## Reporting Site Communications Form

Please use this form to enter all survey text content for the reporting site, including user invite and action plan reminder.

Examples of best practice communications can be found in the Appendix.

Thank you for allowing Perceptyx to be your partner in this important process.

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## Reporting Site Communications

### User Invite

Senders Email

Reply-to Email

Email Subject Line

Email Body

###

### Action Planning Reminder Email

Senders Email

Reply-to Email

Email Subject Line

## Appendix

### User Invite Example #1

Senders Email

customersupport@perceptyx.com

Reply-to Email

customersupport@perceptyx.com

Email Subject Line

Perceptyx Reporting Login Information

Email Body

$first\_name,

An account has been setup for you to view the survey results. Below is the information you'll need to login:

URL: $url
Username: $username
Temporary Password: $temp\_password

Please let us know if you have any questions.

Regards,

Perceptyx, Inc.

### User Invite Example #2

Senders Email

customersupport@perceptyx.com

Reply-to Email

customersupport@perceptyx.com

Email Subject Line

Perceptyx Reporting Login Information

Email Body

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| --- | --- | --- |
| A close up of a logo  Description automatically generated

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| --- |
| Cambodian, Deutsch, Español (España), Français, Italiano, Magyar, Norwegian, Polski, Português, Română, Tiếng Việt, Türkçe, Українська, 中文(简体), 日本語, 한국어, ไทย$first\_name,Your [Company] Employee Engagement Survey Report is now available for you to review. An account has been setup for you to view your **survey results** and **action planning toolkit**. Below is the information you'll need to log in:Perceptyx Dashboard When you log in, **you will see your team’s results** as part of the dashboard. Below are the next steps so you can follow up on the survey results: 1. Log in to the Perceptyx Dashboard. You should be logged in automatically. If you are a manager who received a link and cannot access it, please contact customersupport@perceptyx.com.
2. Familiarize yourself with the information and reports available to you – use the Manager Dashboard Job Aid for an overview of key features.
3. Click on “**Step 1: Review your Manager Report.**” View a downloadable pdf that you can share directly with your teams to discuss their aggregated feedback.
4. Share the report with your teams. Acknowledge and thank employees for the provided feedback. Ask for suggestions for which *Drivers of Engagement*to focus on and specific actions to take.
5. Go back to your Dashboard, click on “Step 2: Take action using Action Planning Toolkit.” Use this tool to identify ONE area of focus, TWO action steps you will take, and THREE dates to hold yourself accountable.
6. Meet with your team. Discuss action plans, who is accountable, and progress made on the action items.

 NOTE: If you are a manager of managers and would like to view your personal team’s results or the  results of a specific manager, follow these steps:* Click on Filter Data on the left-hand navigation
* Select New Filter
* Go to select Demographic drop-down and select Manager Name
* Click on the manager you would like to see – including your own
* Whichever filter you choose will be shown at the bottom ribbon of the screen

To learn more, visit the Employee Engagement and Engage My Team pages on MyHR, review the FAQs, or reference the Manager Dashboard Job Aid.If you have a technical issue, contact customersupport@perceptyx.com or post a question on the Employee Engagement Group on Yammer.   |
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### User Invite Example #3

Senders Email

customersupport@perceptyx.com

Reply-to Email

customersupport@perceptyx.com

Email Subject Line

Perceptyx Reporting Login Information

Email Body

The ***FICTCO VOICE Engagement Results*** are now available!  Below is a link for you to view the results in the reporting tool.  Please reach out to your HR Partner for any support you may need to fully understand and digest your results.

Please note that the ***Field Sales results*** continue to be exceptionally stronger than the remaining teams and are ***significantly boosting the results of many divisions.*** For those of you with large field teams, it is important to also review your results by filtering this group out of your data to have a more nuanced view of your data.

Below is the information you'll need to login:

                URL: https://www.perceptyx.com/appid

                Username: ckolze

                Temporary Password: dds-cwd-cnu-uuf

Please reach out to [LEAD CONTACT] on the ENGAGEMENT Team if you have any questions.

### User Invite Example #3

Senders Email

customersupport@perceptyx.com

Reply-to Email

customersupport@perceptyx.com

Email Subject Line

Perceptyx Reporting Login Information

Email Body

Thank you for your participation on the Reporting tool training. The overview of the system functionalities will prepare you to support your clients with their reports. We have provided you with log in information below which gives you access to companywide results in addition to:

* **An online reporting tool**
* **A presentation deck** **(“My Presentation Slides”)**

To access your results:

**URL: https://www.perceptyx.com/appid
Username: ckolze
Temporary Password: zdt-ken-pad-ohh**

Once you log in, you will be instructed to set a new password.

***We will inform HRBPs when all reports have been released according to the cascading schedule.***

**Please DO NOT share results until Managers at all levels have received their reports.**

**SHADOWING OTHER USERS**   As you field questions from the business, you can see the results of any manager by “shadowing” their results. To do this:

* Log into the reporting tool
* On the left side navigation bar, select “Functions”.
* From the drop down, select “Shadow User”.
* You will be able to search to find any manager’s name. Once you find the manager whom you wish to shadow, click on the “Shadow” button on the left.
* To end the “shadow session”: “Click here to end shadow session and return to my own account” (located in yellow at the top of the screen).

For questions, please contact Talent and Organizational Development: [Company Contact].

### Standard Action Planning Reminder Email

Senders Email

customersupport@perceptyx.com

Reply-to Email

customersupport@perceptyx.com

Email Subject Line

Perceptyx Action Plan Reminder

Email Body

[ Action Plan Owner First Name ],

After the most recent survey, you built an action plan on behalf of survey question: [ Action Plan Issue ].

You identified follow up dates in your action plan and committed to doing the following things:

[ Action Plan Commitment 1 ]

[ Action Plan Commitment 2 ]

One of the dates you selected is quickly approaching, [ Action Plan Discussion Date ]. This email is a simple reminder to continue your work on your survey action plan, update your team and follow through on those action items.