

# EMPLOYEE EXPERIENCE

## ONBOARDING GUIDE

**For questions, contact:**

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## IT requirements

Macorva surveys use responsive HTML5 webpages to collect survey information and to display results. Macorva is compatible with nearly every modern browser on computers, tablets, and smartphones. However, it is **not compatible with Internet Explorer**. If a significant portion of your workforce uses Internet Explorer and cannot be upgraded, we recommend sending employees SMS messages so that they can fill out the survey on their phones.

Emails will be sent from [system@macorva.com](mailto:system@macorva.com), and links to our interface will always point to [company.macorva.com](http://company.macorva.com). These should be whitelisted in your company's spam and traffic filters.

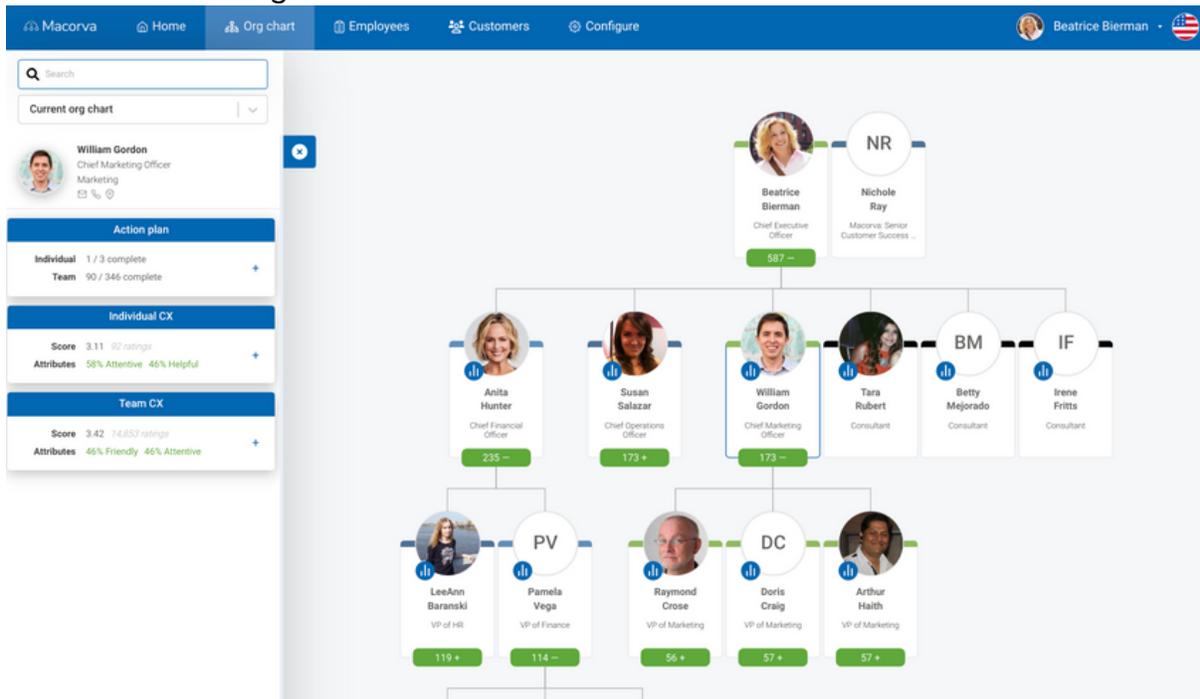
If you are an Enterprise client, please contact us to integrate with your HRIS (SuccessFactors, ADP, Workday, etc.).

## Entering employees in the People editor

You can choose to use the People editor to add all employees, or you can optionally download your company's CSV, edit it with Microsoft Excel / Google Sheets, then upload it to Macorva. This can be a faster way to input employee information that already exists in a spreadsheet format.

