<u>Peffectory</u>

Product Roadmap

Q22024-Q42025



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- > What we've done
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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:

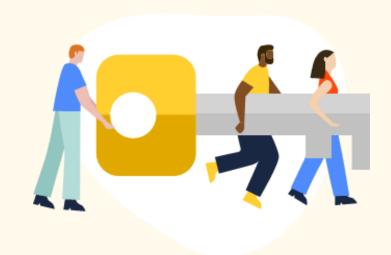
- Effortless
- Stable & safe
- Reliable

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.



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!

Learn more >



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 <u>Integrations Marketplace</u> 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!

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?

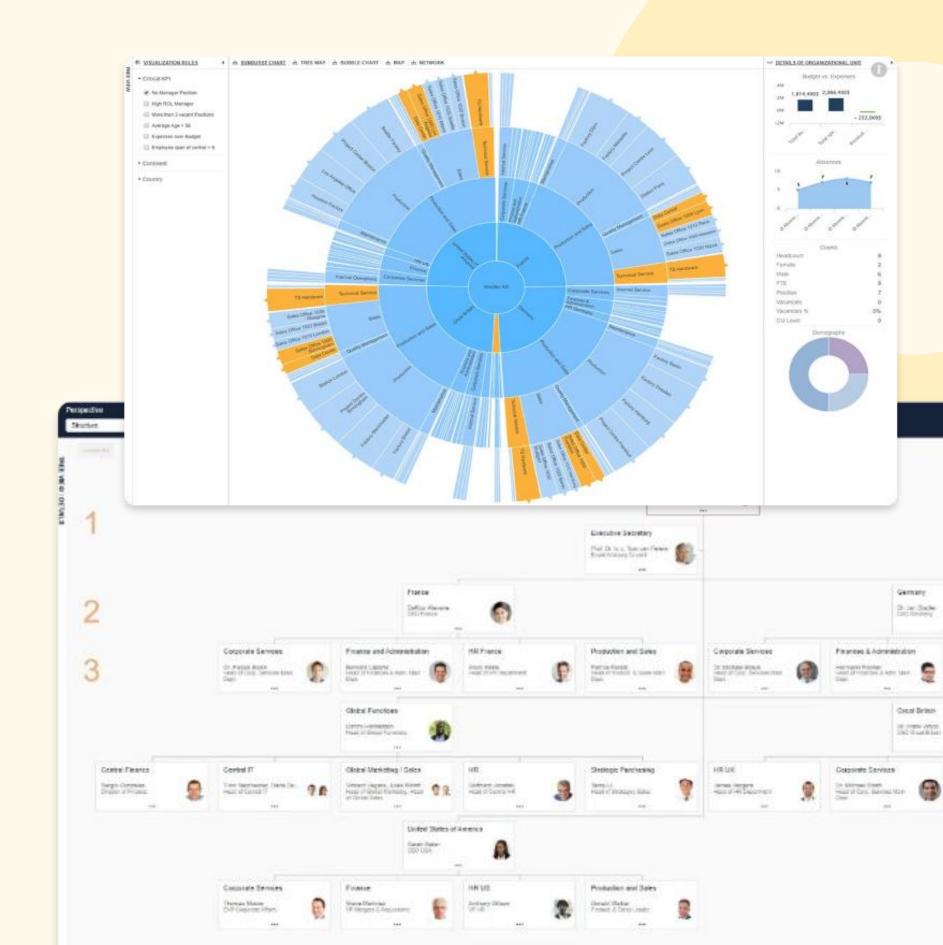
Get in touch with your CSM to explore possibilities!

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.

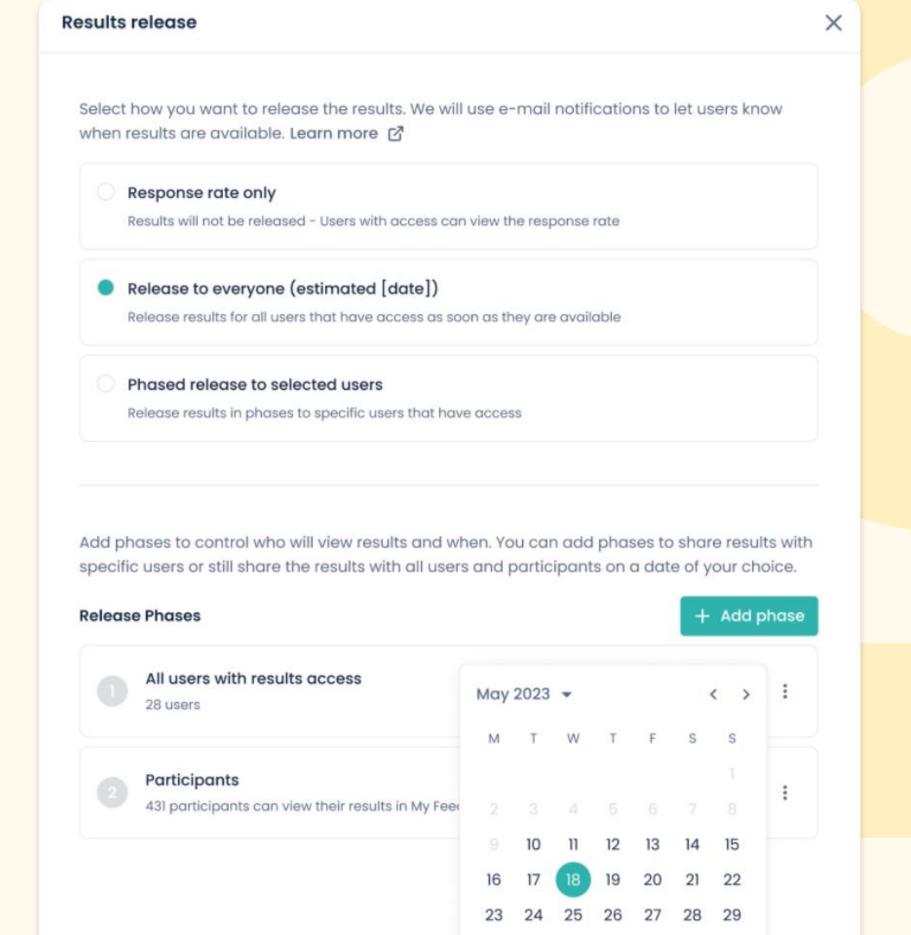
- Visualize organizational hierarchies, merge teams, and ensure data accuracy.
- Set up reporting structures directly from your HRIS.
- Integrate various data sources, whether it's different HRIS systems or business unit locations.
- Enhance security by eliminating the need for local Excel file exchanges 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.



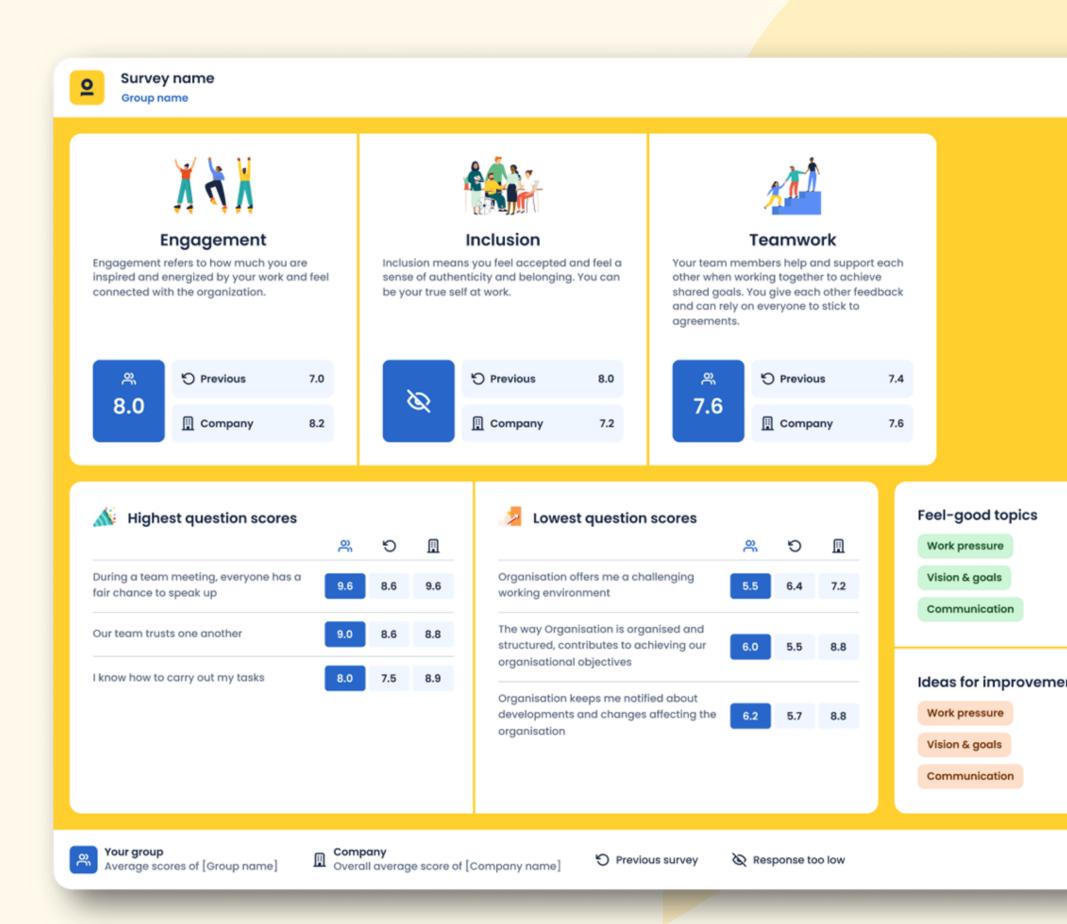


One-pager

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.



