29                                   | 0,32                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| Important information is readily accessible for me                                                   | 0,08                          | 0,10                          | 0,14                                            | 0,22                                 | 0,32                                           | 1                                                  | 0,42                                                                                                 | 0,22                                                                      | 0,30                                                   | 0,09                                        | 0,23                           | 0,33                                                                                | 0,21                                                     | 0,15                                                                | 0,33                              | 0,27                                 | 0,26                                   | 0,32                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I am provided with good work resources (tools, devices, software, materials, etc.) to do my job well | 0,16                          | 0,18                          | -0,02                                           | 0,21                                 | 0,12                                           | 0,42                                               | 1                                                                                                    | 0,31                                                                      | 0,32                                                   | 0,16                                        | 0,11                           | 0,25                                                                                | 0,13                                                     | 0,19                                                                | 0,38                              | 0,25                                 | 0,31                                   | 0,29                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I have good opportunities to develop myself professionally and personally                            | 0,33                          | 0,27                          | 0,18                                            | 0,16                                 | 0,19                                           | 0,22                                               | 0,31                                                                                                 | 1                                                                         | 0,48                                                   | 0,24                                        | 0,20                           | 0,27                                                                                | 0,29                                                     | 0,23                                                                | 0,37                              | 0,29                                 | 0,41                                   | 0,28                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| When I do a good job, I receive praise and recognition                                               | 0,30                          | 0,16                          | 0,10                                            | 0,12                                 | 0,31                                           | 0,30                                               | 0,32                                                                                                 | 0,48                                                                      | 1                                                      | 0,20                                        | 0,27                           | 0,35                                                                                | 0,27                                                     | 0,29                                                                | 0,49                              | 0,55                                 | 0,47                                   | 0,53                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I can be myself around everyone I work with                                                          | 0,23                          | 0,15                          | 0,15                                            | 0,21                                 | 0,23                                           | 0,09                                               | 0,16                                                                                                 | 0,24                                                                      | 0,20                                                   | 1                                           | 0,30                           | 0,26                                                                                | 0,16                                                     | 0,22                                                                | 0,27                              | 0,17                                 | 0,24                                   | 0,16                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| In my team we collaborate well                                                                       | 0,32                          | 0,26                          | 0,27                                            | 0,16                                 | 0,23                                           | 0,23                                               | 0,11                                                                                                 | 0,20                                                                      | 0,27                                                   | 0,30                                        | 1                              | 0,53                                                                                | 0,58                                                     | 0,44                                                                | 0,40                              | 0,35                                 | 0,39                                   | 0,34                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| My team understands what needs to be done to contribute to the success of Effectory                  | 0,36                          | 0,26                          | 0,16                                            | 0,12                                 | 0,43                                           | 0,33                                               | 0,25                                                                                                 | 0,27                                                                      | 0,35                                                   | 0,26                                        | 0,53                           | 1                                                                                   | 0,58                                                     | 0,49                                                                | 0,45                              | 0,37                                 | 0,43                                   | 0,36                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| My team continuously develops good ideas for improvement                                             | 0,27                          | 0,24                          | 0,20                                            | 0,14                                 | 0,30                                           | 0,21                                               | 0,13                                                                                                 | 0,29                                                                      | 0,27                                                   | 0,16                                        | 0,58                           | 0,58                                                                                | 1                                                        | 0,50                                                                | 0,39                              | 0,32                                 | 0,37                                   | 0,27                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| In my team, we have taken action to improve on our feedback results                                  | 0,20                          | 0,18                          | 0,14                                            | 0,14                                 | 0,30                                           | 0,15                                               | 0,19                                                                                                 | 0,23                                                                      | 0,29                                                   | 0,22                                        | 0,44                           | 0,49                                                                                | 0,50                                                     | 1                                                                   | 0,41                              | 0,42                                 | 0,33                                   | 0,34                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I have confidence in my team lead                                                                    | 0,40                          | 0,33                          | 0,26                                            | 0,30                                 | 0,39                                           | 0,33                                               | 0,38                                                                                                 | 0,37                                                                      | 0,49                                                   | 0,27                                        | 0,40                           | 0,45                                                                                | 0,39                                                     | 0,41                                                                | 1                                 | 0,73                                 | 0,62                                   | 0,56                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| My team lead motivates me in my work                                                                 | 0,41                          | 0,37                          | 0,22                                            | 0,23                                 | 0,30                                           | 0,27                                               | 0,25                                                                                                 | 0,29                                                                      | 0,55                                                   | 0,17                                        | 0,35                           | 0,37                                                                                | 0,32                                                     | 0,42                                                                | 0,73                              | 1                                    | 0,63                                   | 0,64                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| My team lead encourages my development                                                               | 0,36                          | 0,28                          | 0,13                                            | 0,21                                 | 0,29                                           | 0,26                                               | 0,31                                                                                                 | 0,41                                                                      | 0,47                                                   | 0,24                                        | 0,39                           | 0,43                                                                                | 0,37                                                     | 0,33                                                                | 0,62                              | 0,63                                 | 1                                      | 0,57                                             |                                                     |                                                   |                                              |                                 |                                   |                                          |
| I am regularly given useful performance feedback                                                     | 0,31                          | 0,28                          | 0,24                                            | 0,14                                 | 0,32                                           | 0,32                                               | 0,29                                                                                                 | 0,28                                                                      | 0,53                                                   | 0,16                                        | 0,34                           | 0,36                                                                                | 0,27                                                     | 0,34                                                                | 0,56                              | 0,64                                 | 0,57                                   | 1                                                |                                                     |                                                   |                                              |                                 |                                   |                                          |
| My team lead supports me in achieving my objectives                                                  | 0,41                          | 0,36                          | 0,27                                            | 0,23                                 | 0,39                                           | 0,29                                               | 0,31                                                                                                 | 0,31                                                                      | 0,44                                                   | 0,29                                        | 0,41                           | 0,44                                                                                | 0,32                                                     | 0,38                                                                | 0,74                              | 0,73                                 | 0,65                                   | 0,67                                             | 1                                                   |                                                   |                                              |                                 |                                   |                                          |
| My team lead leads changes in an exemplary manner                                                    | 0,31                          | 0,27                          | 0,23                                            | 0,29                                 | 0,38                                           | 0,33                                               | 0,29                                                                                                 | 0,24                                                                      | 0,39                                                   | 0,27                                        | 0,33                           | 0,37                                                                                | 0,40                                                     | 0,31                                                                | 0,72                              | 0,64                                 | 0,49                                   | 0,55                                             |                                                     | 1                                                 |                                              |                                 |                                   |                                          |
| My team lead sets a good example for my team                                                         | 0,34                          | 0,26                          | 0,23                                            | 0,27                                 | 0,30                                           | 0,37                                               | 0,38                                                                                                 | 0,35                                                                      | 0,47                                                   | 0,22                                        | 0,39                           | 0,38                                                                                | 0,36                                                     | 0,37                                                                | 0,81                              | 0,77                                 | 0,59                                   | 0,66                                             |                                                     |                                                   | 1                                            |                                 |                                   |                                          |
| I am proud to work at Effectory                                                                      | 0,45                          | 0,46                          | 0,40                                            | 0,09                                 | 0,19                                           | 0,16                                               | 0,18                                                                                                 | 0,35                                                                      | 0,33                                                   | 0,18                                        | 0,28                           | 0,24                                                                                | 0,20                                                     | 0,25                                                                | 0,29                              | 0,30                                 | 0,26                                   | 0,35                                             |                                                     |                                                   |                                              | 1                               |                                   |                                          |
| I feel that I fit in at Effectory                                                                    | 0,33                          | 0,29                          | 0,34                                            | 0,10                                 | 0,27                                           | 0,22                                               | 0,19                                                                                                 | 0,28                                                                      | 0,27                                                   | 0,37                                        | 0,19                           | 0,28                                                                                | 0,14                                                     | 0,16                                                                | 0,31                              | 0,25                                 | 0,12                                   | 0,24                                             |                                                     |                                                   |                                              |                                 | 1                                 |                                          |
| I identify with the culture of Effectory                                                             | 0,26                          | 0,23                          | 0,19                                            | 0,01                                 | 0,32                                           | 0,22                                               | 0,20                                                                                                 | 0,24                                                                      | 0,26                                                   | 0,35                                        | 0,18                           | 0,28                                                                                | 0,11                                                     | 0,21                                                                | 0,29                              | 0,15                                 | 0,14                                   | 0,25                                             |                                                     |                                                   |                                              |                                 |                                   | 1                                        |



