



Effectory

Product Roadmap

2024 – 2026

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



Contents



- **Our Product vision**
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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

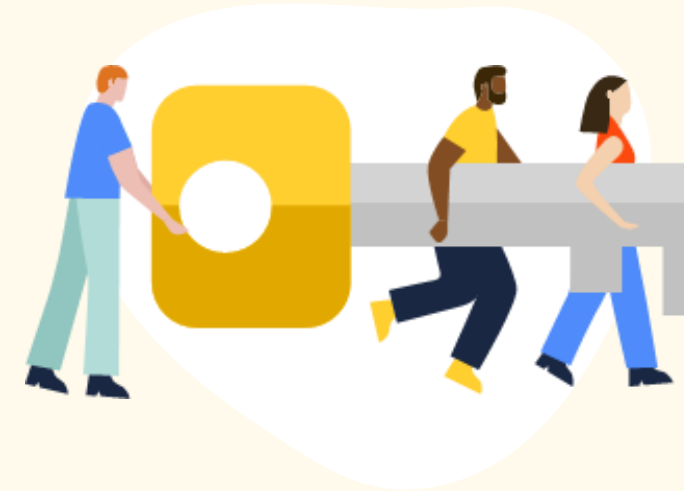
Surveying should be a no-brainer!

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 >



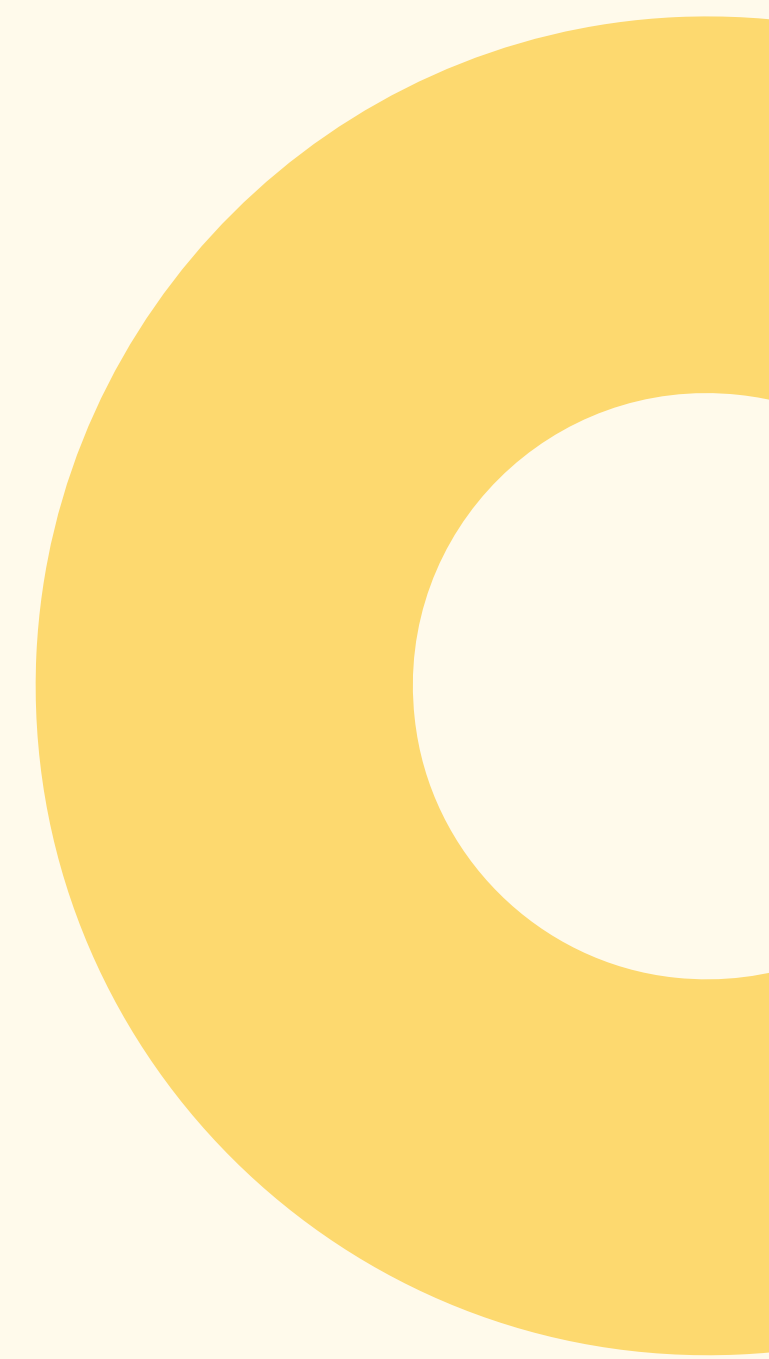
Fully ISO certified since 2015

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:

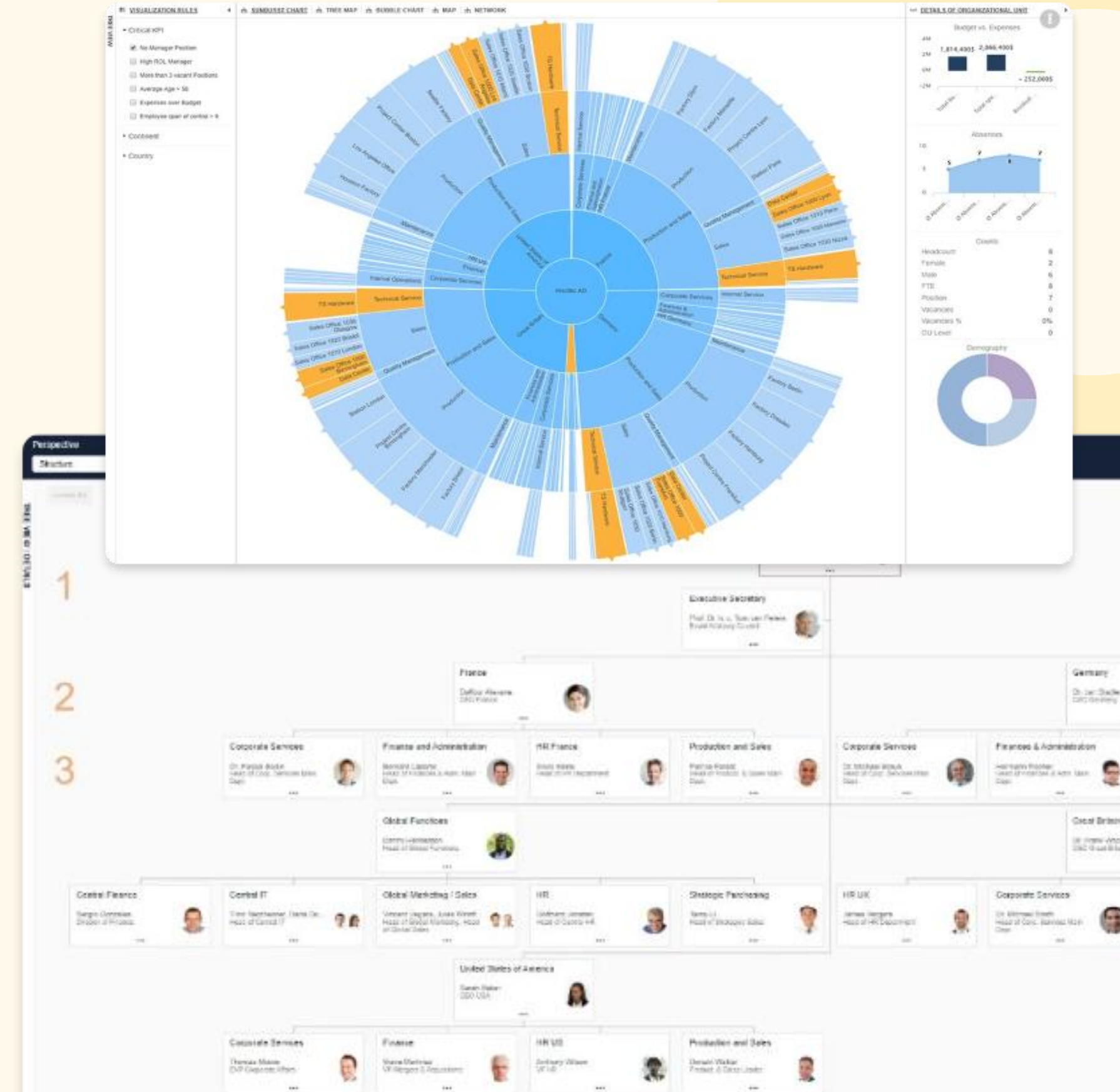
Personio	Eurécia
Workday	Officient
SAP successfactors	Charlie
Factorial	HRworks
AFAS	Breathe HR
BambooHR	AlexisHR
Kenjo	Rippling
HeavenHR	Sapling
HiBob	Nmbrs
Cezanne HR	PeopleHR
Sage HR	Lucca
Humaans	HaileyHR
	IRIS Cascade

