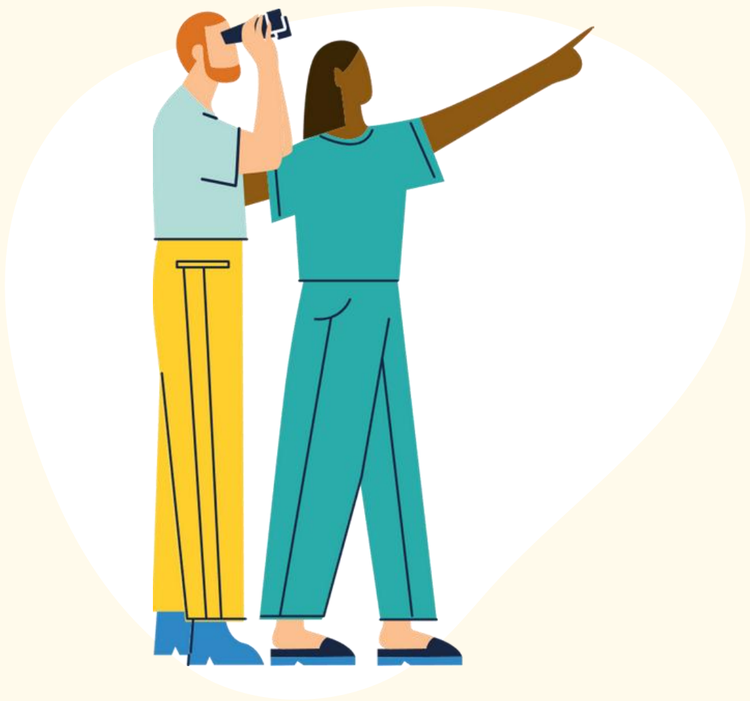
Effectory

Product Roadmap

2024 – 2026

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

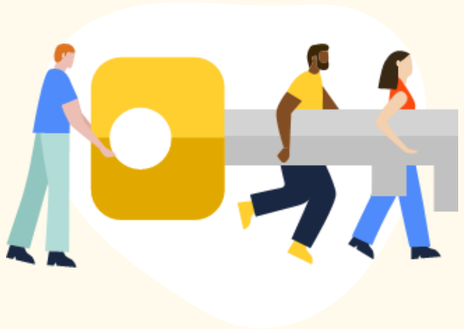
Surveying should be a no-brainer!

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.

Participant management

Release: Q2 2024

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
Workday
SAP successfactors
Factorial

AFAS
BambooHR
Kenjo
HeavenHR

HiBob
Cezanne HR
Sage HR
Humaans

Eurécia
Officient
Charlie
HRworks

Breathe HR
AlexisHR
Rippling
Sapling

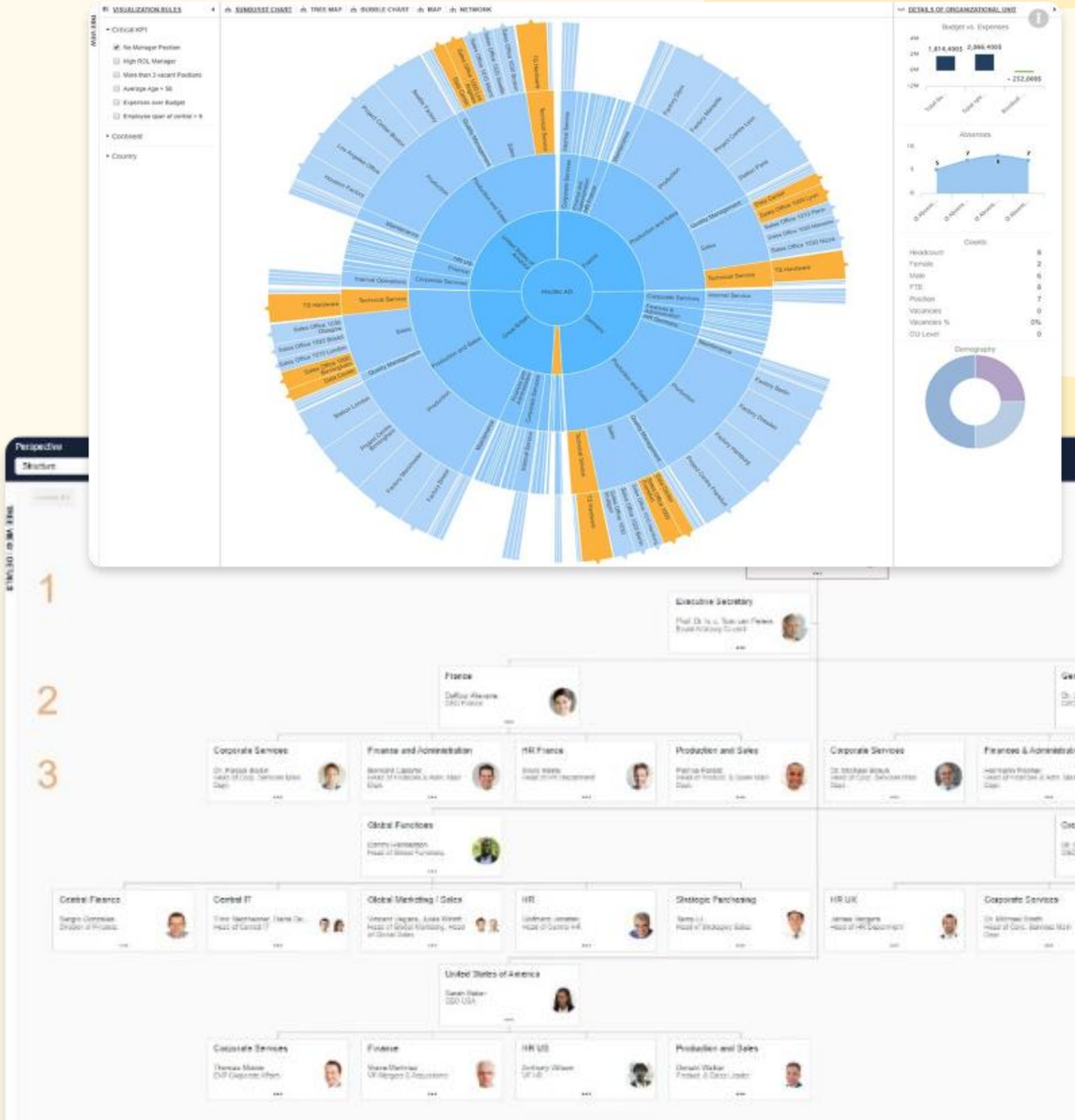
Nmbrs
PeopleHR
Lucca
HaileyHR
IRIS Cascade

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.

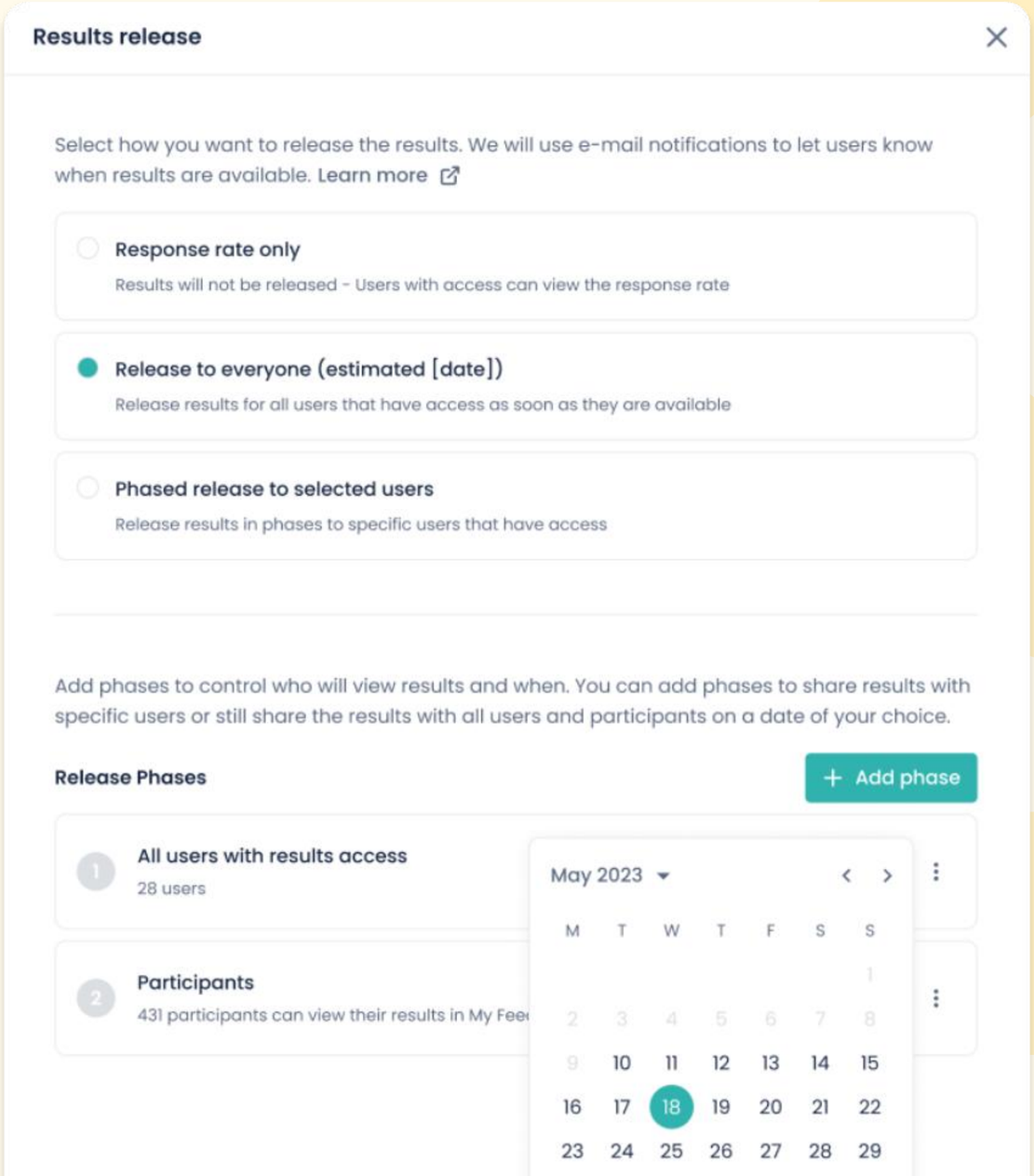


Results release settings

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

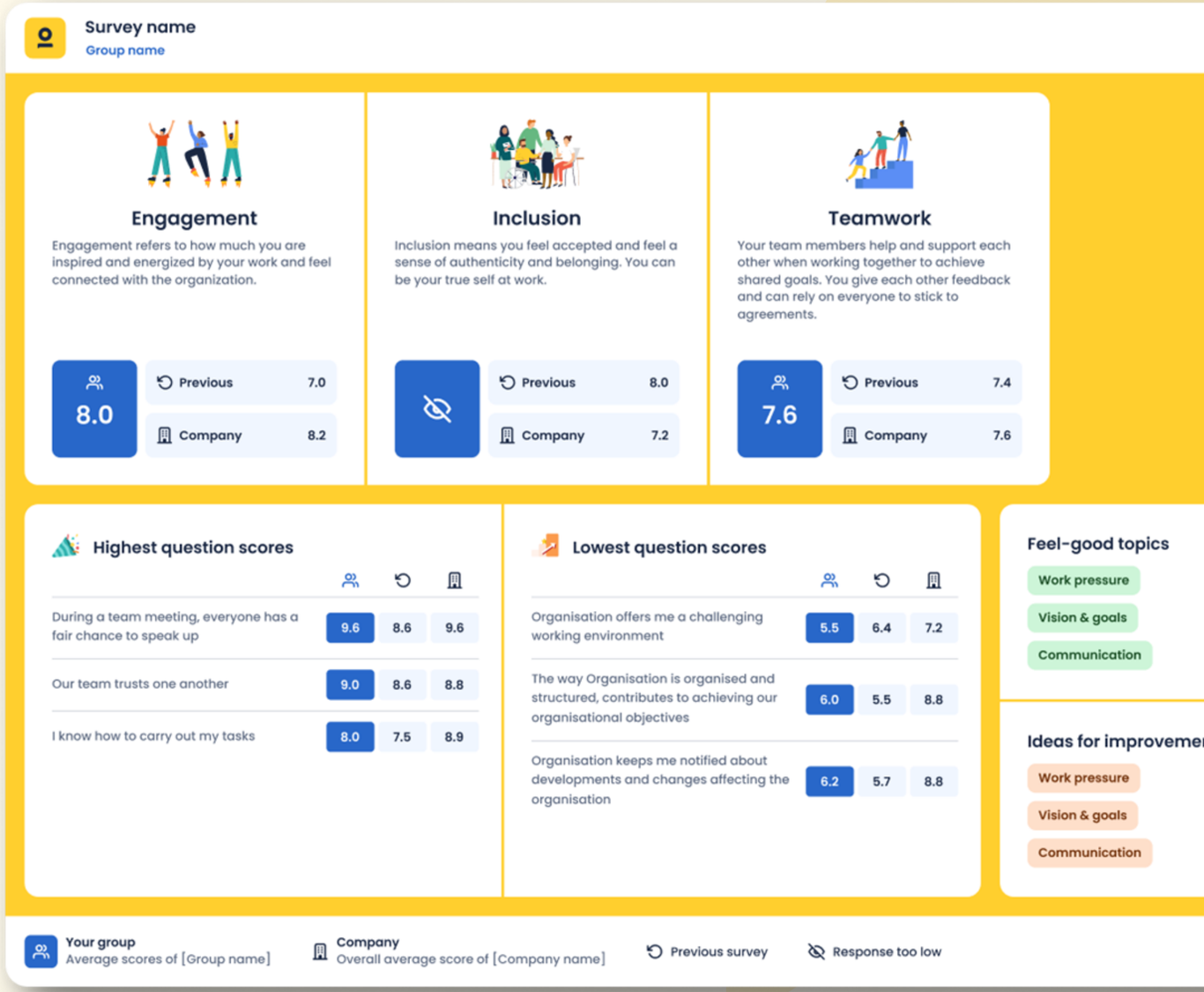


One-pager

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!