# 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.

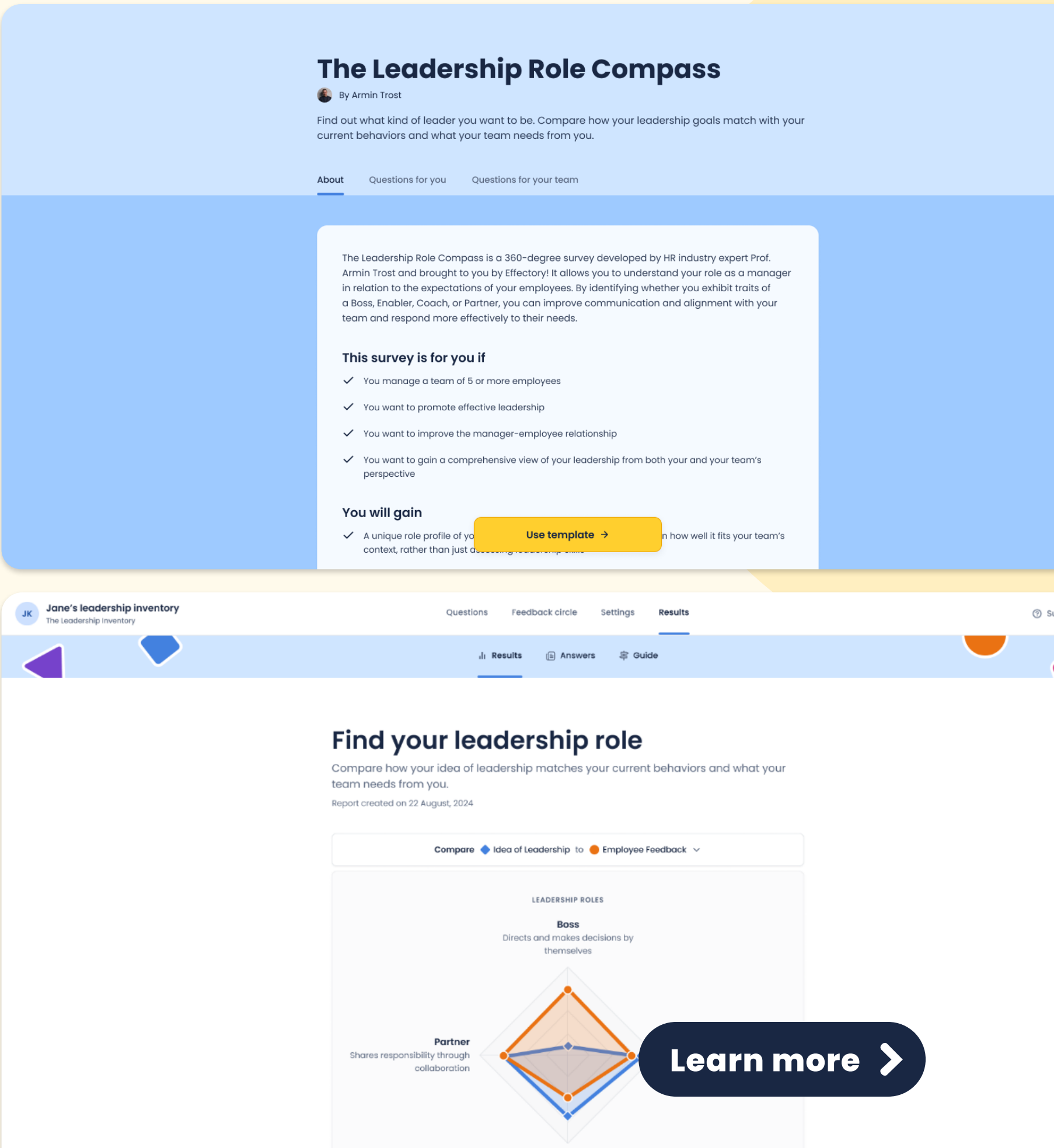


**Learn more** 

# 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.





# 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

Cancel Save

[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!