To download the Org Chart template, go to Configure > People > Bulk download/upload. From here click "Download org chart"

These files create the org chart shown below:



## Employee CSV file

This is a single file that describes each employee, who they report to, where they are located, etc. It can be created in Microsoft Excel or Google Sheets, then exported as a CSV file. Additionally, many payroll and personnel management systems will export this data as a CSV. CSVs exported from other sources may need to be edited in Excel or Google Sheets to fit Macorva's format.

**When making updates to the org chart, users should export the existing org chart and use this to make any edits. This will ensure the correct format.**

The columns that should be included in the CSV are:

Column title	Description	Examples
id	The unique ID of the individual. <b>Display:</b> None. <b>Backend:</b> Used to assign managers and track employees who have left. This may match the email address of the employee, or it may be different (as employee email addresses may change, but IDs will not).	0001 John.smith john.smith.003 fxd6718
work_email	Work email of employee. <b>Display:</b> Org chart / employee info. <b>Backend:</b> Used to send all Macorva communication (such as login information, survey kickoff, etc.).	john.smith@company.com
personal_mobile	The employee's personal mobile number <b>Display:</b> Org char/ employee info <b>Backend:</b> Used to send messages for survey notifications and login links.	512-555-1234 (512) 555-1234
first_name	Employee's first name <b>Display:</b> Org chart / employee info. <b>Backend:</b> None.	John

last_name	<p>Employee's last name</p> <p><b>Display:</b> Org chart / employee info.</p> <p><b>Backend:</b> None.</p>	Smith
department	<p>Department employee works for.</p> <p><b>Display:</b> Org chart / employee info.</p> <p><b>Backend:</b> Used to generate department reports, and used to determine Inside and Outside department for ABIO scores.</p> <p>Notes: For best results, each department should have at least 20 people and each company should have no more than 30 departments.</p>	<p>Finance</p> <p>Accounting</p> <p>Sales</p> <p>Marketing</p>
position	<p>The position (or title) of each person.</p> <p><b>Display:</b> Org chart / employee info.</p> <p><b>Backend:</b> None</p>	<p>VP North American Sales</p> <p>CFO</p> <p>Market Analyst II</p>
direct_manager	<p>The ID of the employee this person reports to.</p> <p><b>Display:</b> Used to build org chart.</p> <p><b>Backend:</b> Used to determine what coworkers are Above and Below each other in ABIO score calculations and recommend coworkers to review.</p> <p><b>Notes:</b> Every row in this column should be found in the "id" column as well. The single person at the top of the org chart must report to himself. Determines manager access for employee results from engagement surveys</p>	<p>0001</p> <p>John.smith</p> <p>fxd6718</p>

location	The location the employee works. <b>Display:</b> Org chart / employee info. This can be as specific or general as you would like. <b>Backend:</b> None.	NYC-101A New York City, NY Office 101-A, Desk 3 USA
work_phone	The employee's work phone number. <b>Display:</b> Org chart / employee info. <b>Backend:</b> None.	512-555-1234 (512) 555-1234 4-1544, ext 21
personal_email	Employee's personal email. <b>Display:</b> Employee info <b>Backend:</b> Used to send emails for survey notifications and login links.	first.last@company.com first.last@gmail.com name@outlook.com
work_mobile	The employee's work mobile number <b>Display:</b> Org char/ employee info <b>Backend:</b> Used to send messages for survey notifications and login links.	512-555-1234 (512) 555-1234 +1 512-555-1234
first_day_of_work	The employee's first day of work <b>Display:</b> Employee info <b>Backend:</b> Used to send employee lifecycle surveys	YYYY-MM-DD 2021-08-29
deactivation_date	The employees last day of work or termination date <b>Display:</b> Employee info <b>Backend:</b> Used to send employee lifecycle surveys	YYYY-MM-DD 2021-08-29
reason_for_deactivation	Reason for deactivation; retired, quit, etc <b>Display:</b> None currently, will be available for future use	