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

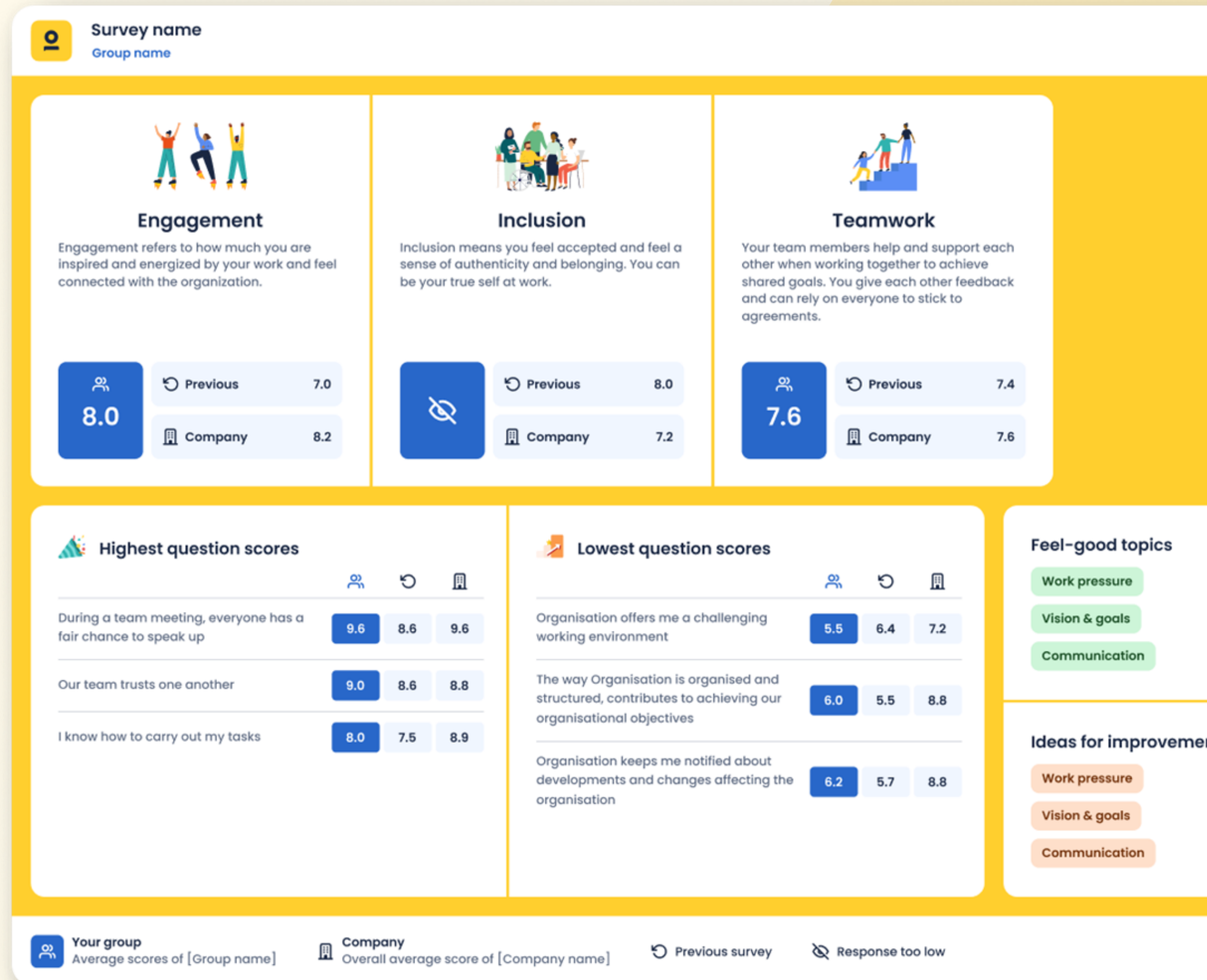
M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

One-pager

We're making it easier than ever to share your survey results with your entire organization!

E-mail, print, or hang our new one-pager to provide your audience with all the most relevant insights. This includes:

- Scores on themes.
- Highest and lowest scoring questions.
- Feel good topics.
- Ideas for improvement.
- And much more!



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.

Your Feedback

All the company wide surveys you've been invited to provide Your Feedback

Survey is open, not filled in yet, shorter than a week

Engagement

Closes today at 15:00

Participate

Survey is open, not filled in yet, longer than a week

Engagement

15 days left

Participate

← Back

Team Check-in

Team Development

English

Closed on 22 Aug, 2023

Your answers

Group results

Search

Change comparison

Topic / Theme	Your Answer	Group Comparison
I enjoy doing my work / tasks	Strongly Agree	<div><div></div><div></div><div></div></div>
I feel strongly supported by my direct supervisor in my professional development and growth within the organization.	Agree	<div><div></div><div></div><div></div></div>
I am proud to work for Organisation	Agree	<div><div></div><div></div><div></div></div>
I feel that I fit in at Organisation	Strongly Agree	<div><div></div><div></div><div></div></div>

Topic / Theme

Your Answer

Group Comparison

I enjoy taking on new or different responsibilities

Agree

How many bananas can you eat every day?

1-2 banana's

Other, namely...

I don't have a set number, but I usually grab a banana whenever I feel hungry between meals.

