Renew Survey

Step 1: Talmetrix Intake Form

Use this form to provide details from survey launch date to desired anonymity threshold. Check your email for a link to your form. If you can't find it contact us at support@talmetrix.com

Step 2: Quick Start Guide

Get stuck along the way? This guide covers everything from IT Whitelisting to ensure the survey emails come through to how to upload your employee data file. Keep reading!

Step 3: Launch the Survey and View Insights

Your survey is typically ready to launch 3-4 days after we receive your data file so we can provide data quality assurance. You'll receive a preview link to the survey, then once approved you can start capturing immediate insights as your employees respond.

Implementation Checklist

Below you will find a checklist designed to help you through the steps of implementing a successful survey at Talmetrix. These steps are to ensure quality of data and optimal response rates. The quick start implementation guide gives all the details you need along the way.

- ☐ Review the quick start implementation guide. If you need additional assistance, please email support@talmetrix.com.
- ☐ Complete Client Intake form
- ☐ Complete IT whitelisting
- ☐ Upload Data
- ☐ Receive survey preview
- ☐ Successful survey launch!

Survey Implementation
Quick Start Guide

Table of Contents

Client Intake Form

The client intake form captures essential information needed to launch your survey. On this form, we will ask you to provide additional information that will be used for reporting, dashboards, and survey programming. Please refer to the email invite link to the client intake form.

Open Date/Close Date

On what *date* and at what *time* do you want to **open** your survey? On what *date* and at what *time* do you want it to **close** (i.e., stop accepting responses)?

We recommend a survey be open for a 2-week window. Usually, surveys open before noon and close at 11:59 p.m. (EST) on the last day of the survey.

Anonymity Threshold

Your organization's anonymity threshold is the minimum number of survey *responses* needed in order for results to be reported. For example: if your threshold is 3, that means three people need to respond to the survey in order for results to display on your dashboard or report. The anonymity threshold is especially relevant for the demographics being used for data filters in your report and dashboard. If a demographic group doesn't meet the anonymity threshold, results will not be reported. You will not be able to view *filtered* results for groups fewer than your anonymity threshold.

Survey Access Method

Email Invitations

The preferred method is to send survey invitations via email. This is the most efficient method for sending and receiving a link to complete a survey. Each employee will be sent a unique link to access the survey, which provides additional response data security. Each employee will be asked to create a password and login using their email address as their username. We recommend using this method, if possible.

"Kiosk" Method

If it is not possible to provide an email address for each employee, or you have a portion of your population that does not have a work email address, the "kiosk" method can be used to take the survey. The "kiosk" method uses a single link, which can be distributed to all employees or setup on computer kiosk stations, to access the survey. Each employee will be asked to create a password and login using their employee ID as their username.

Custom Demographic Filter

The following are optional demographic filters you may provide employee data for, which will be used to filter survey response data via the online dashboard and in your report. For the three demographic filters below, we have pre-set demographic options that will be used (more details on data formatting in the “Data Upload” portion of this guide)

- Age Range
- Race
- Gender
- People Manager

Additionally, you may opt to include one other **custom demographic**. We ask that you indicate what that custom demographic will be included on the intake form.

Survey Administrator Contact Info

In the event, we need to contact you regarding your survey, we ask that the name, email, and job title be provided for the primary survey administrator.

Dashboard Access

Up to 2 people may have access to the online dashboards to manage survey reminders and view results (while the survey is open and after it closes). Please indicate who these individuals will be by providing their names and email address.

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Data File Upload Process

Employee Data Overview

The employee data file you send us determines:

- Who is invited to the survey
- How you can view survey results data in the dashboard and in your report

There are two points of data, *at minimum*, we must receive in your employee data file to implement a survey: an **email address** and **unique employee ID** for each employee. Below, we outline the demographic data you can provide in addition to the minimum data requirements noted (email and unique employee ID).

Survey Demographic Information

The following are optional demographic filters you may provide employee data. For the three demographic filters below, we have pre-set demographic options that will be used. Please assign each employee in your data file to one of the pre-set data values for the following demographics (if you wish to include them in your file).