date_of_birth	The employee's date of birth <b>Display:</b> Employee info <b>Backend:</b> Used to segment survey results by age	YYYY-MM-DD 1960-10-12 1985-11-19
ethnicity	The employee's ethnicity <b>Display:</b> Employee info <b>Backend:</b> Used to segment survey results	HI- Hispanic or Latino NA- American Indian or Alaska Native AS- Asian BL-Black or African American MU- Two or more races UN- Undisclosed PA- Native Hawaiian or Other Pacific Islander WH-White
gender	The employee's gender <b>Display:</b> Employee info <b>Backend:</b> Used to segment survey results	NB- Non binary ND- not disclosed FE- female MA-male
hrs_display_id	This field is used for HRIS ID codes.	
company_code	This field is used for ADP company codes	
active	Delineates if the employee is active or not <b>Display:</b> None <b>Backend:</b> Identifies who surveys are sent to vs. not	T= Active F= Inactive

## Employee image files (optional)

Macorva also displays employee photos in the org chart. If an employee does not have a photo, their initials will be displayed instead. You can use the People editor to add images one at a time, or you can place a large number of images in a Zip file and use the Bulk upload tool. For zip files, images must:

- Be named “id.jpg” or “id.png”, where “id” is the employee ID from the CSV file. For example:
  - 0001.jpg
  - john.smith.png
  - fxd6718.jpg
- Have a resolution of at least 128x128 (250x250 or higher recommended)
  - Macorva uses square images. If the image is not square, the central portion of the image will be displayed.

## Org chart review and approval

After the CSV and pictures have been uploaded, you can view the resulting org chart. You should make sure managers are assigned correctly, employees are in the correct departments, and contact information is accurate. Remember that managers will be able to see the scores of all employees reporting to them.

## Employee messaging before the survey

### Survey announcement

Companies frequently will announce the survey at an all-hands meeting. This announcement typically includes topics such as:

- Why the survey is being performed
  - A single manager is usually not enough to assess performance in modern work environments. Employees now work from home, travel, collaborate across departments, go to multiple locations, etc. This makes it impossible for one person to have the full set of information needed to evaluate performance.
  - Asking everyone to contribute feedback in a formal, anonymous process allows everyone’s voice to be heard in a structured manner.
  - The company is investing resources to ensure employees are happy at work, have the tools they need, and feel like they are contributing to success.
  - Receiving unfiltered feedback on operations is critical to decide where to invest resources that will result in the highest improvement.

- Overview videos
  - This video shows the entire process: <http://video.macorva.com/>
  - This video is a software demo for managers: <http://demo-video.macorva.com/>
- What the survey will ask
  - There will be general questions about your experiences with the company as a whole (how happy you are, if you have the right tools to do your job, etc.).
  - You will also have the chance to rate your experiences with individual coworkers. In addition to being able to give an overall 1-5 score, you can select positive and negative attributes.
- How anonymity is ensured
  - Macorva will perform all data collection and generate summary reports. Macorva never shares raw data with employers.
  - Individual answers are never displayed. They are only used to generate summary results.
- What the results look like
  - If more than 5 coworkers share their experiences with you, you will receive a 1-10 average rating. If you have common attributes, those will be displayed as well.
  - These are trended over time, so you can see changes in teamwork.
- Who can view the results
  - You can see your results, as well as the results of anyone who reports to you.
  - Your manager can see our results, but not your peers or subordinates.
- What will be done after the survey
  - The initial survey is simply a starting place for a long-term performance plan, and will not be used for any disciplinary actions.
  - It identifies outstanding employees, generates quantitative teamwork results, and gives guidance for performance goals and 1:1s with your manager.

## Materials to distribute

An email containing the above information can be sent to all employees, so that they can review the information at their own pace and ask management any questions before the survey begins.

## Employees participate in the survey

### Initial email

When the survey begins, Macorva sends an email to all employees that briefly explains the process. It also includes a magic link that users click to automatically and securely log them into their survey.

