

# Survey Reporting Handbook

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A quick reference guide to the survey reporting site.

**KINCENTRIC** > A Spencer Stuart Company

# Welcome to Your Results!

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General Reporting Site Overview

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Dashboard

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Explore

Learn

Segment

Listen / Comment Insights

Heatmap

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Act

Virtual Coach

Managing your Action Plan

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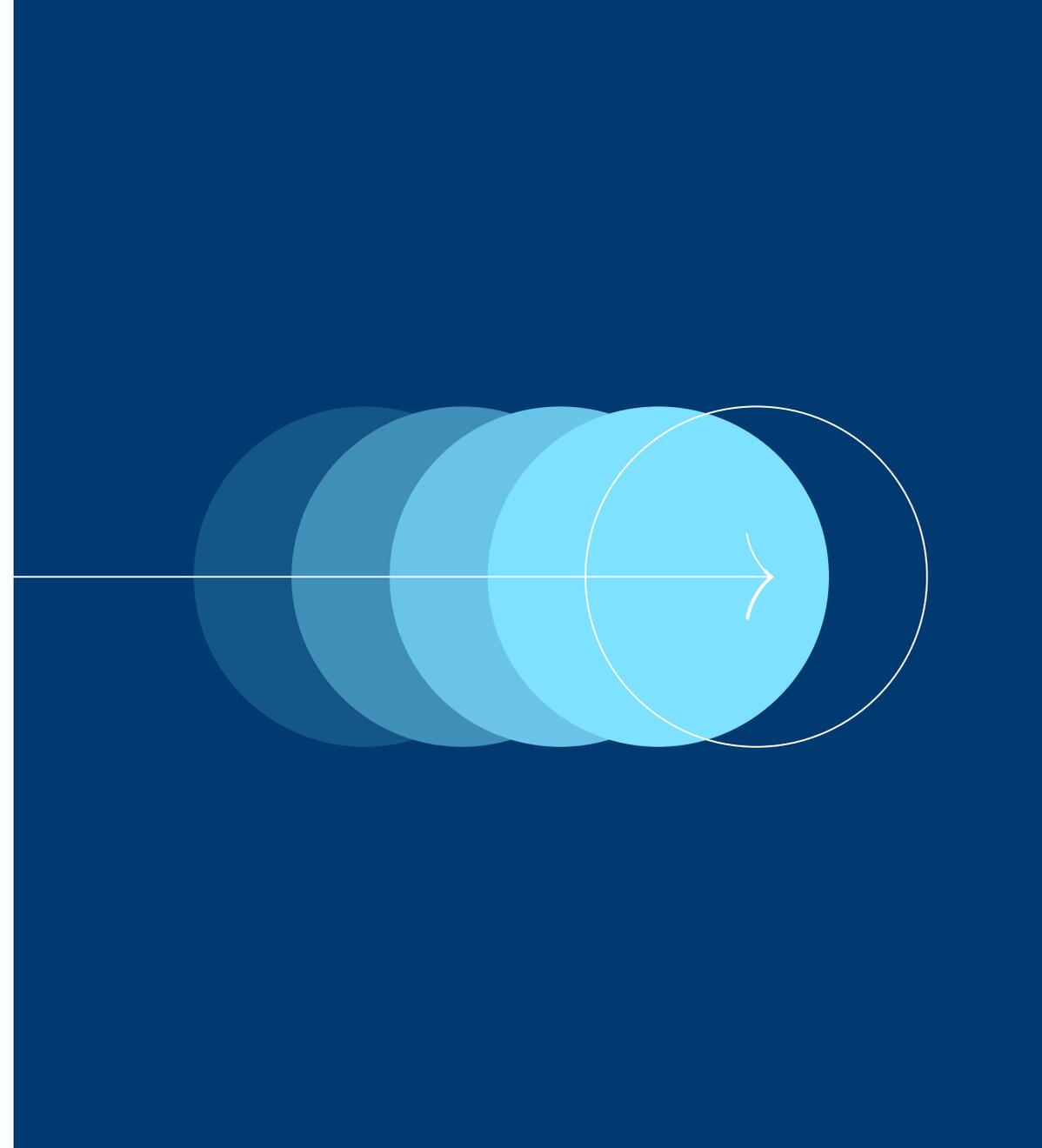
Leveraging the Reporting Site

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Exports

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Appendices



# General Reporting Site Overview

# General Reporting Site Overview – Login and Landing Page

Use the access credentials provided to you to log in

Reset password: Access resets may take up to 1 business day

Enter Your Username:

Enter Your Password:

[Forgot your Password?](#)

Login

## Additional Tips:

- Upon initial login (including after account and password resets), you will be prompted to change your password
- Access to the site will be available for 1 full calendar year

Home

Engagement 

 Learn what engages your people and where to take action.

Click the arrow or the Thrive icon to access survey results

Welcome, Demo Super!   

Log Off

Download Manager

Expand the arrow to log off

Change reporting site language (if applicable)

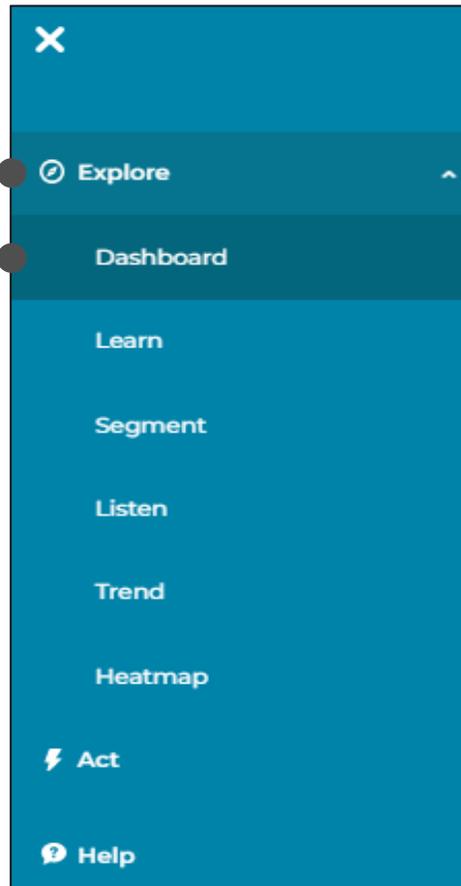
View generated reports

# General Reporting Site Overview – Site Navigation

Click to expand the site navigation menu



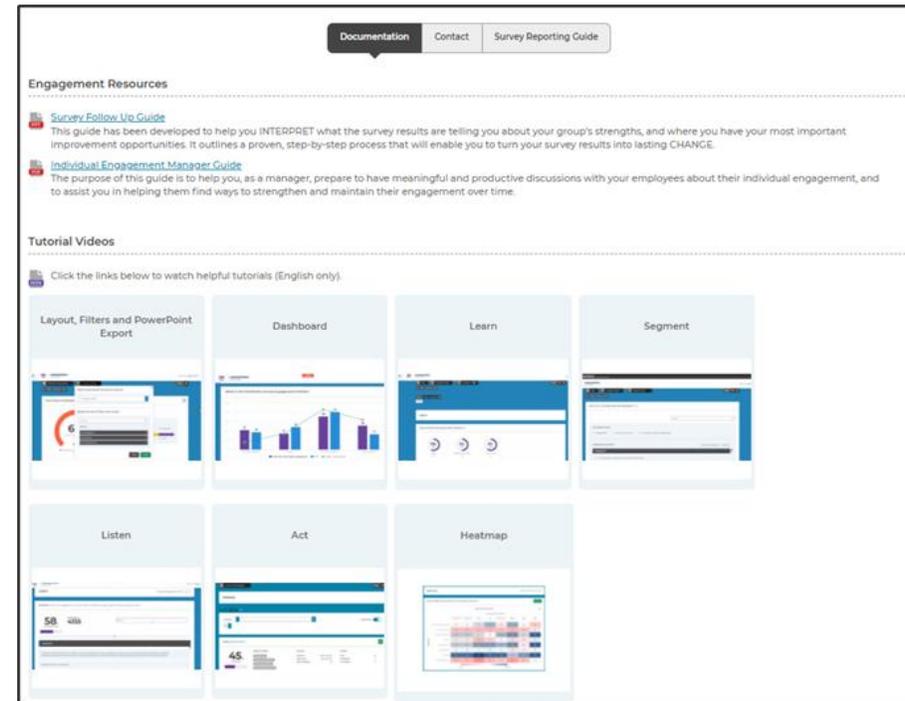
Use the Explore tab to view pages



Click on the Dashboard to return to the Dashboard Homepage

## Additional Tips:

- Icons like these throughout the site allow you to expand your view or see additional information   
- The 'Help' section contains additional information and resources about the survey and reporting tool



# General Reporting Site Overview

Use the calendar to change your timeframe and trend (if applicable)

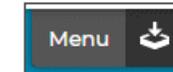
Use the filter menu to choose your focal group

Displays the number of respondents for your selected group

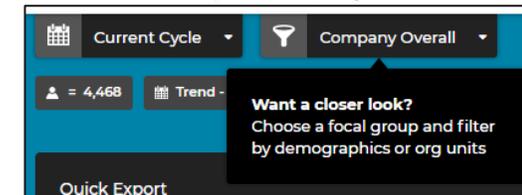
Use the search function or select from the drop-down menu options

## Additional Tips:

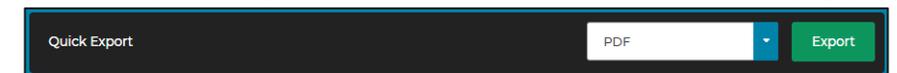
- Use the export menu to customize your export (more details provided in the Exports section)



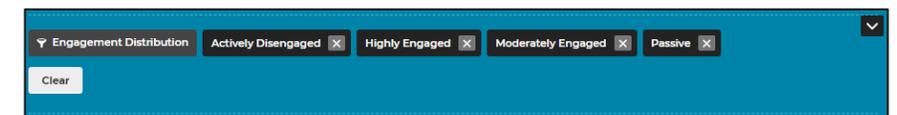
- Hover over any of the page menus to view more information



- Leverage the 'Quick Export' banner to easily pull your data into a PDF, PowerPoint or Excel report (depending on the page) (Quick Exports are pulled based on the filters selected on the page)



- Applied filter selections will appear at the top of the page but can be easily hidden from view using the arrow toggle in the top right of the section or quickly cleared using the 'Clear' button



Dashboard →

# Dashboard – Use the Dashboard (🏠) for an Overview of Your Results

Your engagement score compared to external benchmarks and historical results (if applicable)



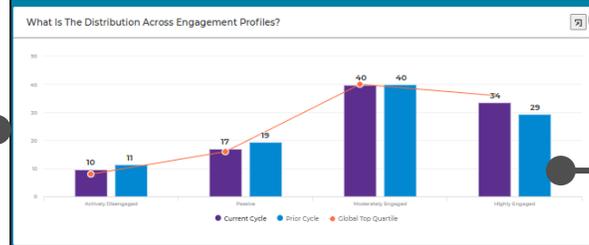
Your participation rate (if applicable)



Summarized list of key indices asked in your survey



Your engagement distribution (Highly Engaged + Moderately Engaged = Engaged)

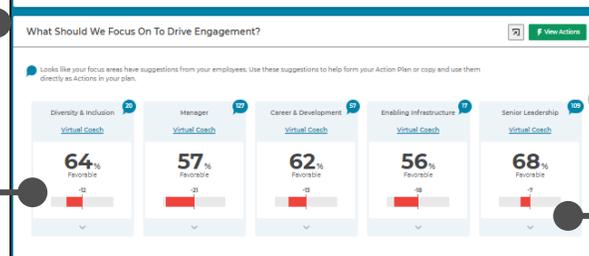


Your top scoring questions

What Are My Top Scoring Questions?

RANK	ITEM	DIMENSION	% FAVORABLE
1	This organization's mission provides meaningful direction to me	Brand/Talent Focus	83%
2	Given the opportunity, I tell others great things about working here	Engagement	78%
3	I can clearly explain what makes working here better than other organizations	Brand	78%
4	There is effective cooperation between different groups/ departments in the organization	Collaboration/Agility	78%
5	My coworkers collaborate effectively to achieve our goals	Collaboration	76%

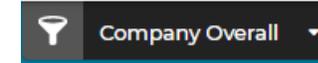
Your Focus Areas (top priorities) for improving engagement



Distance from the external benchmark used in analysis for each dimension

## Additional Tips:

- Use the filter menu to view results for different groups



- Expand sections for more detail

Expand dashboard windows for more details

Hover over chart elements for more details or click the legend to show or hide a specific set of data

View self-categorized comments from respondents with potentially actionable suggestions

Expand to show the top items of priority for each focus area

# Explore



*Learn, Segment, Listen / Comment Insights, Heatmap*

# Learn – Use Learn for Survey Item Results and External Benchmarks

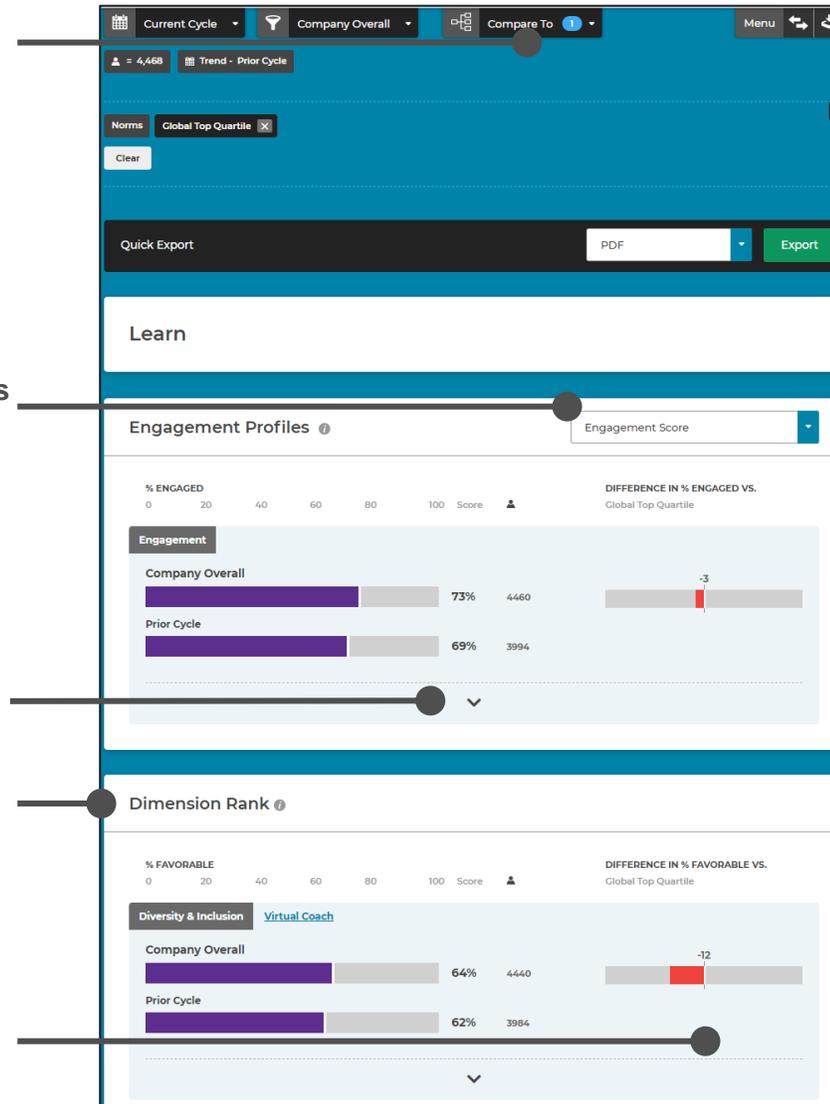
Select internal organizational groups or external benchmark for comparisons