1-2 bananas

3-4 bananas

5-6 bananas

33%

12%

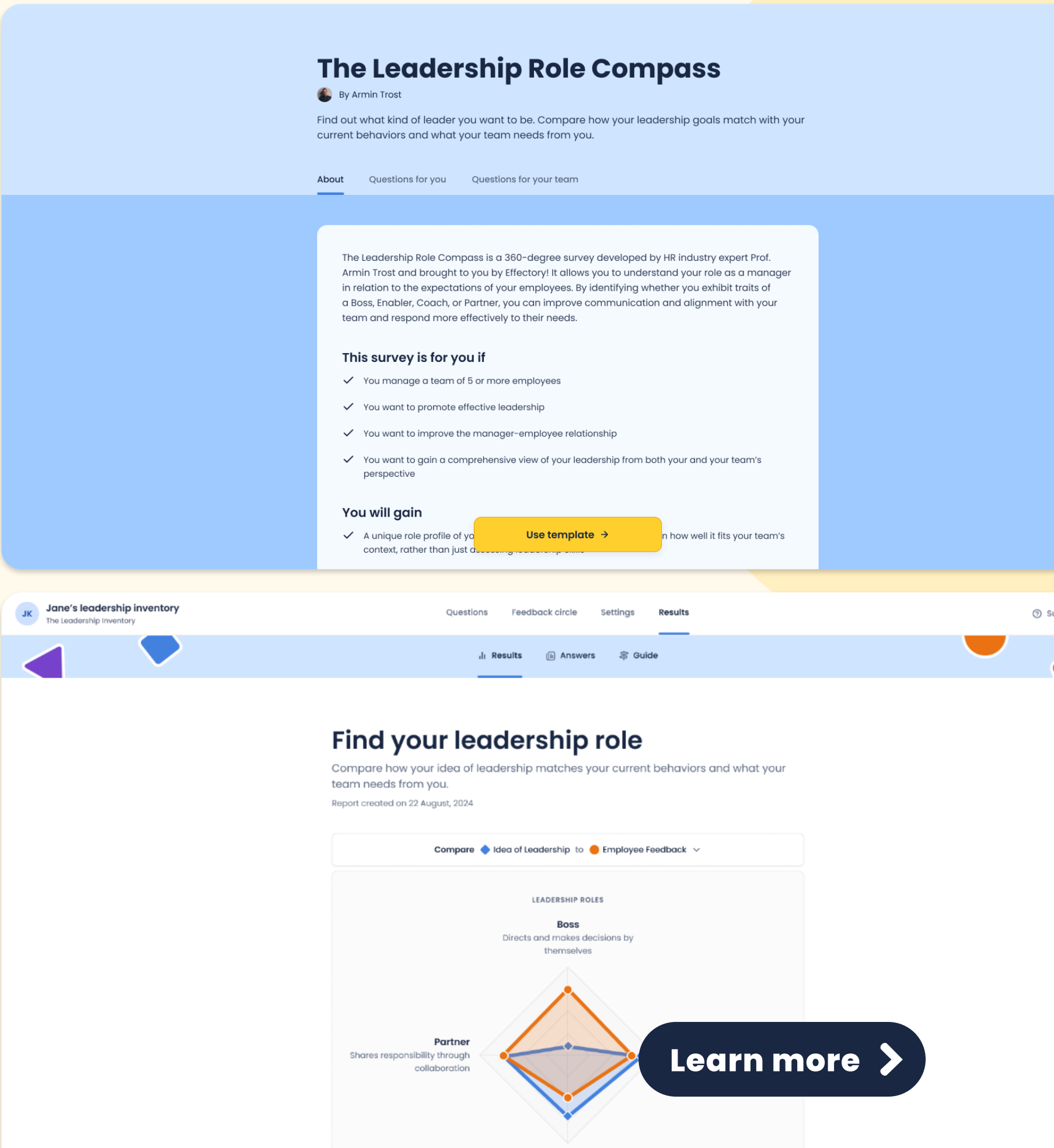
0%

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

[Learn more >](#)

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

The screenshot displays the 'People Pulse Survey 25' dashboard. The left sidebar contains navigation links for Home, Employees, Projects, and Organization. The main content area shows the survey overview for the 'Orange' group, dated from 22 Jul 2023 to 22 Aug 2023. The 'Overview' tab is selected, showing a summary of results. A prominent 'AI Summary' section is highlighted, indicating it is a beta feature. The summary text states: 'Despite a general decline compared to the previous survey, overall results remain well above external benchmarks. Leading change and team leadership stand out with scores of 86% and 79% respectively, exceeding benchmarks by 19 and 20 points—indicating strong capabilities in communication and motivation. Engagement remains high at 82%, though it dipped slightly from 84%. However, managing systems and people fell below their benchmarks, with managing systems underperforming by 6 points and both themes dropping 5 points since the last survey. Focused action is needed to strengthen people and system management practices, such as manager training, clearer process ownership, and increased employee involvement in decision-making.' Below this, 'Strengths' are listed: 'Engagement (82%) and Leading Change (86%) are well above benchmark by 14% and 19%.' 'Growth Areas' are listed: 'Managing People (65%) declined by 5% and is now below the 67% benchmark.' An 'About the AI summary' modal is open, explaining that the summary is generated using team theme scores, compares current results to past surveys and benchmarks, and highlights key trends and changes. It also states that no personally identifiable information or open-text comments are used in the analysis. A disclaimer notes that while the summary is generated by AI, it may not capture every nuance and is designed to support, not replace, user insights and decision-making. A footer note mentions that Effectory uses AI technology under the same contractual terms as the rest of the platform, with data stored in Europe and not used for AI model training. A 'Got it' button is at the bottom right of the modal.

Projects > Project title > Results > Survey title > Overview

People Pulse Survey 25'