| Survey Timeline                 |                                                                     |            | Survey start                                                                                                                              |        |        |        |        |        |
|---------------------------------|---------------------------------------------------------------------|------------|-------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|--------|--------|--------|
| Activity                        |                                                                     | Date       | Week 1                                                                                                                                    | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 |
| Setup & preparation             | Kick-off session                                                    |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Configure project settings                                          |            | <div>Legend:</div> <ul style="list-style-type: none"><li>Sessions with your CSM/PSC</li><li>Internal communication (suggestion)</li></ul> |        |        |        |        |        |
|                                 | Technical setup — Confirm system requirements                       |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Organizational structure session                                    |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Import employee data & define group structure(s)                    |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Question library session (optional)                                 |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Determine survey questions                                          |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Translations of custom questions (optional)                         |            |                                                                                                                                           |        |        |        |        |        |
| Communication & survey creation | Announcement to managers                                            |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Announcement to employees                                           |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Platform onboarding session                                         |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Create survey                                                       |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Link group coordinators                                             |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Group linking — Set up internal benchmarks                          |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Second announcement to managers & employees                         |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Review survey with your CSM (optional)                              |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Finalize & plan survey                                              |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Survey setup freeze — No more changes allowed 12h before start      |            |                                                                                                                                           |        |        |        |        |        |
| Survey launch & monitoring      | Survey start                                                        | ENTER DATE |                                                                                                                                           |        |        |        |        |        |
|                                 | Survey invitations sent to participants                             |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Invitation for managers to follow survey response                   |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Configure release of survey results                                 |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Survey reminder at 50% of duration                                  |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Survey reminder at 90% of duration                                  |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Extend survey until 8h before end (optional)                        |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Survey end                                                          | ENTER DATE |                                                                                                                                           |        |        |        |        |        |
| Survey closure & results        | Thank you e-mail to managers & employees                            |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Results available                                                   |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Results presentation (optional)                                     |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Invitation for managers to explore survey results                   |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Invitation for participants to explore personal and own team scores |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Extra workshops (optional)                                          |            |                                                                                                                                           |        |        |        |        |        |
|                                 | Success review & evaluation                                         |            |                                                                                                                                           |        |        |        |        |        |

# Effectory public API

Unlock the power of your data with **Effectory's Public API**.

- Seamlessly and securely connect your Effectory survey results data across multiple systems.
- Import your survey results into your organization's own dashboard and combine them with your own KPIs.
- Conduct comprehensive analyses tailored to your organization's needs.

Take full control and experience the freedom to use your data exactly as you envision!

### Create new API Key

to connect securely to My Effectory, your application or tool needs an API key with permission to access the resources, such as employee data

Key name

Zappier

Expiration date

never

☒ Never expires

Read permissions

|                                     |                    |
|-------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | Employees          |
| <input type="checkbox"/>            | Response rate      |
| <input checked="" type="checkbox"/> | Participation rate |
| <input type="checkbox"/>            | Results            |

Write permissions

|                                     |           |
|-------------------------------------|-----------|
| <input checked="" type="checkbox"/> | Employees |
| <input type="checkbox"/>            | Files     |



# AI summary

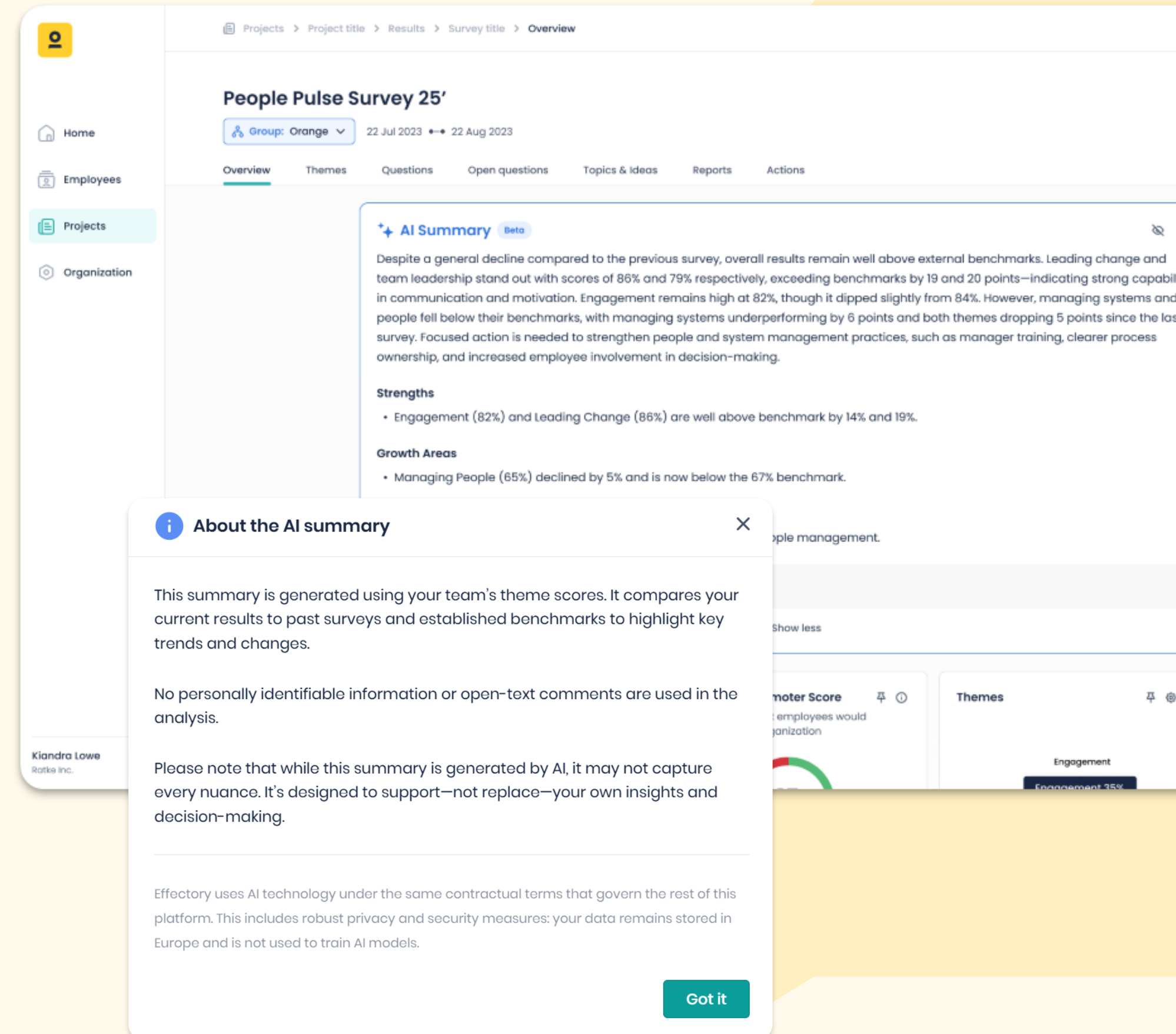
Get instant, AI-driven guidance directly in your results dashboard as soon as your results are in.