- **Age Range**
  - 18-24
  - 25-34
  - 35-44
  - 45-54
  - 55-64
  - 65+
  - Other/Unknown
- **Gender**
  - Female
  - Male
  - Other/Unknown
  - Prefer not to disclose
- **Race/Ethnicity**
  - White
  - Black
  - Asian/Native Hawaiian/Other Pacific Islander
  - Native American/American Indian
  - Latino
  - Two or More Races
  - Other/Unknown
- **People Manager**
  - Individual Contributor - Hourly
  - Individual Contributor - Salary
  - People Manager - Hourly
  - People Manager - Salaried

Custom Demographics

You may provide ***one*** additional custom demographic, such as:

- **Department**
- **Division**
- **Executive Team Member Assignment**
- **Functions**

Any of these additional fields can be used to filter your survey data, if they are included in your employee data file and populated for all employees.

Please include the minimum required fields (email and unique employee ID), age range, race/ethnicity, gender, and People Manager. You may also include a single custom demographic.

Submission Process

Each time you implement a survey with Talmetrix, we will request you to send us a data file with information for each employee that you want to invite to take the survey. By "data file," we mean a **spreadsheet** (Excel XLS, XLSX, or CSV format), via Egnyte, a secure file transfer site. **Do not send employee data via email.** You will be sent a link to Egnyte prior to survey implementation where you will upload your data file. If you need a new Egnyte link at any time during your engagement with Talmetrix, please email support@talmetrix.com.

Talmetrix will not modify employee data that is unique to your organization (i.e., custom demographic data). We will only edit data fields that have pre-set data values (e.g., age range, gender, race, or People Manager). Therefore, it is important to review your data for accuracy and consistency before sending it to us. We will also thoroughly review the data after we receive it and let you know if any corrections are needed.

Exceptions Reporting

After review of your data file, you will receive an email from Talmetrix containing an exceptions report. This report will contain any discrepancies in your data file upload, if any. The most common discrepancies are duplicate emails, employee IDs, and inconsistencies in data value formatting.

Additionally, this report will contain demographic counts by filter category, highlighting any group(s) that may not meet your organization's anonymity threshold. Do not be alarmed; this section is not noting an error in your file, but rather notifying you that survey responses for a particular group may not be reported if they do not meet the anonymity threshold.

IT Whitelisting

Talmetrix sends survey invitations via email directly to your employees; you'll want to make sure they can receive them by whitelisting our domains. To do this, please follow the instructions below. We recommend sending these instructions to your IT team or contact – they'll know what to do.

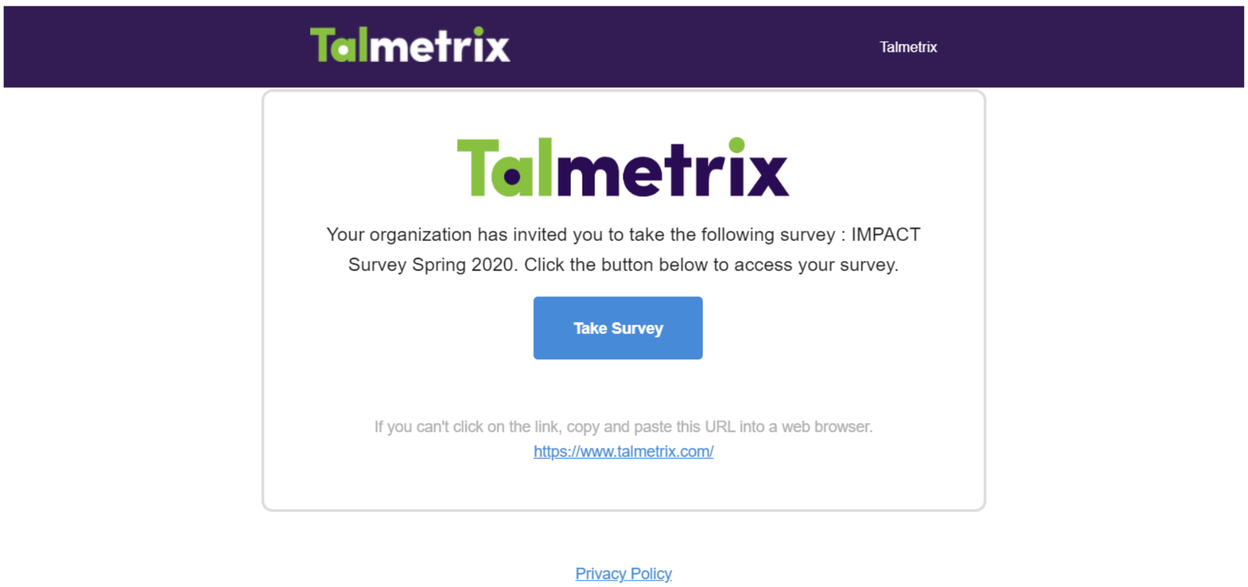
1. Allow emails from help@talmetrix.com, support@talmetrix.com, surveys@talmetrix.com, noreply@talmetrix.com, and info@talmetrix.com
2. Allow unrestricted mail from mail.talmetrix.com, appmail.talmetrix.com, and talmetrix.com
3. If you use IP address-based whitelisting, the address to whitelist is 168.245.17.200