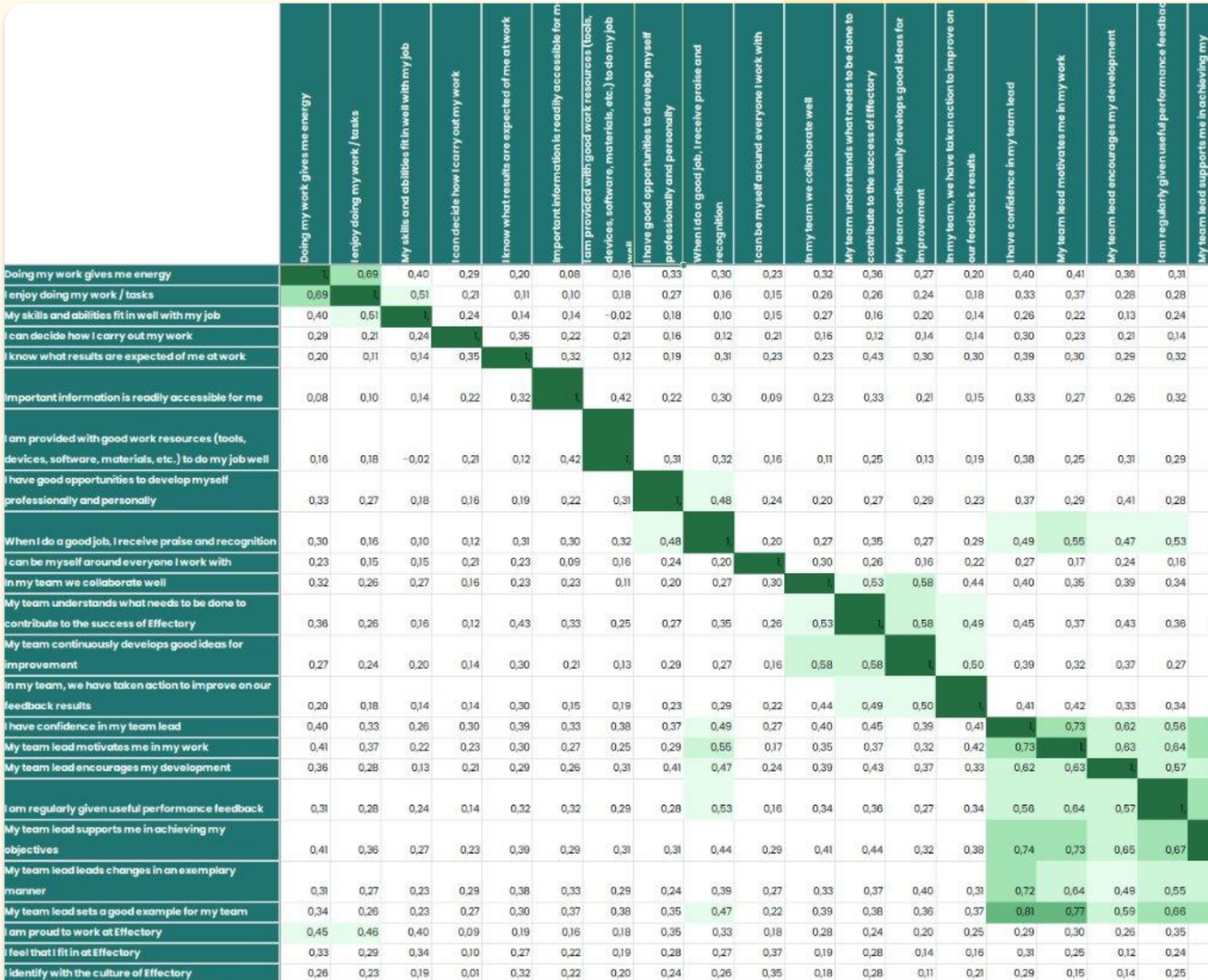


Correlations report

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

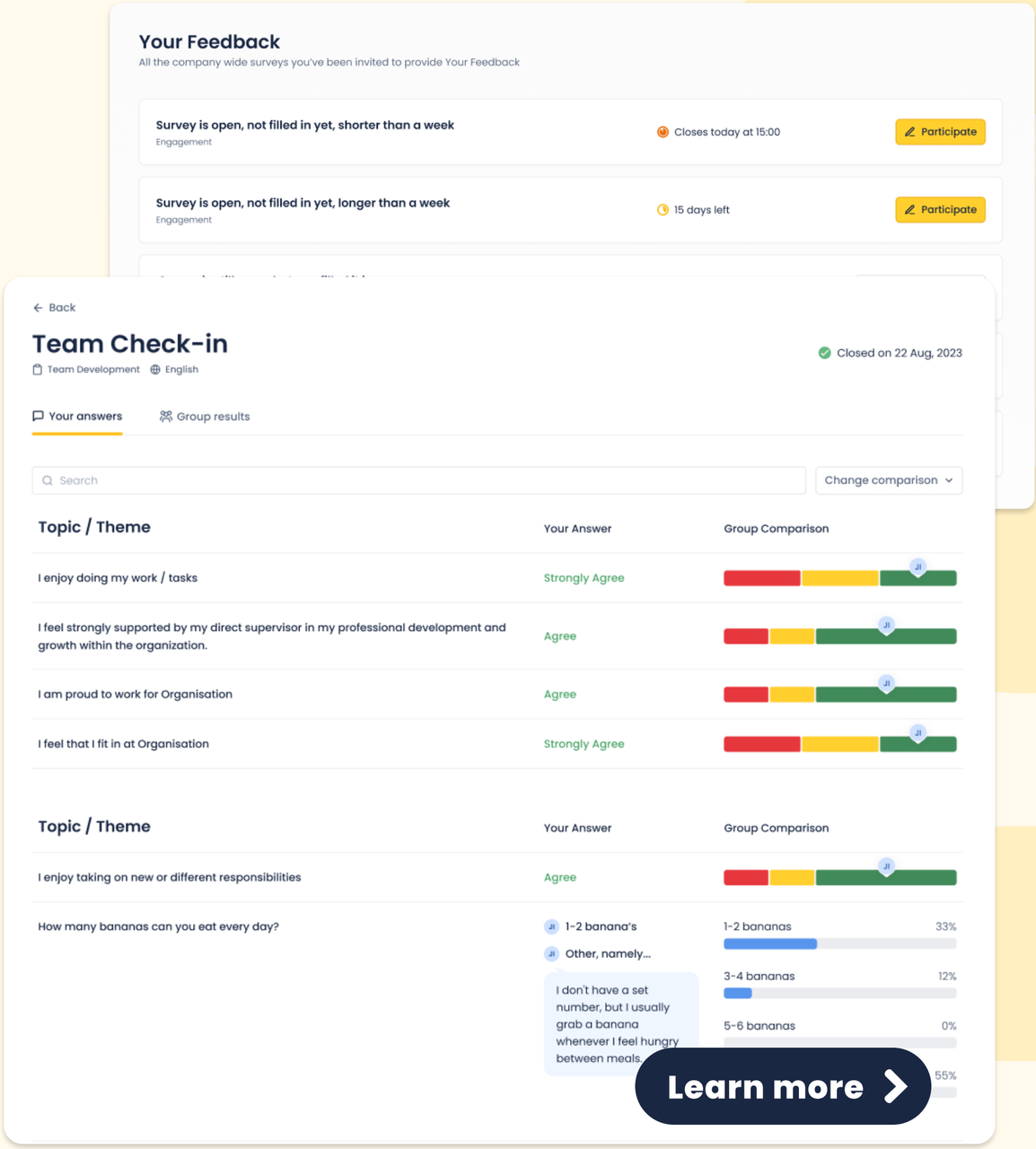


	Doing my work gives me energy	I enjoy doing my work / tasks	My skills and abilities fit in well with my job	I can decide how I carry out my work	I know what results are expected of me at work	Important information is readily accessible for m	I am provided with good work resources (tools, devices, software, 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 feedbac	My team lead supports me in achieving my
Doing my work gives me energy	1	0,69	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	0,69	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	
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	
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	
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	
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	
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	

Your Feedback

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

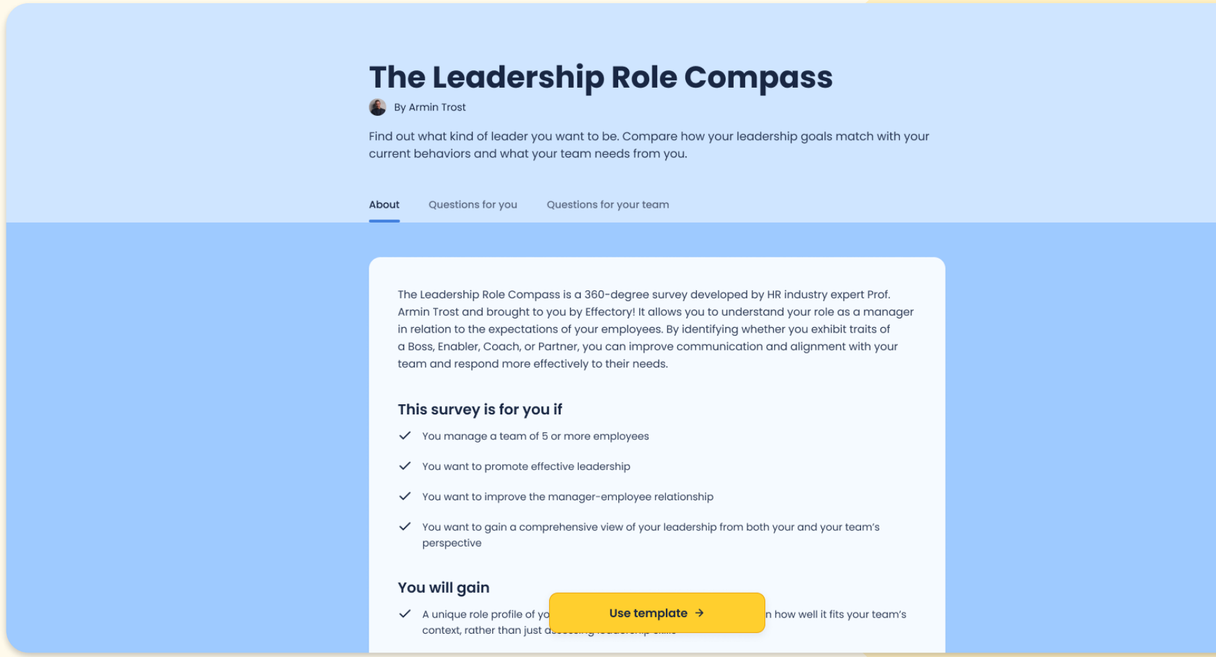
- The new design makes feedback accessible and engaging, helping employees quickly act on insights and keep feedback relevant over time.
- Each question type displays individual and comparison scores uniquely, with some showing answer distributions for deeper insights.
- Choose which teams or benchmarks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

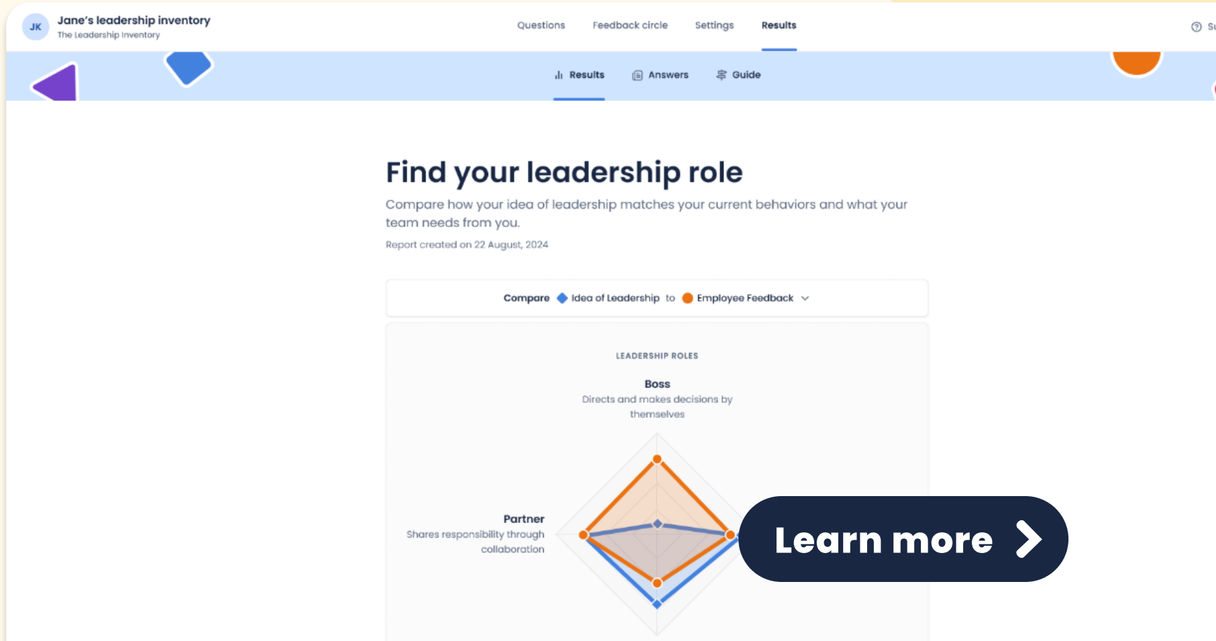


Leadership Role Compass

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.