## 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:

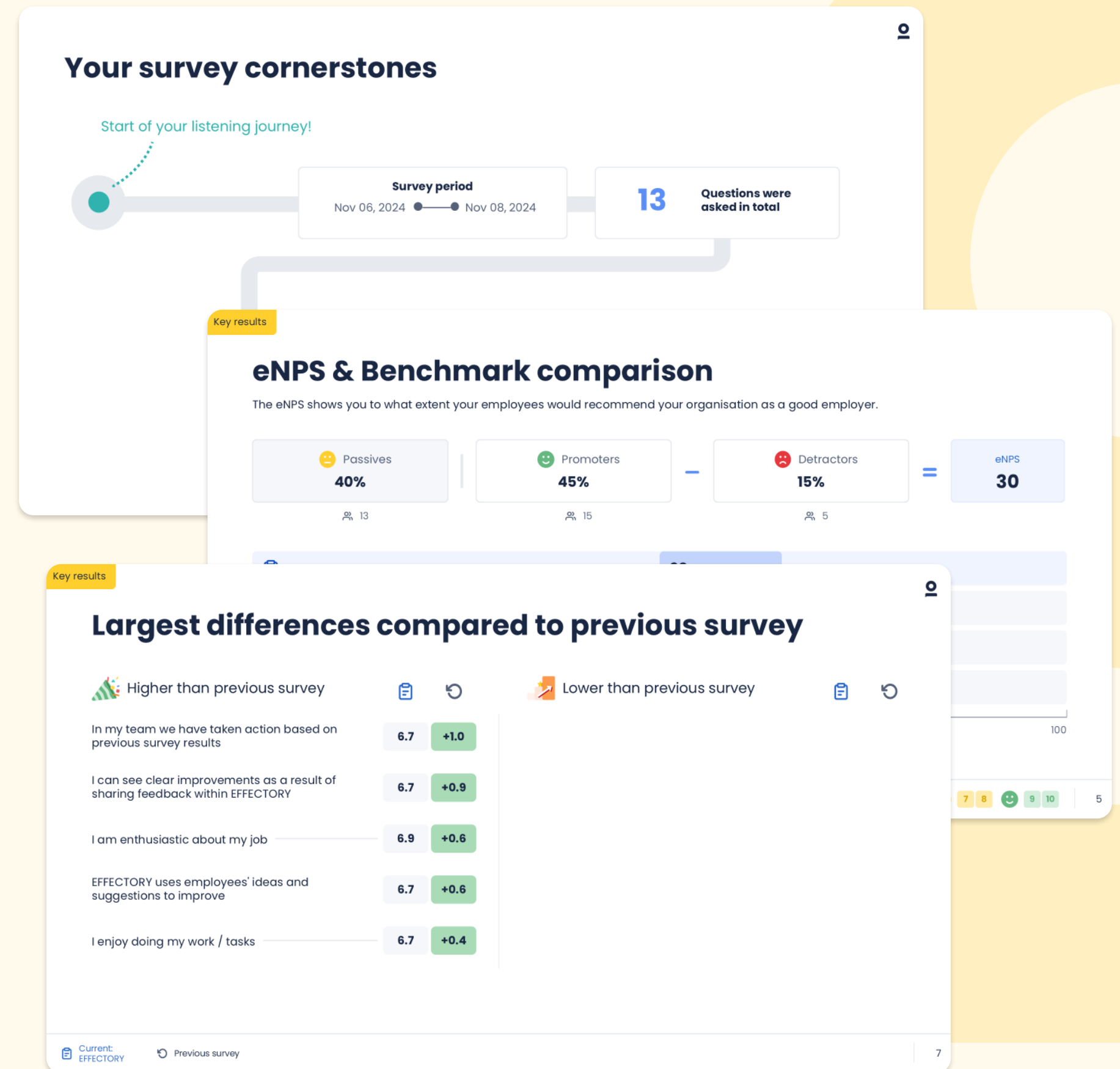
- **End of Q2:** Engagement-based recommendations go live
- **Q3:** Summary on all themes released



# 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<br>Organisatie | Previous<br>survey | Benchmark | Top 3<br>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