Group: Orange 22 Jul 2023 - 22 Aug 2023

Overview Themes Questions Open questions Topics & ideas Reports Actions

AI Summary Beta

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

Strengths

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

Growth Areas

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

About the AI summary

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

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

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

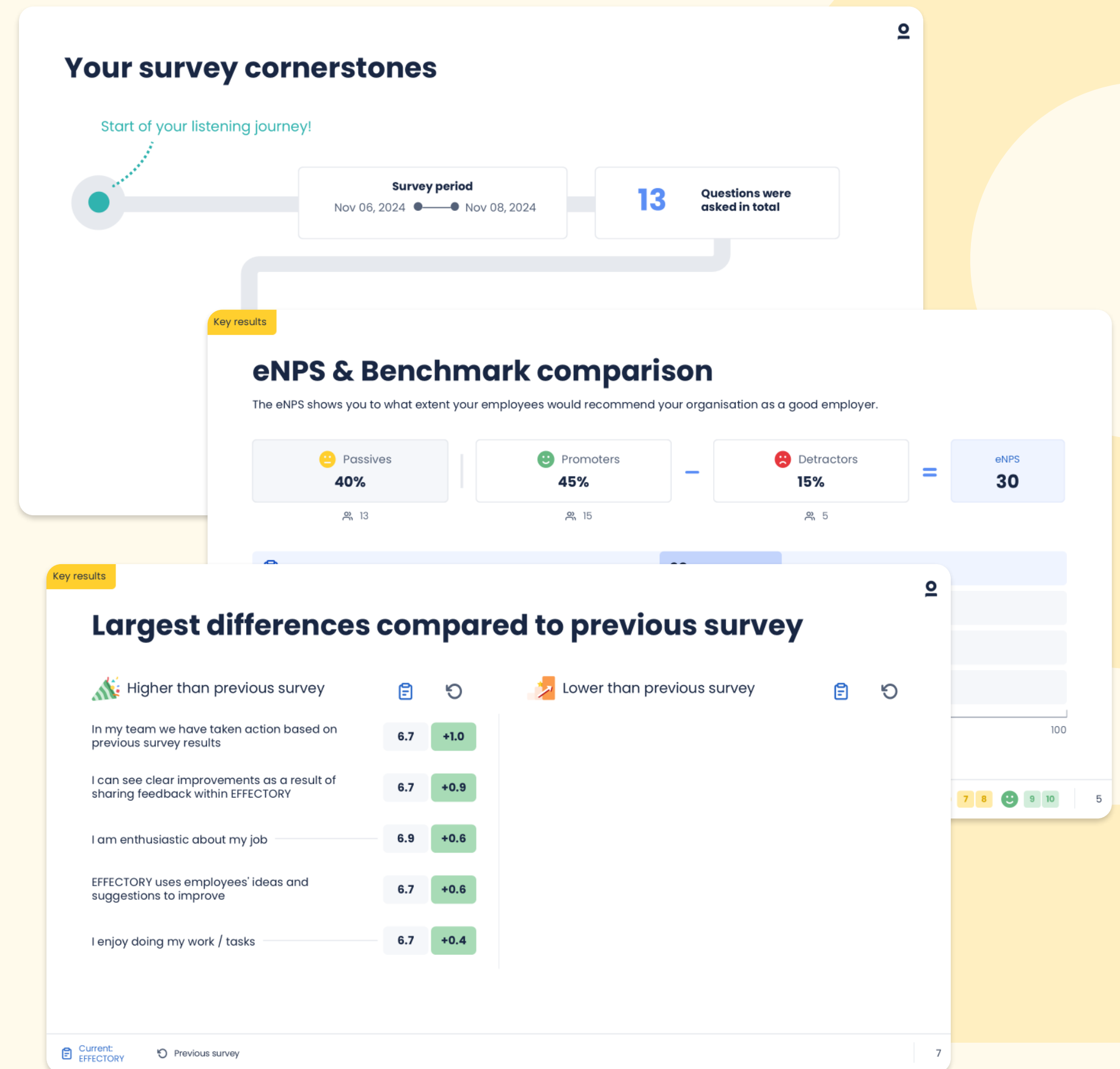
Effectory uses AI technology under the same contractual terms that govern the rest of this platform. This includes robust privacy and security measures: your data remains stored in Europe and is not used to train AI models.

Got it

Management summary

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

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



Significance in the results dashboard

We're reintroducing **statistical significance** to the results dashboard, so you can see whether score differences are meaningful or just random variation, helping you make more informed decisions.

- Significant differences will be marked with an asterisk (*).
- Calculated using standard deviation, group size, and variability.
- A 95% confidence level ensures reliable insights.

Sort

Themes

Compare: Groups & Benchmarks

Demo Organisatie	Previous survey	Benchmark	Top 3 benchmark
5.5	6.0	* 7.7	8.0
6.1	7.5	7.9	8.2
6.6	6.9	7.8	8.0
8.8	* 6.9	7.8	8.0

Significance (*)

Significance helps identify whether the difference between two scores is meaningful and not due to random chance. A score marked with an asterisk indicates that the difference between this score and {{currentGroup}}'s score is considered significant. It reflects a real difference worth paying attention to.

CURRENT GROUP	PREVIOUS SURVEY	BENCHMARK
5.5	6.0	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 Klopper** on **Apr 12, 2024**.



Project name Fixed for your plan

A project name to easily find your project.

Employee listening



Language(s) for invites & surveys

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

[Learn more](#) >

English (United Kingdom)

Dutch (Netherlands)

German (Germany)

... and 1 more language

[View all or add new](#)