Toggle to view engagement results as a score or as a distribution chart

Expand your view to see all the items in a dimension / index

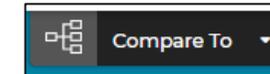
Dimensions are ranked from highest scoring to lowest

Compare to up to 3 external benchmarks at the same time

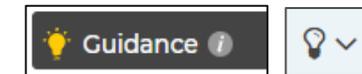


## Additional Tips:

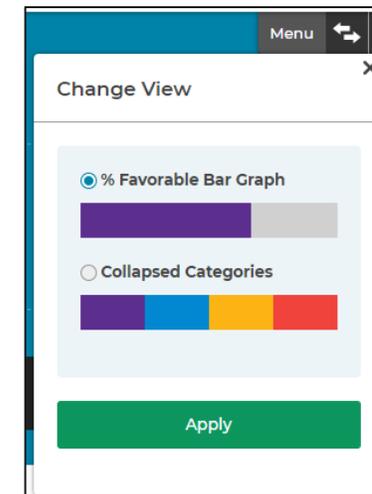
- More information on how to view comparisons can be found in the section, 'Leveraging the Reporting Site'



- Quickly see where there are significant differences between groups



- Change your answer scale view for more or less detail for item and dimension scores



# Segment – Use Segment to Compare Results for Different Groups

Select a demographic to compare data across the demographic groups

Toggle to view historical scores included with the comparisons across the demographic groups (if applicable)

Search for individual survey items or select items using the listed menu

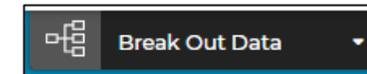
Select / deselect all the items or dimensions at the same time or individually to view for comparison

Selected scores for comparison will appear at the bottom of the page respectively

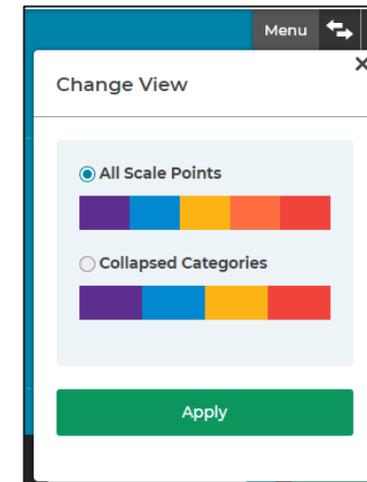
Export the specific chart into various image formats

## Additional Tips:

- More information on how to view demographic comparisons can be found in the section, **‘Leveraging the Reporting Site’**



- Use this icon to change your answer scale view for more or less detail



# Listen—Use Listen to Analyze Verbatim Comments

The screenshot displays the Listen interface for a survey titled '2022 - Engagement'. The top navigation bar includes filters for 'Company Overall 2021' and 'Dimensions'. A 'Menu' button is located in the top right corner. Below the navigation, there is a 'Quick Export' section with a 'PDF' dropdown and an 'Export' button. The main content area is titled 'Listen' and features a toggle for 'Employee Suggestions Only'. The survey question is 'QUESTION: What one suggestion could you offer to make this organization a better place to work?'. The results show a '100% RESPONSE RATE' and '121 RESPONDENTS'. A search bar contains the text 'manager or team lead' with a search icon and a note: 'Use "AND", "OR", "NOT" to combine multiple keywords to define your search.' A vertical arrow points to a section below the search bar, labeled 'Expand to view comments'.

Expand the menu to view responses aligned to specific dimensions or topics asked in your survey

Turn on 'Employee Suggestions Only' to view responses that may provide actionable comments\*

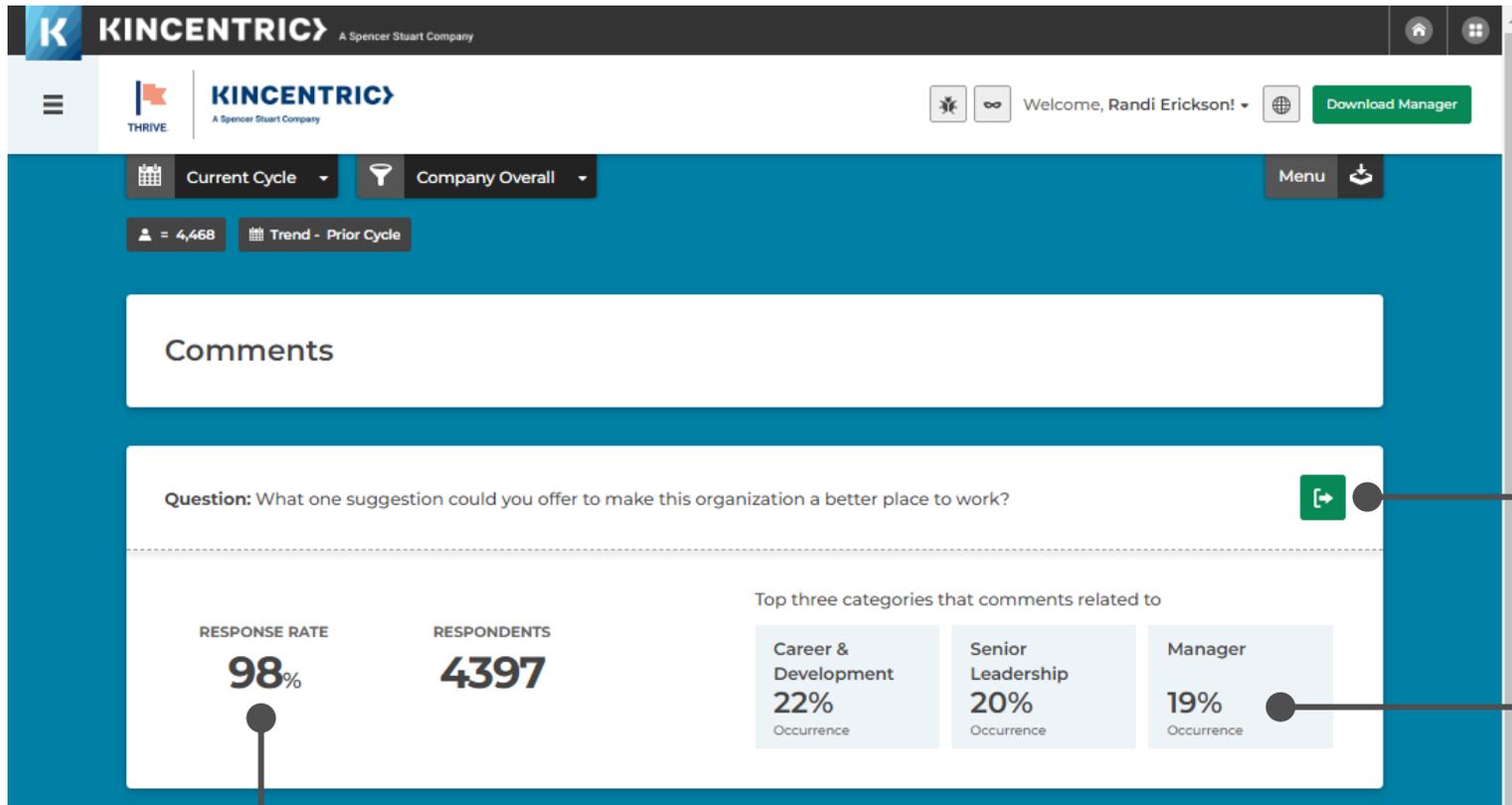
\*Filter pulls comments containing certain actionable key words

Search to show comments containing key words or phrases using 'and', 'or, & 'not'

Response rate of respondents who provided a comment over the total number of respondents to the survey

Expand to view comments

# Comment Insights — Analyze Verbatim Comments



View the comments for this question

Available when you asked participants to apply a category to their comment.

Response rate of respondents who provided a comment over the total number of respondents to the survey

# Comment Insights — Analyze Verbatim Comments

The screenshot displays the 'Comment Insights' interface. At the top, there are navigation elements: 'Current Cycle' and 'Company Overall' dropdowns, a user count of '4,468', and a 'Trend - Prior Cycle' button. Below this is a 'Quick Export' section with a dropdown menu set to 'Excel' and an 'Export' button. A '<- Back to Comments' link is also present.

The main content area is titled 'Comment Insights' and features a question: 'What one suggestion could you offer to make this organization a better place to work?'. The response rate is 98% and the number of respondents is 4397.

On the left, 'SURVEY DIMENSIONS BEING DISCUSSED' are shown in a grid:

Career & Development 22%	Senior Leadership 20%
Manager 19%	Work/Life Balance 16%
Rewards & Recognition 12%	Performance Management 6%
Empowerment/Autoi 4%	Diversity & Inclusion 1%
Enabling Infrastructure 1%	

On the right, 'WORDS BEING DISCUSSED' are shown in a word cloud. The most prominent words are 'work life balance', 'balance', 'team', 'work life', and 'managers'. Other visible words include 'leaders', 'performance', 'leader', 'support', 'flexibility', 'career', 'growth', 'pay', 'direct', 'manager', 'senior training', 'reward', 'family', 'roles', 'recognition', 'leadership', 'managers', 'decisions', 'high hard boss focus environment', 'goals', 'career development', 'understand learning', 'love', 'future', 'products sales', 'rewards based ability communication', 'development management teams', 'life xyz', 'manager', 'growth', 'pay', 'direct', 'manager', 'senior training', 'reward', 'family', 'roles', 'recognition', 'leadership', 'managers', 'decisions', 'high hard boss focus environment', 'goals', 'career development', 'understand learning', 'love', 'future', 'products sales', 'rewards based ability communication', 'development management teams'.

At the bottom of the dashboard, there is an upward-pointing arrow icon.

Export your results to Excel. Exporting retains any search or filter criteria on the page.

Clear all your selections.

Download the word cloud as an image.

Reflects the words used most in all the comments or a dimension when a dimension tile is selected. The bigger the word, the more often it's used. Click on a word to see all the comments where the word is used.

Click on a tile to view all the comments in the dimension.

Expand to view comments.

# Comment Insights — Analyze Verbatim Comments

View comments in your preferred language. Select the language from the drop-down.

The screenshot displays the 'Comment Insights' interface. At the top, there is a search bar with a magnifying glass icon. Below it, a toggle switch labeled 'Employee Suggestions Only' is currently turned off. A callout box points to this toggle with the text: 'Turn on 'Employee Suggestions Only' to view responses that may provide actionable comments\*' and '\*Filter pulls comments containing certain actionable key words'. Below the toggle, there is a 'Translate Responses:' section with a dropdown menu set to 'Original Comments'. To the right of this is a search input field with a magnifying glass icon and a callout box pointing to it with the text: 'Search to show comments containing key words or phrases using 'and', 'or, & 'not''. Below the search field, there is a small note: 'Use "AND", "OR", "NOT" to combine multiple keywords to define your search.' The main content area shows a list of comments. The first comment is in English: 'More flexibility for work/lifestyle balance. More opportunity to hot desk/working from home.' The second is in Japanese: '機器への投資 フィールド セールス チームが、XYZ がマーケット リーダー/業界のベンチマークであるという主張を立証できるようにする機器サービス。' The third is in Polish: 'Codzienne wyzwania. Pełne nadziei szanse na rozwój kariery i naukę.' The fourth is in English: 'Flexibility and Work life Balance'. The fifth is in Hindi: 'हमारे अर्थ: एक लोगों के साथ गढ़ आगम है कि नानदाग लोगों के एक आर्से को हमारे गानों के साथ उपेक्षित नहीं है और नज़ीनी नहीं है और एक गानालों में गढ़ उपकरण मनीन'. At the bottom of the list, there is a scroll indicator with an upward arrow.

Search to show comments containing key words or phrases using 'and', 'or, & 'not'

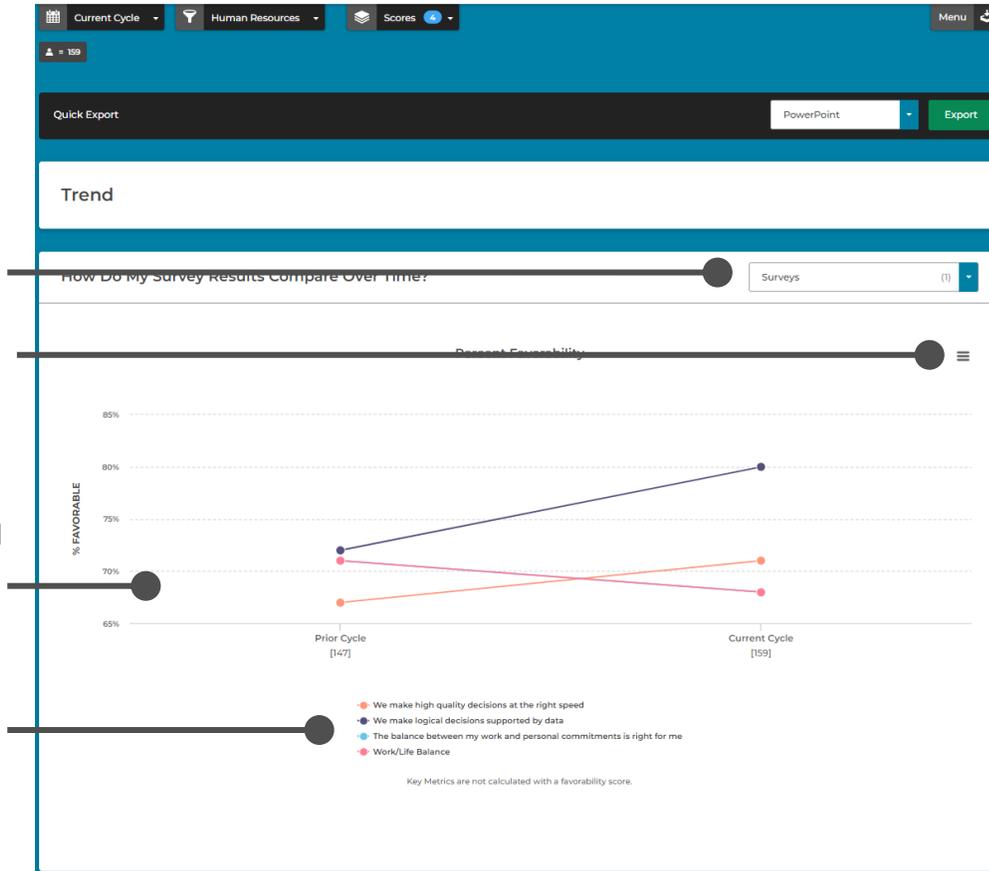
# Trend – Use Trend to Compare Historical Results

Select which surveys you want to compare to the current survey

Export the chart into various image formats

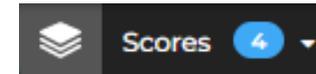
The chart shows how scores changed over time for multiple questions & dimensions or groups (using comparison options)

The chart legend provides the color representation for the questions & dimensions. Hover over each to see the percent and number of respondents

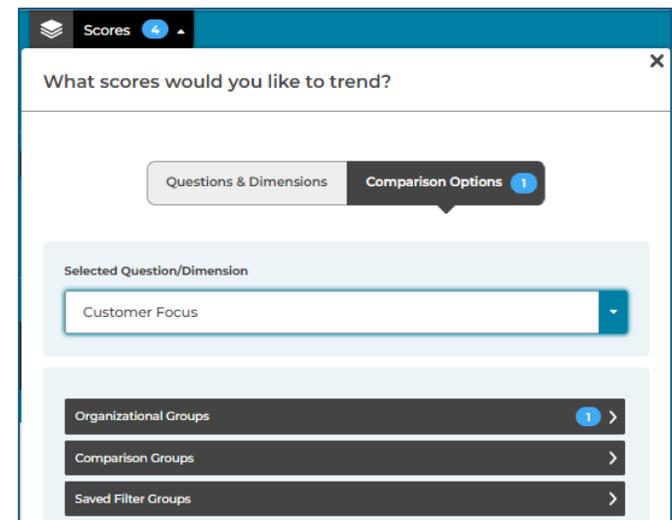


## Additional Tips

- Select the questions and dimensions you want included in the chart. You can select up to 16 at one time.