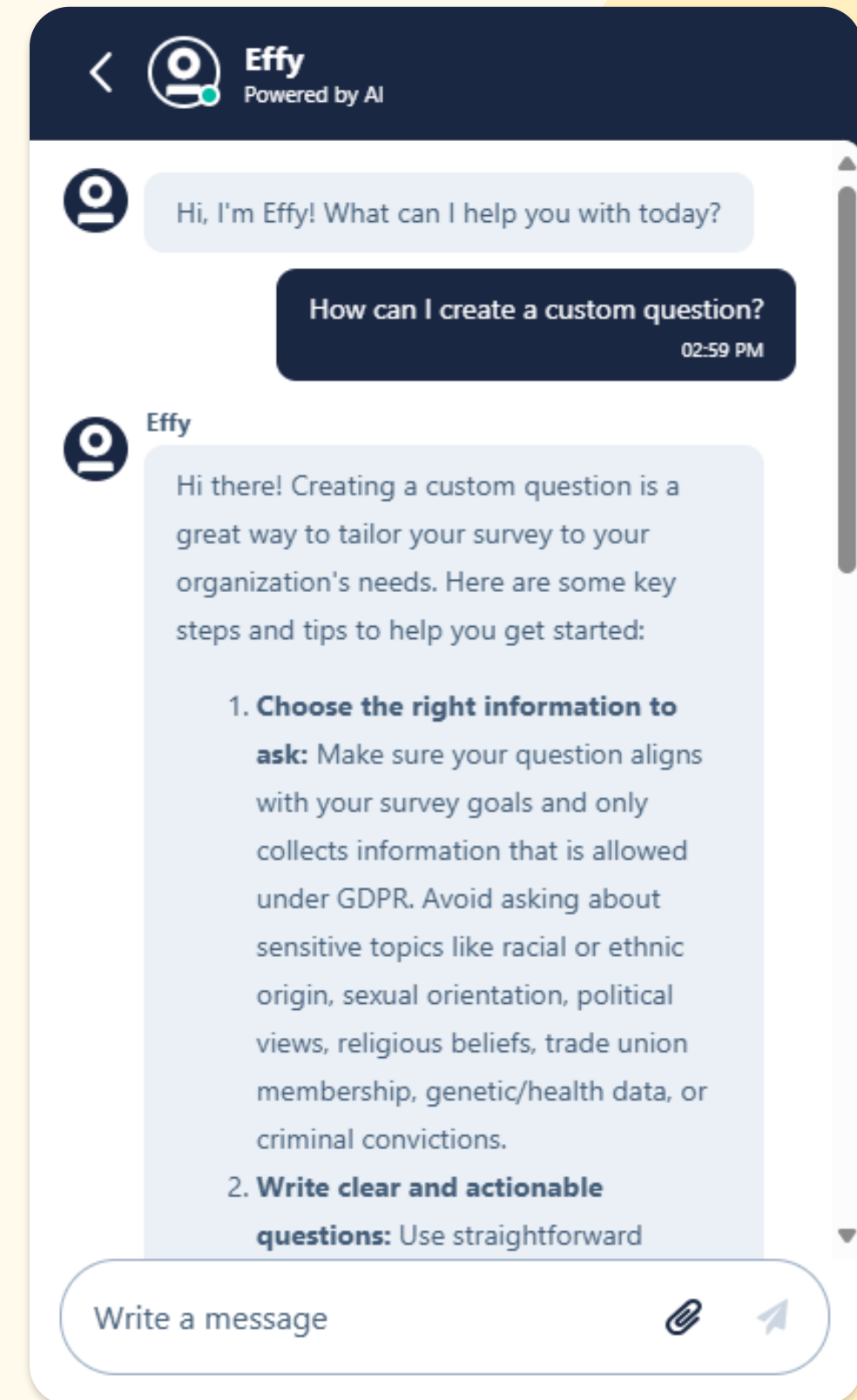


# Meet Effy, our AI assistant

**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



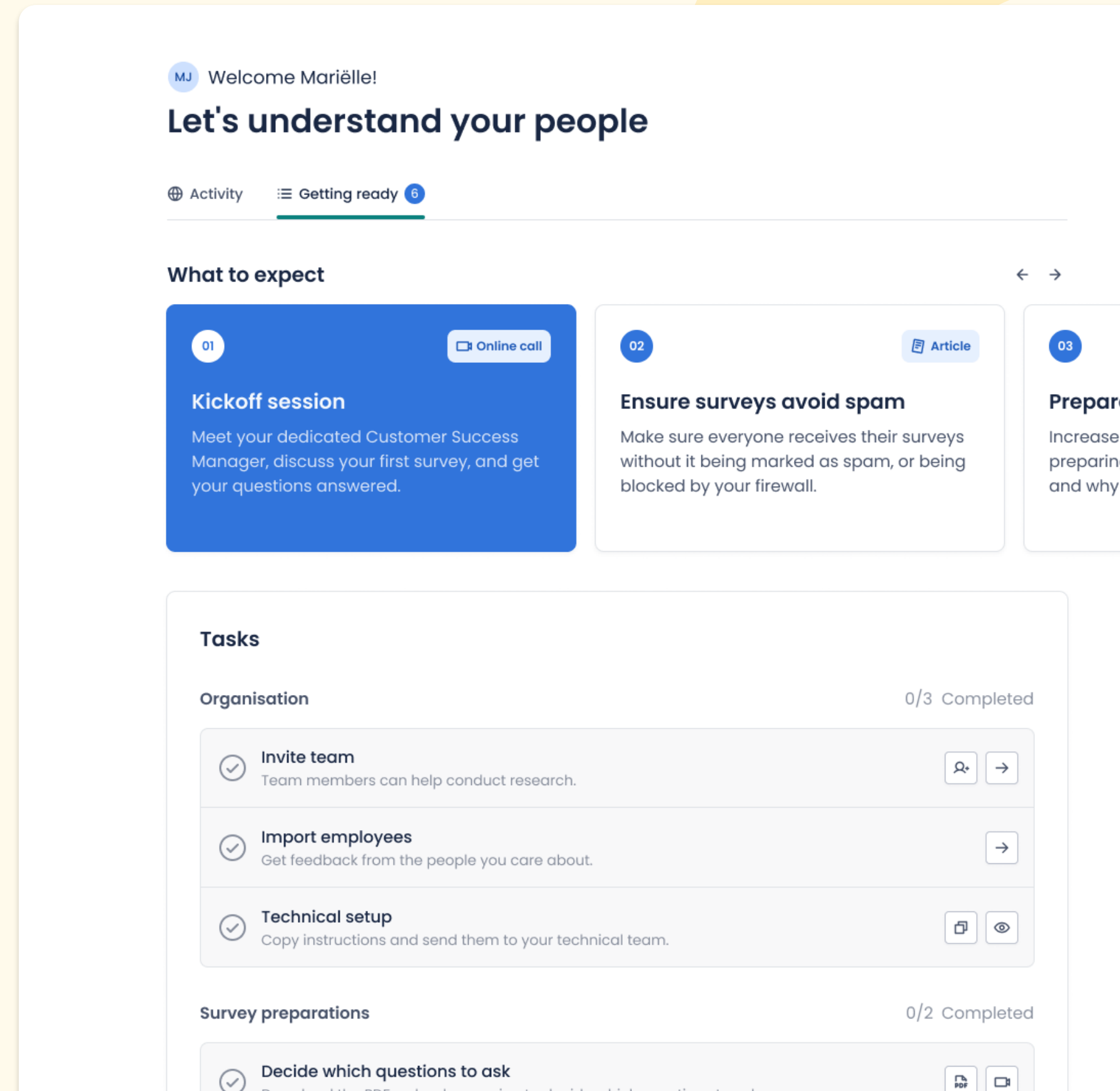
**Meet Effy >**

# 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





# 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.

# 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
- **Customize** the categories of standard segments, or create entirely new ones based on your organization's needs