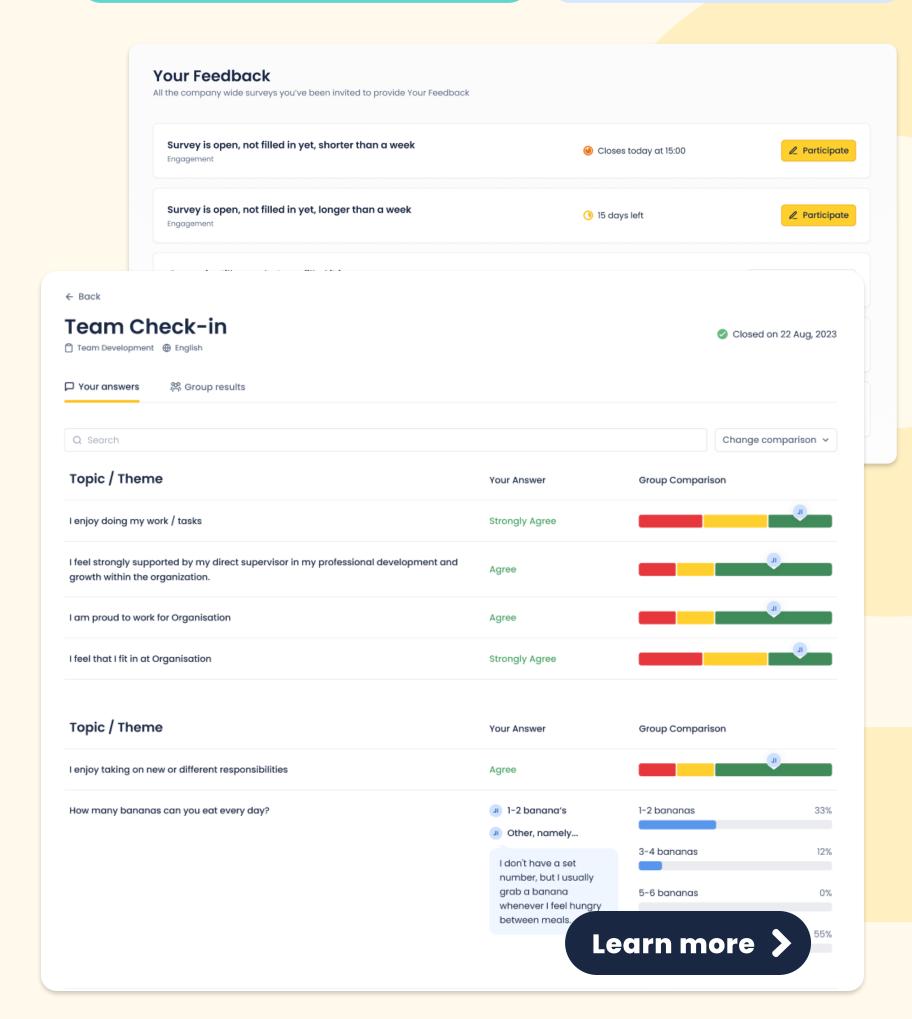
	Doing my work gives me energy	enjoy doing my work / tasks	y skills and abilities fit in well with my job	can decide how I carry out my work	know what results are expected of me at work	nportant information is readily accessible for m	am provided with good work resources (tools, tevices, software, materials, etc.) to do my job	have good opportunities to develop myself professionally and personally	Vhen I do a good job, I recelve praise and ecognition	can be myself around everyone I work with	n my team we collaborate well	y team understands what needs to be done to ontribute to the success of Effectory	fy team continuously develops good ideas for in provement	in my team, we have taken action to improve on our feedback results	have confidence in my team lead	ly team lead motivates me in my work	ly team lead encourages my development	am regularly given useful performance feedbac
Doing my work gives me energy	- 1	0,69	0,40	0,29	0,20	0,08	0,16		0,30	0,23	0,32	0,36	0,27	0,20	0,40	0,41	0,36	0,31
lenjoy doing my work / tasks	0,69	e1)	0,51	0,21	0,31	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
l know what results are expected of me at work	0,20	0,11	0,14	0,35	Ţ	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	i i	0,42	0,22	0,30	0,09	0,23	0,33	0,21	0,15	0,33	0,27	0,26	0,32
l 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	Ī,	0,31	0,32	91,0	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	81,0	0,16	0,19	0,22	0,31	- 3	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		— A,	0,20	0,27	0,35	0,27		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		0,20	- 6	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	- 2	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	į,	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
l 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	Ť.	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
l 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	3,
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
lam 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
l 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
l 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

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

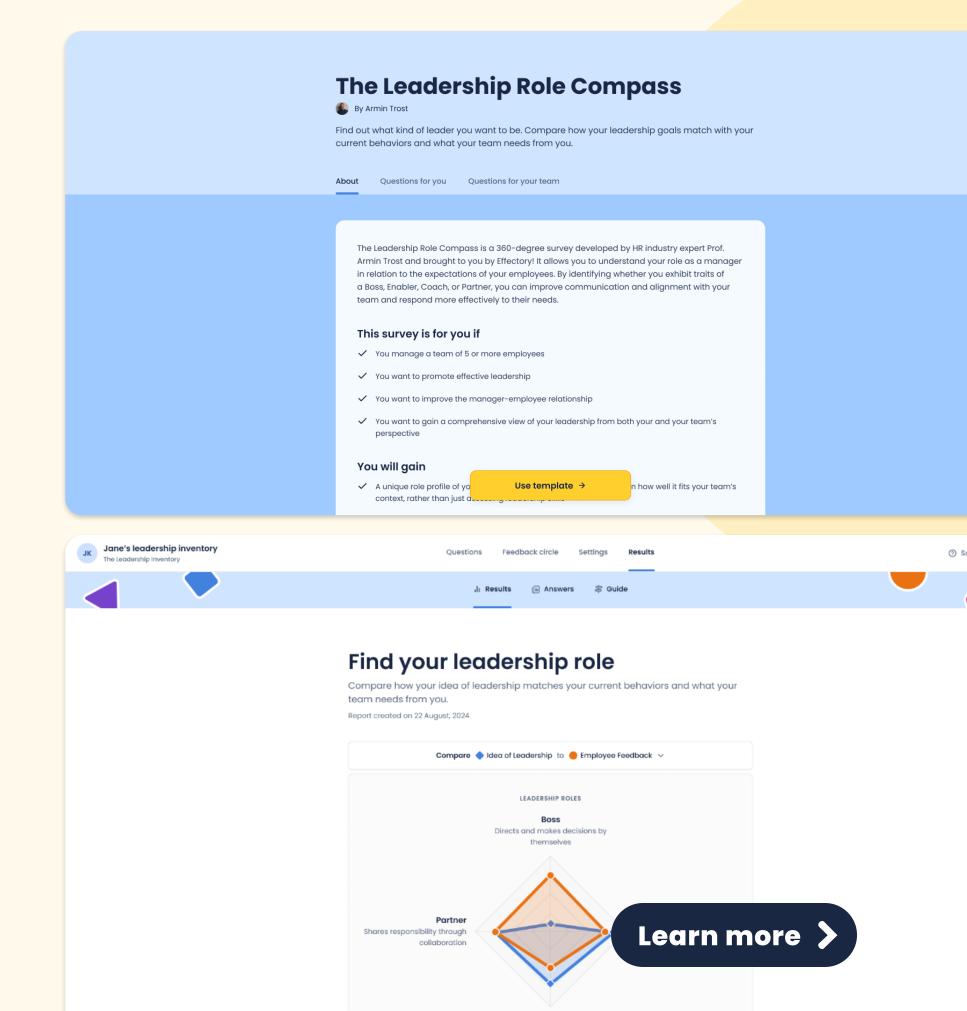
Release: Q4 2024



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.