- Drill deeper into a specific question or dimension by adding a comparison group from the 'Scores' dropdown to see how each group is trending for that item.



# Heatmap – Use Heatmap to Distinguish Similarities and Differences

Toggle to hide groups that do not meet minimum threshold for optimal chart view

Export the chart into various image formats

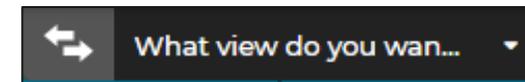
The heatmap is applied to the chart relative to the lowest score and highest score of the selected data for comparison

The chart legend includes details of the displayed data range, from dark red indicating the lowest score to dark blue indicating the highest score



## Heatmap Menu Options (more information can be found in the section, 'Leveraging the Reporting Site'):

- Adjust your view to see scores, trends, or benchmark comparisons



- Select your demographic for comparison across the X-axis



- Select multiple item or dimension scores or select another demographic to view one item or dimension score for comparison across the Y-axis  
(By default, the first listed demographic is selected for comparison)



# Virtual Coach



# Use Virtual Coach to Create an Action Plan

## Evolution of Action Planning

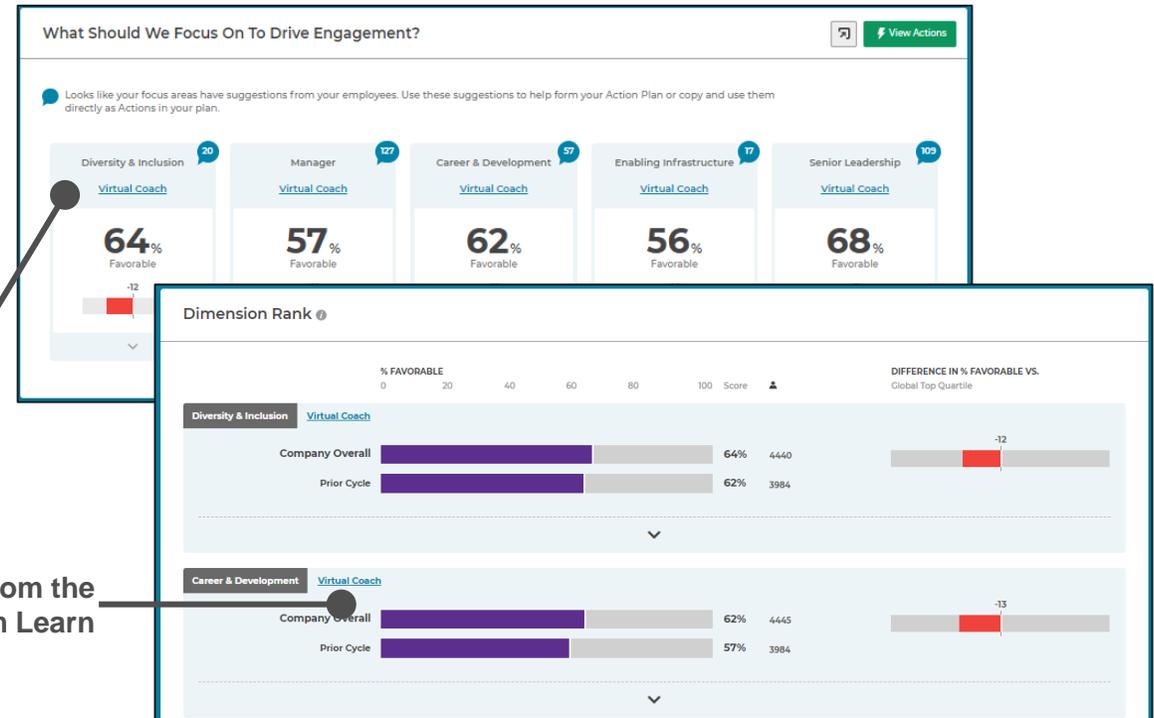
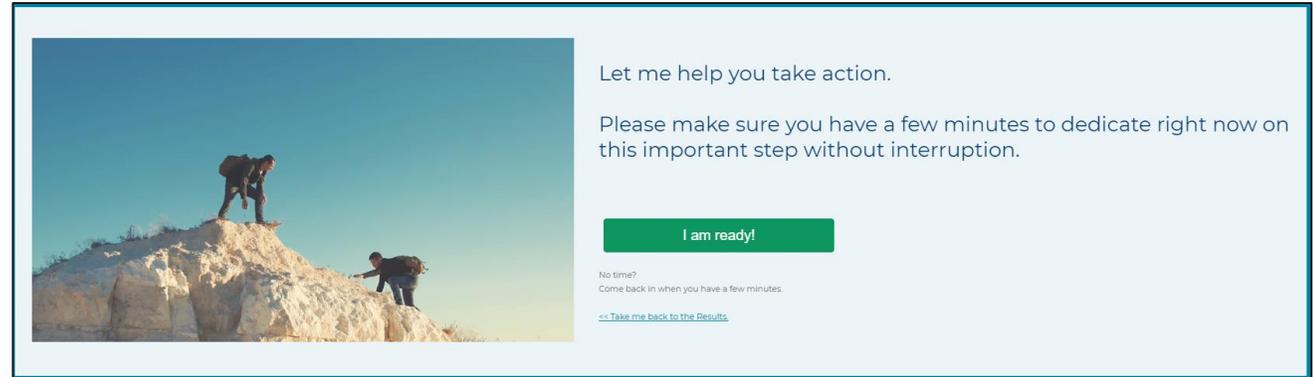
Virtual Coach is an evolution of how Kincentric utilizes technology to enable the kinds of behaviors that improve the employee experience

## Guided by RWA3

Initially guided to critical engagement priorities thanks to RWA3 (Engagement Priority Analysis), Virtual Coach helps to quickly shift gears from understanding engagement to taking action to improve engagement

## Focus on the action, not the process

Virtual Coach simplifies the process and provides ideas to start working on the action plans as soon as possible



Access Virtual Coach from the Dashboard or from Learn

# Virtual Coach Overview (Page 1 of 2)

Follow along the guided process to quickly create your action plan

The screenshot displays the 'Action recommendations for you' section of the Virtual Coach. It features a list of six recommended actions for Diversity & Inclusion, such as 'Actively seek out points of view different from yours before making decisions.' Below the list is a 'Need more help?' link. A 'Print' button is visible on the right side of the recommendations list. Below the recommendations is a section titled 'Let's have you read and reflect on a few questions below:' followed by a list of 11 reflective questions. A 'Next' button is located at the bottom right of this section. To the right of the 'Next' button is a large text area for writing a custom action plan, with a 'Create' button below it. A 'Back' button is also present at the bottom left of the action plan section.

**Navigate back to the reporting site at any point during the process**

**Select from a list of recommended actions as developed by Kincentric's IO Psychologists and leadership coaches**

**Expand this window to create your own action plan or to view additional guidance**

**Guidance is available to print for future reference**

**Enter your custom action plan**

(Continued to next page)

# Virtual Coach Overview (Page 2 of 2)

Create 'nudges' to help keep track of progress and view a summary of your action plan

The screenshot displays two main sections of the Virtual Coach interface. The top section, titled "Finalize your Actions", includes navigation links ("<< Take me back to the results", "< Re-work your Actions list"), a sub-header "Finalize your Actions", and a message: "Let's finalize other details and define a cadence for me to make sure you are successful in taking action." Below this is a form for "Action# 1" with the title "test" and category "Diversity & Inclusion". The form contains three input fields: "What would success for this action look like?", "How often should I remind you?" (set to "Every 2 weeks"), and "When do you expect to wrap up this action?". A "Let's finalize" button is located below the form. The bottom section, titled "Great Job and Good Luck!", contains a congratulatory message and instructions: "Let me collate these action(s) and make them available to you shortly within the Act section for your reference. Be sure to make and track progress, and to update your plan. You can now close this browser window or click to view your results or actions. You can also print this page, and/or email these to yourself for your future reference. You can always export your plans later from the Act section." Below this is a heading "Here are the actions you created today." and a summary card for the "Diversity & Inclusion" action "test". The summary card states: "Here is how you will know you have been successful: test. As you make progress, I will remind you every 90 days over email. Remember - you have set 06/30/2021 as your target completion date." At the bottom of the summary card are icons for print, email, and calendar.

**Finalize your Actions**

<< Take me back to the results < Re-work your Actions list

Let's finalize other details and define a cadence for me to make sure you are successful in taking action.

**Action# 1**

**test**

Diversity & Inclusion

What would success for this action look like? How often should I remind you? Every 2 weeks When do you expect to wrap up this action?

Let's finalize

**Great Job and Good Luck!**

Let me collate these action(s) and make them available to you shortly within the Act section for your reference. Be sure to make and track progress, and to update your plan. You can now close this browser window or click to view your results or actions. You can also print this page, and/or email these to yourself for your future reference. You can always export your plans later from the Act section.

Here are the actions you created today.

**Diversity & Inclusion**

**test**

Here is how you will know you have been successful: test.

As you make progress, I will remind you every 90 days over email. Remember - you have set 06/30/2021 as your target completion date.

Print Email Calendar

Navigate back to the reporting site or Actions list

Enter details to indicate success measures, frequency of nudges, and expected date of completion

Navigate back to the reporting site or to the Act page to view and manage your action plans

View a summary of your newly created action plans

Print or send a copy of the summary to additional team members and set-up a calendar invite to discuss action planning with your team

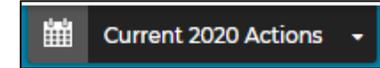
# Managing your Action Plan



# Use Act to Manage Your Action Plans

## Additional Tips:

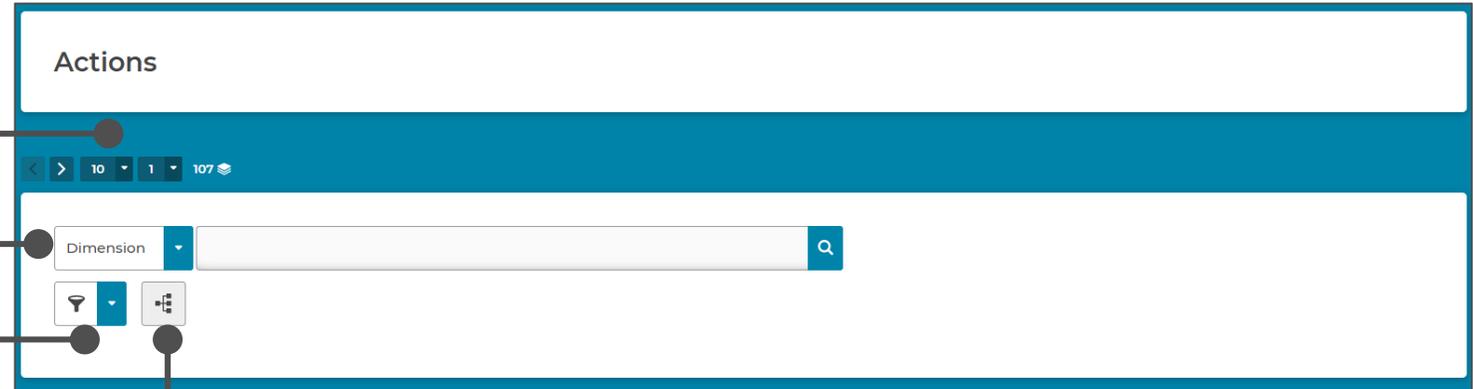
- Use the filter menu at the top to view action plans for different years *(if applicable)*



Adjust the view to see more or less groups on a single page or toggle to another page

Expand the list to indicate what field to search within *(i.e., Dimension, Team Name, etc.)*

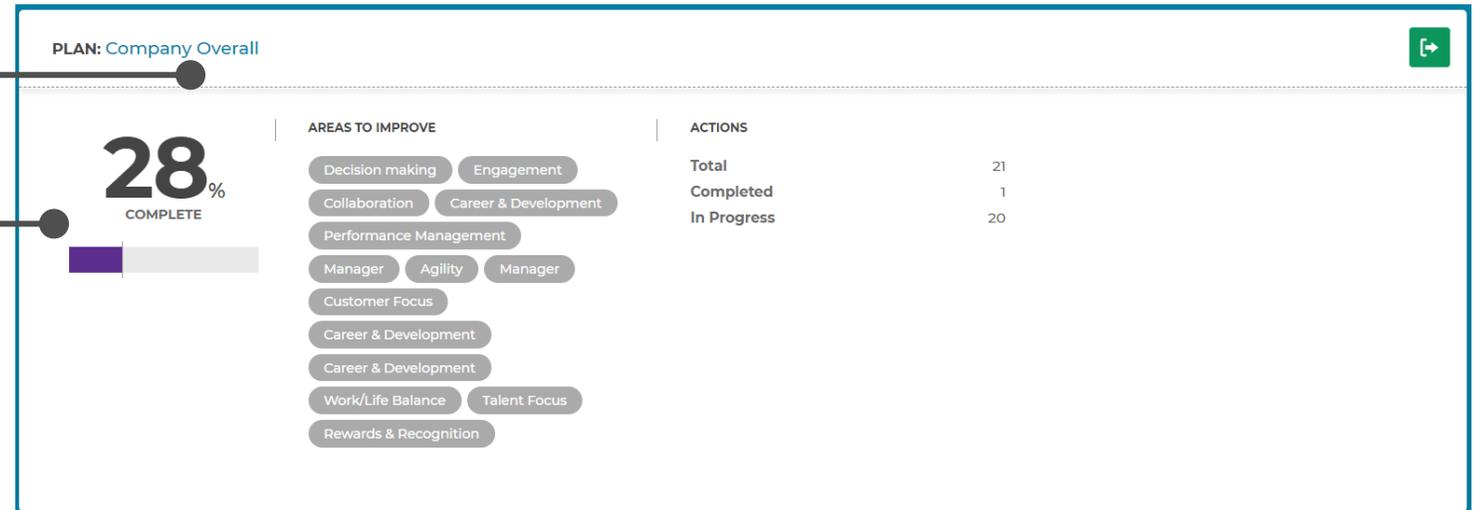
Use the filter to view action plans by progress *(Not Started, In Progress, and Complete)*