External benchmarks

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

[Learn more](#) >

Country benchmark: Effectory Index

Country benchmark: Global Index

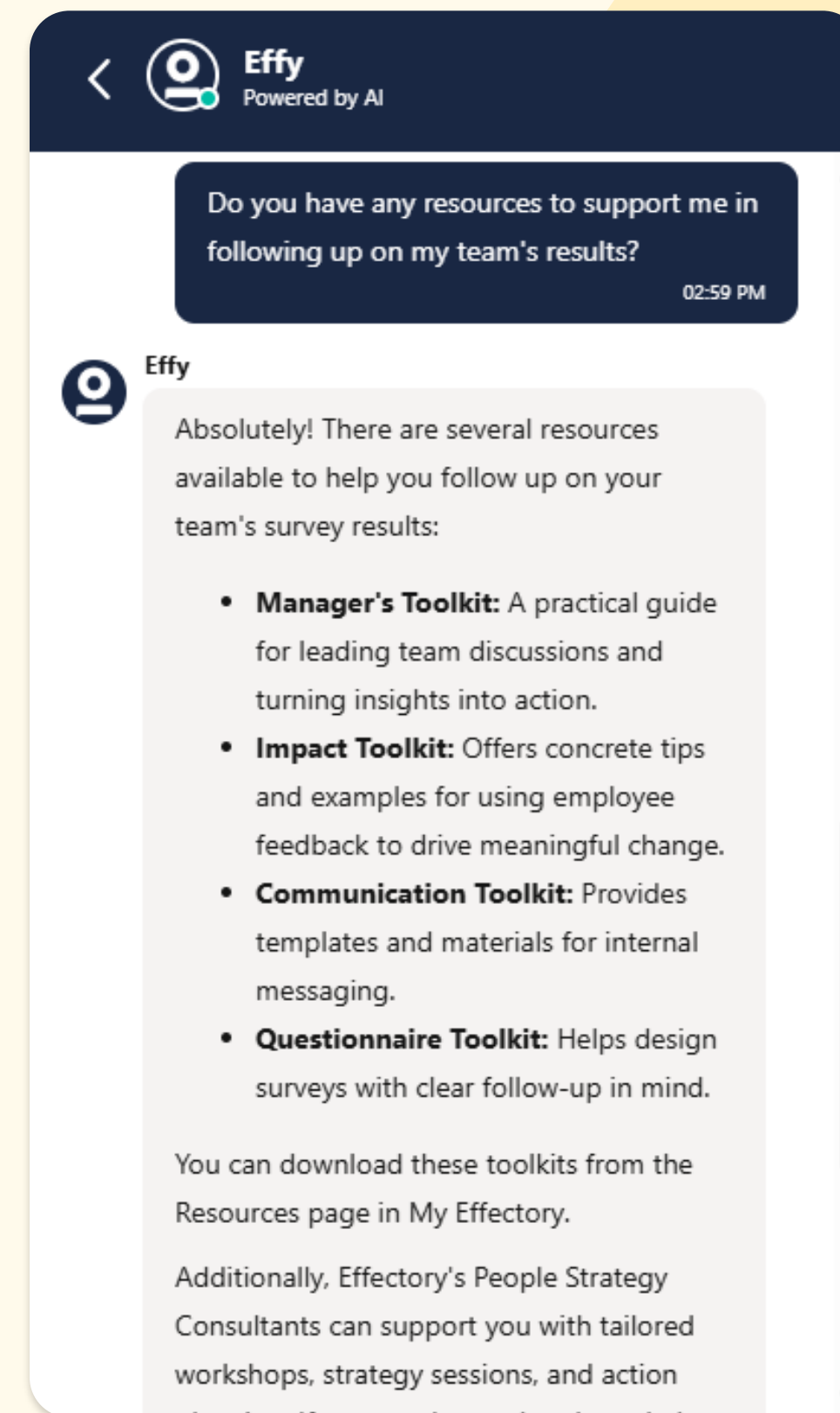


Meet Effy, our AI assistant

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

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

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



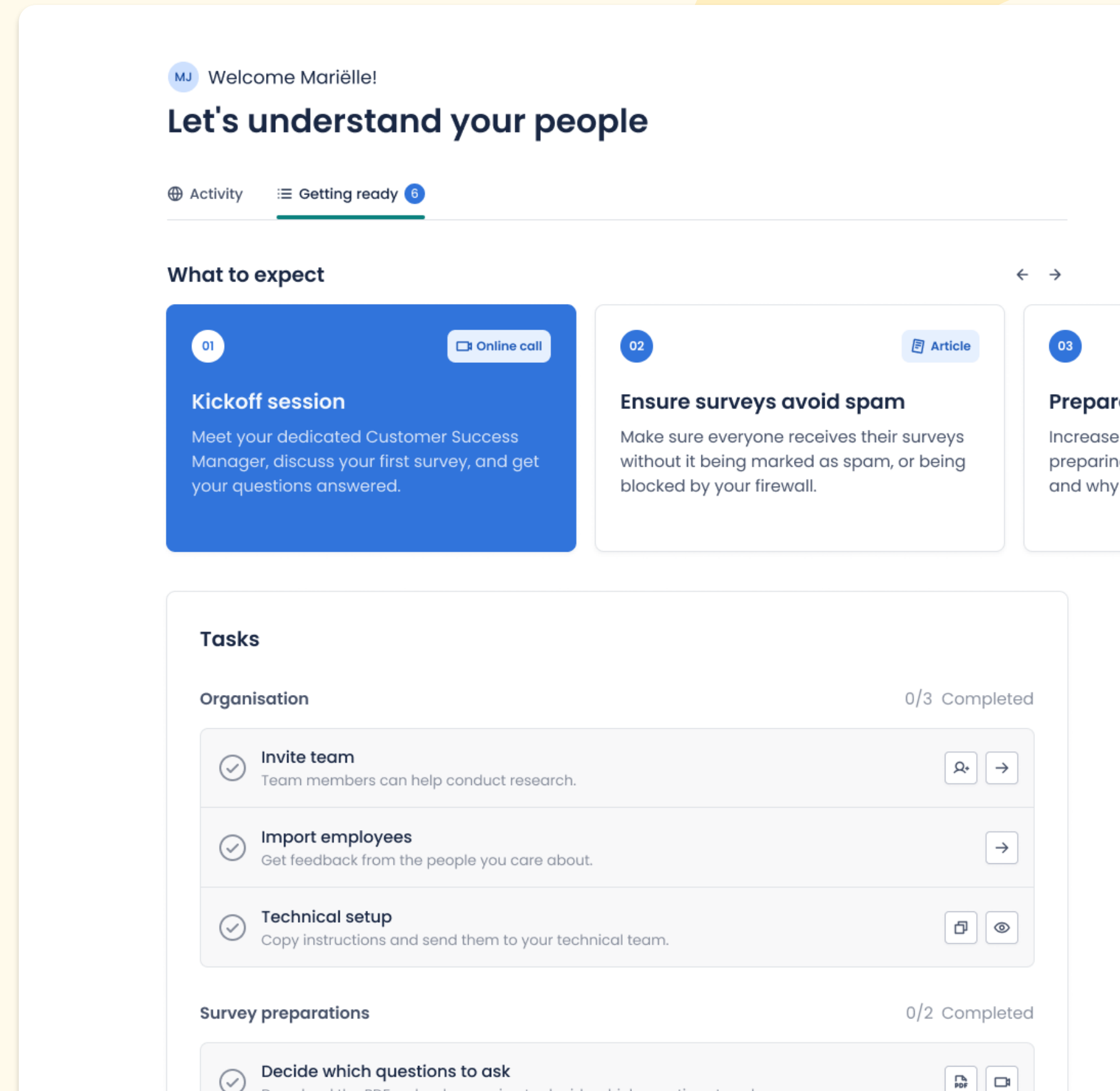
Meet Effy >

Onboarding task list

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

- **A clear checklist** covering all steps of survey setup.
- **Direct links** to relevant platform sections or helpful information.
- **Best-practice advice** and in-depth guidance at every step.
- **A structured overview** from start to finish—so you always know what's next.

Follow the task list in the platform and launch your survey with confidence!



In-platform enablement resources

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

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



Enhanced survey flexibility

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

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

Set up your survey

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

✓ Participants

→ **Scheduling**

○ Questions

○ Results

○ Survey Schedule Activation

← Back

Scheduling

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



Survey Scheduling

Choose a time to send out the survey

Launch Date

📅 24.04.2025

Frequency

🔄 Weekly

Survey Start D

📅 Monday

Survey Duration ⓘ

🕒 12 days (recommended)



Survey Length

Choose the right survey length with our smart survey generator

Number of Questions ⓘ

6 questions (recommended)

Save & Continue

Advanced filters

We are enhancing our dashboard to allow for more dynamic reporting. This will help you gain a deeper understanding of your respondents' feedback.

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

×

Create advanced filter

Name

0/50

Type a name

🔍 4 / 316 respondents selected

A minimum of 5 respondents is required to calculate new results

+ Filter by

👤 Groups

▼

🗑️

2 Groups selected Product & Development

AND

Manager

▼

🗑️

Is ▼

Select value

▼

More mailing functionalities (1)

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


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

Send test email


email address

Enter an email address

email language

 English (united States)

▼


 Please

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- 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