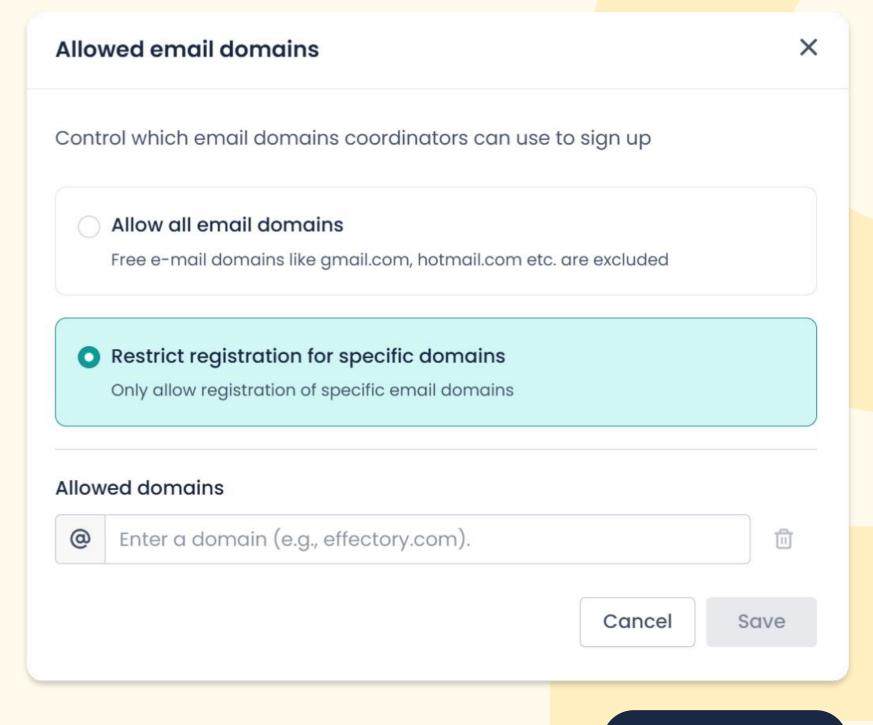


Learn more

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.



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							Sı		
	Activity	Date	Week 1	Week 2	Week 3	Week 4	Week 5	W		
Setup & preparation	Kick-off session									
	Configure project settings	Legend:								
	Technical setup — Confirm system requirements		Sessions with your CSM/PSC							
	Organizational structure session		Internal communication (suggestion)							
	Import employee data & define group structure(s)									
	Question library session (optional)									
Se	Determine survey questions									
	Translations of custom questions (optional)									
	Announcement to managers									
_	Announcement to employees									
	Platform onboarding session									
ţi	Create survey									
red	Link group coordinators									
/ey	Group linking — Set up internal benchmarks									
Communication & survey creation	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		Enter your survey start and end dates in							
	Configure release of survey results		column D. The template will fill in key date							
	Survey reminder at 50% of duration		recommendations automatically. Adjust							
	Survey reminder at 90% of duration		them as needed to fit your timeline!							
	Extend survey until 8h before end (optional)									
	Surveyend	ENTER DATE								
Survey closure & results	Thank you e-mail to managers & employees									
	Results available									
	Results presentation (optional)									
	Invitation for managers to explore survey results									
م	Invitation for participants to explore personal and own team scores									
	Extra workshops (optional)									
	Success review & evaluation									

Effectory public API

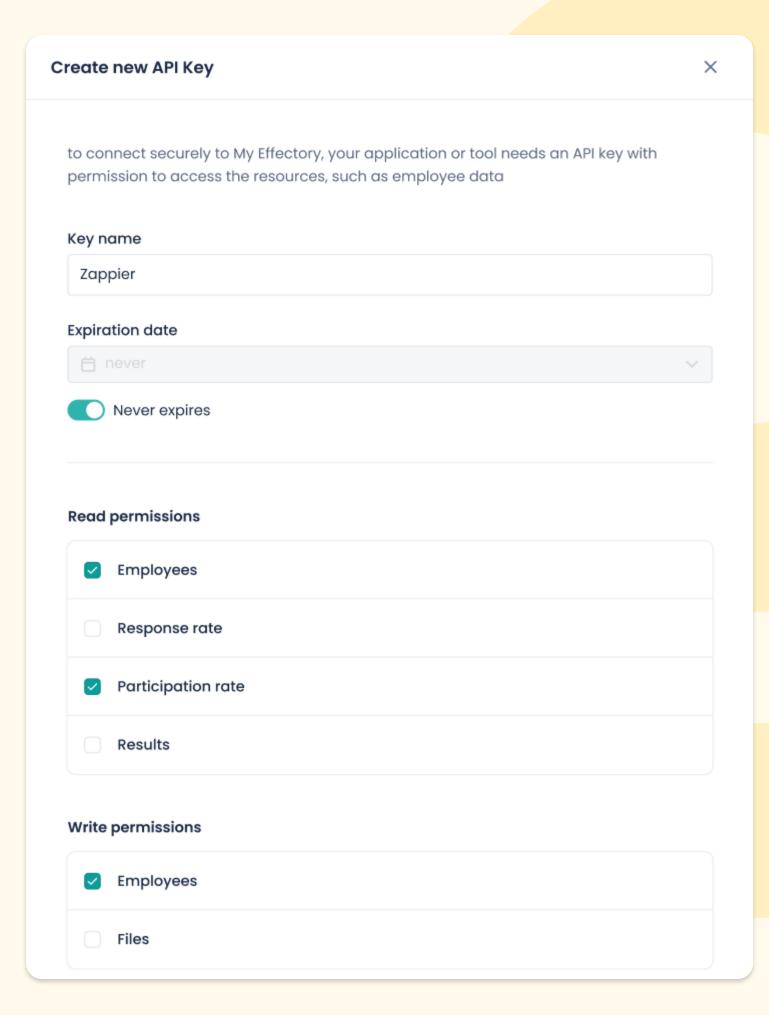
Unlock the power of your data with Effectory's Public API.

- 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!

Results & reporting

Release: Q1 2025





Alsumary

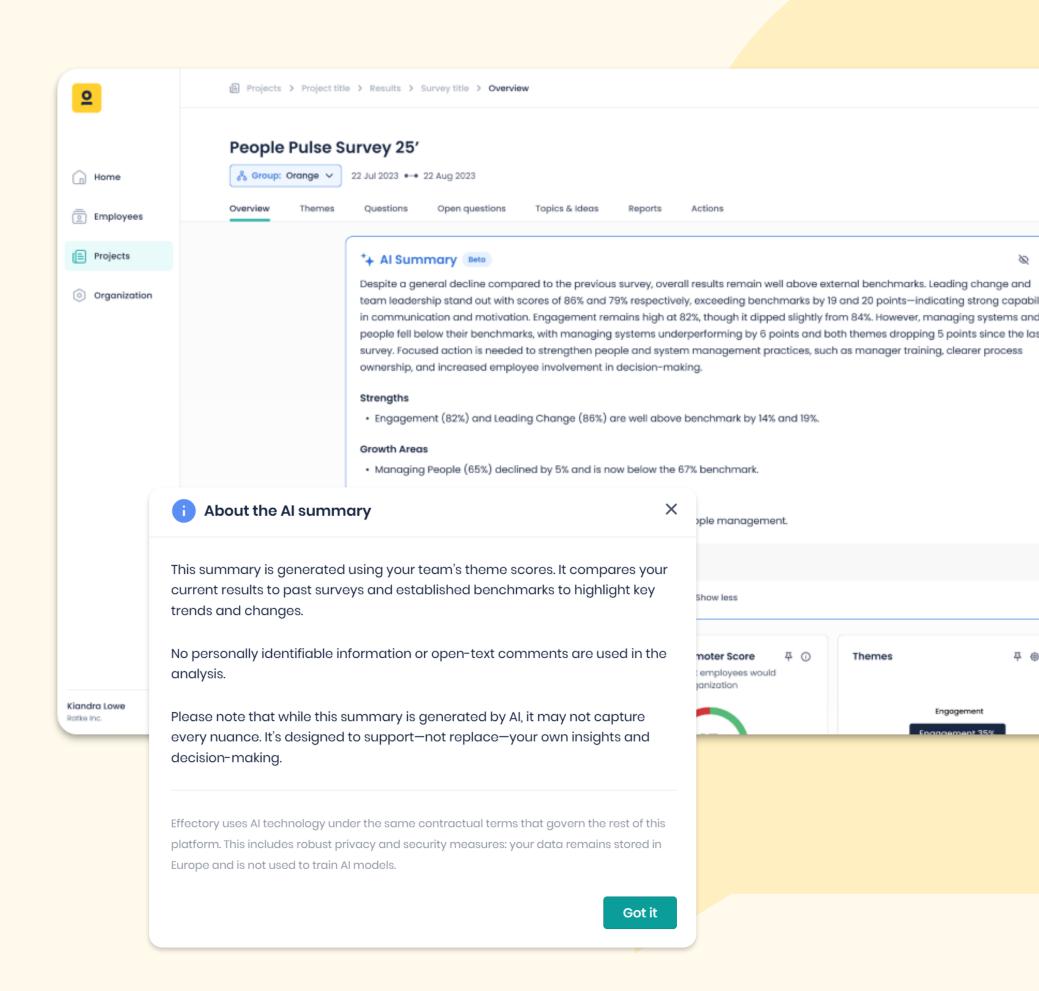
Get instant, Al-driven guidance directly in your results dashboard as soon as your results are in.