Expand the hierarchy to easily view plans for a specific organizational group

Click the group name or the green arrow to edit or review action plans in more detail *(more information provided in the next slide)*

View a quick summary of action plan progress and aligned improvement areas

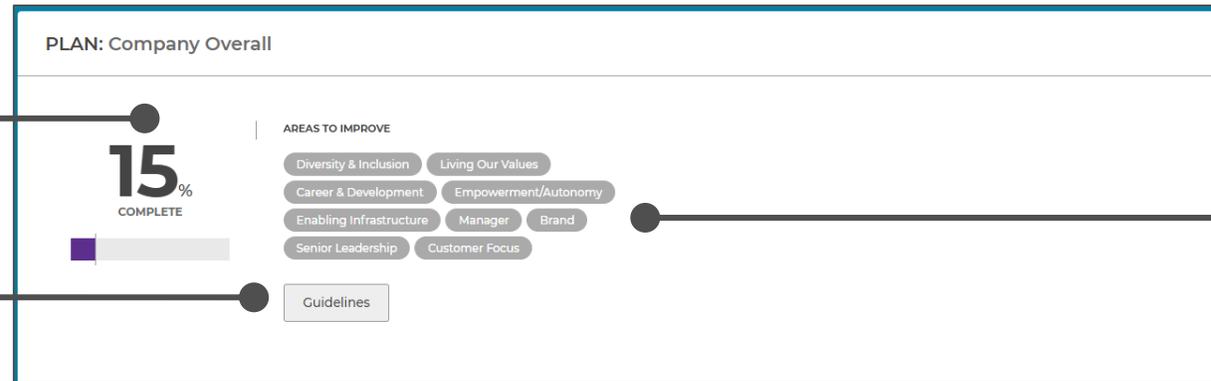


# View and Edit Detailed Action Items within a Group

(Page 1 of 2)

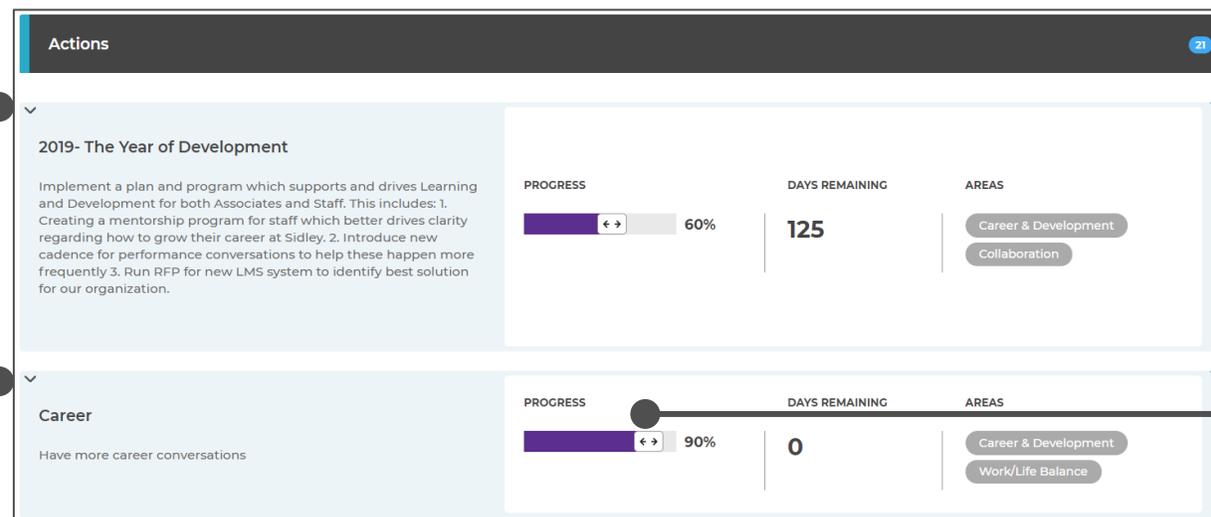
View overall progress across the action plans within a group

View guidance to assist you in managing an action plan



View of the list of dimensions aligned to the group's action plans

Expand the view for a given action to edit details, track progress, and log notes for review or reference along the way  
*(more information provided in the next slide)*



Displays the number of actions as listed below in summarized overviews

Adjust the slider to update the progress meter

# View and Edit Detailed Action Items within a Group

(Page 2 of 2)

## Additional Tips:

- Use the pencil icon to edit details of plans



The screenshot displays a list of action items. The top item is completed (100% progress, 0 days remaining) and has a green checkmark. The second item is in progress (40% progress, 118 days remaining) and is expanded to show its details. Callouts point to various features: a green checkmark for completed plans, an expand/collapse arrow for viewing details, a pencil icon for editing, a 'Map Actions to Dimensions' section for linking to multiple dimensions, and a 'Progress Log' section for adding notes.

Item	Progress	Days Remaining	Areas
Actively seek out points of view different from yours before making decisions.	100%	0	Diversity & Inclusion
Actively seek out points of view different from yours before making decisions.	40%	118	Diversity & Inclusion

**Action** [Delete]

**Title** Actively seek out points of view different from yours before making decisions. [Edit]

**Description (max. 100 words recommended)** Actively seek out points of view different from yours before making decisions. [Edit]

**Map Actions to Dimensions** [Add Another]

Diversity & Inclusion [Edit]

**Success Indicator** success [Edit]

**Complete By** 06/30/2021 [Edit]

**Progress Log** [Write A Comment]

2021-03-03 3:09 pm

Progress Milestone - Demo Super - 40%

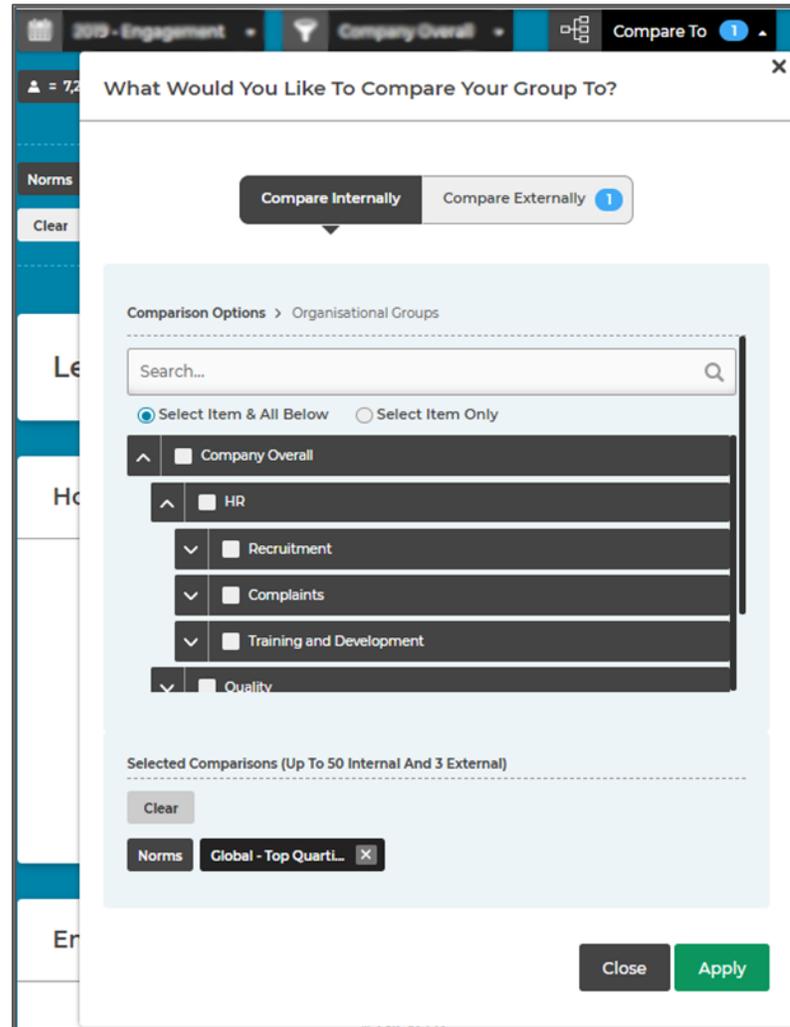
# Leveraging the Reporting Site



*A deeper look into the use of the Explore pages*

# Learn – Understand Results Within the Organization

(Page 1 of 2)



## Compare Scores for Organizational Groups

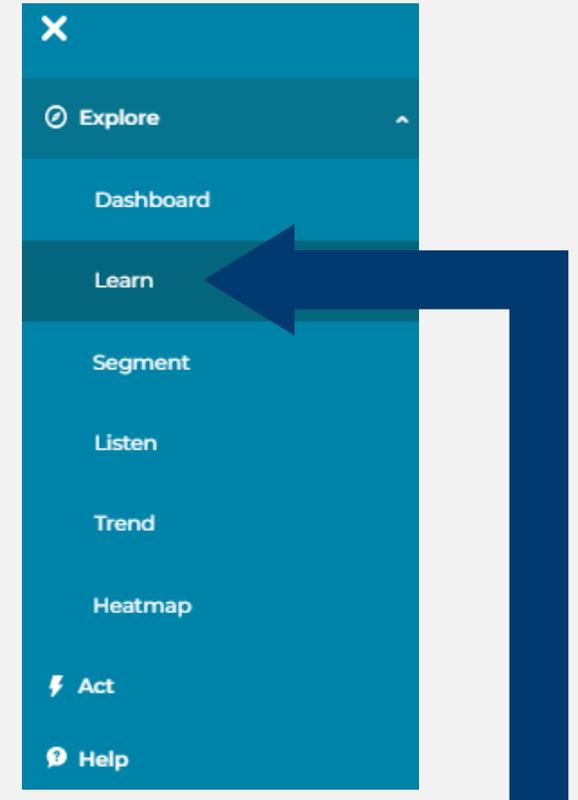
Expand the 'Compare To' menu.

On the 'Compare Internally' tab, choose the group you'd like to compare to the overall organization.

This allows you to compare a group within your organization to the overall organization to identify different dimensions, or drivers of engagement, as well as specific survey item results, that may vary from the organization overall.

**Note:** By choosing 'Select Item & All Below' all roll-up groups under the selected unit will be displayed (there is a limit of 50 units at a time on screen, and 500 in Excel). To see a group as an overall, choose 'Select Item Only'.

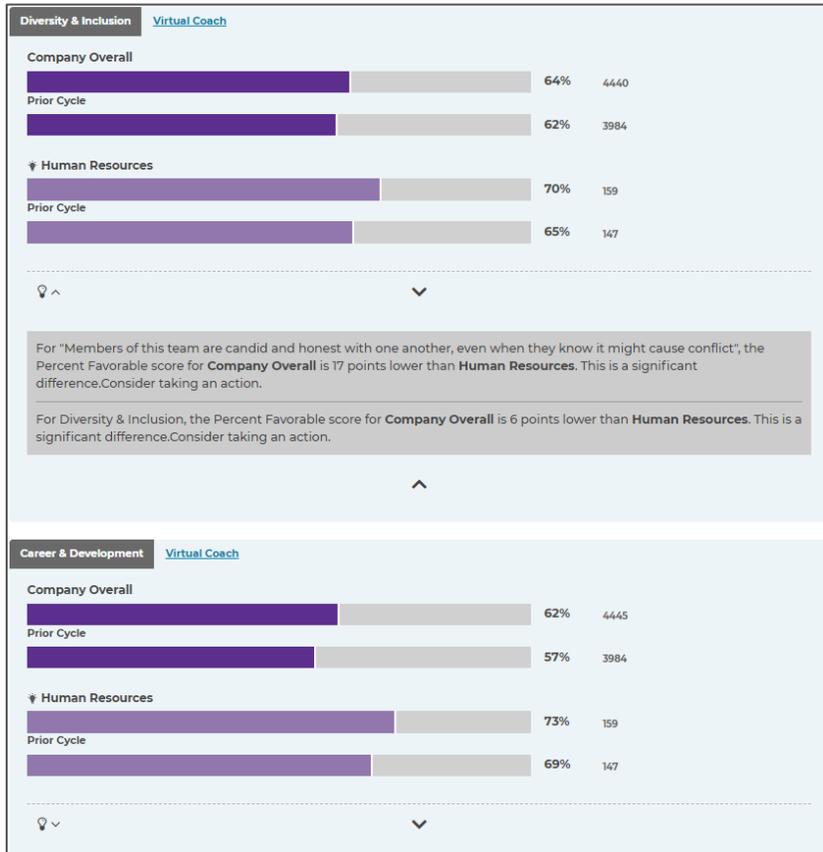
Select Item & All Below  Select Item Only



*There is a group within my organization whose engagement score varies from the overall organization. How can I better understand how this group's scores differ from the company overall, and what are the most 'important' differences?*

# Learn – Understand Results Within the Organization

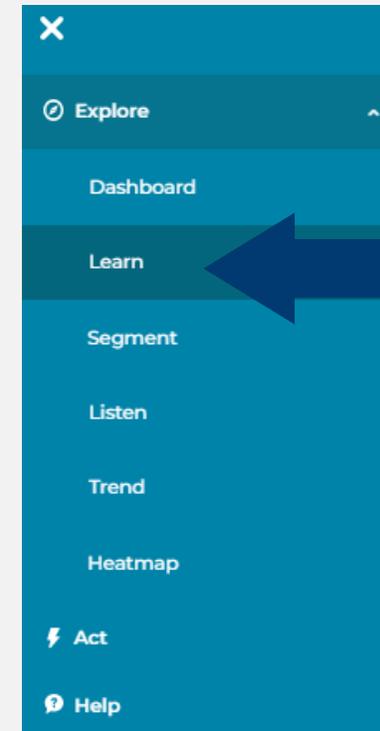
(Page 2 of 2)



## Identify Significant Differences

The Learn tab is organized by dimensions, or different work experience topics that drive engagement. Dropdown icons below each dimension allow you to see the survey items that roll up into each dimension.

To find significant differences between the overall organization and your comparison group(s), look for light bulb icons below each dimension.



*There is a group within my organization whose engagement score varies from the overall organization. How can I better understand how this group's scores differ from the company overall, and what are the most 'important' differences?*

# Segment – Take a Deeper Dive into Results

(Page 1 of 2)

Break Out Data 1

What story would you like to tell with your data?

Add Segment Category

Region 5

Search...

Select All

Asia Pacific

Europe

Latin America

North America

Corporate

Selected Segments (Up To 50)

Clear

Region Asia Pacific X Europe X Latin America X North America X

Corporate X

Close Apply

## Compare Scores by a Demographic

Expand the 'Break Out Data' menu.

From the 'Add Segment Category' drop down, choose which demographic to compare data for.

Check the box(es) for which demographic groups to include for the comparison.

This allows you to compare groups within a demographic to identify differences in perceptions across a specific survey item or dimension that may vary from the organization overall.

X

Explore

Dashboard

Learn

Segment

Listen

Trend

Heatmap

Act

Help

*I understand results at the organization level. Now I want to understand engagement and drivers of engagement at a deeper level across demographics.*

# Segment – Take a Deeper Dive into Results

(Page 2 of 2)

How Do I Compare By Demographic? 🔍

Search...