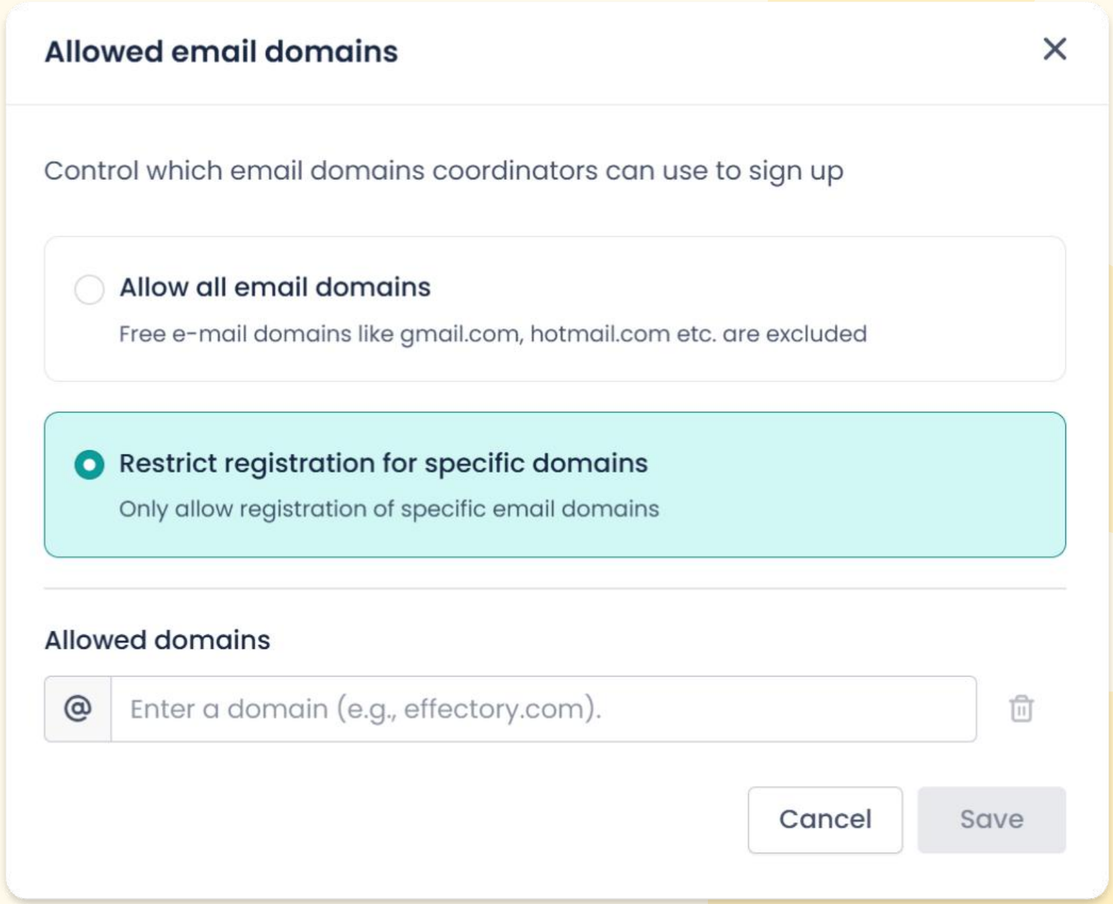




Allowed e-mail domain settings

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.



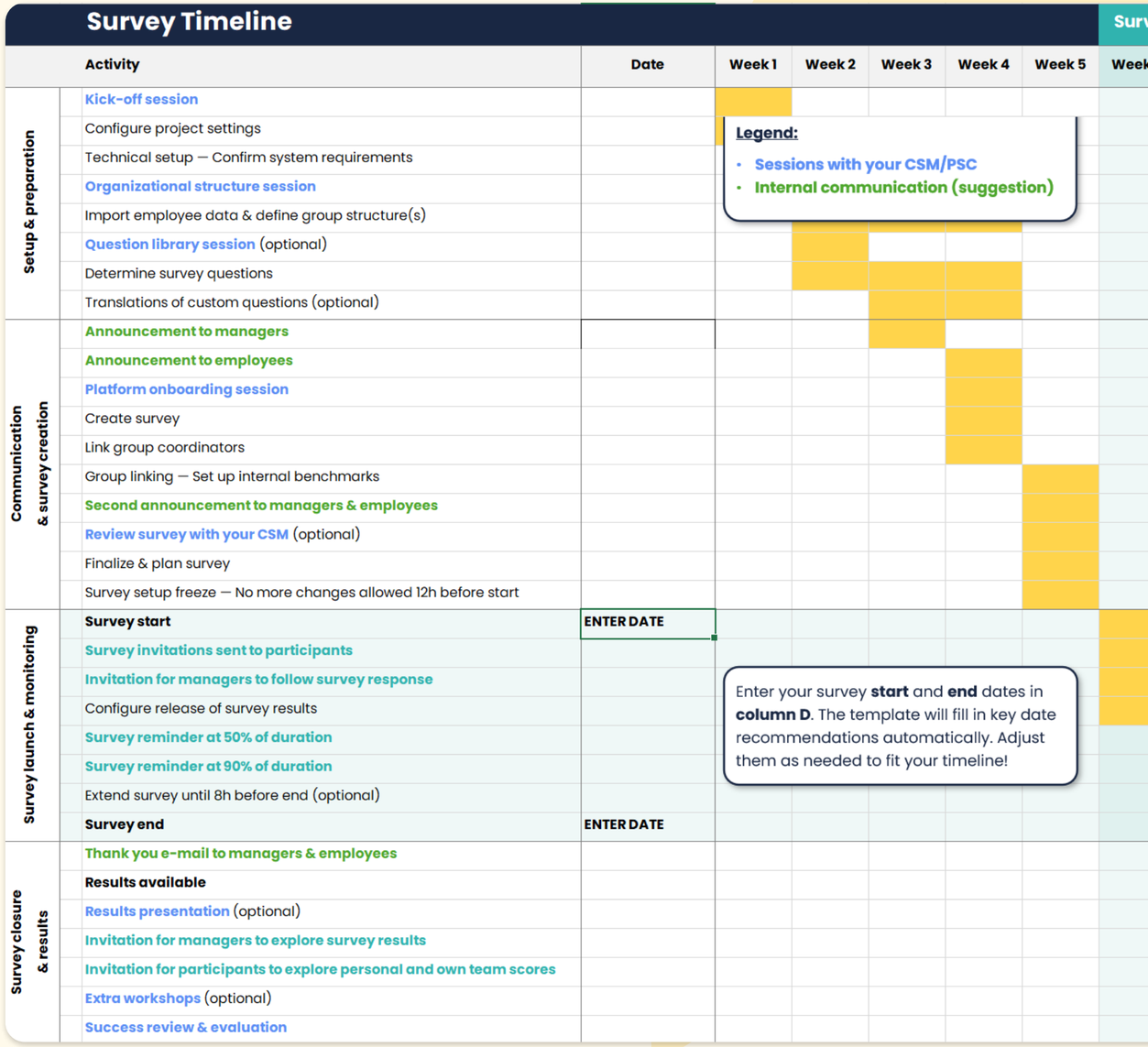
Learn more

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

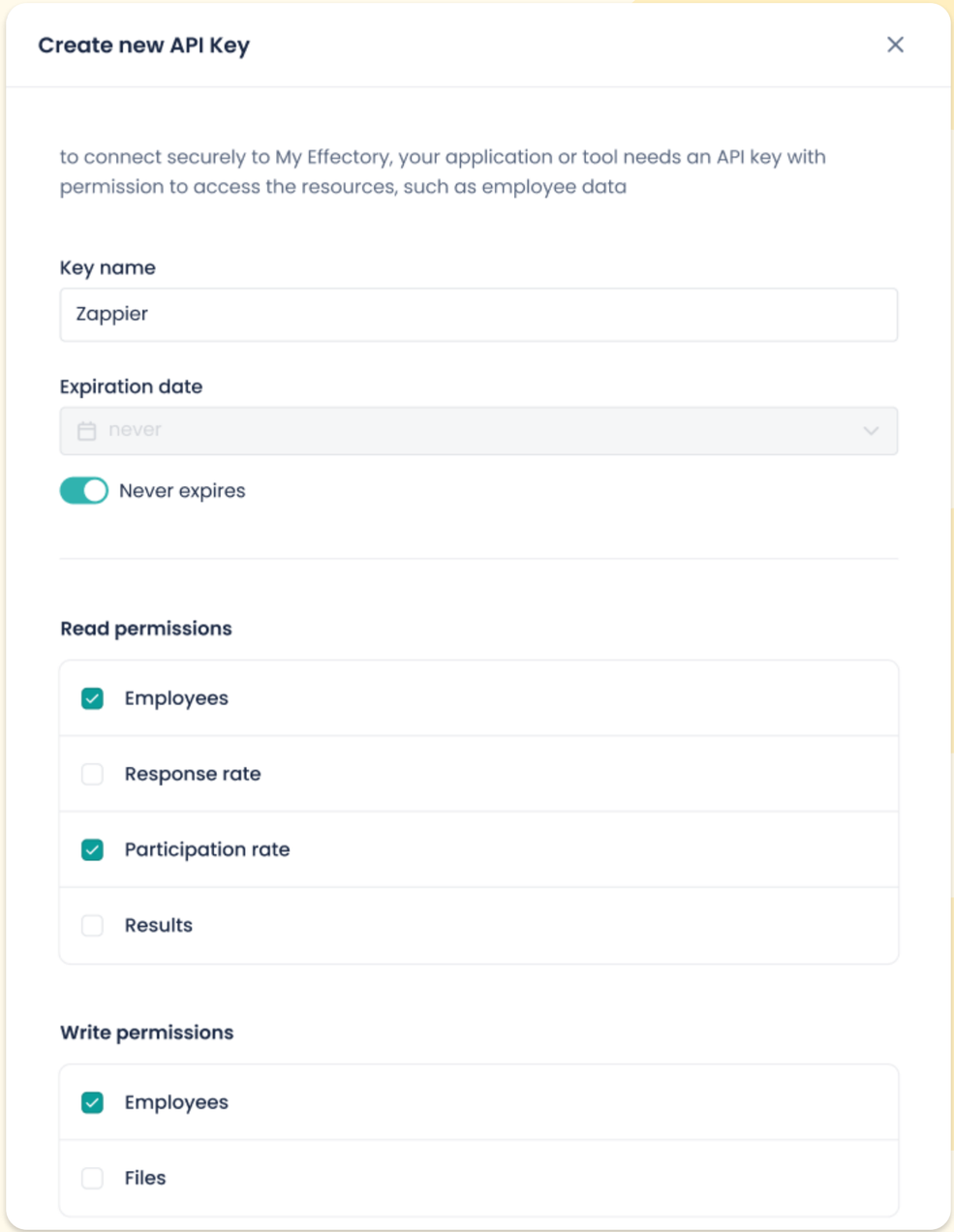
	Activity	Date	Week 1	Week 2	Week 3	Week 4	Week 5
Setup & preparation	Kick-off session						
	Configure project settings						
	Technical setup — Confirm system requirements						
	Organizational structure session						
	Import employee data & define group structure(s)						
	Question library session (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**.

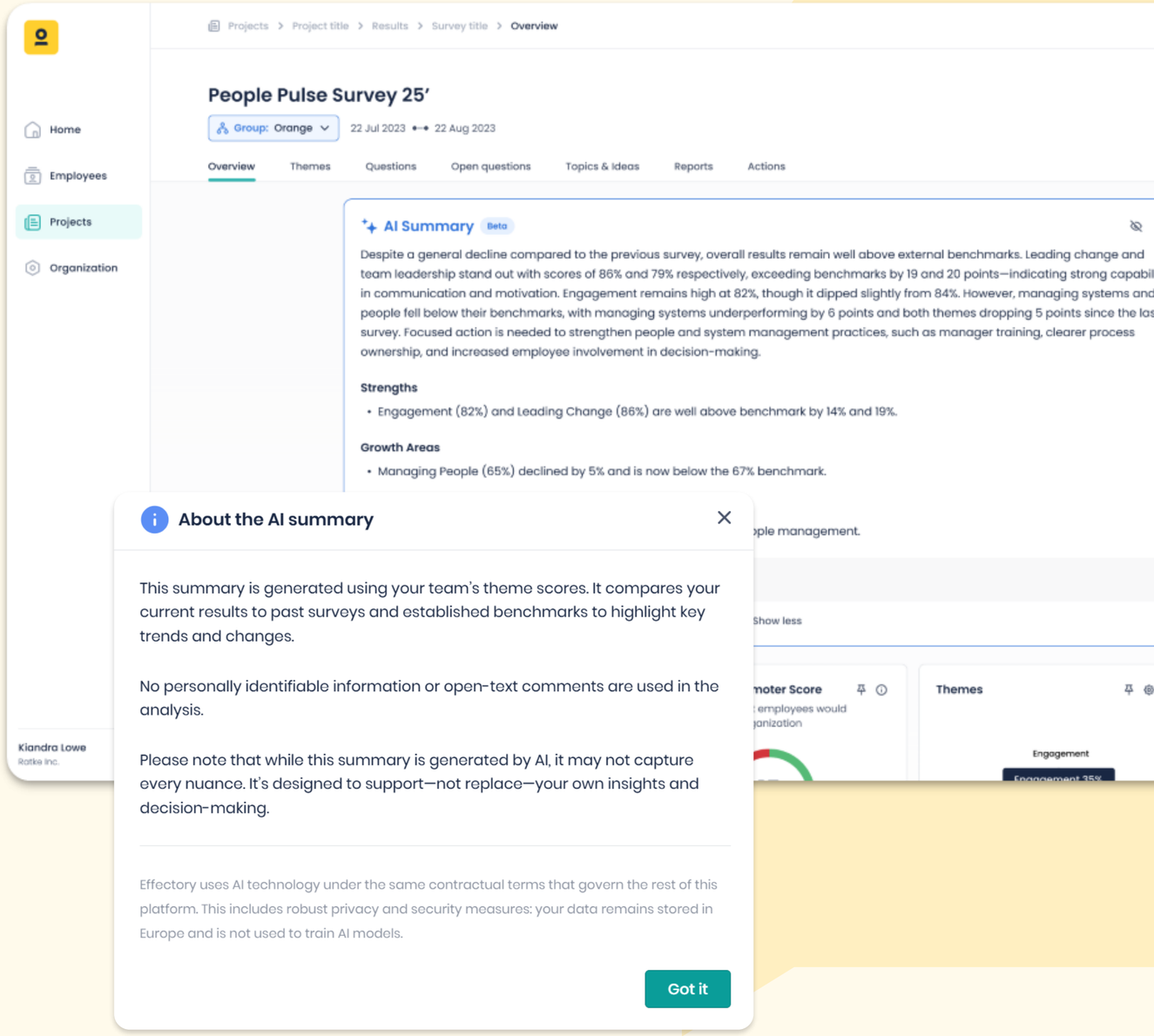
- Seamlessly and securely connect your Effectory survey results data across multiple systems.
- Import your survey results into your organization's own dashboard and combine them with your own KPIs.
- Conduct comprehensive analyses tailored to your organization's needs.