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

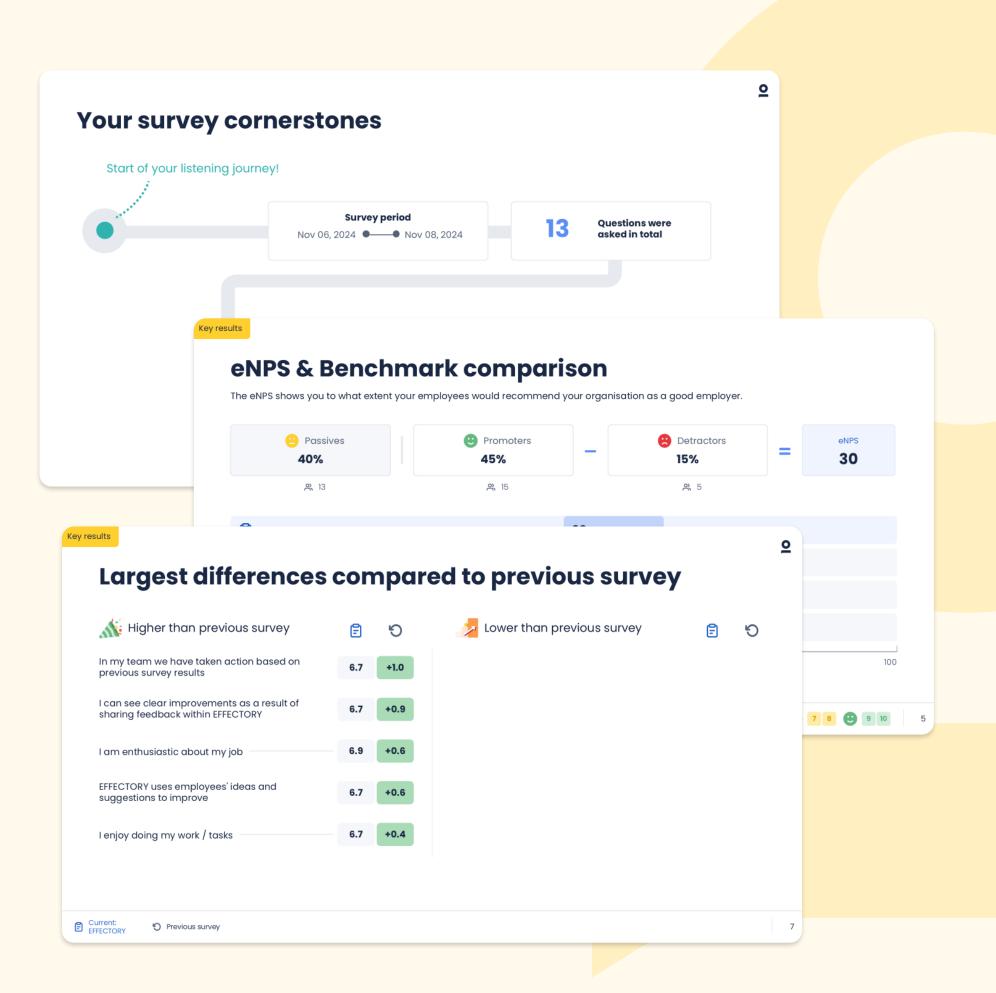
Release timeline:

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



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



Release: Q2 2025

Results & reporting

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.





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

Survey setup & creation

Release: Q3 2025

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 Alassistant

Effy is our new Al-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



Do you have any resources to support me in following up on my team's results?

02:59 PM



Effy

Absolutely! There are several resources available to help you follow up on your team's survey results:

- Manager's Toolkit: A practical guide for leading team discussions and turning insights into action.
- Impact Toolkit: Offers concrete tips and examples for using employee feedback to drive meaningful change.
- Communication Toolkit: Provides templates and materials for internal messaging.
- Questionnaire Toolkit: Helps design surveys with clear follow-up in mind.

You can download these toolkits from the Resources page in My Effectory.

Additionally, Effectory's People Strategy Consultants can support you with tailored workshops, strategy sessions, and action

Survey preparations

Decide which questions to ask

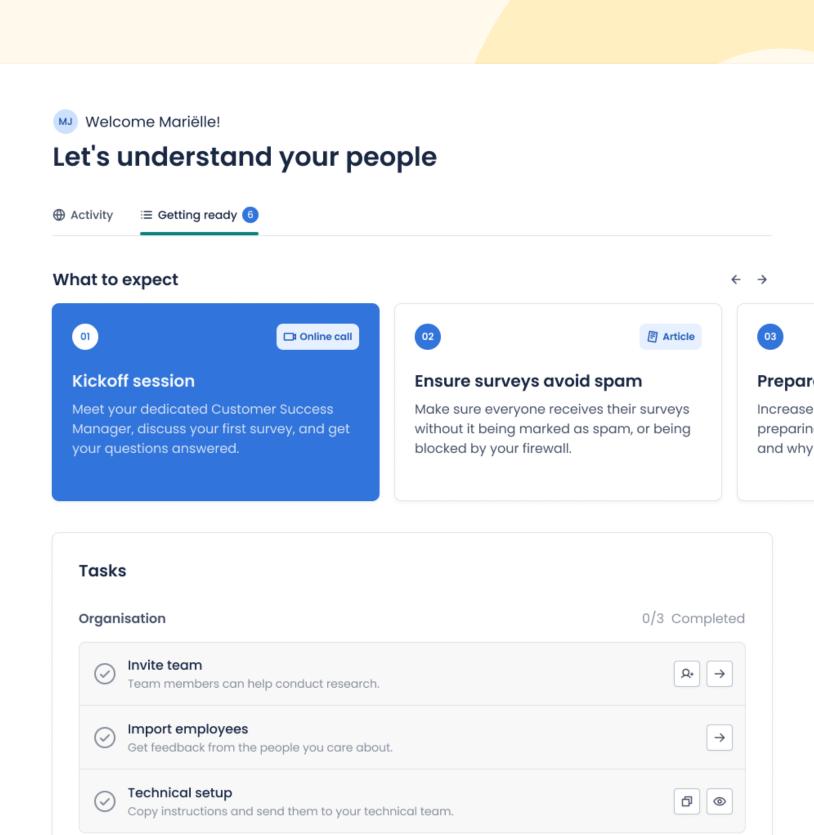
0/2 Completed

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.