ENGAGEMENT SCORE

Engagement

DIMENSIONS / QUESTIONS Select All Dimensions Select All

Engagement

It would take a lot to get me to leave this organization

I would not hesitate to recommend this organization to a friend seeking employment

This organization inspires me to do my best work every day

I rarely think about leaving this organization to work somewhere else

Given the opportunity, I tell others great things about working here

This organization motivates me to contribute more than is normally required to complete my work

Career & Development

## Focus on Key Metrics for Comparison

In the 'Dimensions/Questions' table, scroll through the list of survey items and dimension to select the data for comparison.

Once you select an item or dimension in the table, a chart appears below the table. Multiple selections will provide a chart for each selection, respectively.



## View Results by Demographic Groups

The chart populates with the demographic cuts you chose in the 'Break Out Data' menu. Hover over a category within a bar to view the number of respondents who answered within that category.

Below the chart, click on the categories within the legend to display or hide each component of the chart.

×

Explore

Dashboard

Learn

Segment

Listen

Trend

Heatmap

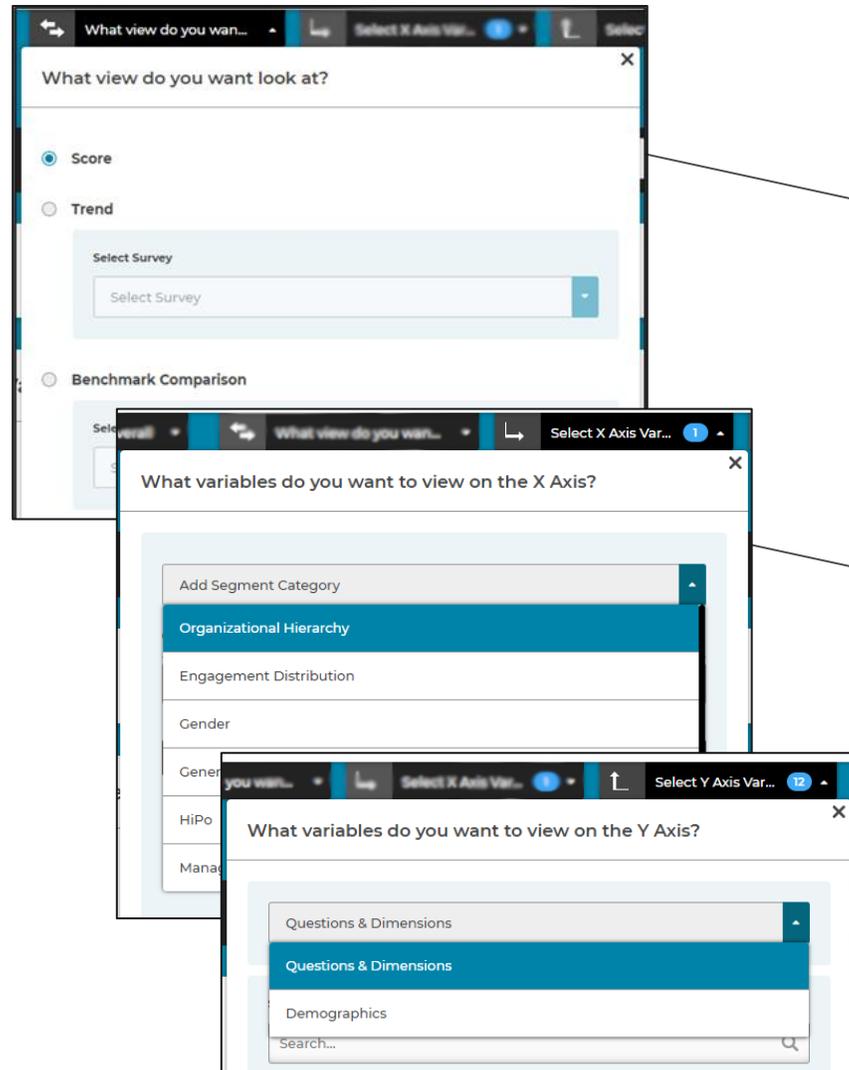
Act

Help

*I understand results at the organization level. Now I want to understand engagement and drivers of engagement at a deeper level across demographics.*

# Heatmap – Identify Trends in Employee Perceptions

(Page 1 of 2)



## Select the Type of Data to View

Data can be compared in one of the following options:

- **Score:** Compare multiple question or dimension scores by demographic
- **Trend:** Compare progress from a previous survey by demographic
- **Benchmark Comparison:** Compare distance from a benchmark by demographic

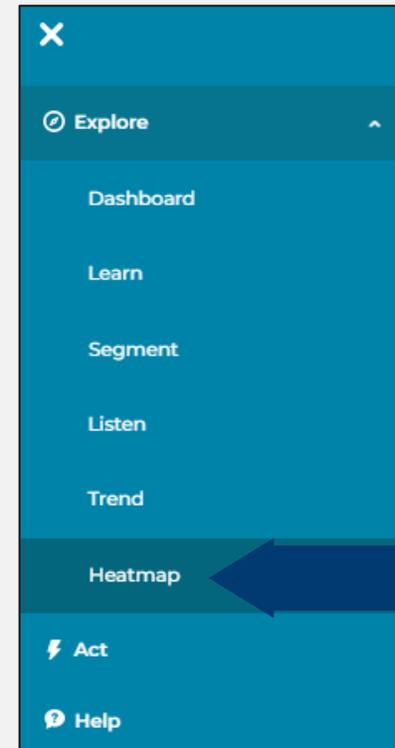
## Select the Demographic to Compare

This selection will appear horizontally across the x-axis, from left-to-right.

## Select the Input for the Cross Sections

This selection will appear vertically across the y-axis, from top-to-bottom.

- **Questions & Dimensions:** Select multiple questions and/or dimension for comparison
- **Demographics:** Select another demographic for a cross-tabbed comparison by one (1) metric score



*I understand results at the demographic level. Now I want to compare scores for different metrics and quickly visualize highs and lows across the demographic groups.*

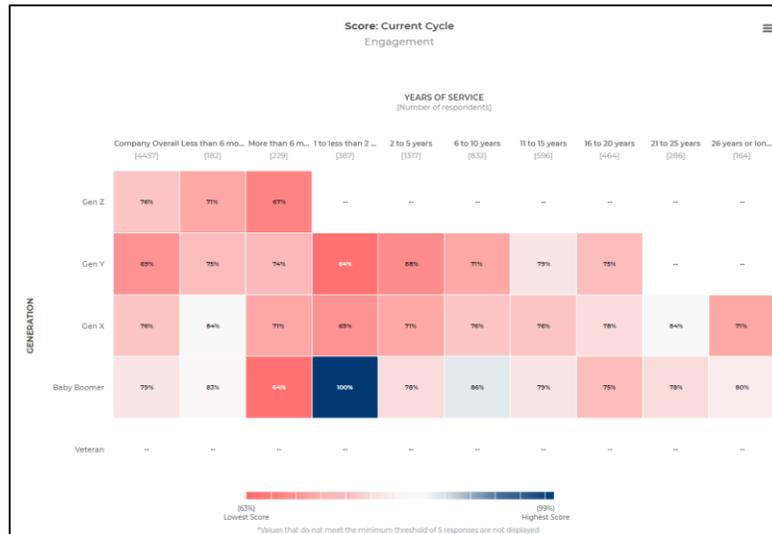
# Heatmap – Identify Trends in Employee Perceptions

(Page 2 of 2)



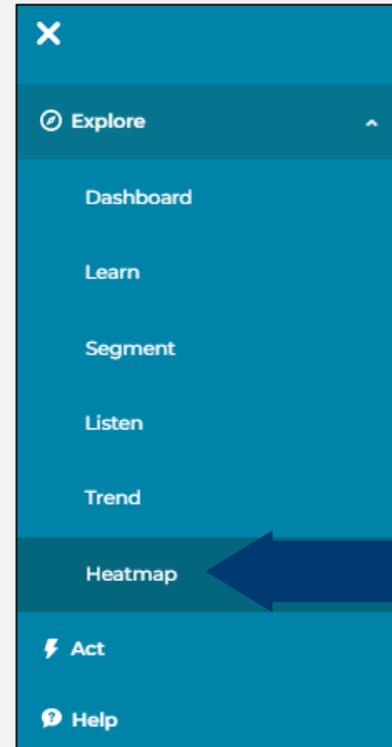
## Compare multiple survey metrics in a summarized table by a demographic

The 'Questions & Dimensions' view along the y-axis allows you to compare various results altogether to see if any trends exist within a particular demographic group.



## View a specific score cross-tabbed by two demographics

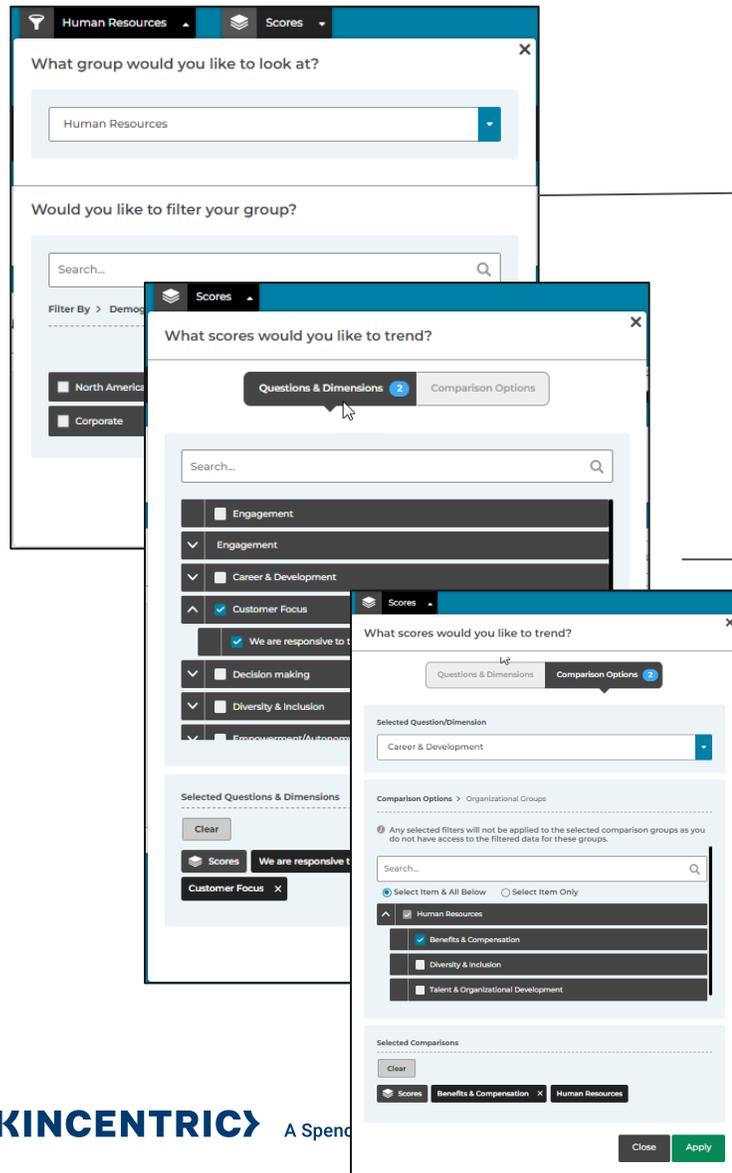
The 'Demographics' view along the y-axis allows you to see the cross-section of results for a specific item or dimension when two demographics overlap.



*I understand results at the demographic level. Now I want to compare scores for different metrics and quickly visualize highs and lows across the demographic groups.*

# Trend – Compare to Historical Results

(Page 1 of 2)



## Select the Group and Filter by Demographics

Data can be shown using multiple options:

- **Group:** Select the group you want to focus on
- **Demographic: Benchmark Comparison:** Drill into specific demographics to see if scores improved or declined for a particular region or demographic.

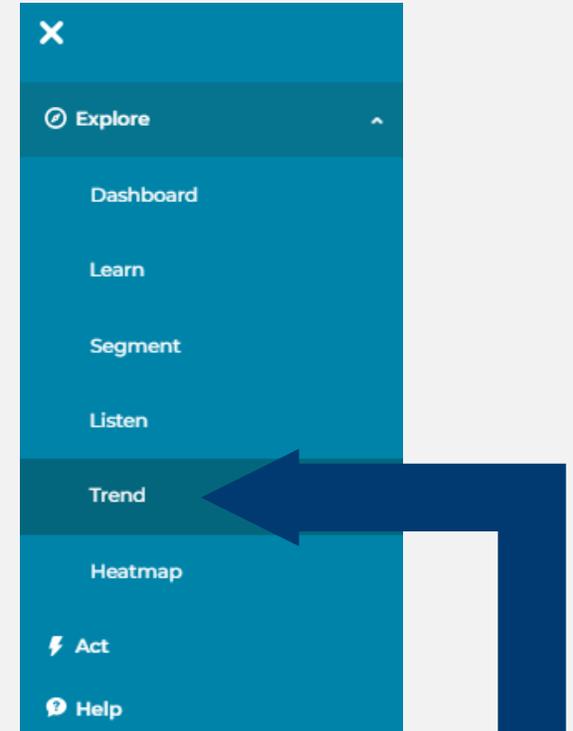
## Select the Questions & Dimensions to Compare

Choose the topics you want to see in the chart for comparison.

## Compare Results to Other Groups

Select '**Comparison Options**' to compare a question or dimension score with other groups.

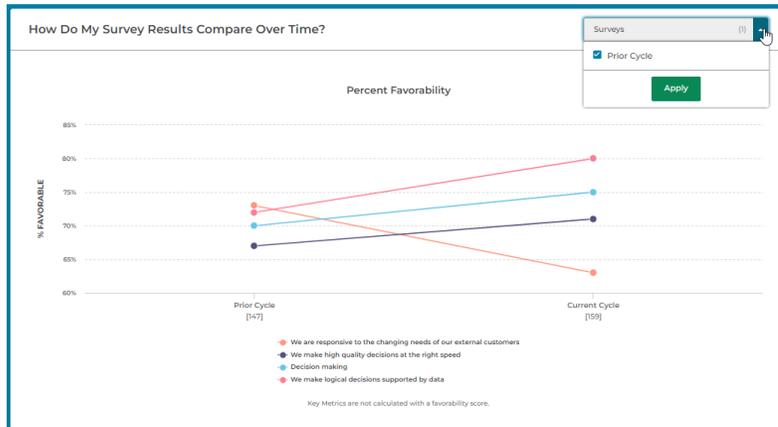
View multiple groups trend scores at once. This allows you to see if groups within your organization are all trending in the same direction.