Email spam-prevention software often requires some period of time to take effect. Please check with your IT department to ensure the minimum amount of time is observed prior to the launch of your survey.

Survey Launch

Survey Invitation and Reminders

When survey invitations are sent, they will look like this:

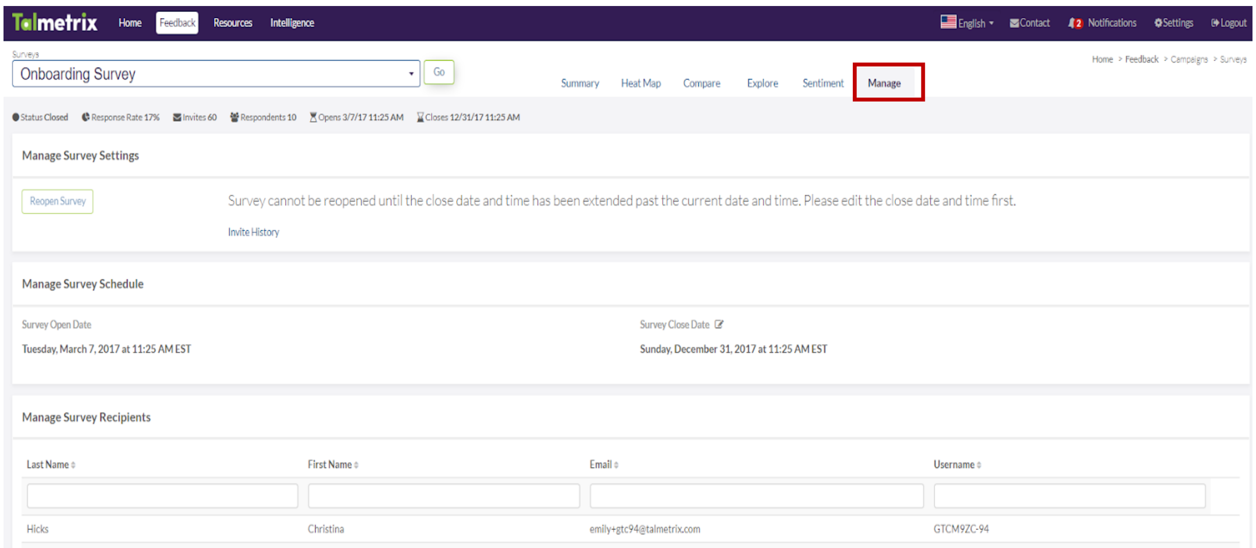


The invitation email **cannot** be customized, including the Talmetrix header image and the text of the buttons.

After the initial launch of your survey, you may want to send reminders to encourage survey participation. We recommend sending three reminders spread out across the time that your survey is open (see Communications Best Practices guide for reminder cadence recommendations). You will have the ability to send out these reminders to employees who have not completed the survey. This can be done via the **Manage tab** in the online dashboard.