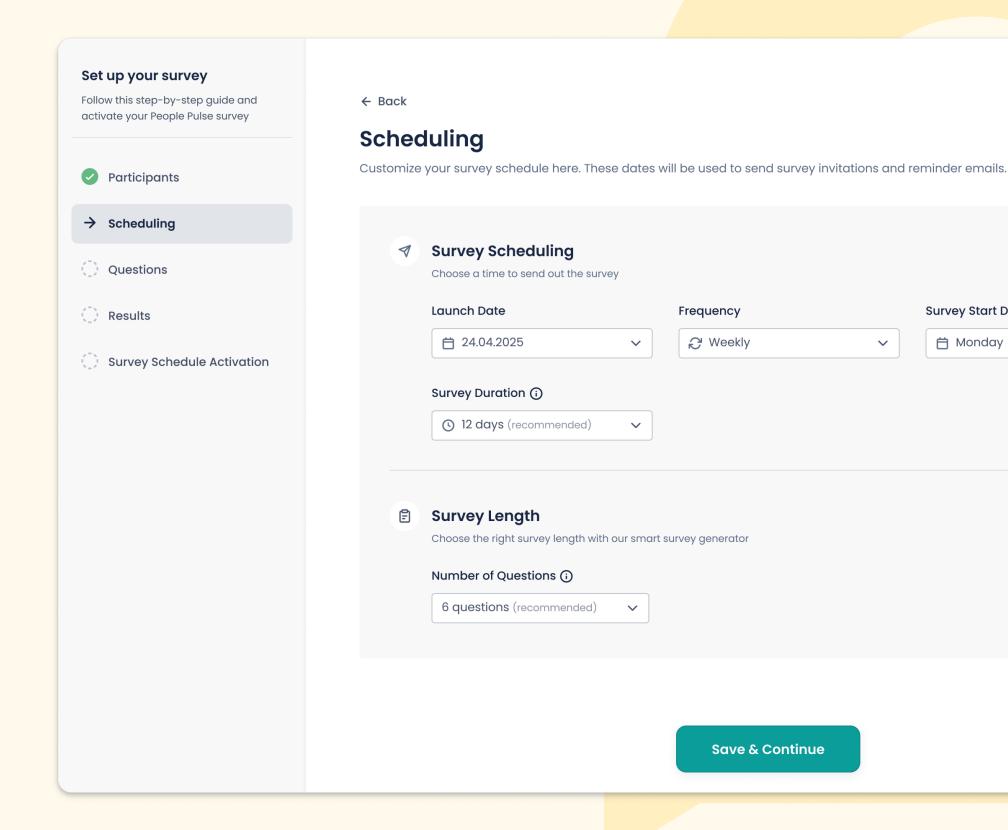
- Communication toolkit with ready-to-use templates and tips to help you inform, involve, and engage employees
- Questionnaire toolkit to help you choose the right questions and build surveys that deliver meaningful insights
- Follow-up toolkit with practical guidance to turn results into action and 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:

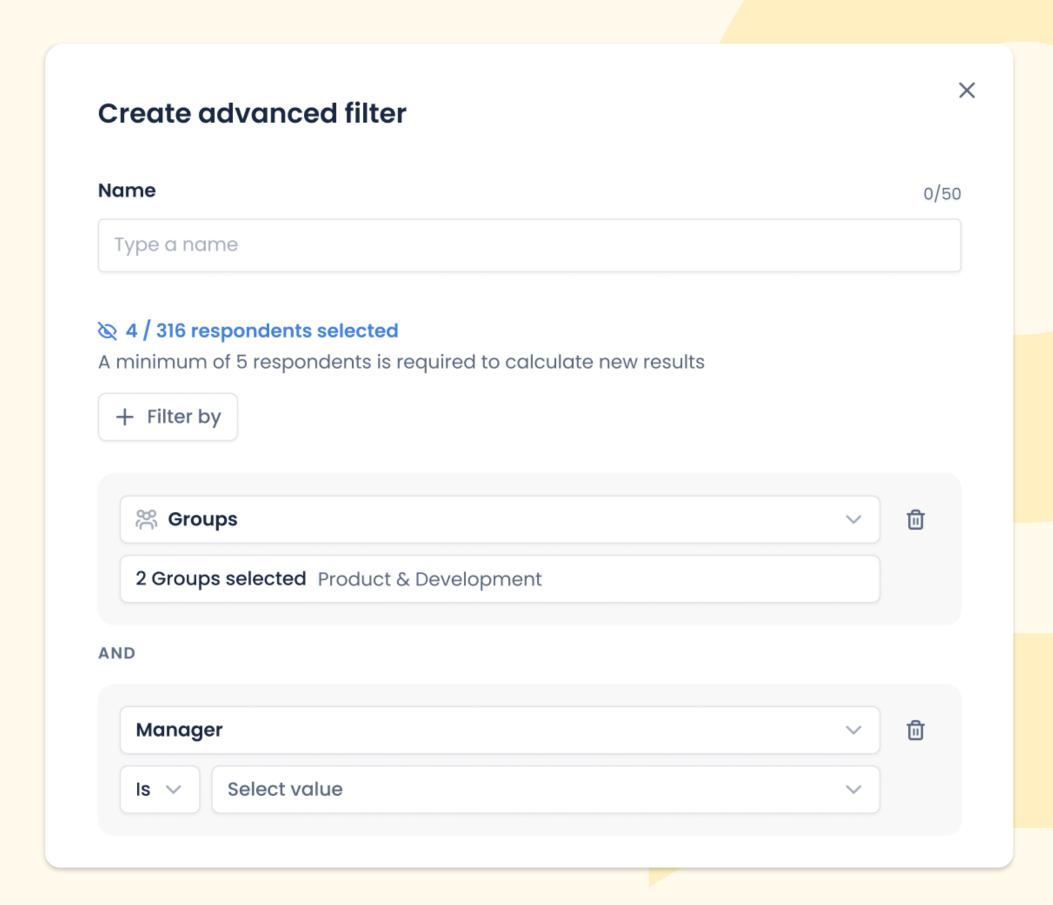
- Plan repeating surveys by setting a recurring schedule
- Stop a survey at any time if something changes
- Archive closed surveys to keep your project overview clean and focused
- Launch a survey immediately without scheduling it in advance
- Add or remove employees while a survey is live



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.

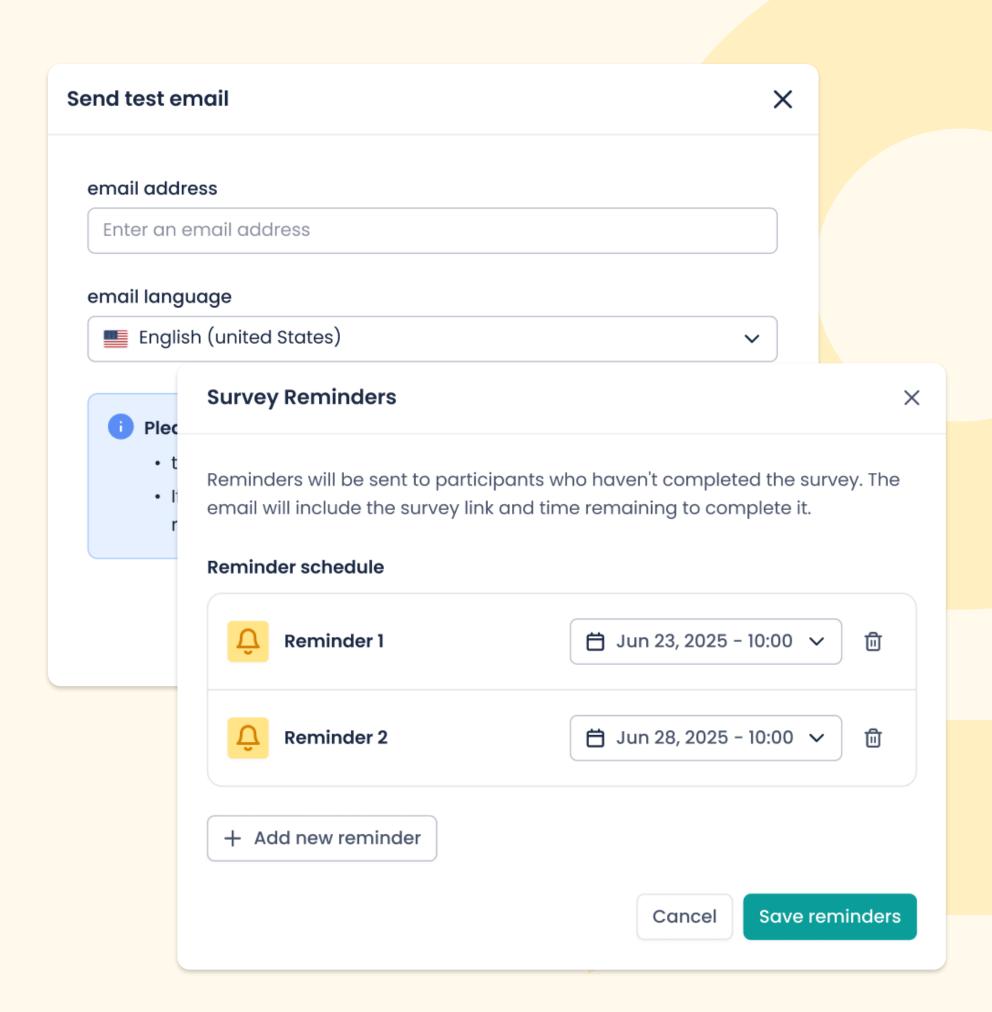
- **Refine your results** with advanced filters based on group, age, gender, and more.
- Gain more actionable insights by zooming in on specific respondent groups.
- Our algorithm ensures confidentiality is guaranteed at all times.