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



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

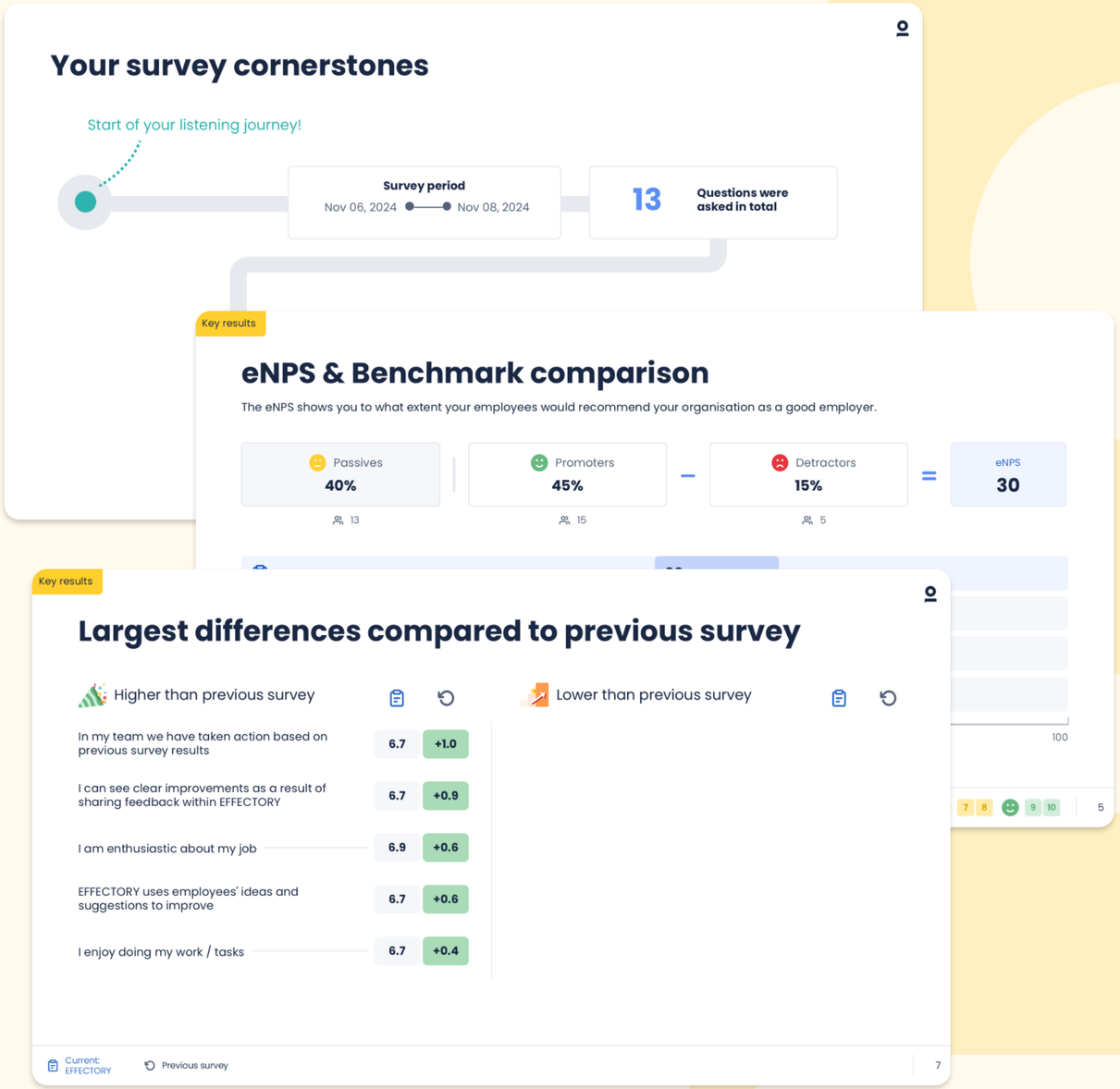
Release timeline:

- **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:

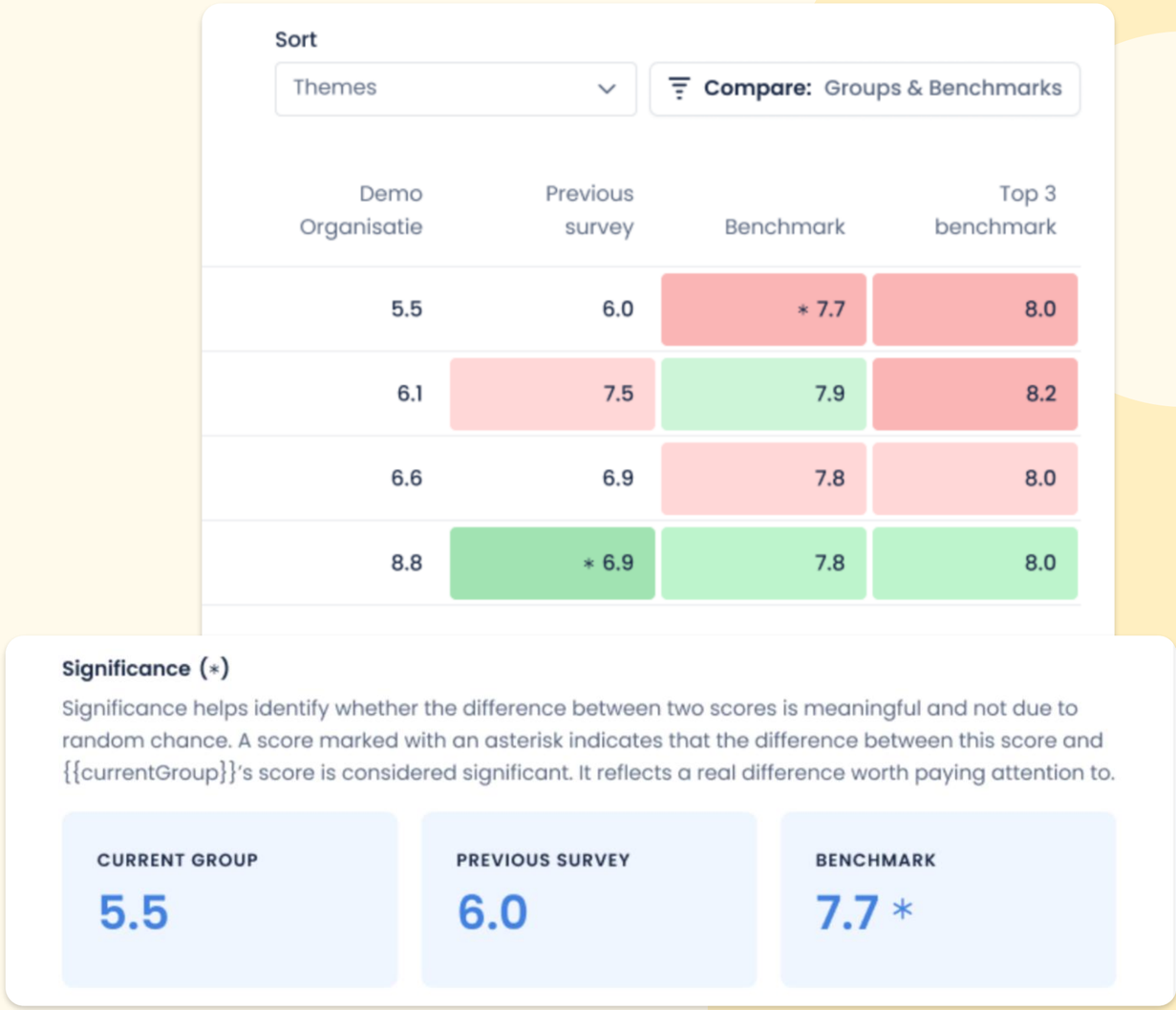
- **Save time** with a ready-to-use format built for speed and clarity
- Drive real change by focusing on **insights that matter most**
- Empower managers and teams to **take ownership** of results and start conversations
- **Accelerate follow-up** with a shared understanding of what needs attention



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.