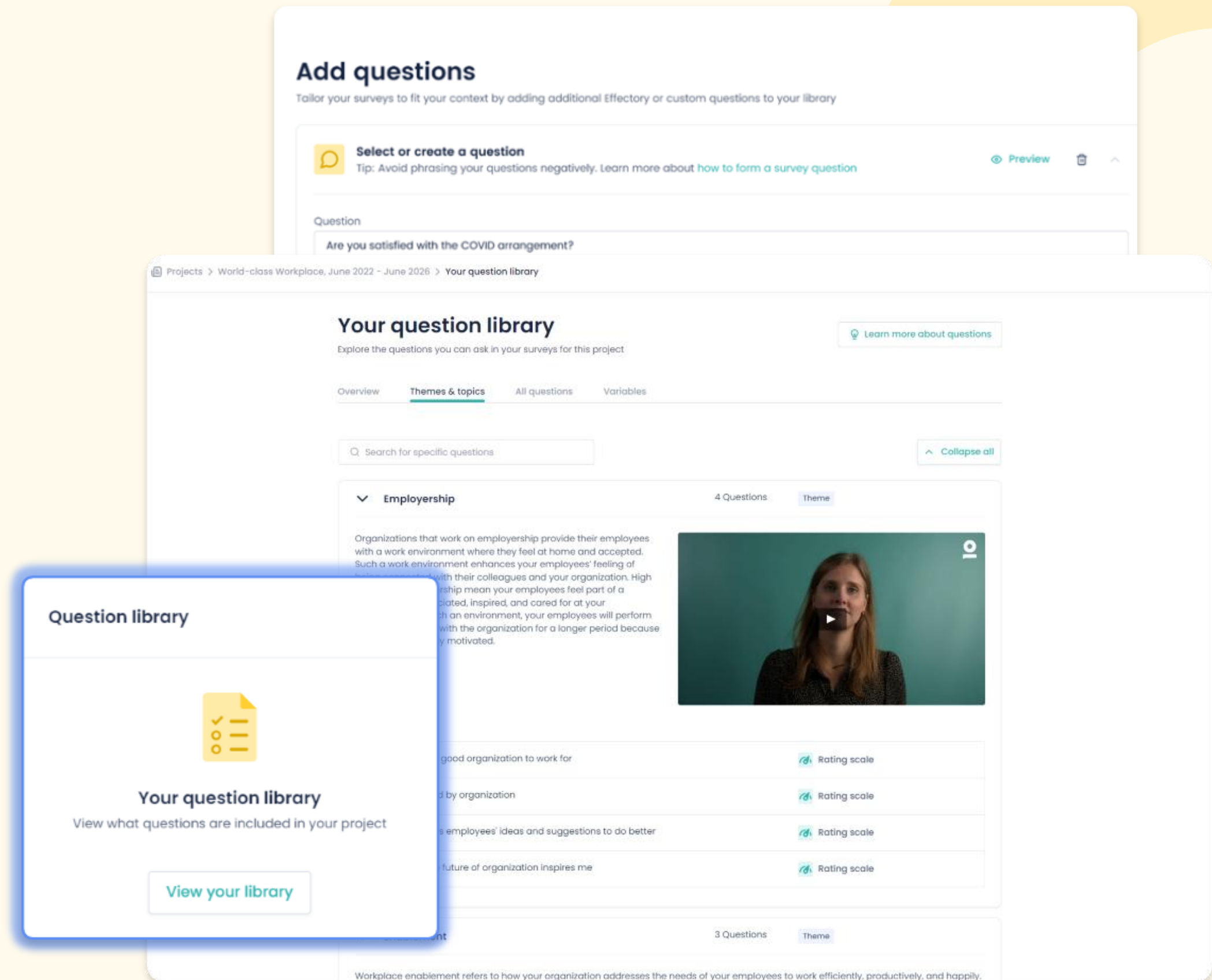
Save reminders

Question library

More question management features are coming to My Effectory:

- Make each question truly yours by customizing merge fields with your organization's information.
- Create custom questions tailored to your organization's specific needs.
- Manage question translations.
- Templates enable you to customize your question library with ease.

[Learn more >](#)