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.

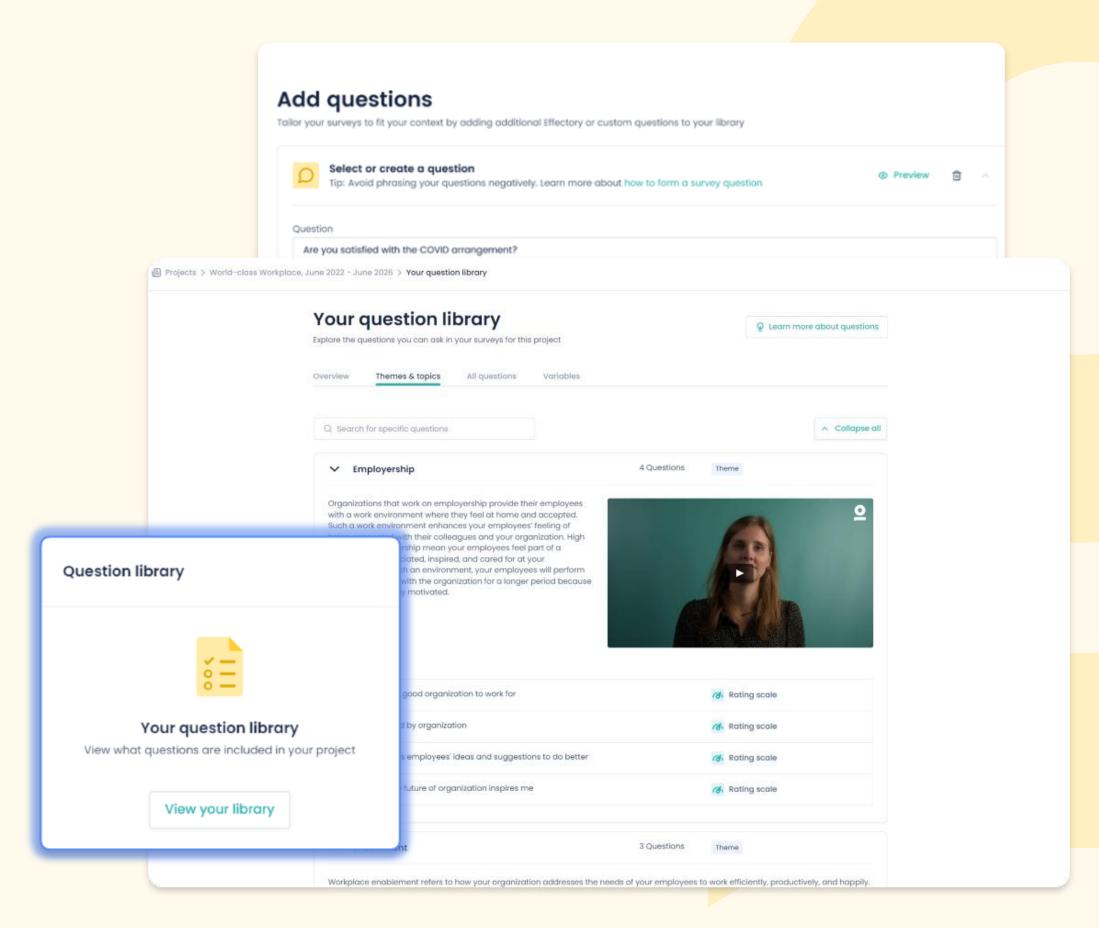
- Send preview versions of invitation and reminder emails to see exactly what participants will receive
- Adjust the time and date of reminders to match your internal planning
- Schedule additional reminders to boost response rates when needed



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.

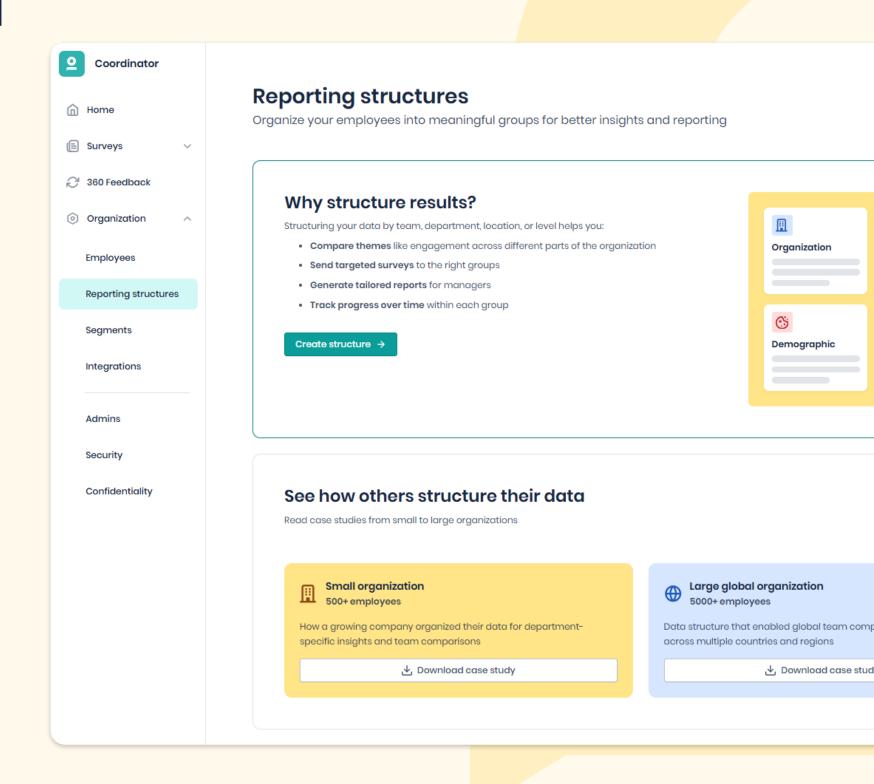


Smarter reporting structures navigation

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

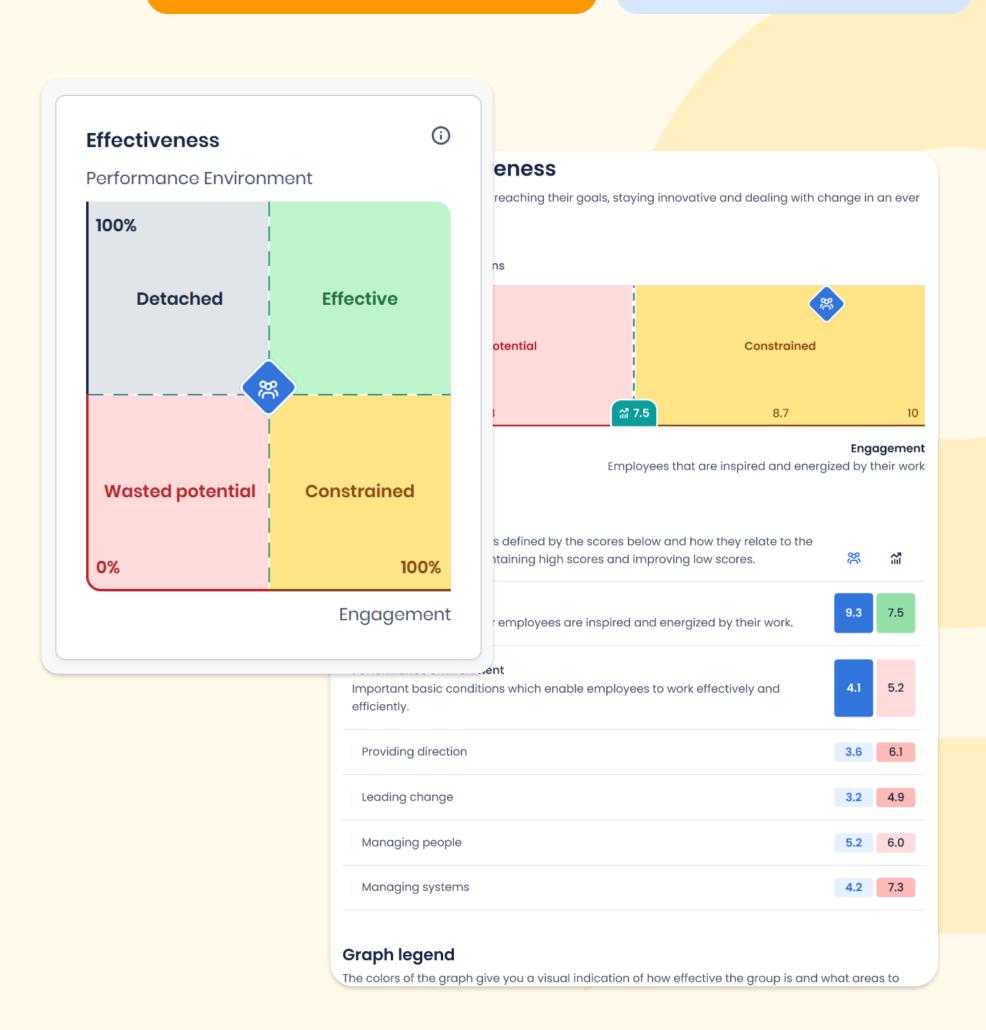
This update makes the process smoother, clearer, and easier to complete independently.