*I understand results for the current survey. Now I want to compare my results to last year to see if we improved or need more work.*

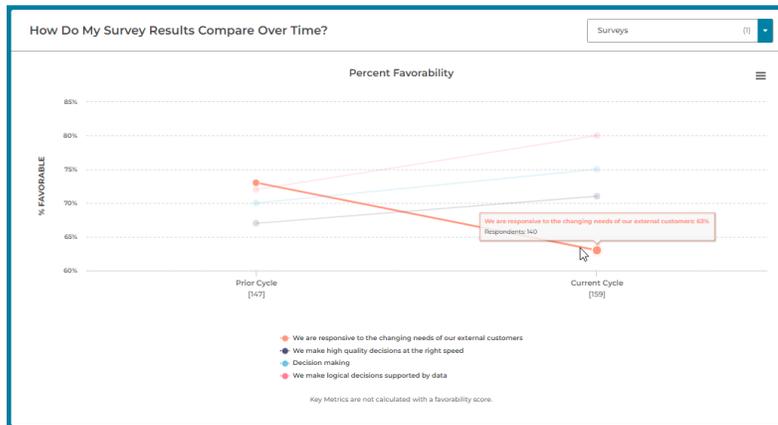
# Trend – Compare To Historical Results

(Page 1 of 2)



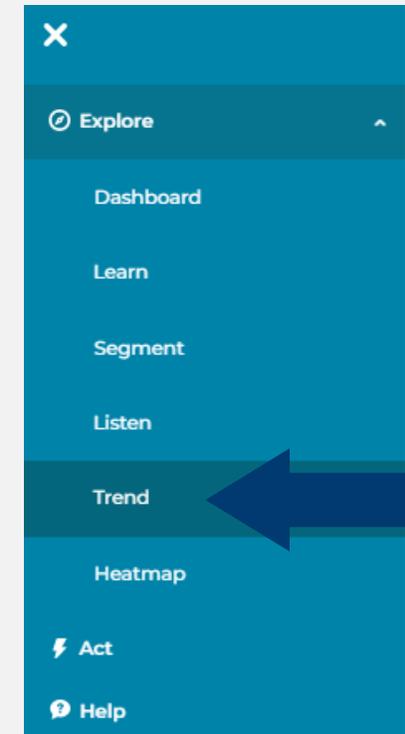
## Compare multiple years of surveys

When you have multiple years of surveys, you can select them from the 'Surveys' dropdown within the chart.



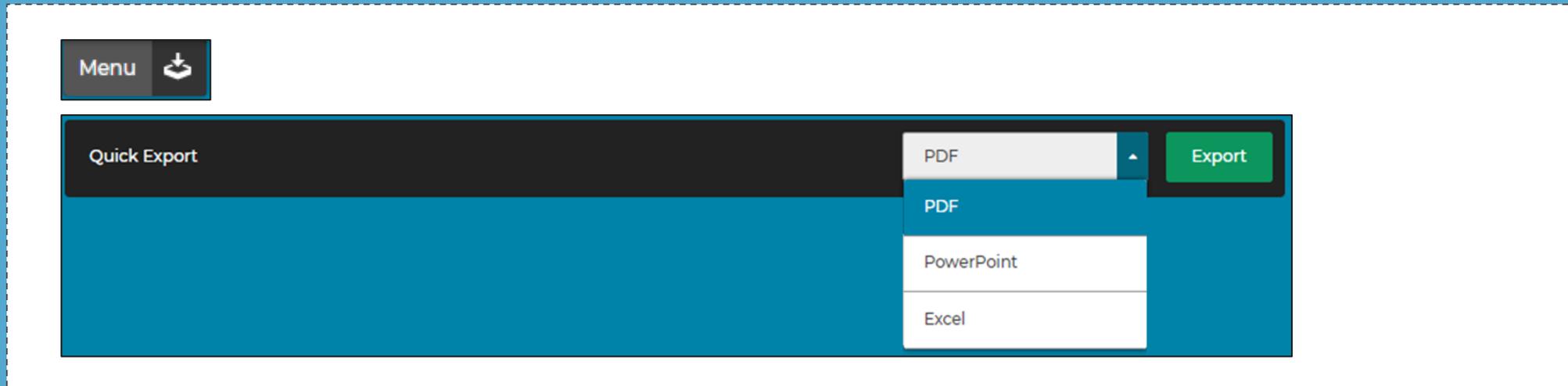
## View a specific score for Dimensions & Questions

View multiple questions and dimensions to see a broad view of changes over time. Move the cursor over the legend or line to see more details.



*I understand results for the current survey. Now I want to compare my results to last year to see if we improved or need more work.*

# Exports



# Exports – the PowerPoint Export

The PowerPoint export is available on all pages and prepares a summarized package export of the survey results. The export does not differ between the different pages.

There are two types of reports that can be pulled in the custom export option: 'Overall Report' and 'Comparison Report'.

## Option 1: Quick export

Creates a PowerPoint with the default selections on the dashboard.

## Option 2: Custom export (Overall Report)

- **Select Content** - Click on the arrow beside the company name to focus the data for a specific organizational unit. You also have the option to change the file name.
- **Filters** - Allows you to filter the data for one or more organizational groups or demographics.
- **Segments** - Allows you to break-out the Engagement score for up to five (5) demographics.
- **Ranges, Norms, Charts View** - Option to select up to two (2) norms and adjust the scale type of charts for the PowerPoint export.
  - **Stacked Bar Graph** provides the distribution of scores across Positive Perception, Positive Hesitance, Negative Hesitance, and Negative Perception.
  - **% Favourable Bar Graph** provides just the Positive Perception score.
- Review your selections on the final screen before exporting the PPT.

## Sample slides from the PPT Overall Report export:

### Engagement Score

Overall Engagement Score

↑ 5 points 57%  
2018 - Engagement

↓ 13 points 75%  
Global - Top Quartile

↓ 19 points 81%  
Global - Best Employers (2015-2017)

External Benchmark

My Group - Company Overall  
Exported By: Demo Super User: 10/13/2020

Selected group engagement score compared to previous survey and selected external benchmarks

### Engagement Distribution

Engagement distribution compared to previous survey and selected external benchmarks

Engagement Level	2019 - Engagement	2018 - Engagement	Global - Top Quartile	Global - Best Employers (2015-2017)
Actively Disengaged	21%	19%	24%	41%
Passive	17%	17%	24%	41%
Moderately Engaged	36%	19%	24%	41%
Highly Engaged	26%	17%	24%	41%

Global - Top Quartile	Global - Best Employers (2015-2017)
+13	-6
0	-21
+5	-13

Dimension scores compared to previous survey and selected external benchmarks

### Dimension Ranking

Dimension	2019	2018	Global Average
Engagement	62%	57%	75%
Research & Recognition	65%	57%	75%
Performance Management	64%	57%	75%
Learning & Development	63%	57%	75%
Work-Life Balance	63%	57%	75%
Empowerment/Autonomy	61%	57%	75%
Senior Leadership	61%	57%	75%
Career Opportunities	61%	57%	75%
Flexibility/Infrastructure	58%	57%	75%
Collaboration	56%	57%	75%
Manager	56%	57%	75%
Work Tasks	56%	57%	75%
Reward	54%	57%	75%
Diversity & Inclusion	54%	57%	75%
Talent and Staffing	54%	57%	75%

Distance From	2019	2018	Global Average
2019	+5	+14	+9
Global Average	-1	+14	+3

# Exports – the PowerPoint Export; Comparison Report

The Overall Report does not include any breakout details beyond the Engagement Score for up to five (5) segments.

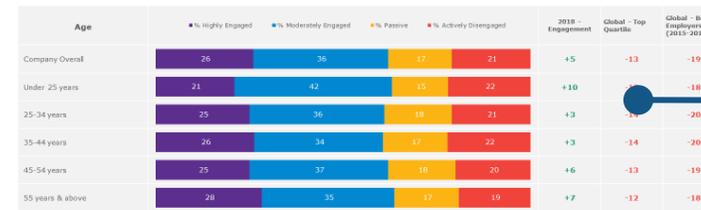
The Comparison Report includes breakout details across all survey measurements for one (1) selected segment.

## Option 3: Custom export (Comparison Report)

- **Select Content** - Click on the arrow beside the company name to focus the data for a specific organizational unit. You also have the option to change the file name.
- **Filters** - Allows you to filter the data for one or more organizational groups or demographics.
- **Segments** – Select one (1) segment to view breakout details by key metric, dimension, and question throughout the report.
- **Key Metrics, Dimensions, Questions** – Each selection will appear as its own chart and slide in the PowerPoint export.
- **Ranges, Norms, Charts View** - Option to select up to two (2) norms and adjust the scale type of charts for the PowerPoint export.
  - **Stacked Bar Graph** provides the distribution of scores across Positive Perception, Positive Hesitance, Negative Hesitance, and Negative Perception.
  - **% Favourable Bar Graph** provides just the Positive Perception score.
- Review your selections on the final screen before exporting the PPT.

### Sample slides from the PPT Comparison Report export:

Engagement Comparison: Age By Dimension



Engagement Distribution broken down by selected segment

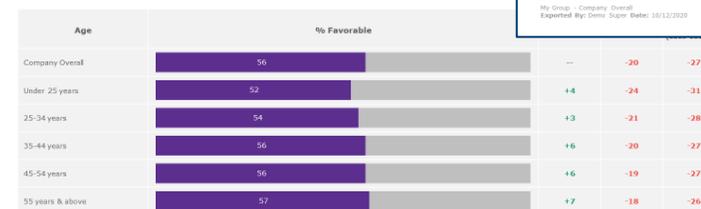
Engagement Comparison: Age By Question

Question: I would not hesitate to recommend this organization to a friend seeking employment



Question broken down by selected segment

Brand Comparison: Age By Dimension



Dimension broken down by selected segment

# Exports – the Excel Export (from Learn)

The Learn export allows you to drill deeper into each dimension by listing the survey items (questions) within that category. Scores for survey items can be compared to internal organizational/manager groups, Saved Filter Groups, or external norms

## Option 1: Quick export

Creates an Excel file with the selections as applied on the Learn page.

## Option 2: Custom export

- **Select Content** - Click on the arrow beside the company name to focus the data for a specific organizational unit. You also have the option to change the file name.
- **Filters** – Allows you to filter the data by organizational group(s) or demographics.
- **Groups, Norms, Scale Type** – Option to select comparison groups from the organizational structure or Saved Filter Groups, up to three (3) norms, and the scale type to include on the ‘Dimension Details’ and ‘Item Details’ tabs.
  - **Stacked Bar Graph** provides the distribution of scores across Positive Perception, Positive Hesitance, Negative Hesitance, and Negative Perception.
  - **% Favourable Bar Graph** provides just the Positive Perception score.
- Review your selections on the final screen before exporting the file.

### Sample data from 'Quick Export':

Information	
Focal Data	2018 - 2018
Trend Data	2017 - Previous Survey
Group	RES Jan Feb 2018
Date	2018-04-12
Minimum N	5
<b>Tab</b>	<b>Description</b>
Engagement	Engagement Score information for each of the Group(s) and Norm(s) selected prior to exporting to Excel
Dimension and Index Comparison	Dimension & Index scores for each of the Group(s) and Norm(s) selected prior to exporting to Excel
Dimension scores for the Focal group and selected Norm	Dimension scores for the Focal group and selected Norm(s)
Item Comparison	Item scores for each of the Group(s) and Norm(s) selected prior to exporting to Excel
Item Details	Item scores for the Focal Group and selected Norm(s)

The ‘Information’ tab provides an overview of the data included in the export

The ‘Engagement’, ‘Dimension and Index Comparison’ and ‘Item Comparison’ tabs provide scores for the current year and previous year (if applicable)

Time Period	2018	Previous Survey
Group	RES Jan Feb 2018	RES Jan Feb 2018
Responses	7,393	4,965
Engagement	58%	55%
Highly Engaged	20%	18%
Moderately Engaged	38%	37%
Passive	22%	22%
Actively Disengaged	20%	23%

Brand	2018	Previous Survey
Manager Effectiveness	58%	56%
Company Practices	55%	55%
Manager Support Inde	54%	54%
Career Opportunities	53%	49%
Senior Leadership	52%	52%
Empowerment & Influe	52%	51%
Learning & Developme	51%	50%
Managing Performance	48%	48%
Enabling Work	46%	52%
Recognition	44%	43%
Pay	42%	42%

Dimension / Index	Item	Responses	% Favourable	Strongly A	Agree	Slightly Ag	Slightly Dis	Disagree	Strongly Disagree
Engagement	SAY: I would not hesitate to recomm	7,379	69%	30%	40%	16%	6%	6%	3%
Engagement	STAY: It would take a lot to get me tc	7,389	60%	24%	36%	17%	9%	9%	4%
Engagement	SAY: Given the opportunity, I tell oth	7,384	60%	23%	37%	22%	9%	7%	3%
Engagement	STRIVE: This organization inspires m	7,381	55%	18%	37%	23%	10%	8%	4%
Engagement	STAY: I rarely think about leaving this	7,369	52%	22%	30%	17%	13%	11%	7%
Engagement	STRIVE: This organization motivates	7,385	51%	18%	33%	23%	12%	9%	5%
Work Tasks	My job is a good fit for my abilities an	7,332	77%	30%	47%	13%	5%	3%	2%
Work Tasks	I get a sense of accomplishment from	7,345	72%	27%	45%	17%	5%	4%	2%
Work Tasks	I truly enjoy my day-to-day work task	7,360	64%	20%	44%	22%	8%	4%	2%
The Basics	The physical work environment is ap	7,325	76%	26%	51%	13%	5%	3%	2%
The Basics	The balance between my work and p	7,354	64%	19%	45%	19%	9%	5%	3%
The Basics	My work-related stress is manageabl	7,350	62%	16%	46%	21%	9%	5%	3%
The Basics	Overall, this organization's benefits p	7,301	62%	19%	43%	19%	9%	6%	5%
The Basics	Overall, this organization's retiremen	7,200	59%	18%	41%	21%	8%	6%	6%
Collaboration	My co-workers work together to achi	7,373	70%	26%	44%	18%	6%	4%	2%
Collaboration	My co-workers share best practice ai	7,304	69%	27%	43%	19%	6%	4%	2%

The ‘Dimension scores...’ and ‘Item Detail’ tabs provide detailed breakdowns for the current year results

# Exports – the Excel Export (from Segment)

The Segment export provides results broken out by different organizational groups or demographics (e.g., gender, job role).

## Option 1: Quick export

Creates an Excel file with the selections as applied on the Segment page.

## Option 2: Custom export

- **Select Content** – Click on the arrow beside the company name to filter the data for a specific organizational unit. You also have the option to change the file name.
- **Filters** – Allows you to filter the data by organizational group(s) or demographics.
- **Segments** – Select up to five (5) segment categories for your data.
- **Key Metrics, Dimensions, Items** – The Dimensions/Questions box allows you to select individual survey items to view in your export.
- Review your selections on the final screen before exporting the file.

## Option 3: Export All

Allows you to download data for all dimensions, segments, and items.