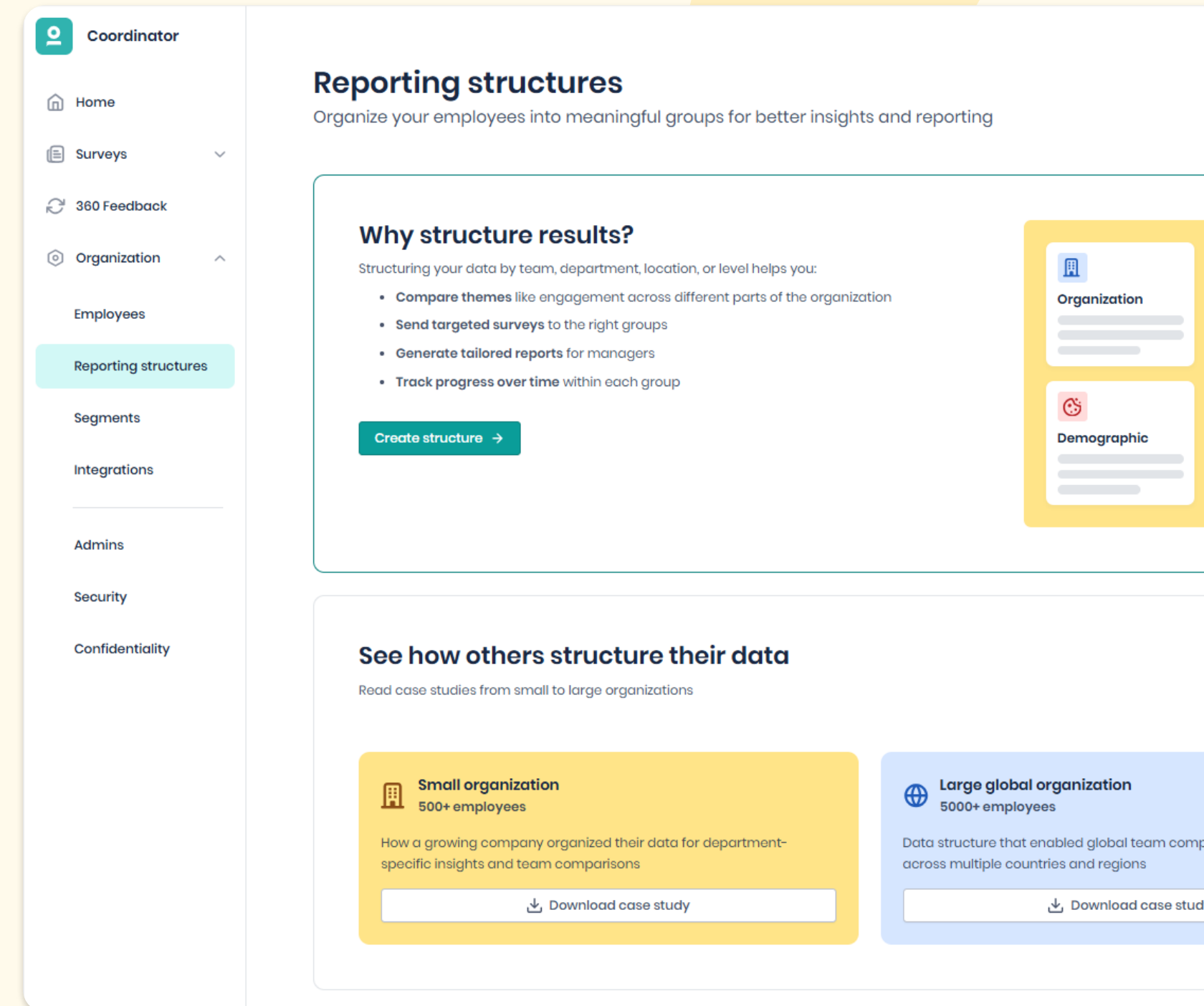


Smarter reporting structures navigation

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

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

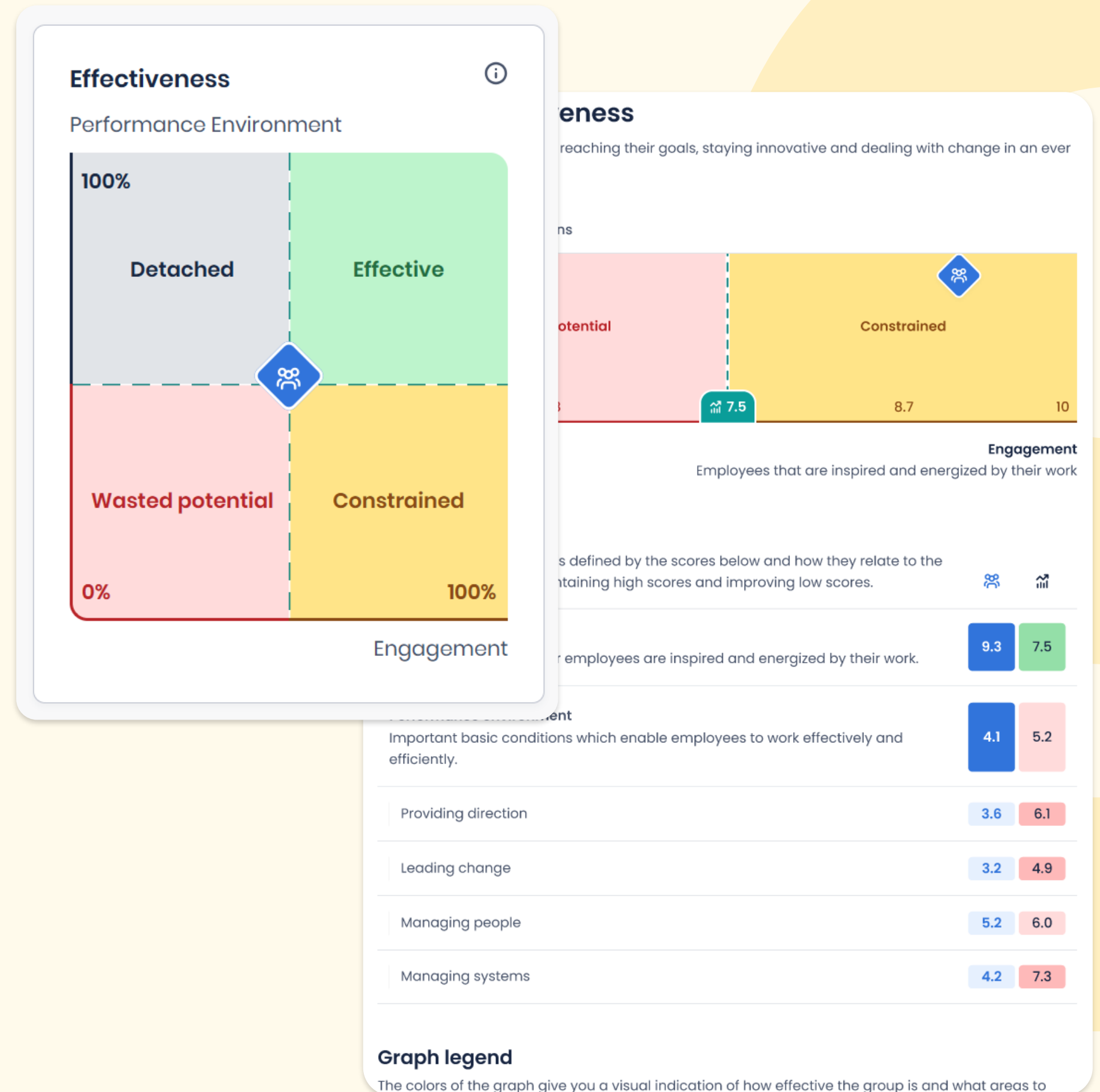
This update makes the process smoother, clearer, and easier to complete independently.



Effectiveness matrix

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

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



Automated segments

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

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

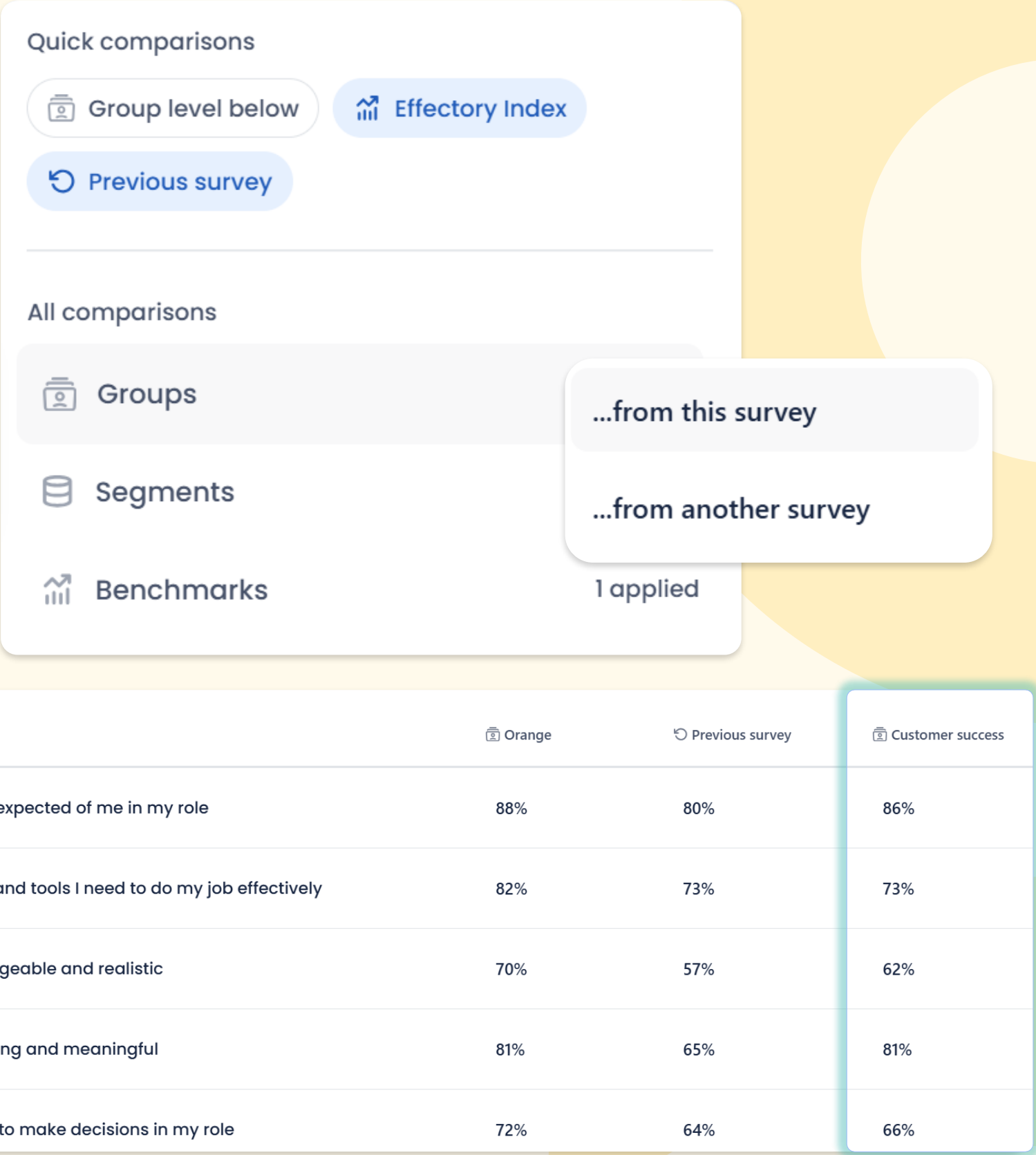
The screenshot displays two overlapping UI panels. The top panel, titled 'Standard Segment', shows a configuration for the 'Age' attribute. It includes a table with three rows: '24 years and younger', '25 to 34 years', and '35 to 44 years', each associated with '942 employees'. An 'Edit segment' button 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. A '+ Create segment' button is located at the top right of the 'Segments' panel.