The screenshot displays two overlapping UI panels. The top panel, titled 'Standard Segment', shows the configuration for the 'Age' segment. It includes a table with three rows: '24 years and younger', '25 to 34 years', and '35 to 44 years', each with a count of '942 employees'. An 'Edit segment' button is visible. The bottom panel, titled 'Segments', lists four standard segments: 'Gender' (3 categories), 'Tenure' (6 categories), 'Age' (5 categories), and 'Salary scales' (6 categories). Each segment has a 'Standard segment' label and a right-pointing arrow.

| Segment              | Category         | Count         |
|----------------------|------------------|---------------|
| 24 years and younger | Standard segment | 942 employees |
| 25 to 34 years       | Standard segment | 942 employees |
| 35 to 44 years       | Standard segment | 942 employees |

| Segment       | Category         | Count        |
|---------------|------------------|--------------|
| Gender        | Standard segment | 3 categories |
| Tenure        | Standard segment | 6 categories |
| Age           | Standard segment | 5 categories |
| Salary scales | Custom segment   | 6 categories |

# More mailing functionalities

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) 

 Please

- t
- l
- r

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

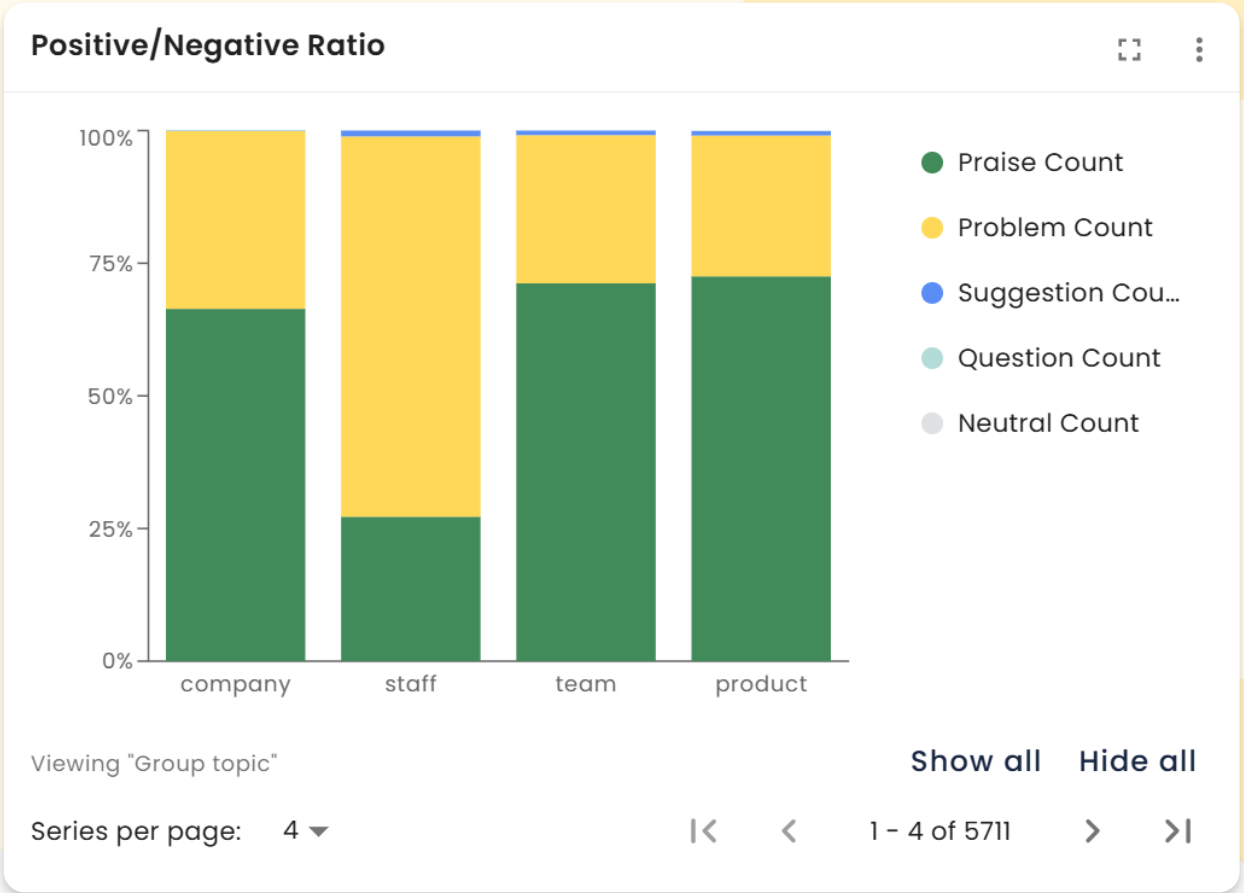
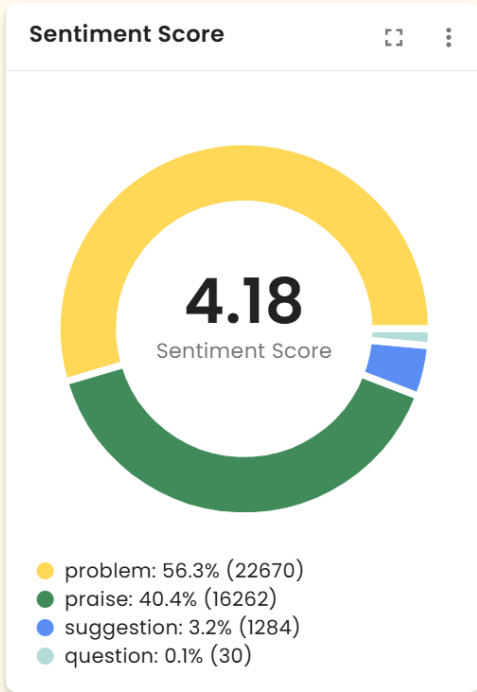
Save reminders

# 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 external dashboard
- **Q4–Q2 2026:** Integrated into Effectory platform