### Sample data from 'Export All':

Information	
Dataset:	2018
Your Group:	RES Jan Feb 2018
Segments:	Language Hourly or salaried Union or non-union People manager Gender I am confident that appropriate action will be taken as a res Career opportunities conversation with manager in the last Manager effectiveness in providing performance feedback a Country Engagement Distribution (detailed)

The 'Information' tab provides an overview of the data included in the export

Key Metric	Segment	Group	Current Cycle					Prior Cycle						
			Score	Response	Highly En	Moderate	Passive	Actively D	Score	Response	Highly En	Moderate	Passive	Actively D
Engagement Overall			73%	4460	34%	40%	17%	10%	69%	3994	29%	40%	19%	11%
Engagement Years of S Less than			77%	183	45%	31%	15%	9%	69%	102	34%	34%	25%	6%
Engagement Years of S More than			72%	229	34%	39%	16%	12%	74%	155	32%	42%	16%	10%
Engagement Years of S 1 to less th			66%	387	31%	35%	21%	13%	64%	326	28%	36%	23%	13%
Engagement Years of S 2 to 5 year			69%	1319	30%	39%	19%	12%	67%	997	27%	40%	20%	13%
Engagement Years of S 6 to 10 year			75%	832	33%	42%	17%	9%	66%	791	28%	38%	20%	14%
Engagement Years of S 11 to 15 year			77%	596	35%	42%	16%	7%	73%	700	30%	42%	18%	9%
Engagement Years of S 16 to 20 year			77%	464	37%	40%	15%	8%	74%	409	32%	41%	17%	9%
Engagement Years of S 21 to 25 year			81%	286	38%	43%	14%	5%	74%	308	33%	41%	18%	8%
Engagement Years of S 26 years or more			77%	164	40%	38%	17%	5%	74%	206	32%	42%	18%	8%
Engagement Gender Male			74%	2807	34%	40%	17%	10%	69%	2419	29%	40%	21%	10%
Engagement Gender Female			73%	1653	33%	40%	18%	9%	70%	1575	30%	40%	17%	13%
Engagement Country Argentina			72%	55	33%	35%	15%	18%	63%	58	24%	28%	28%	17%

The 'Key Metric Details' tabs provide engagement results for each group broken down by score and distribution

The 'Dimension Question Details' tab provides detailed breakdowns by group for each item in both the Collapsed Categories view and the All Scale Points view

Dimension / Index	Question	Segment	Group	Response	Positive P	Positive H	Negative I	Negative F	Strongly / Agree	Slightly A	
Engagement		Overall									
Engagement	STAY: I w	Overall		7389	60%	17%	9%	14%	24%	36%	17%
Engagement	SAY: I wo	Overall		7379	69%	16%	6%	9%	30%	40%	16%
Engagement	STRIVE: T	Overall		7381	55%	23%	10%	12%	18%	37%	23%
Engagement	STAY: I ra	Overall		7369	52%	17%	13%	18%	22%	30%	17%
Engagement	SAY: Give	Overall		7384	60%	22%	9%	10%	23%	37%	22%
Engagement	STRIVE: T	Overall		7385	51%	23%	12%	14%	18%	33%	23%

# Exports – the Excel Export (from Heatmap)

The Heatmap export provides a colour mapping based data visualization of cross-tabbed comparisons over different attributes and dimensions.

## Quick export

Creates an Excel file with the selections as applied on the Heatmap page.

In Heatmap, the Excel export can only be pulled using the 'Quick Export' banner as customizations will be dependent on the selections applied to the page.

### Sample data from 'Quick Export':

Information	
Dataset	2019 - Engagement
Group	Sales
Date	9/13/2021 3:02:11 PM
Minimum N	10
View	Trend Difference: 2019 - Engagement vs 2018 - Engagement
X Axis	Organizational Hierarchy
Y Axis	Key Metrics, Dimensions, Questions
Legend	(-25) Highest Negative Change  (43) Highest Positive Change
Tab	Description
Heatmap Value	Scoring details for the Scores available broken down by each demographic value or selected trend/benchmark difference.

The 'Information' tab provides a summary of the selections made on the page and the range of data included in the export

		Sales	Sales Team D	Sales Team D1	Sales Team D10	Sales Team D2
		[3739]	[761]	[61]	[76]	[74]
Brand	[3715]	+5	+4	+7	+10	+8
Career & Development	[3742]	+17	+16	+13	+21	+19
Collaboration	[3751]	+3	+4	+9	+6	+8
Customer Focus	[3712]	+32	+34	+27	+41	+35
Diversity & Inclusion	[3715]	-5	-6	-4	-7	+2
Enabling Infrastructure	[3744]	+10	+9	+9	+12	+14
Manager	[3734]	-4	-4	-1	-3	0
Rewards & Recognition	[3739]	+5	+6	+5	+11	+7
Work Tasks	[3728]	+7	+7	+14	+12	+13
Work/Life Balance	[3739]	+4	+6	-2	+18	+9
Performance Management	[3733]	+10	+8	-1	+19	+21
Talent & Staffing	[3745]	+4	+3	+2	+6	+8
Senior Leadership	[3745]	+6	+3	+2	+9	+7
Empowerment/Autonomy	[3735]	+6	+6	+5	+10	+15
Decision making	[3701]	+3	+3	+4	+5	+9
Agility	[3744]	+12	+12	+10	+14	+18
Engaging Leadership	[3745]	-2	-1	-1	+1	+2
Talent Focus	[3739]	+7	+6	+7	+11	+16

Number of responses by demographic group

The 'Heatmap Value' tab applies the colour mapping aligned to the data selected for the export

Number of responses by item, dimension, or demographic

# The Act Excel Export

The Act export provides an overall summary for all action plans created by users for their respective organizational/manager group.

## Quick export

Creates an Excel file with the organizational/manager groups within the span-of-control for the user (an overview of their group and any groups that report into their group).

In Act, the Excel export can only be pulled using the 'Quick Export' banner as there are no customizations applicable to this page.

## Sample data from 'Quick Export':

The 'Summary' tab provides a high-level overview of the action plans entered across all organizational/manager groups

Plan	Action Plan Created	# of Actions	Dimension(s)	Overall Progress
Company Overall	Yes	21	Career & Development; Diversity & Inclusion; Empowerment/Autonomy; Manager; S	15%
Information Technology	Yes	5	Career & Development; Empowerment/Autonomy; Empowerment/Autonomy; Perform	74%
Cyber Security	Yes	1	Senior Leadership	100%
Infrastructure	No	0		0%
Service Delivery	No	0		0%
Human Resources	Yes	16	Career & Development; Diversity & Inclusion; Empowerment/Autonomy; Enabling Inf	61%

The 'Detail' tab provides an in-depth view of all action plans and the progress across all organizational/manager groups

Plan	Mapped To Dimension	Mapped To Question	Action Name	Created Date	Progress	Action Description	Days Remaining	Success Indicator	Complete By	Progress Log
Company Overall	Living Our Values		Actively seek	04-02-2022	70%	Actively seek	100	Taking act	26-03-2022	23-11-2021 10:06 AM: DEMO SUP
Company Overall	Manager		Exert time	12-11-2022	0%	Exert time to	0	test	30-11-2021	
Company Overall	Diversity & Inclusion		Actively seek	08-12-2022	0%	Actively seek	74	ABC	28-02-2022	
Company Overall	Senior Leadership		Transmit to	29-11-2022	0%	Transmit to s	46	test	31-01-2022	
Information Technology	Career & Dev	The way we m	Ask your t	18-03-2022	80%	Ask your tea	0	test	30-04-2021	10-12-2021 03:22 AM: DEMO SUP
Information Technology	Empowerment/Autonomy		安排一对	04-07-2022	70%	安排一对一	218	每位员工	22-07-2022	10-12-2021 02:05 AM: DEMO SUP
Information Technology	Senior Leadership		Provide lea	07-04-2022	80%	Provide leade	0	Test	30-04-2021	10-12-2021 02:05 AM: DEMO SUP
Cyber Security	Senior Leadership		Arrange for	10-06-2022	100%	Arrange for s	0	Blue cup	10-06-2021	23-10-2021 06:19 AM: DEMO SUP
Human Resources	Manager		Assign em	20-09-2022	90%	Assign empl	15	staff assign	31-12-2021	16-11-2021 09:47 AM: DEMO MAI
Human Resources	Diversity & Inclusion		In one-on-c	16-11-2022	0%	In one-on-one	0	test	17-11-2021	25-11-2021 03:19 AM: DEMO SUP

**KINCENTRIC**➤

A Spencer Stuart Company

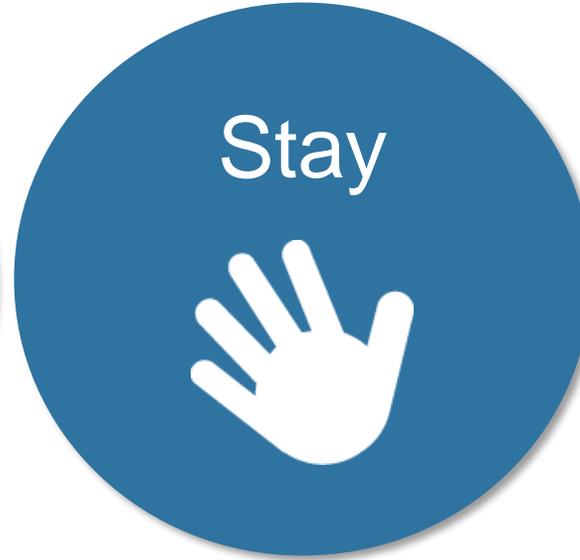
# Appendix A: *The Engagement Model*

# Engagement Defined

Engagement is the state of emotional and intellectual involvement that motivates employees to do their best work



Employees consistently speak positively about the organization to coworkers, potential employees, and customers



Employees have an intense desire to be a member of the organization



Employees are motivated to exert extra effort and engage in work that contributes to business success

# Engagement Levels

Average response to the 6 questions is less than 3.5



Unhappy and willing to share their unhappiness with others. Minimal participation; dissatisfaction and lack of discretionary effort are apparent. Can be disruptive.

Average response to the 6 questions is 3.5 to less than 4.5



Going through the motions. Generally satisfied, but not motivated to act in ways that positively impact business results.

Average response to the 6 questions is 4.5 to less than 5.5



Consistently contribute, intend to stay with organization, strive to effectively meet their goals.

Average response to the 6 questions is 5.5 or more



Bring their heads and hearts to work. Highly participative in day-to-day activities, contribute ideas, positive customer interactions.

# Engagement is Calculated at the Individual Level

Engagement Item		Person A	Person B	Person C	Person D	Person E	Person F
Say	I would not hesitate to recommend this organization to a friend seeking employment	Strongly Agree 6	Agree 5	Strongly Agree 6	Slightly Agree 4	Slightly Agree 4	Slightly Disagree 3
	Given the opportunity, I tell others great things about working here	Agree 5	Strongly Agree 6	Slightly Agree 4	Agree 5	Slightly Disagree 3	Agree 5
Stay	It would take a lot to get me to leave this organization	Strongly Agree 6	Strongly Agree 6	Slightly Agree 4	Slightly Agree 4	Slightly Agree 4	Disagree 2
	I rarely think about leaving this organization to work somewhere else	Slightly Agree 4	Agree 5	Slightly Disagree 3	Slightly Agree 4	Slightly Disagree 3	Slightly Disagree 3
Strive	This organization inspires me to do my best work every day	Strongly Agree 6	Agree 5	Agree 5	Agree 5	Slightly Agree 4	Slightly Agree 4
	This organization motivates me to contribute more than is normally required to complete my work	Strongly Agree 6	Agree 5	Agree 5	Slightly Agree 4	Slightly Disagree 3	Slightly Disagree 3
<b>Average</b>		<b>5.5 Highly Engaged</b>	<b>5.3 Moderately Engaged</b>	<b>4.5 Moderately Engaged</b>	<b>4.3 Passive</b>	<b>3.5 Passive</b>	<b>3.3 Actively Disengaged</b>



Engaged employees are those whose average response to the 6 questions is 4.5 or more (i.e., on average, they agree or strongly agree with the 6 questions).

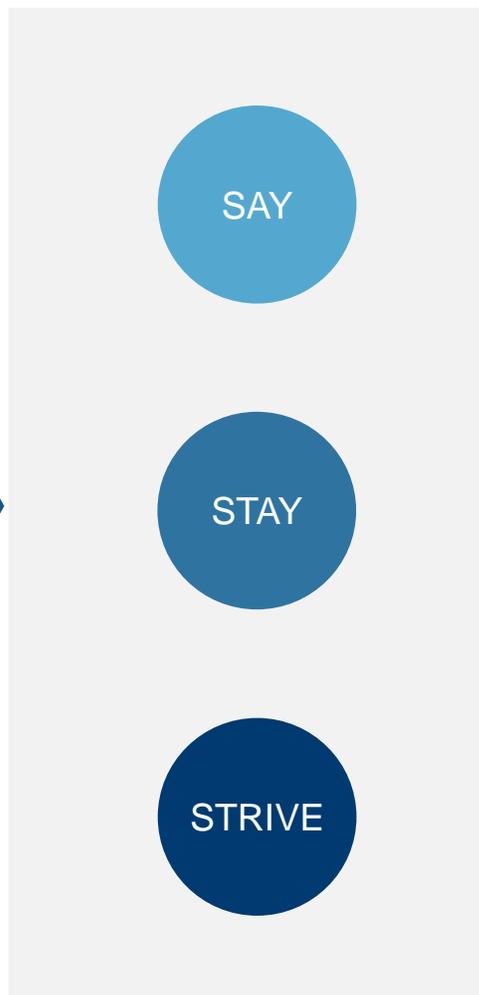
**Engagement = 50%**  
**(3 of 6 are engaged)**

# Engagement Survey Model

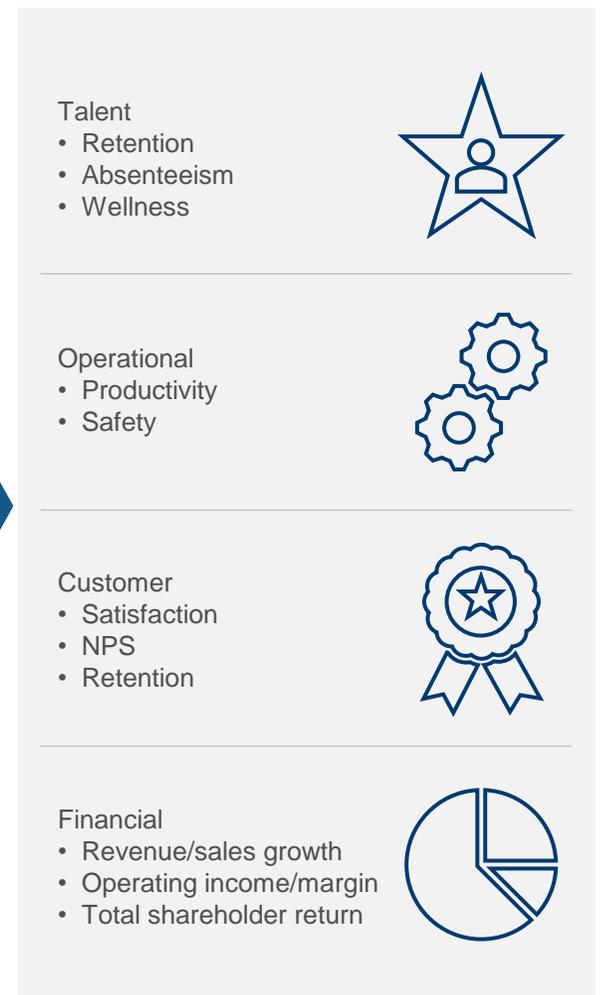
## The Work Experience Engagement Dimensions



## Employee Engagement (Measured through 6 items)



## Organization Outcomes



# Appendix B:

## *Additional Calculation Models*

# Dimension and Question – Collapsed Categories

	Collapsed Category	6-Point Agree
1	Positive Perception	Strongly Agree
2	Positive Perception	Agree
3	Positive Hesitance	Slightly Agree
4	Negative Hesitance	Slightly Disagree
5	Negative Perception	Disagree
6	Negative Perception	Strongly Disagree

Also displayed as the '% Favourable' score on the site and commonly referred to as the 'Top-2 Box Score'

# Prioritizing Engagement Results

Results are analyzed in three ways and ranked in terms of their potential to impact engagement.