Attribute	Segment Type	Categories
Gender	Standard segment	3 categories
Tenure	Standard segment	6 categories
Age	Standard segment	5 categories
Salary scales	Custom segment	6 categories

Dynamic comparisons of results

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

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



More mailing functionalities (2)

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

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

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

Marketing

5 participants + Add Participant

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

✉ Resend invitation
🗑 Remove participant

Bounced invitations

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

{{numberBounced}} bounces

- DK** Sophia Lee
sophia.lee@happycompany.com Undelivered
- DK** Sophia Lee
sophia.lee@happycompany.com Undelivered
- DK** Daniel Kim Email address updated
daniel.kim@happycompany.com Resend
- DK** Daniel Kim
daniel.kim@happycompany.com Resend

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

How to resolve

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

Resend

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

Effectory

Hi {{firstName}},

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

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

Engagement survey Q2

Period ✓ Closed on 18 aug. 2025

Survey Length 🕒 24 questions - 15 minutes

We guarantee your privacy!

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

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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

My organization as an employer

✦ AI summary Beta

Employees selecting this answer often highlighted the organization's strong benefits, supportive leadership, and transparent policies. They described how these elements create a workplace where people feel valued, respected, and motivated to grow their careers. Many respondents emphasized that the organization fosters not only professional development but also personal well-being, which contributes to a healthier work-life balance.

Most representable answers

...The benefits package is competitive...

...It's rare to find a place that balances professional growth and personal well-being so well.

...my manager genuinely cares about my workload and mental health.

👍 This summary was helpful 🚫 Not helpful

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



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.

Merge surveys

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

Select surveys to merge

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

Choose a project

Central Employee Listening

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



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

Set up your survey

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

✓ Participants

✓ Scheduling

→ Questions

○ Results

○ Survey Schedule Activation

← Back

Questions

Choose the questions to be included in your People Pulse survey

Question set

Single questions

All the Questions

✦

Ai Recommended Survey Types

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

25 questions selected

See all

✓ Strategic Fitness

Unlock insights with science-backed surveys to align teams and boost performance

See the questions (23)

✓ eNPS

Identify why employees stay or leave and what would make them more likely to stay longer

See the question (1)

✓ Retention

Measure employee loyalty and likelihood to recommend your organization as a place to work

See the question (1)

Save & Continue

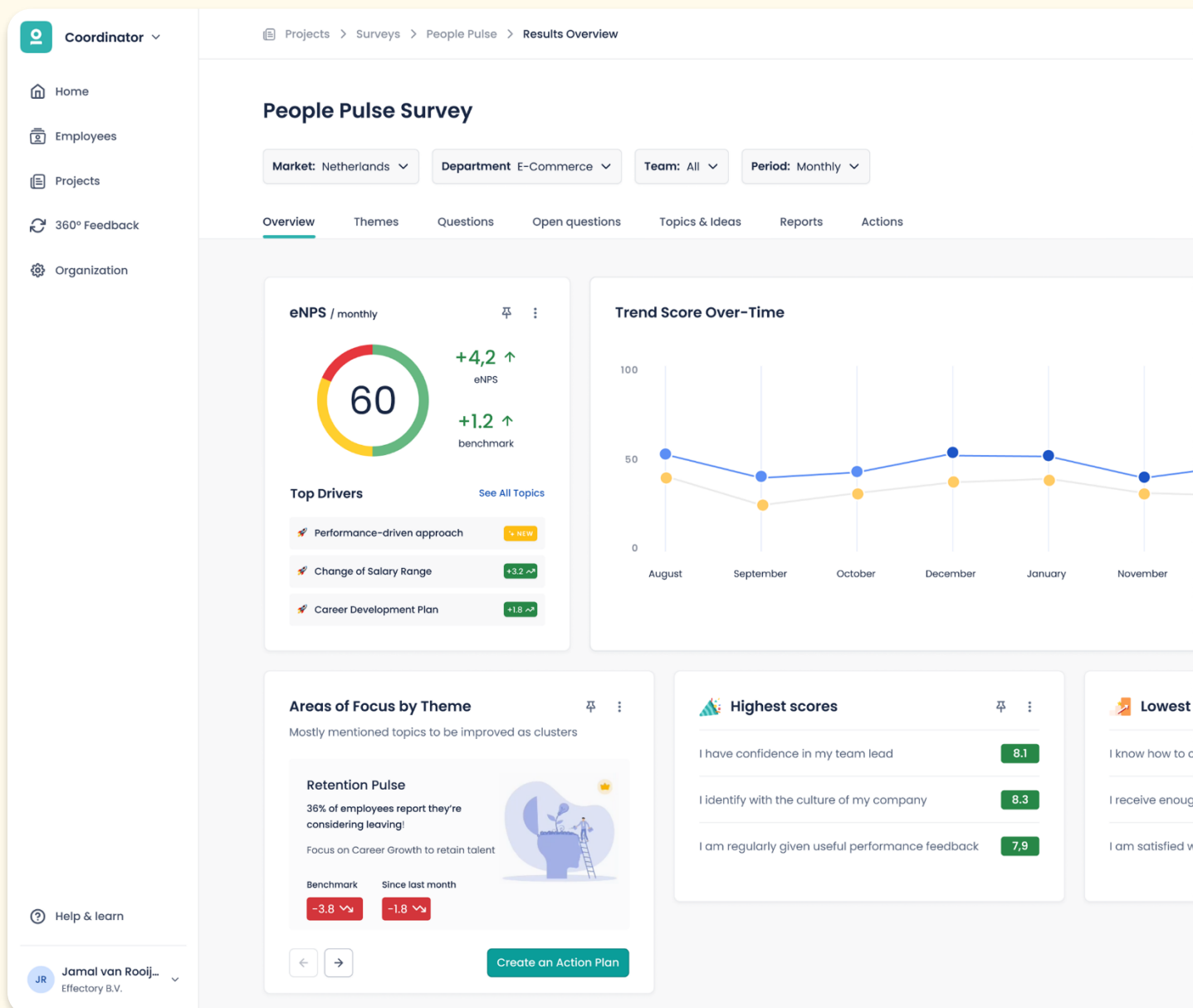
✦

Ai Recommended Survey Types

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



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

✓ Selected

Theme: Satisfaction period ⓘ

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



Thank you!

Questions or feedback?

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