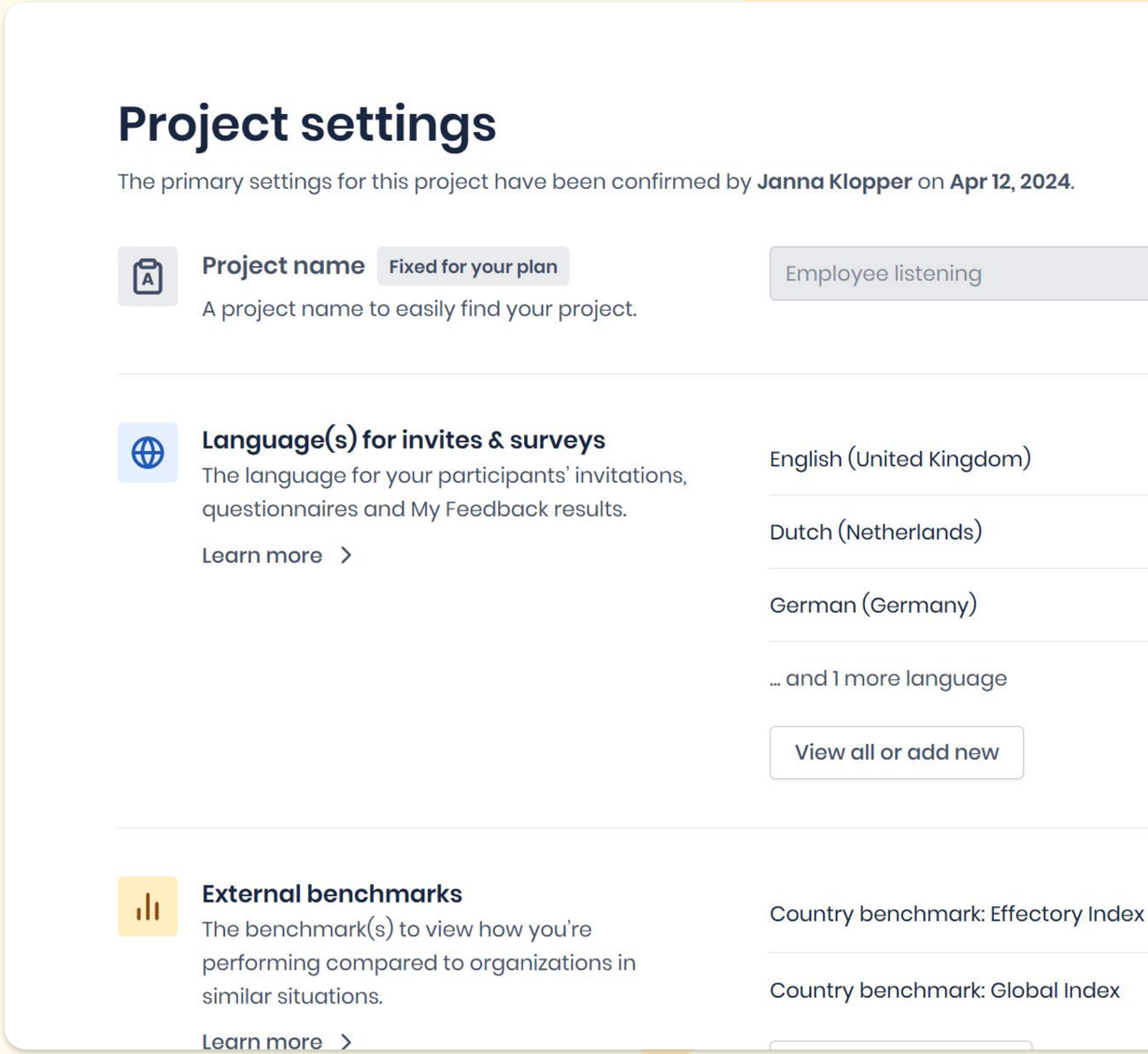
Survey setup & creation

Release: Q3 2025

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



User experience

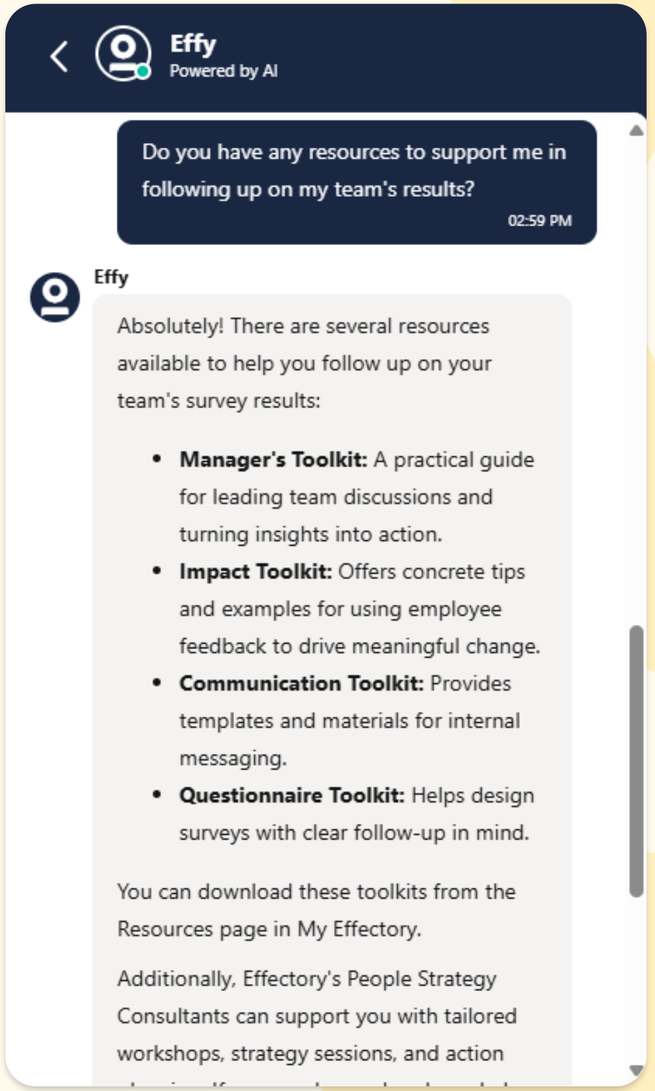
Release: Q3 2025

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

User experience

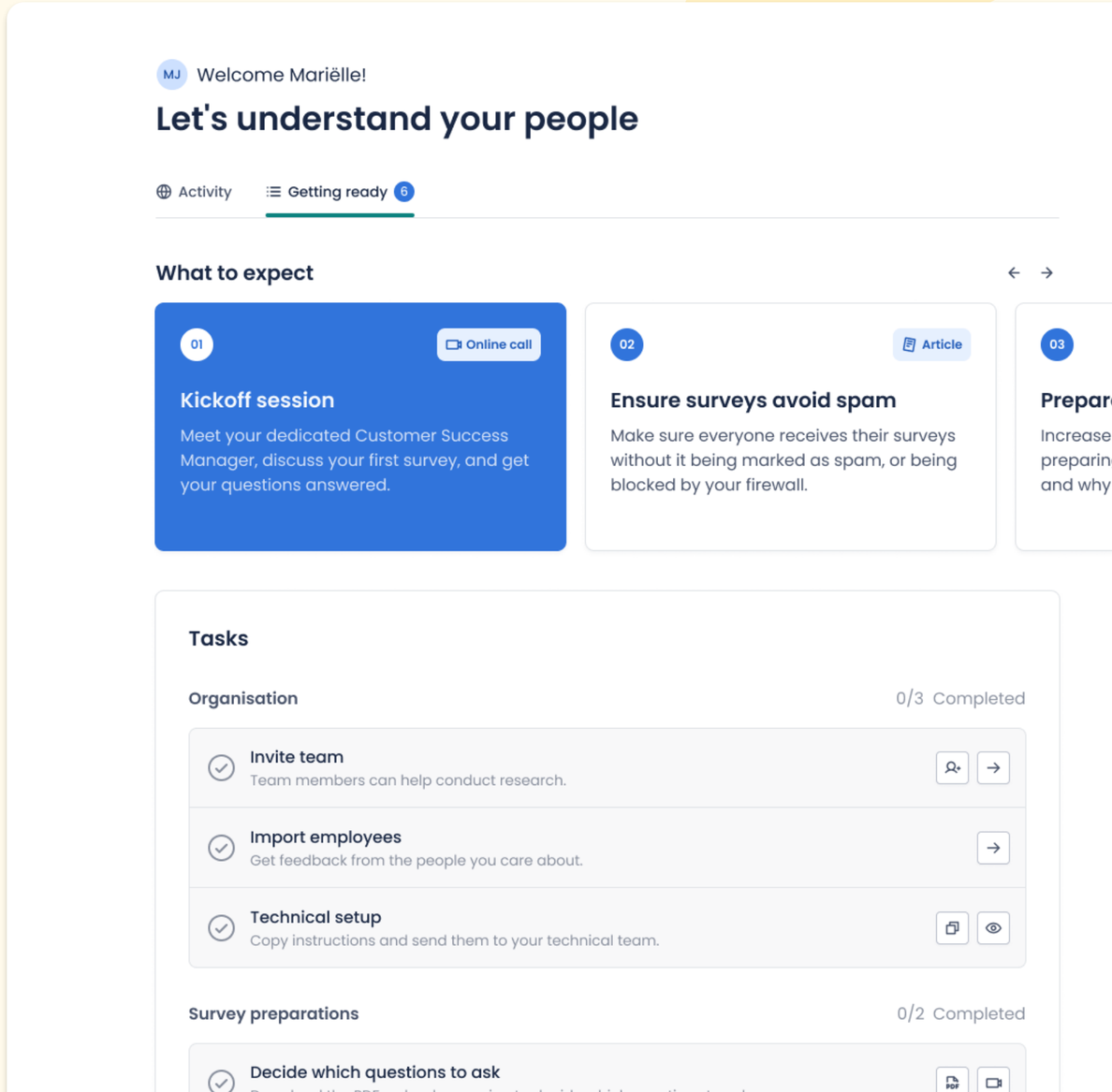
Release: Q3 2025

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

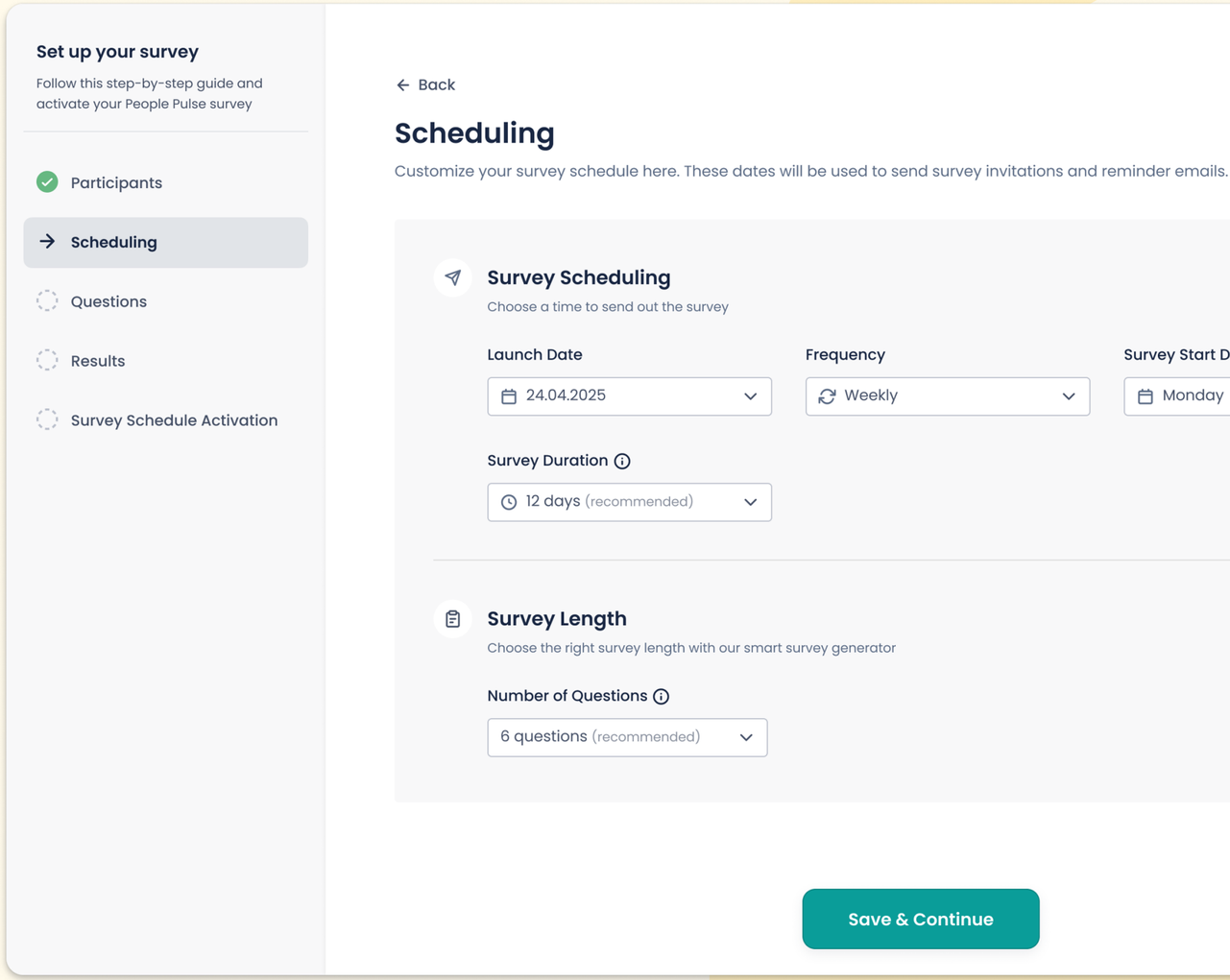
Survey setup & creation

Release: Q3 2025

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:

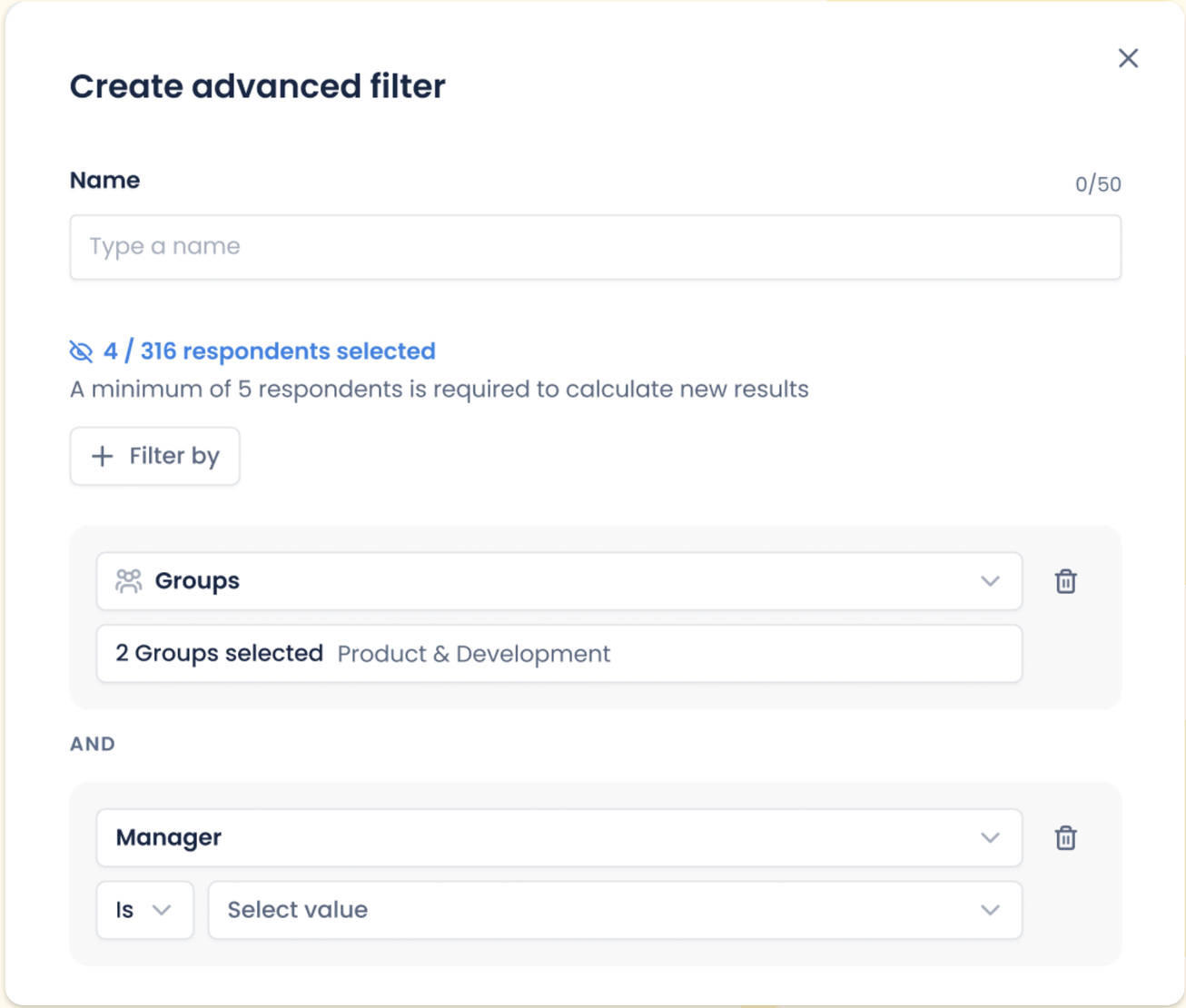
- **Plan repeating surveys** by setting a recurring schedule
- **Stop a survey** at any time if something changes
- **Archive closed surveys** to keep your project overview clean and focused
- **Launch a survey immediately** without scheduling it in advance
- **Add or remove employees** while a survey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



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.

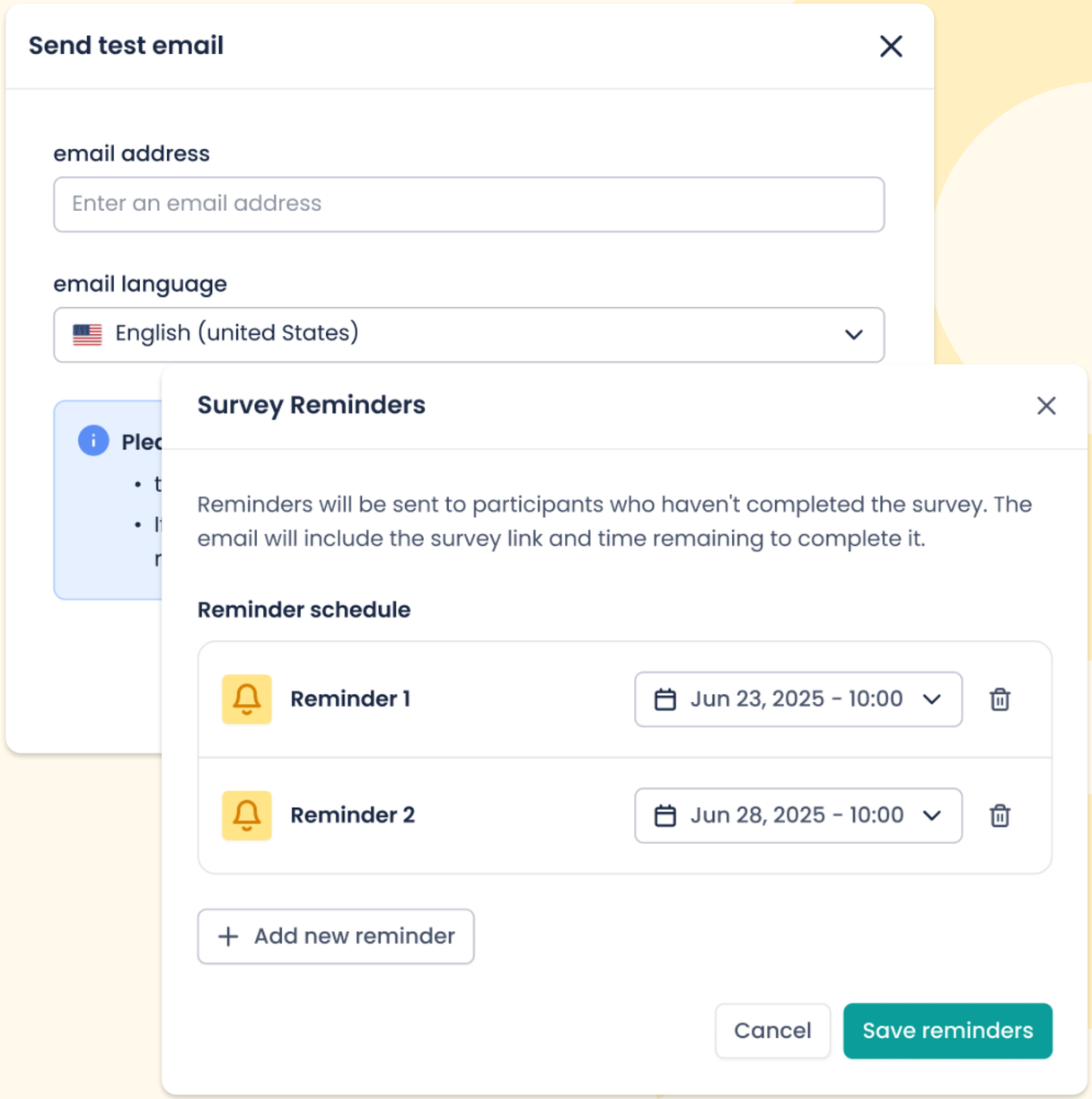
- **Refine your results** with advanced filters based on group, age, gender, and more.
- **Gain more actionable insights** by zooming in on specific respondent groups.
- Our algorithm ensures **confidentiality is guaranteed** at all times.