The **Manage tab** allows you to do the following for the selected survey:

- Close the survey or change scheduled close date/time (we recommend notifying us if you're planning on extending your survey)
- Resend invites to all employees who have not yet taken the survey
- Resend invite to a single user



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FAQs

Survey Administration

- **Who is eligible to participate in the survey?**
  - We will invite everyone that was included in the data file you uploaded to participate in the survey.
- **How do I access the survey?**
  - Every employee included in the data file will receive a survey email invitation from Talmetrix. The email will include a unique link to the survey. To access the survey, click on the link in the invitation. You will need to create a unique password to access the survey dashboard. *Importantly, to maintain confidentiality of responses, you should never forward the survey link to others.* If an employee cannot find the email invitation, please advise them to contact support@talmetrix.com or the survey administrator at your organization.
  - Your login credentials will be used to log back into the Talmetrix dashboard at any time. If you have trouble accessing the survey, please email support@talmetrix.com.
- **Is there a supported browser I'm supposed to use?**
  - The Talmetrix platform supports all of the commonly used web browsers, such as Google Chrome, Internet Explorer, Microsoft Edge, and Mozilla Firefox.
- **Is there a 'not applicable' option?**
  - No. The questions presented in this survey are general enough that they should apply to anyone invited to take it. If you still feel that a question is not applicable to you or your role, simply select the answer that best applies.
- **Do I need to answer every question?**
  - All scaled questions are required, but the open-ended questions are optional.
- **Can I add comments?**
  - There will be open-ended questions designed to obtain your feedback in the form of a comment.
- **Can I complete the survey on a smartphone or tablet?**
  - Absolutely. We support most modern desktop, laptop, tablet, and mobile devices. If you're on a mobile device, we support Android version 2.3 or higher and iOS (iPhone or iPad) version 2 or higher.

- **Can I save my survey and complete it later?**
    - Yes. In the event that you need to stop and complete your survey later, click the "Finish Later" button or proceed to the next page, and your responses will be saved. Just log back in with the username and password you have chosen and you can continue when you are ready.
    - If you exit the survey while on an open-ended question where you have typed your comment response, the platform will not save your comment unless you click the "next" or "submit" button.

- **Can I change my answers?**

    - You can go back and change your answers any time *before* submitting the survey. It is Talmetrix's best practice to not reopen a survey once it has been submitted because we aim to capture genuine, in-the-moment feedback from employees.
- **How long will the survey take to complete?**
    - The survey will take approximately 5 - 10 minutes to complete.
- **How long will I have to complete the survey?**
    - The survey will be open depending on the time frame you set. We usually recommend two weeks, but we can extend or shorten the survey depending on your direction. Please try to complete the survey as soon as possible.
- **What language will the survey be in?**
    - The survey will be offered in English and Spanish.
- **How many times can I take the survey?**
    - You may only take a survey once.
- **Are employees required to participate in the survey?**
    - No. Participation in any survey is completely voluntary. However, without your feedback, you are not taking advantage of the opportunity to provide input that can improve your work environment.
    - We encourage everyone to participate so that their feedback can help guide the future work experience for all employees. This survey is your opportunity to convey your feedback and have your voice heard. Your engagement in this process is one of the best mechanisms for enabling real change to occur.

Technology Support

- **What if I have technical difficulties with the survey?**
    - If you experience technical difficulties, please contact support@talmetrix.com.
- **I can't log in and resetting my password doesn't work.**
    - If you're seeing the message "Contact your administrator for assistance" after trying to log in or reset your password, your account may have been locked due to too many incorrect password attempts. Just send us a message via the help form and we'll unlock your account; then, you can reset your password again and log in.
- **I never received a password reset email.**
    - First, check your spam folder to make sure the email isn't there. Then, check the email address you put into the password reset form - it must match the one we have on file for your account. If you're not sure which email address to use, check your survey invitation email, or ask your survey administrator to confirm the email address we have on file for you. You can also contact us for assistance.