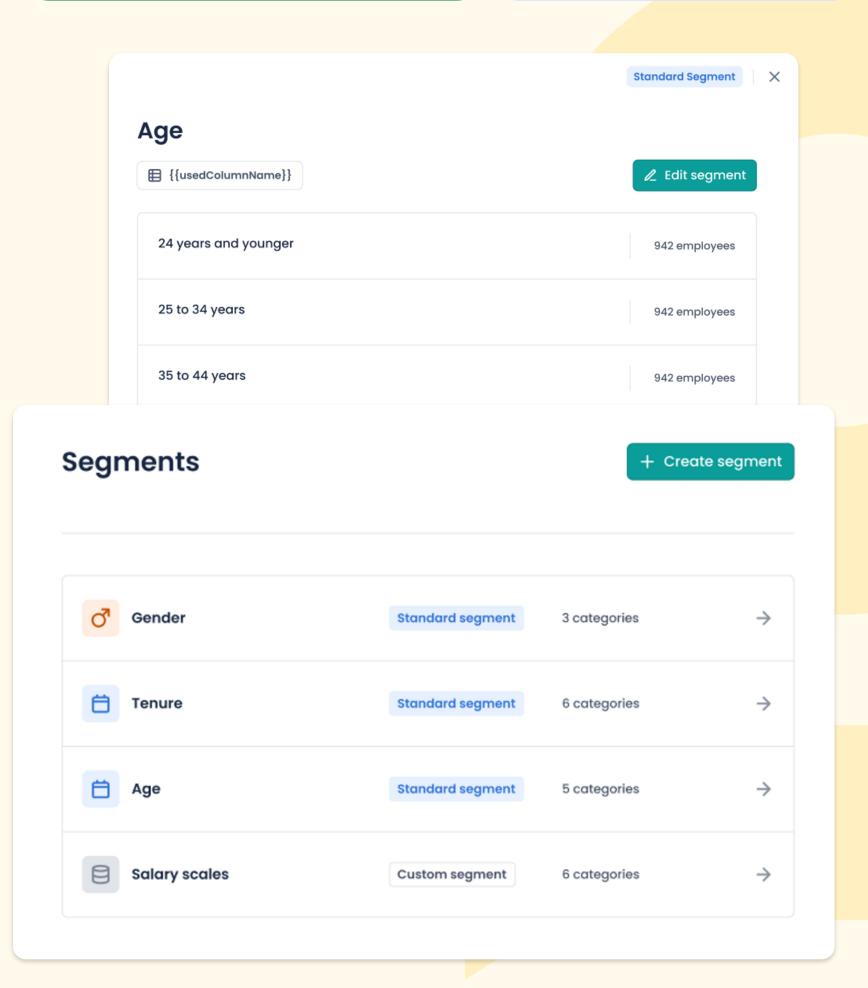
Effectiveness matrix

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.



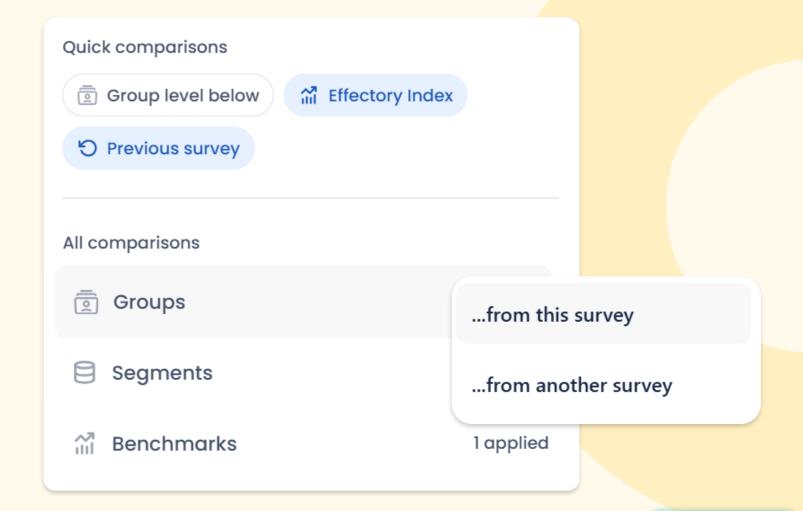
- Automatic assignment of gender, age group, and tenure bucket based on employee data
- Scheduled updates to age and tenure values for up-to-date reporting
- Standard segment definitions to ensure consistency across projects. Customers can check if these ranges fit their organizational size
- **Customize**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



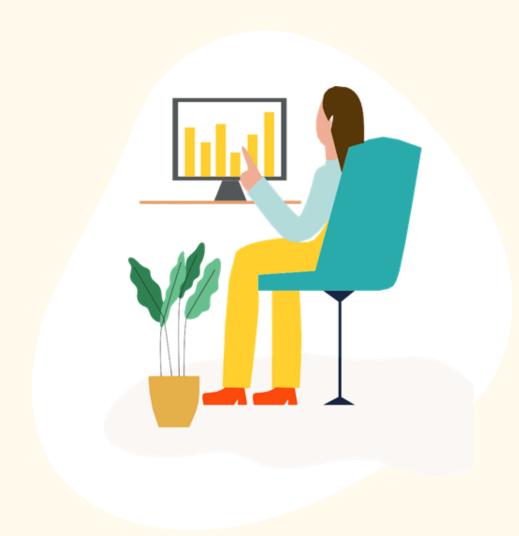
Dynamic result comparisons

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%



What's coming

Take a peek at what's on our roadmap.

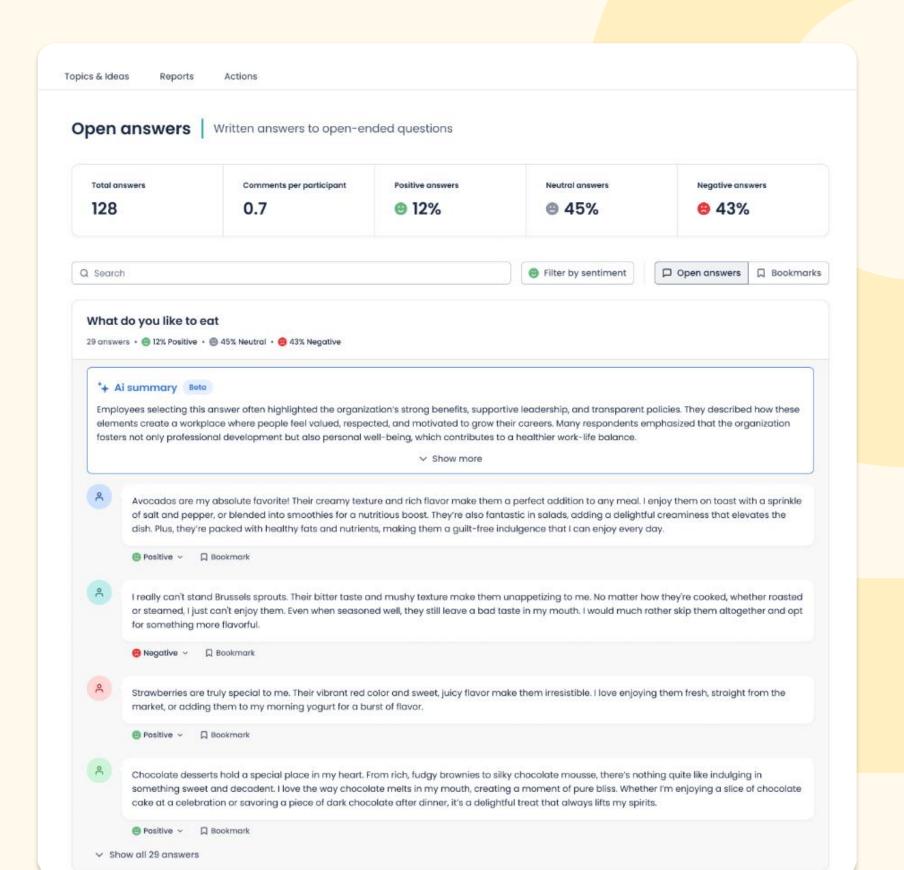
Please note: This roadmap is intended to offer a glimpse into our future plans. All planned features and timelines may change as we adapt to new opportunities and challenges.