	Question Answered	Method
① <b>Importance</b>	How important an impact is this having on engagement?	Statistical predictive relationship between a driver and engagement outcome
② <b>Effectiveness</b>	How are we doing in this area?	% favourable responses of employees
③ <b>Probability of Movement</b>	How do we compare?	Distance from benchmark

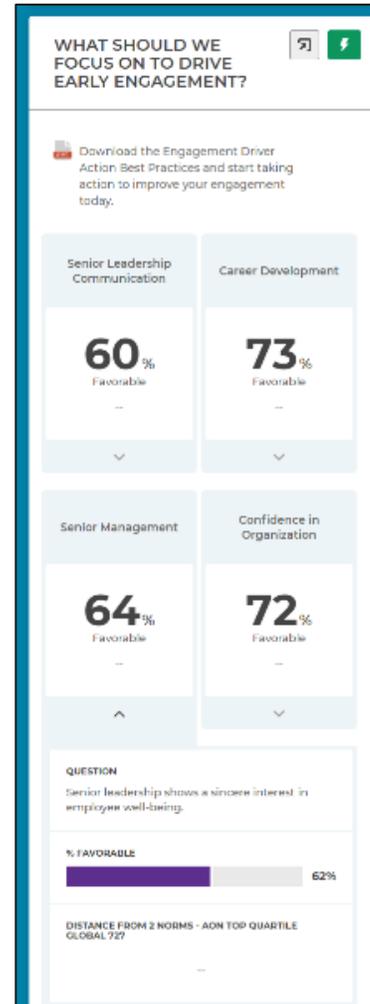
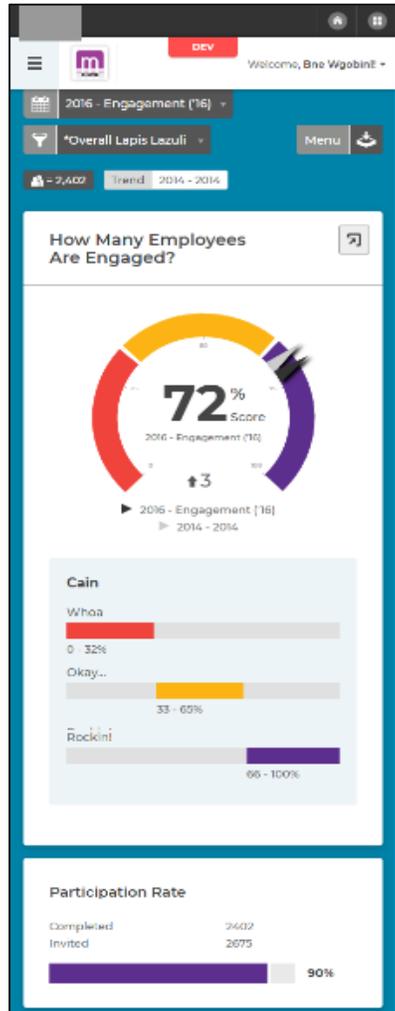


**Simple  
Focused  
Action**

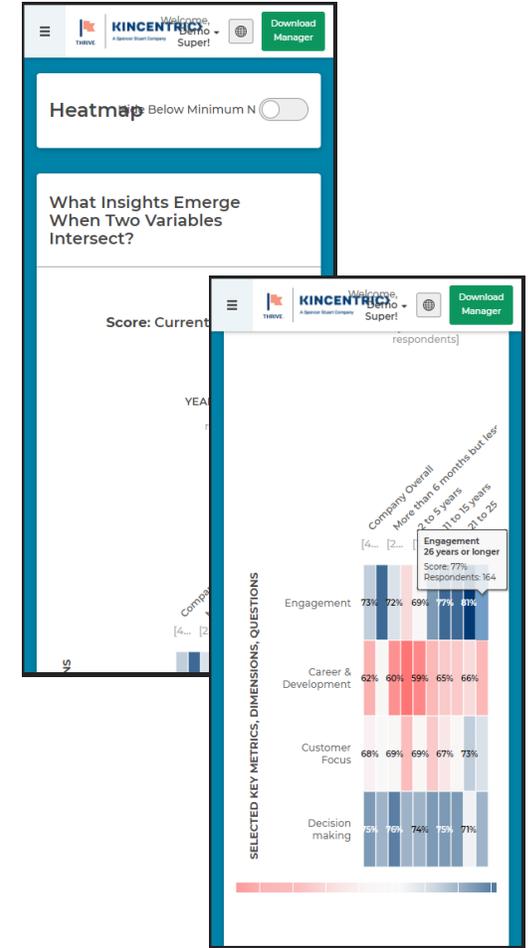
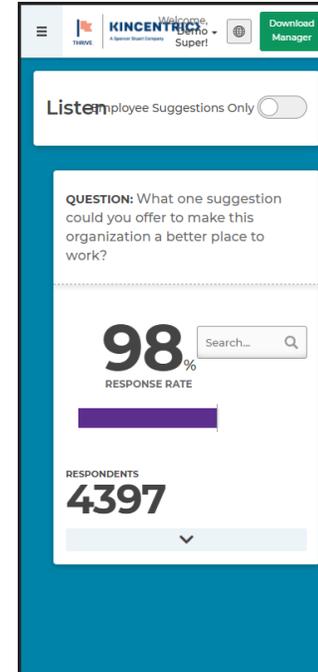
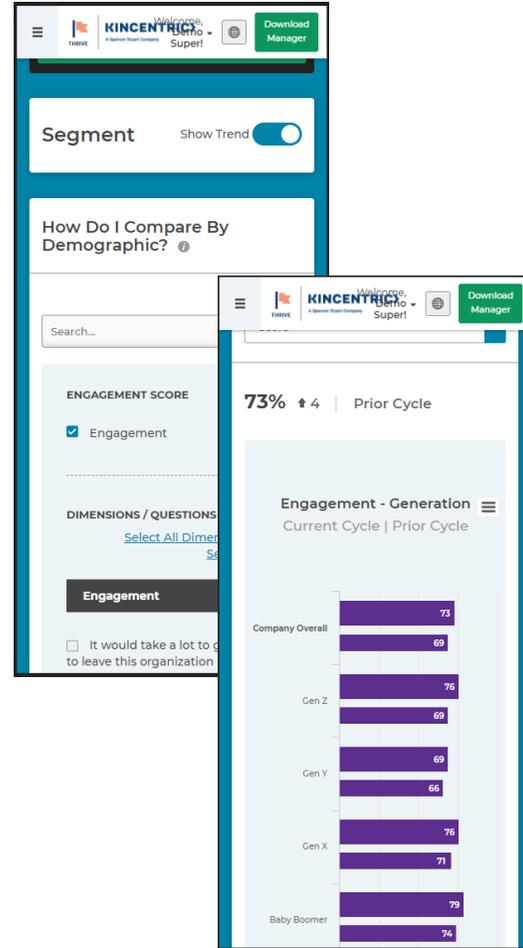
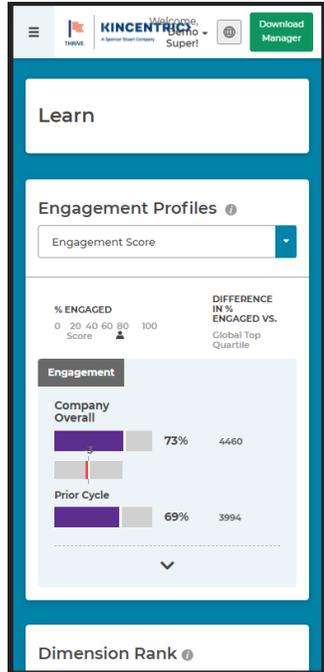
# Appendix C:

*Mobile Screenshots*

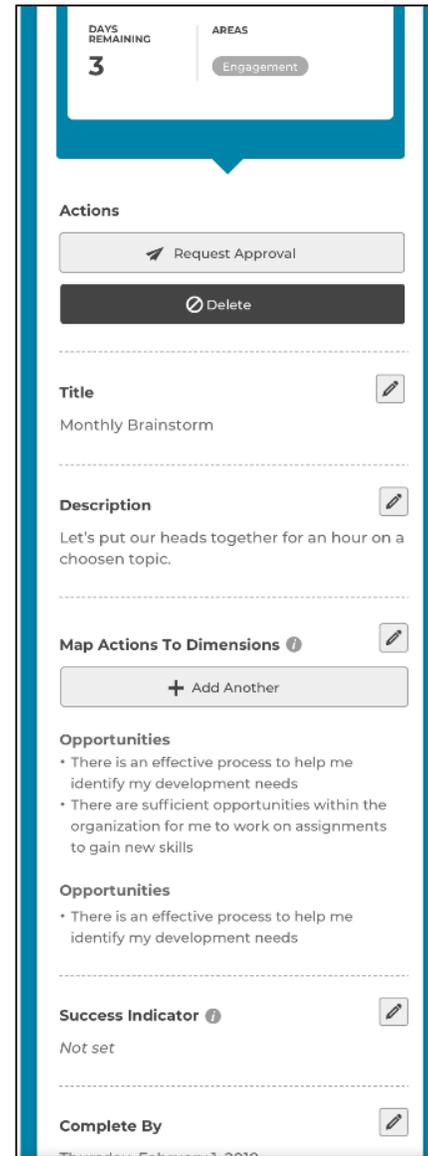
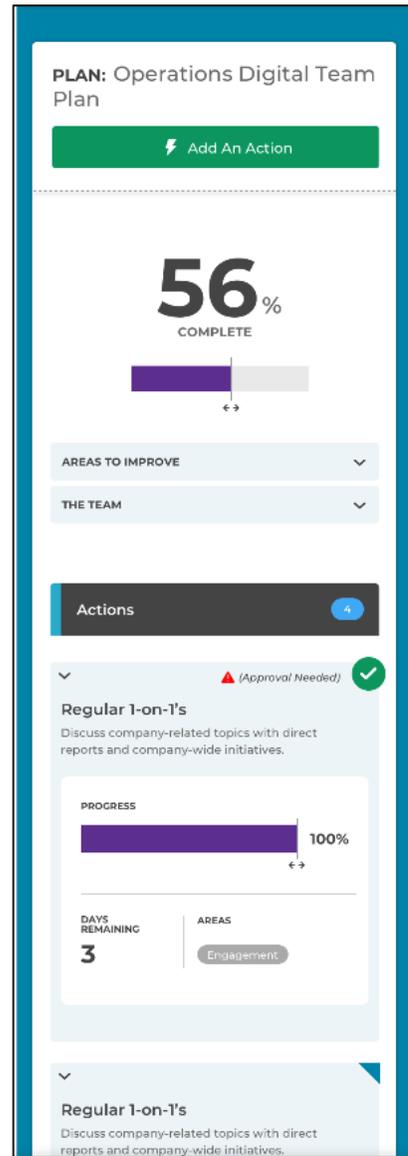
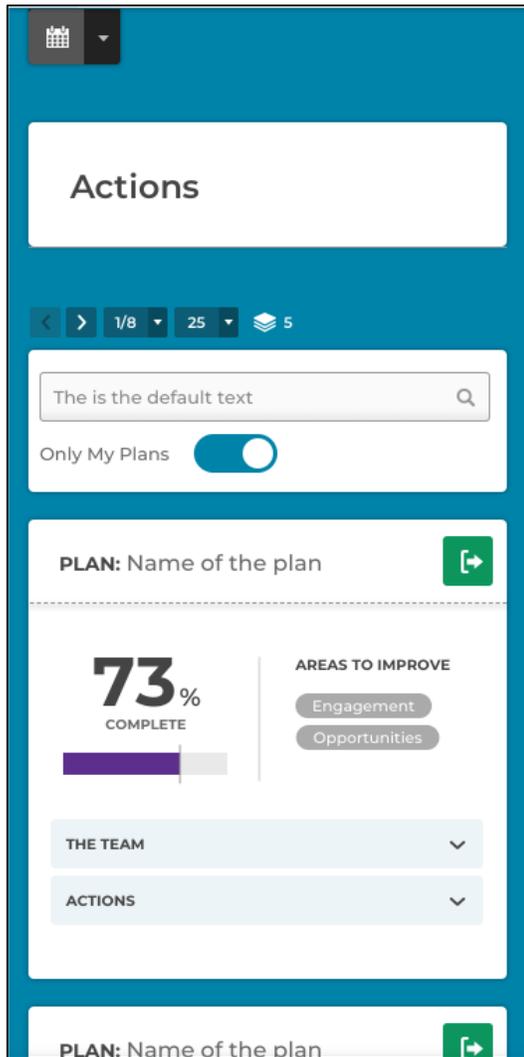
# Mobile Reporting Examples: Dashboard



# Mobile Reporting Examples: Explore



# Mobile Reporting Examples: Act



# Appendix D:

*Help*

# Help

## Documentation & Video Resources

### Help

For information on new features, visit the [Product Updates](#) website.

Documentation | Contact | Survey Reporting Guide

#### Engagement Resources

 [Survey Follow Up Guide](#)  
This guide has been developed to help you INTERPRET what the survey results are telling you about your group's strengths, and where you have your most important improvement opportunities. It outlines a proven, step-by-step process that will enable you to turn your survey results into lasting CHANGE.

 [Individual Engagement Manager Guide](#)  
The purpose of this guide is to help you, as a manager, prepare to have meaningful and productive discussions with your employees about their individual engagement, and to assist you in helping them find ways to strengthen and maintain their engagement over time.

#### Tutorial Videos

 Click the links below to watch helpful tutorials (English only).

##### Layout, Filters and PowerPoint Export



##### Dashboard



##### Learn



##### Segment



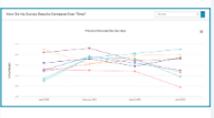
##### Listen



##### Act



##### Trend



##### Heatmap



##### Virtual Coach



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Thrive Overview

56

# Help

## Contact

### Help

For information on new features, visit the [Release Notes](#) website.

Documentation

Contact

Survey Reporting Guide

### Explorer

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For questions, contact your local HR Representative.

# Help

## Survey Reporting Guide

The screenshot shows a help page with a teal header. Below the header is a navigation bar with three buttons: 'Documentation', 'Contact', and 'Survey Reporting Guide'. The 'Survey Reporting Guide' button is highlighted with a dark background and a white pointer. Below the navigation bar is a section titled 'Survey Reporting Guide' with a dashed line underneath. A call to action says 'Click this link to go to the site:' followed by a green button labeled 'Survey Reporting Guide'. Below this is a paragraph describing the guide and a bulleted list of features.

**Help**  
For information on new features, visit the [Product Updates](#) website.

Documentation Contact **Survey Reporting Guide**

### Survey Reporting Guide

Click this link to go to the site: [Survey Reporting Guide](#)

The Survey Reporting Guide is Kincentric's comprehensive guide for our survey reporting applications.

- Step by step instructions will help you use filters so you can organize your data.
- Understand how to download the data into Excel or create PDF and PowerPoint reports.
- Methodology overviews provide details on how data is calculated.
- Detailed page overviews help guide you through each page, section and features available.
- Watch video tutorials for quick overviews.
- Know what's happening by viewing the Release Notes announcements.
- Download the Survey Reporting Guide as a PDF or print a page.

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