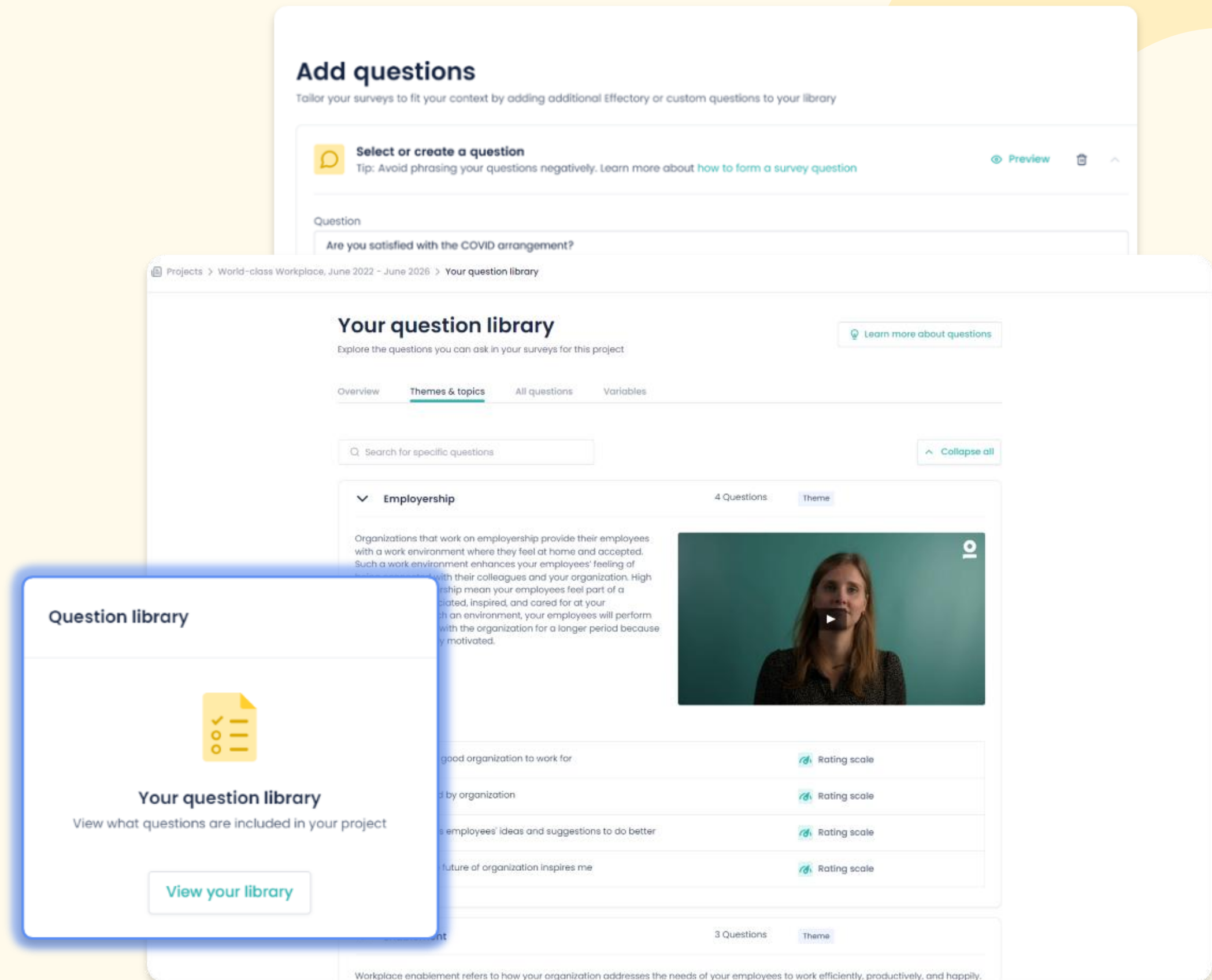
| Topics  | Opinions |         |              |                 |                   |
|---------|----------|---------|--------------|-----------------|-------------------|
|         | Great    | Too Low | Insufficient | Not Appreciated | Not Accommodating |
| Company | 1071     | -       | -            | 38              | 137               |
| Product | 441      | -       | -            | -               | -                 |
| Team    | 357      | -       | -            | 27              | -                 |
| Salary  | -        | 334     | 65           | -               | -                 |



# 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.

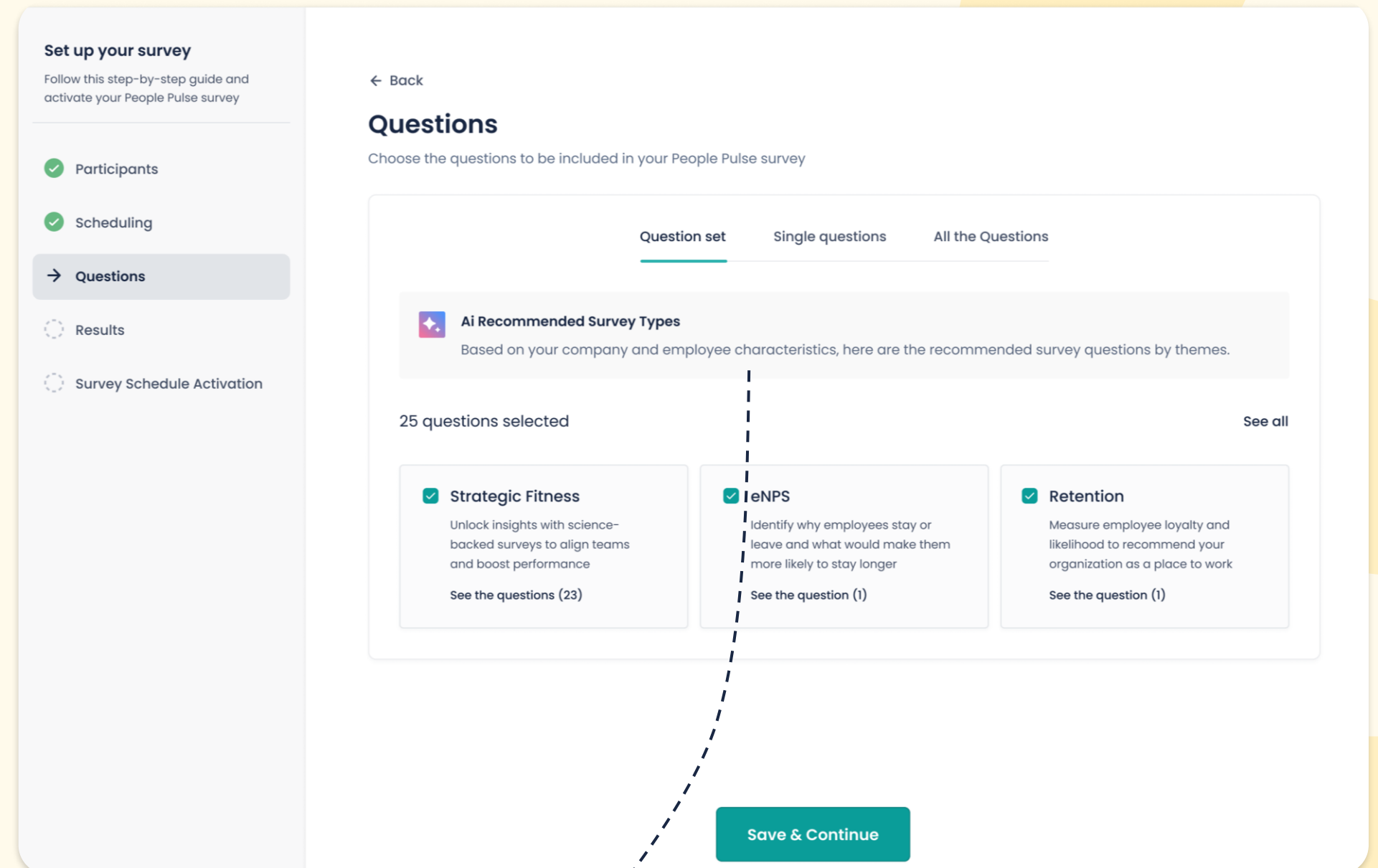
[Learn more >](#)