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.

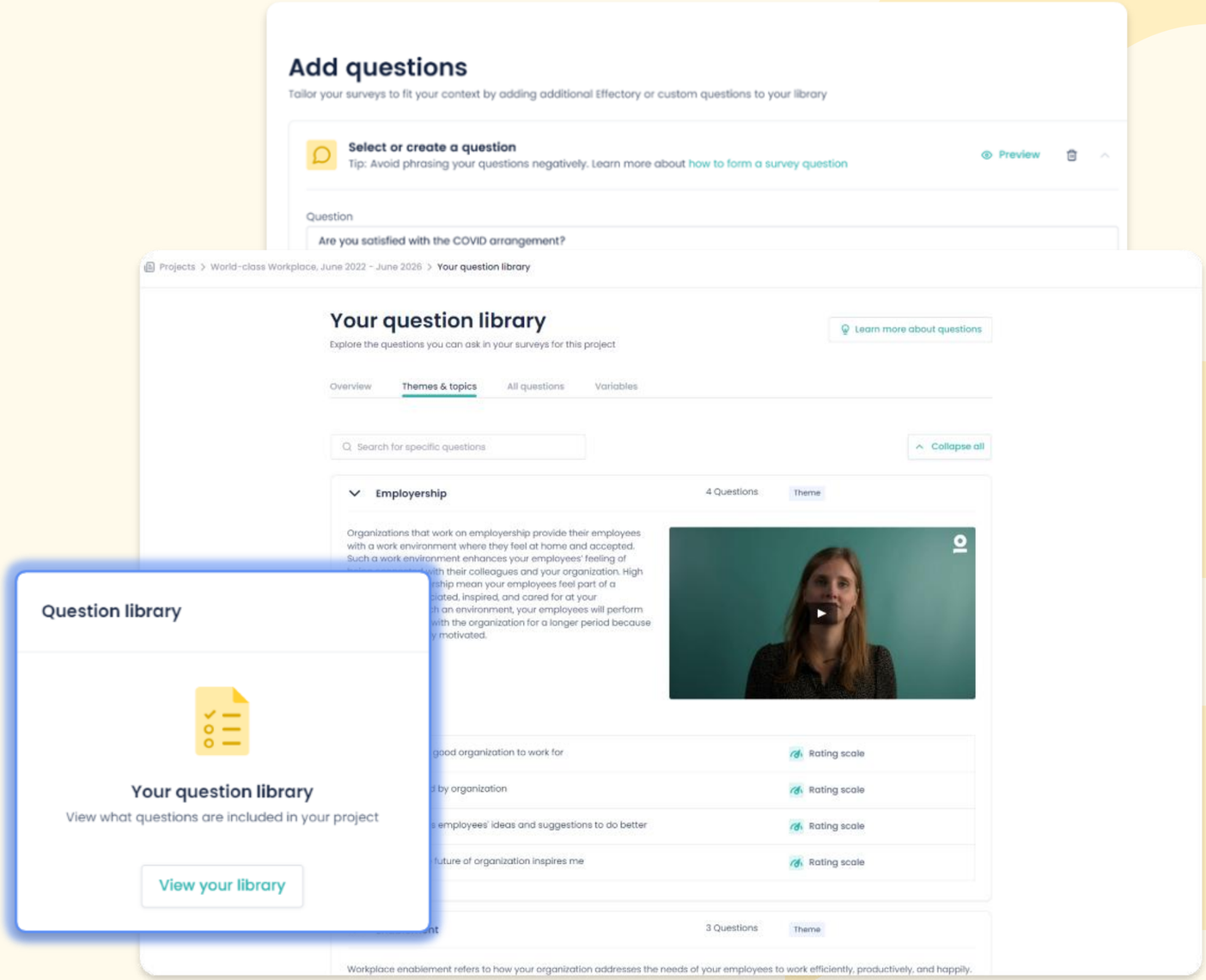
- **Send preview versions** of invitation and reminder emails to see exactly what participants will receive
- **Adjust the time and date of reminders** to match your internal planning
- **Schedule additional reminders** to boost response rates when needed



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

User experience

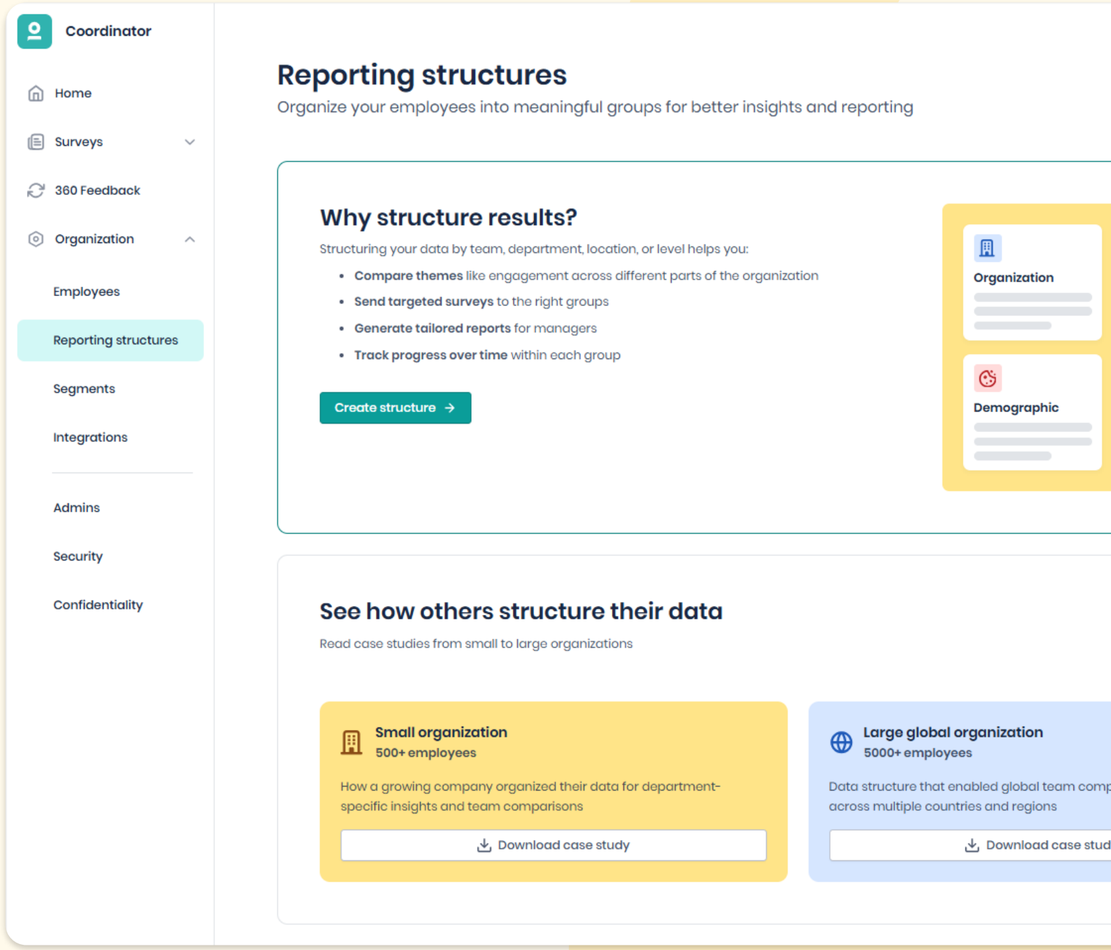
Release: Q3 2025

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

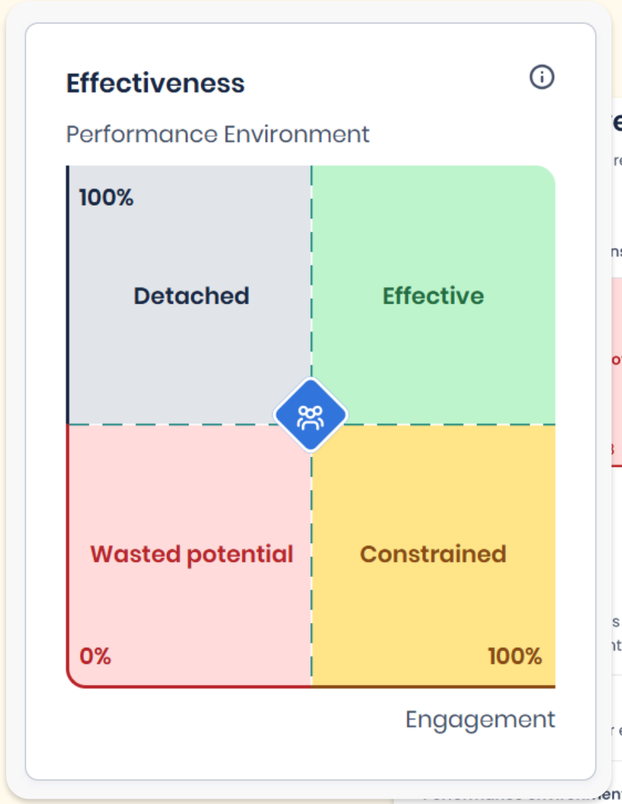
This update makes the process smoother, clearer, and easier to complete independently.

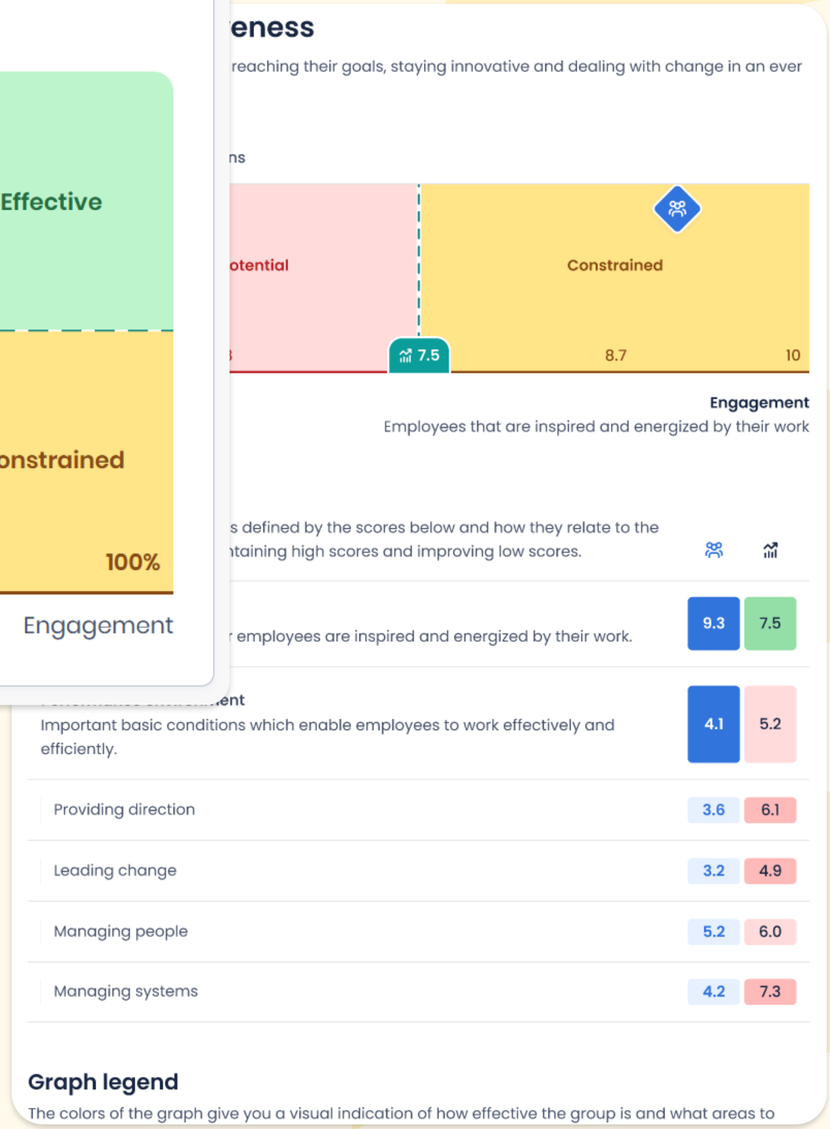


Effectiveness matrix

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.