### Reminder emails

Every few days during the 2 week survey period, employees will get a reminder email to log in and start the survey, or provide additional 360° feedback.

## Viewing progress

Managers can view the percent of their reports that have completed the survey, and identify departments that may need additional encouragement to fully participate.

## Contacting Macorva support

If there are any questions at any time, Macorva can be reached at [support@macorva.com](mailto:support@macorva.com).

## “Admin review period” for senior leaders to review results

After the survey closes, Macorva will tabulate results and allow selected senior leaders to view the results. This is an important management step in order for key takeaways to be understood before results are released to individual employees.

After leadership review, the survey results will be opened to all employees.

## All employees review their results

An email will be sent to every employee that contains a “magic link” to automatically log them into the results dashboard. Employees can continuously view results for themselves and their team. They can also use the org chart display to see the company management structure and coworker contact information.

## Take action and repeat

It is important for management to visibly take action after any survey. With Macorva, individuals can independently take action from their personalized results. Even the mere act of collecting unlimited 360° feedback on a regular basis can change employee behavior.

Discussing overall results, lessons learned, and action plans (such as recognition, mentorships, training programs, 1:1 meetings, etc.) is essential to improve employee engagement. Praising employees for positive change in 360° feedback results will emphasize that management is actively monitoring teamwork, and positively encouraging improvements.

## Understanding engagement results

Responses to survey questions can be found by clicking on individuals in the org chart, and by looking at the Trends and Department tabs under the Reports menu.

### Engagement calculation

Macorva defines an engaged employee as one who a) completes the survey, and b) answers an average of “Agree” to the first five questions (job happiness, opportunities to learn and grow, trust in leadership, compensation, and workplace). This means that your engagement percentage can never be higher than your survey completion percentage. It also means employees have to be happy (on average) with all five of the main drivers of engagement in order to be considered engaged.

The global average of employee engagement is 34%. You may be surprised that your engagement level is lower than you would have guessed. There is no global standard for engagement calculations. We have heard of survey companies reporting 84% engagement when only 56% of employees respond. Macorva is designed to give you a true measure of your current engagement, and arm your management team with accurate information to immediately increase it.

### Results of individual questions

If there are more than 5 responses (or a difference of at least 5 direct reports between levels in an org chart), you will see a single number representing all responses to that question (ie, 76% are happy with their jobs). This number is 0% if everyone responded “Strongly disagree”, 25% for “Disagree”, 50% for “Neutral”, 75% for “Agree”, and 100% for “Strongly agree”. Because most responses are a mix of the above categories, Macorva averages them to report a single number.

If there are more than 25 responses in a department, you will see a histogram of all individual responses. For anonymity, we do not display histograms for many of the data subsets (for example, in the org chart).

### Using the org chart to drill down

For company leaders, it is extremely helpful to start at their direct report level in the org chart, click on an employee, and view their team’s engagement score (along with answers to individual questions). This can help leaders quickly identify which groups have high or low engagement, and use this information to form strategies to improve future results.

## Understanding unlimited 360° feedback results

All 360° feedback is optional. Each of your employees chose to rate experiences with their coworkers. We have found that the average employee voluntarily rates 20+ experiences. We do not restrict to whom employees can submit feedback, but we do segment the data so that management can better understand its implications. Allowing everyone to provide feedback about any coworker is a central theme of Macorva, and it results in employees feeling empowered to have their voices heard. This section will give you guidelines for interpreting individual results. However, the most powerful analysis comes from looking at how individual results compare to peers. Because Macorva empowers employees to use their own judgment when determining ratings, there can be differences in absolute numbers between groups.

### Overall scores

Macorva transforms all 1-5 ratings into a single overall score, on a scale of 1-10. We do not perform a simple average to get these results. We have a complex weighting system to determine the final result. For example, if an employee receives 6 ratings mostly of 5s, they may get a score of 9.4. If they receive 100 ratings mostly of 5s, they may get a 10.0. If they receive 6 ratings mostly of 5s, but those 6 employees all have 10.0 overall scores, their score may be 9.7. These are hypothetical examples, but they demonstrate how weightings can affect results. Macorva weights score calculations using factors such as number of raters, quality of individual raters, use of attributes, position in the org chart, etc.