Al Open Answer Sumarization

Empower HR and managers to quickly grasp the essence of employee feedback from Pride & Improvement questions through concise, Algenerated summaries.

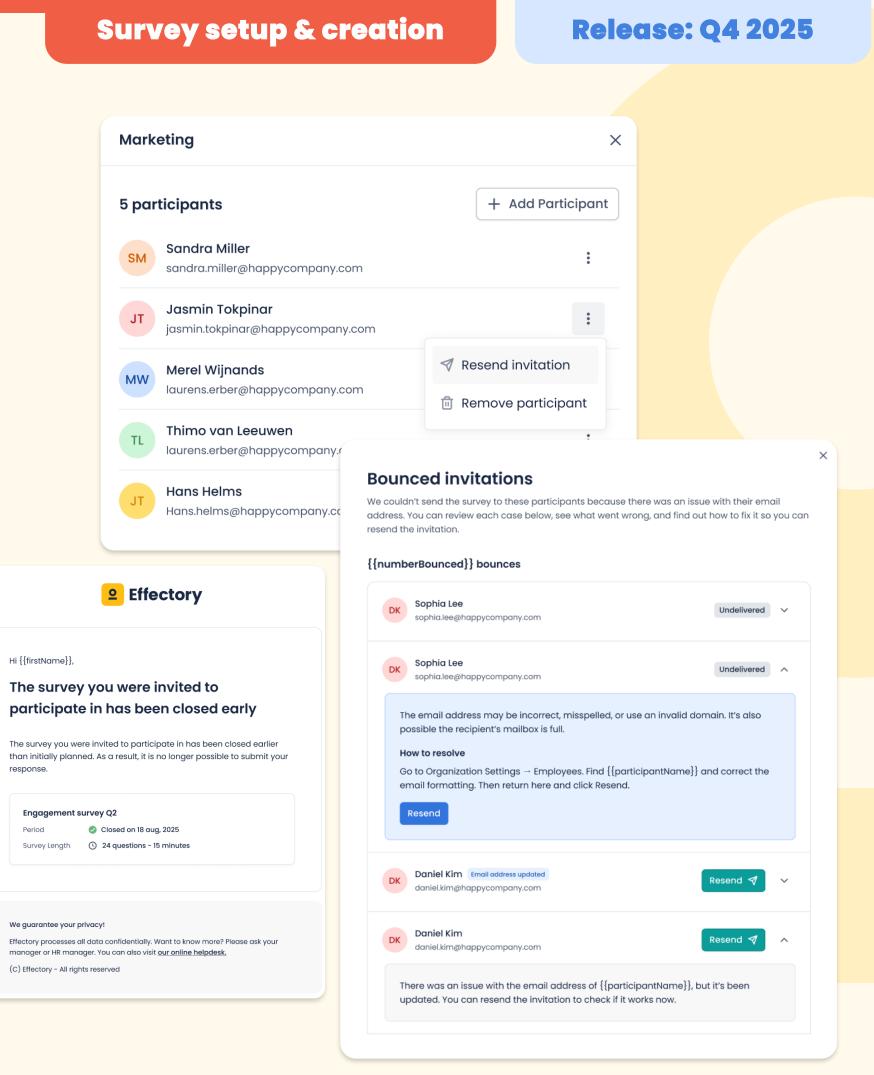
- A summary of the open-answer responses to the Pride & Improvement questions
- Scalable, narrative insights that reduce the need for manual reading



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.



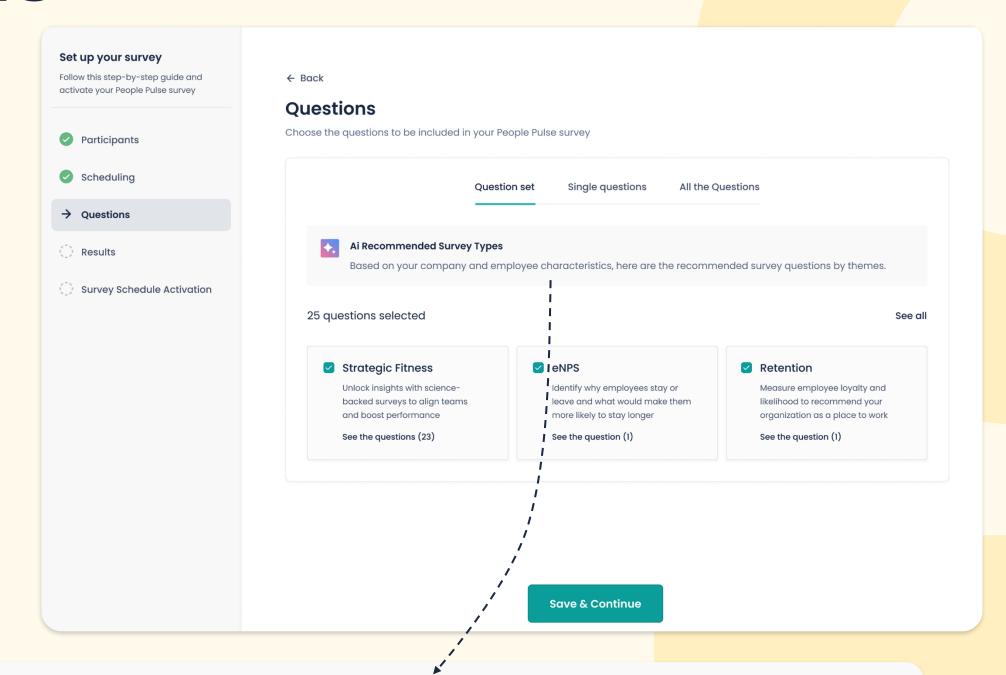


Al-driven question recommendations

Ask the right questions, effortlessly. Our Alpowered 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



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Ai Recommended Survey Types

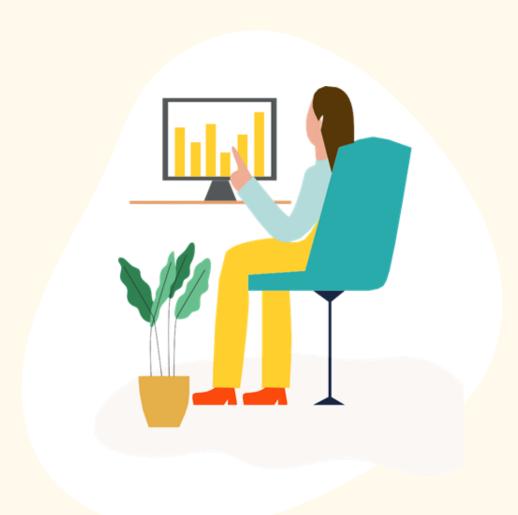
Based on your company and employee characteristics, here are the recommended survey questions by themes.



Intelligent survey automation & continuous

insights Preview Survey Set up your survey Follow this step-by-step guide and ← Back activate your People Pulse survey Questions Choose the questions to be included in your People Pulse survey Coordinator ~ Projects > Surveys > People Pulse > Results Overview Participants Scheduling **People Pulse Survey** Strategic Fitness Employees 25 questions in an order → Ouestions Projects Sinale answer Results I enjoy doing my work / task Organization ✓ Selected Survey Schedule Activation eNPS / monthly Trend Score Over-Time Not at all Not really A bit +4,2 ↑ Theme: Satisfaction period ① +1.2 ↑ 2 My skills and abilities fit in well with my job ✓ Selected Not at all Not really A bit Very much Single answer ✓ Selected 3 Doing my work gives me energy Lowest s Areas of Focus by Theme Mighest scores I have confidence in my team lead I know how to ca Retention Pulse 5-point scale I identify with the culture of my company Save & Continue ? Help & learn Jamal van Rooij...

Effectory B.V.



Thank you!

Questions or feedback?

Get in touch with our Helpdesk or with your CSM!