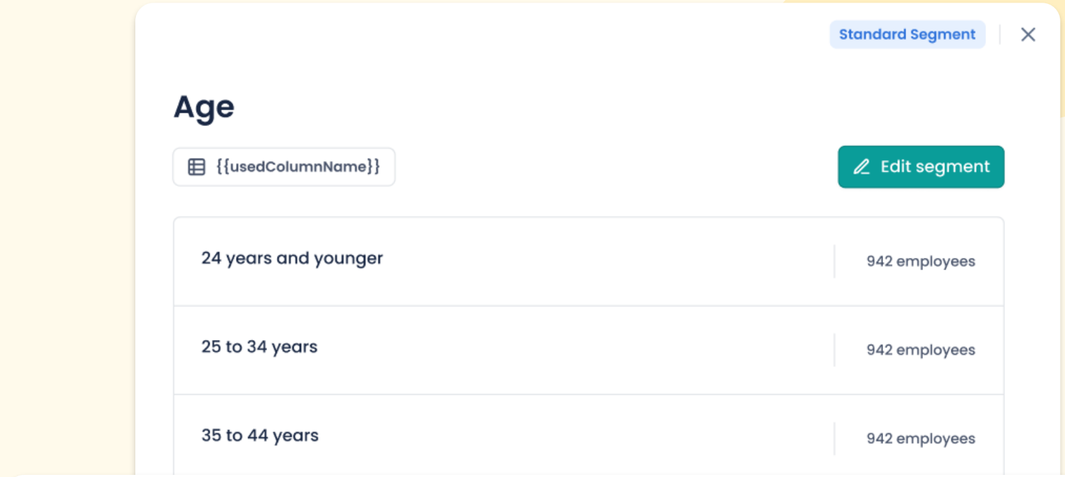
Participant management

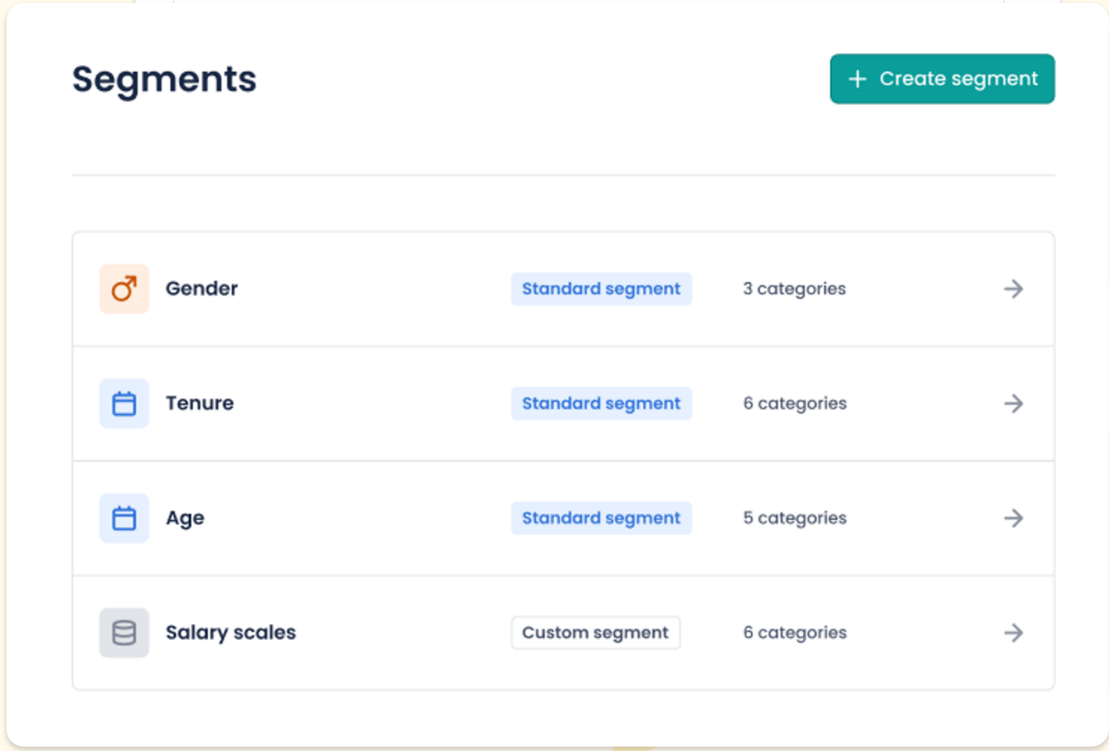
Release: Q4 2025

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

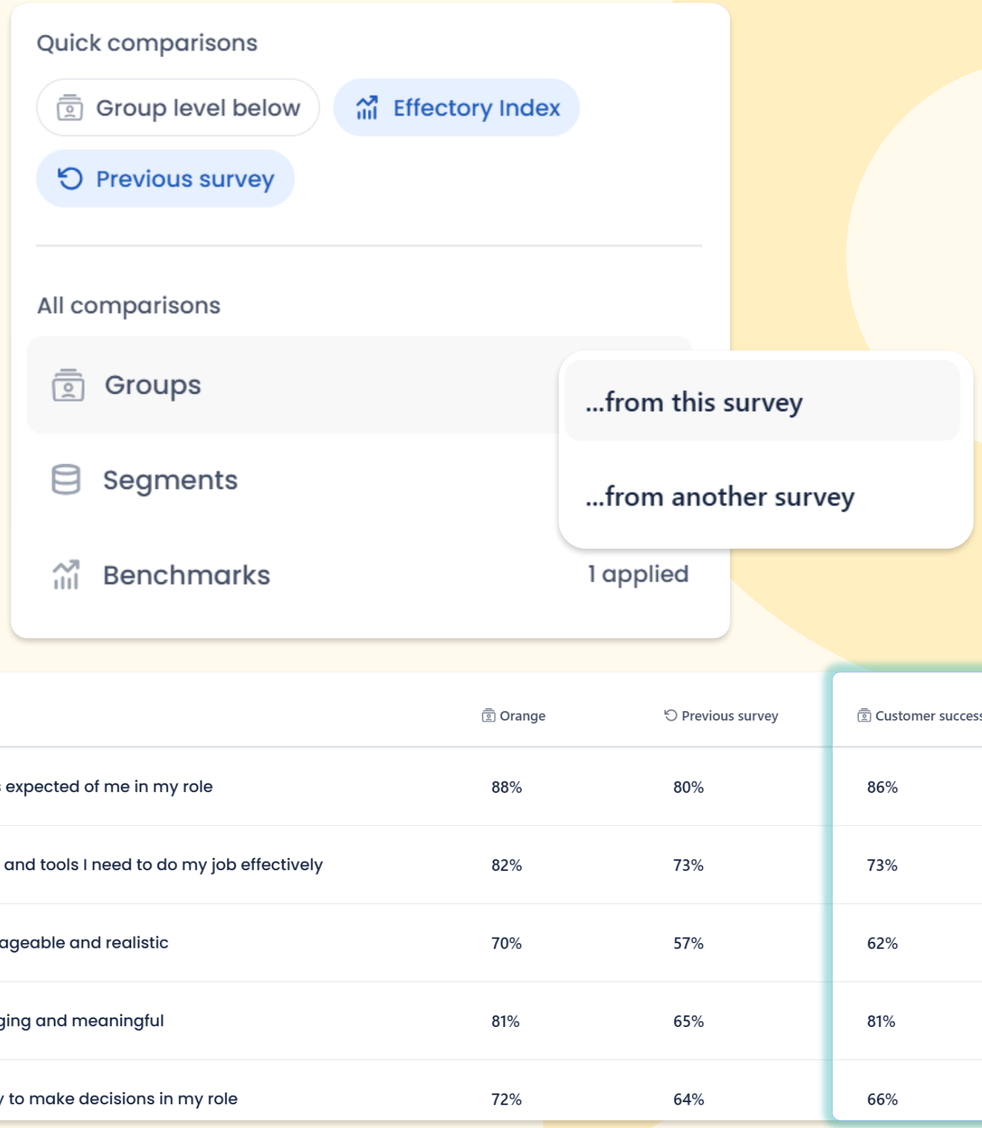




Dynamic comparisons of results

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



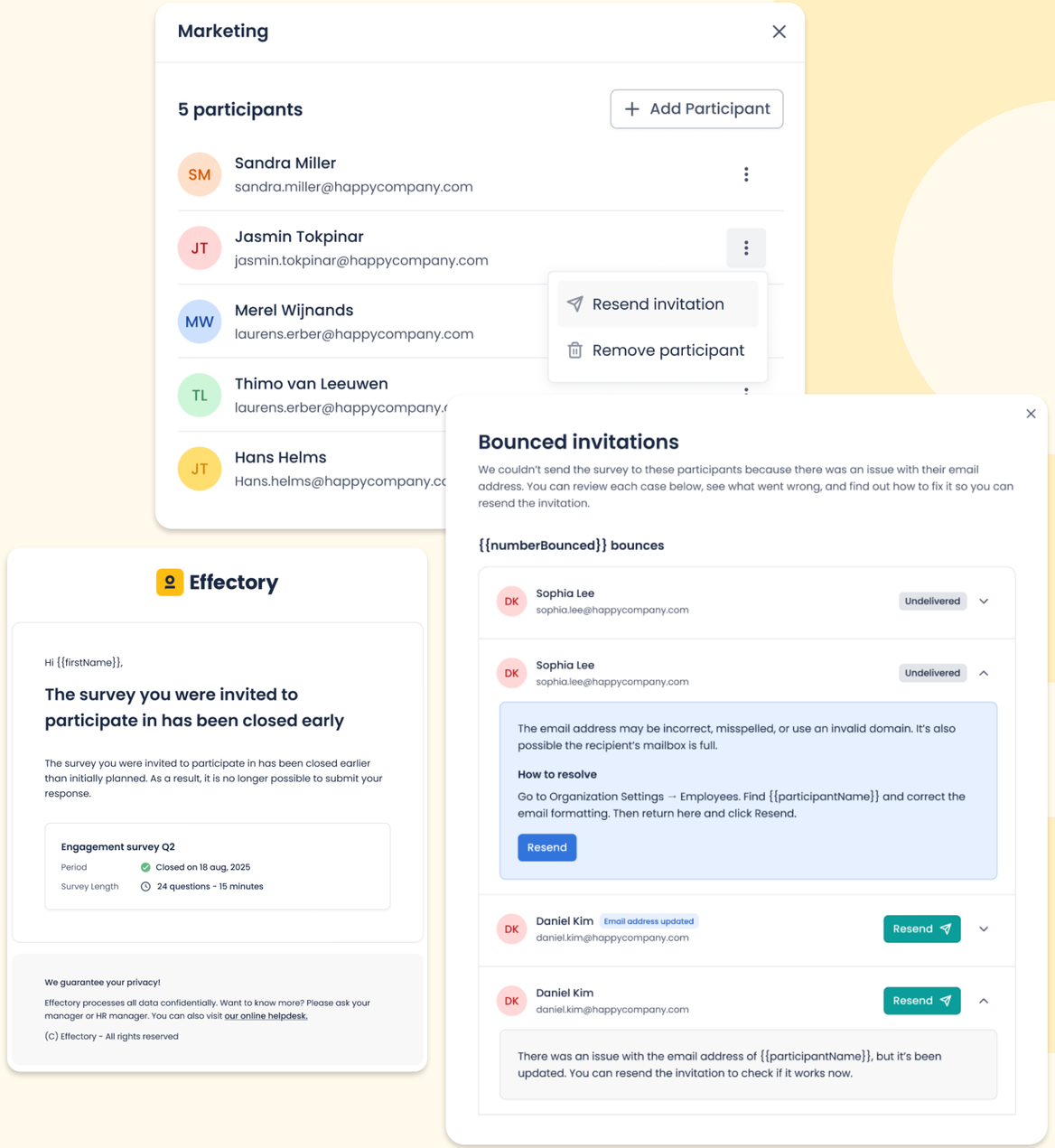
My Job	Orange	Previous survey	Customer success
I understand what is expected of me in my role	88%	80%	86%
I have the resources and tools I need to do my job effectively	82%	73%	73%
My workload is manageable and realistic	70%	57%	62%
I find my work engaging and meaningful	81%	65%	81%
I have the autonomy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

More mailing functionalities (2)

We're expanding the mailing options in My 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.



Results & reporting

Release: Q4 2025

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's coming

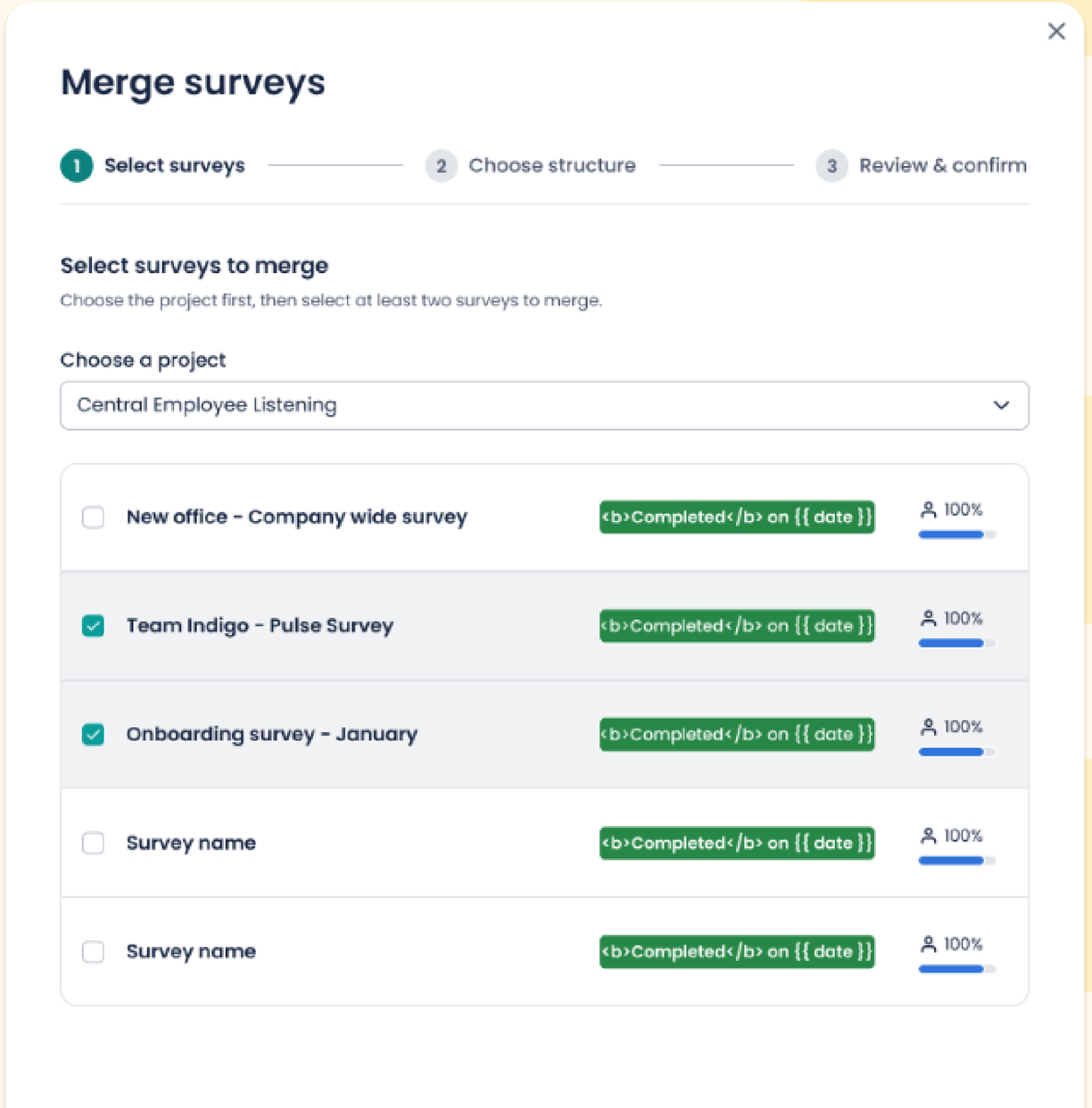
Take a peek at what's on our roadmap.