#### Below 6.5

Employees with <6.5 overall scores are typically viewed poorly by their peers. Most of their ratings are likely 1s. It is recommended that their managers discuss plans to increase teamwork, assuming team interactions are a standard function of their role.

#### 6.5 - 7.0

Scores between 6.5 and 7.0 indicate lower than expected peer ratings, but they are likely mixed with more positive experiences. If teamwork is an integral part of their job function, they should be strongly encouraged and incentivized to improve this result.

#### 7.0 - 8.0

Scores between 7.0 and 8.0 typically indicate mixed results. While improving teamwork should always be a goal, it is less critical for these employees.

#### 8.0 - 9.0

Many employees will have scores between 8.0 and 9.0. They likely have mixed, but overall good, feedback.

## 9.0 - 9.5

Scores between 9.0 and 9.5 indicate employees that have very positive team interactions. They likely received mostly 4 and 5 ratings. They are trusted team members that have a positive effect on their work environments.

## 9.5 - 10.0

Any employee above a 9.5 has shown exceptional teamwork skills. Their managers, and company leadership, should consider privately acknowledging their contributions to the company.

## Number of raters

Every segment (overall, above, below, inside department, outside department) shows the number of raters in that category. If there are less than 5, a score is not produced. While Macorva factors in the number of responses to score calculations, we highly recommend looking at each employee's number of raters in addition to their scores. This shows how broad of an impact they have in your organization.

## Positive and negative attributes

Typically, over 90% of Macorva ratings include at least one consistent attribute. Looking at these attributes can provide valuable insight into employees' numerical scores. Positive attributes selected by at least 20% of raters are displayed, as well as negative attributes selected by at least 30% of raters. In addition to noting what attributes appear for employees, it can be useful to look at the percentages as well. For example, if most of the Manufacturing team has 80%-90% "Knowledgeable," but one person is 30% "Knowledgeable," it may provide insight as to why that person's score is slightly lower than peers. This is still a positive result, but it shows that there can be a spectrum that spans 90% "Knowledgeable," 30% "Knowledgeable," no attributes, 30% "Lacks expertise," to 80% "Lacks expertise."

## Segmented Results

Employees will be able to receive a personalized report of feedback from all coworkers including managers and reports. In addition to overall feedback scores, segmented scores reflect an employee's esteem with different groups in the organization.

## Standout employees

Macorva automatically analyzes scores for all employees and displays a list of Standout employees. Each category is described in the interface. Leadership should pay particular attention to these employees, as they have the most influence (good and bad) on company culture.

## What does this mean for my company?

A Macorva survey gives you an unprecedented look at your company. You now understand how your employees feel about company-wide issues, how well they work as a team, and how your management structure is viewed by all employees. You have confirmed your personal views on how several individuals are perceived by their teams, and you have probably learned of at least a couple Silent Superstars that are highly respected by their peers.

It can be interesting to view the Overall Score of each employee as the impact they have on the company, and conversely, the impact they would have if they left the company. If five employees with the lowest overall scores left to pursue other career paths, it likely would not have a large negative impact on morale. If five employees with the highest overall scores quit, you may be in need of damage control to ensure the remaining employees feel confident about the company's management team and future prospects.

Just by taking the survey, employees will feel like their voice has been heard, even on very sensitive interpersonal issues. Most employees will naturally want to strive for higher scores, higher percentages of positive attributes, and lower percentages of negative attributes. Managers are immediately armed with subject material to discuss in 1:1s, and employees know that management is viewing their performance from a holistic perspective. Even without company-wide action from leadership, surfacing this data leads to better employee/manager relationships and higher engagement.