# AI-driven question recommendations

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:

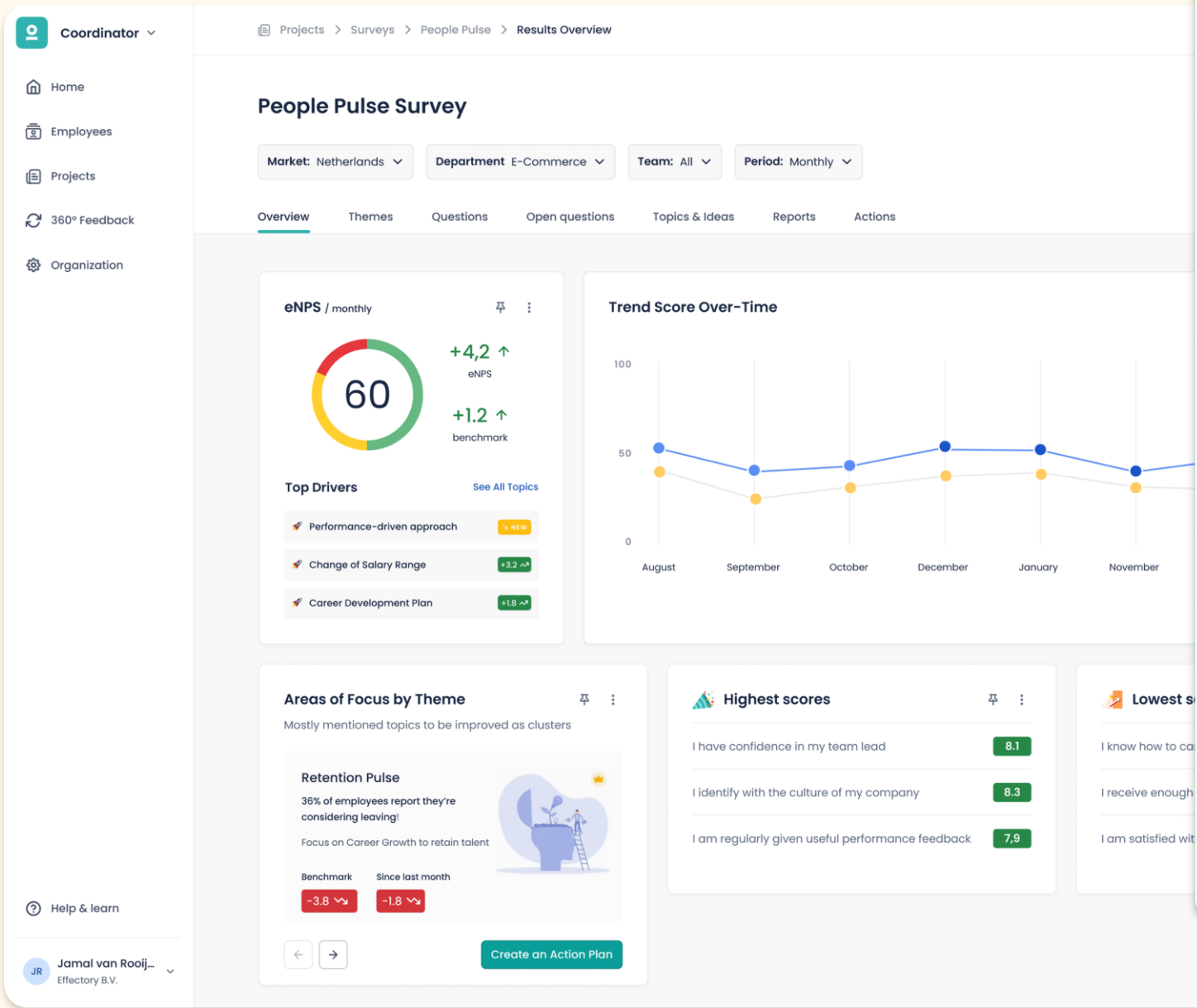
- Question templates will be released as part of the **Question Library** updates in **Q4**
- This feature to follow as an add-on



### Ai Recommended Survey Types

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

# Intelligent survey automation & continuous insights



Set up your survey

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

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

Preview Survey

← Back

### Questions

Choose the questions to be included in your People Pulse survey

#### Strategic Fitness

25 questions in an order

Single answer

1 I enjoy doing my work / task

Not at all Not really A bit Very much

Theme: Satisfaction period ⓘ

✓ Selected

Single answer

2 My skills and abilities fit in well with my job

Not at all Not really A bit Very much

✓ Selected

Single answer

3 Doing my work gives me energy

✓ Selected

5-point scale

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

▼





# Thank you!

**Questions or feedback?**

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