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.

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.** No more switching between surveys — everything in one place.
- **Spot trends across time and groups.** Understand how feedback evolves and where to focus.
- **Easily manage access rights across merged results.** Coordinator suggestions help you assign the right people quickly.

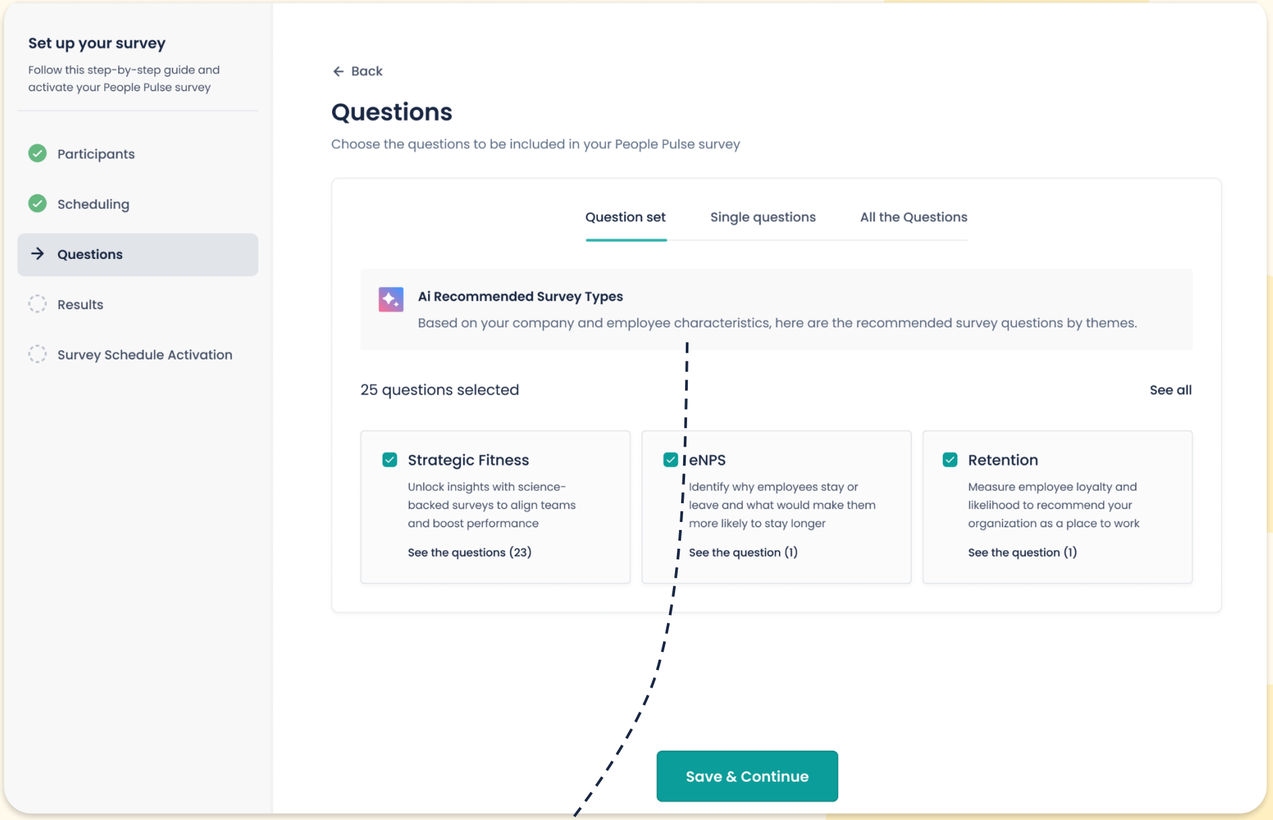


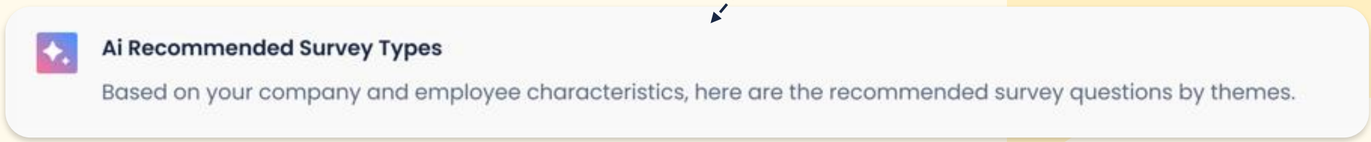
Survey setup & creation

Release: 2026

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.





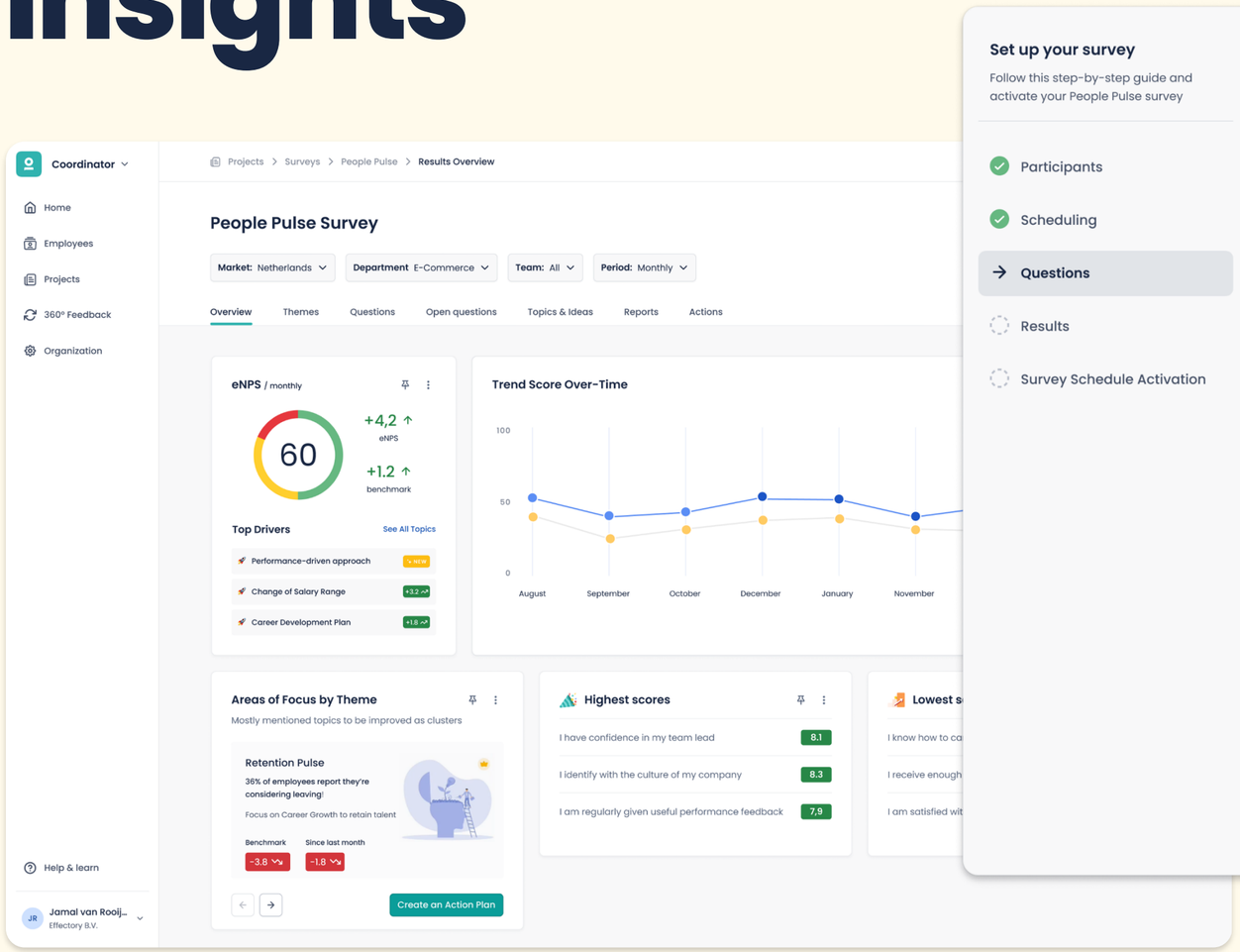
Release timeline:

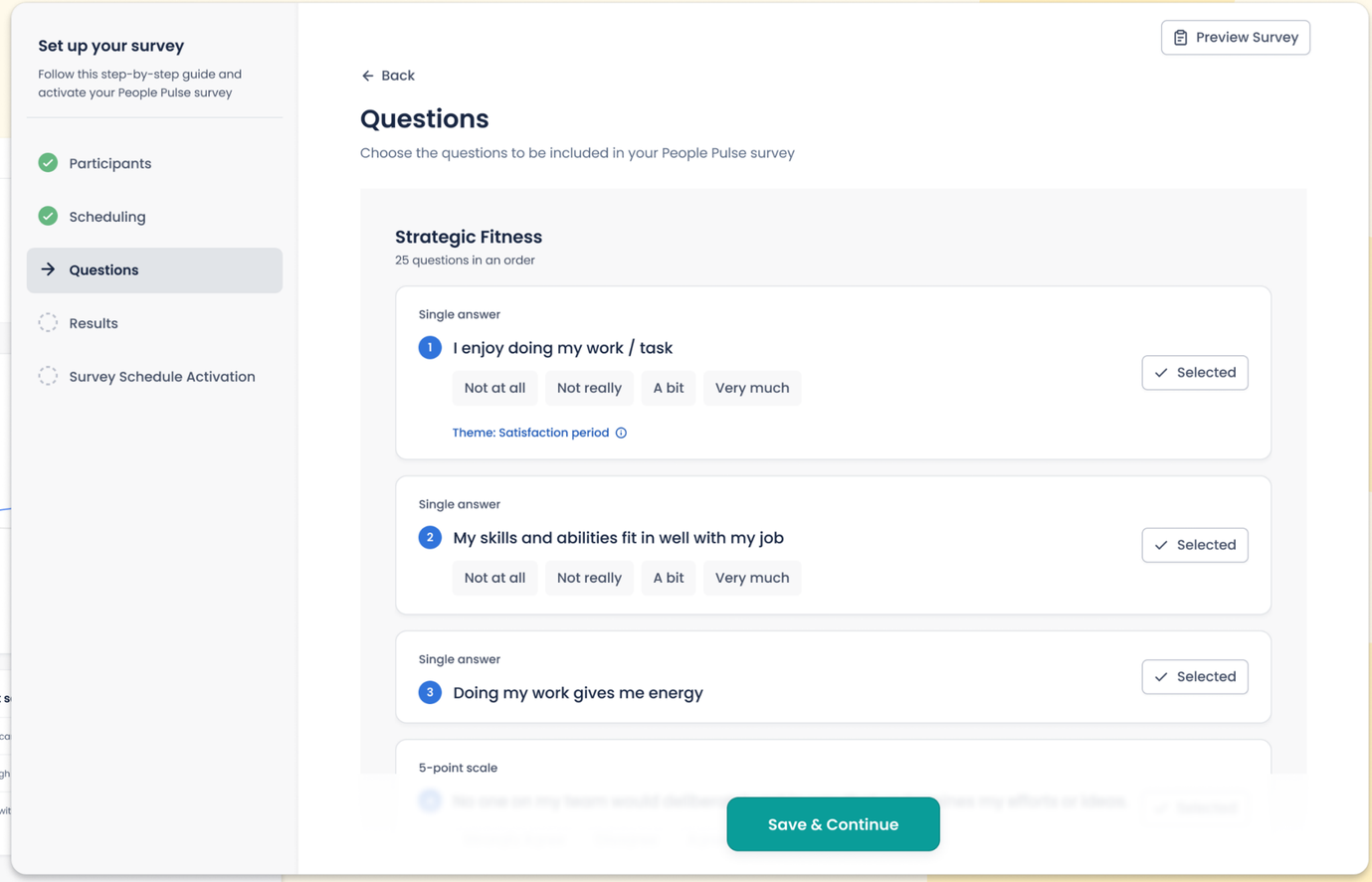
- Question templates will be released as part of the **Question Library** updates in **Q4**
- This feature to follow as an add-on

Survey setup & creation

Release: 2026

Intelligent survey automation & continuous insights





Thank you!

Questions or feedback?

Get in touch with our Helpdesk
or with your CSM!