

ClearlyRated®

Getting Started Package



CLEARLYRATED

Preparing Your Contact List for the Survey

Included in this Getting Started Packet is a blank contact list (CSV file) along with instructions on how to properly fill out each column in order for it to upload smoothly into our system (PDF document titled “Contact List Template”). The PDF tells you which information belongs in each column and includes three examples. The CSV is the blank template you’ll use to populate your contact list.

ACCESSING YOUR FEEDBACK

You will receive information regarding your ClearlyRated dashboard login. If you already have a login to ClearlyRated dashboard but forgot your password you can reset it by clicking the “[I forgot my password!](#)” button on the [ClearlyRated login page](#).

ASSEMBLING YOUR SURVEY CONTACT LIST

Create a survey contact list with your clients’ contact information and data segmentation (if applicable to your package), and upload to the ClearlyRated dashboard.

Don’t Forget!

Important Action Items

- Log into your dashboard to view your key survey dates. Use [this guide](#) to navigate you to your survey schedule
- COMPILE YOUR CONTACT LIST AND UPLOAD TO THE CLEARLYRATED DASHBOARD USING THIS [CHECKLIST](#)

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Initial Email Invitation

From: [Your Brand Name]
Subject: [Your Brand Name] - [#] Question Survey

Dear [survey recipient's first name],

Your opinion is important to us. Please help us improve by completing a quick, [#] question survey on your recent experiences with [Your Brand Name].

How likely are you to recommend this organization to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10 Don't Know

(0 - Not at all likely and 10 - Extremely likely)

(Please note: If you have problems loading the survey, you may also copy the entire link into your web browser.)

By taking time to share a few thoughts with us on your experience, you are helping us discover ways to improve the service we provide you.

Thank you in advance for your time.

Sincerely,

[Email_Signature_Name]
[Email_Signature_Title]

This survey was sent to you by ClearlyRated on behalf of [Your Brand Name]. If you have any questions or problems with the survey, please contact ClearlyRated at 800-921-2640, or by email at survey@clearlyrated.com

Please read our Privacy Policy. To unsubscribe from all future surveys conducted by ClearlyRated, please click here: [\[unsubscribe link\]](#)

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9-Question Client Survey

This is the survey that will be sent to your clients.

SURVEY QUESTIONS

How likely are you to recommend this organization to a friend or colleague?
(Scaled 0 - 10 answer option)

What is the primary reason behind the rating you provided?
(Open-ended text answer option)

How familiar are you with our organization's mission?

- Extremely familiar
- Somewhat familiar
- Not so familiar
- Not at all familiar

The staff at [Brand] are helpful.

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

[Brand]_____ has a thorough understanding of my needs.

- Always
- Sometimes
- Never
- N/A

[Brand] is _____ proactive in their approach to helping me.

- Always
- Sometimes
- Never
- N/A

How easy was it to enroll in our services?

- Extremely easy
- Somewhat easy
- Somewhat difficult
- Very difficult

Why did you choose to partner with our organization?

(Open-ended text answer option)

What could we be doing differently to increase the value of our services to you?

(Open-ended text answer option)



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11-Question Donor Survey

SURVEY QUESTIONS

How likely are you to recommend this organization to a friend or colleague? (Scaled 0 - 10 answer option)

What is the primary reason behind the rating you provided? (Open-ended text answer option)

How familiar are you with our organization's mission?

- Extremely familiar
- Somewhat familiar
- Not so familiar
- Not at all familiar

The staff at [Brand] are helpful.

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

I receive an appropriate number of donation requests from [brand] throughout the year.

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

The donation program is exactly the same as it was described to me when I signed up.

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

I am completely satisfied with the way my donation is processed by [brand].

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

How often do you want to hear from [brand]?

- Once a week
- A few times a month
- Once a month
- A few times a year
- Less frequently than that

How do you prefer hearing about [brand] event and services? Select all that apply

- Email
- Phone
- Mail
- Social Media
- Website
- Text Message

Why did you choose to donate to our organization? (Open-ended text answer option)

What could we be doing differently to increase the value of our services to you? (Open-ended text answer option)

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9-Question Volunteer Survey

This is the survey that will be sent to your volunteers.

SURVEY QUESTIONS

How likely are you to recommend this organization to a friend or colleague?
(Scaled 0 - 10 answer option)

What is the primary reason behind the rating you provided?
(Open-ended text answer option)

How familiar are you with our organization's mission?

- Extremely familiar
- Somewhat familiar
- Not so familiar
- Not at all familiar

How much of an impact do you feel your volunteer work had?

- A great deal of impact
- Somewhat of an impact
- A little impact
- No impact at all

The staff at [Brand] are helpful.

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

How likely are you to continue volunteering with [brand] in the future?

- Extremely likely
- Somewhat likely
- Somewhat unlikely
- Very unlikely

How were the volunteer training sessions at [brand]?

- Extremely easy
- Somewhat easy
- Somewhat difficult
- Very difficult

Why did you choose to volunteer with our organization?

(Open-ended text answer option)

What could we be doing differently to improve your volunteer experience with [brand]??

(Open-ended text answer option)



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Important Considerations to Ensure a Successful Survey Program

WHO WILL BE THE SENIOR LEADERSHIP INTERNAL CHAMPION?

We recommend having a senior leader on board with this program who has the authority to make changes based on your survey feedback.

WHO ON YOUR TEAM WILL OWN THE PROGRAM TACTICALLY?

One person internally should be assigned the tactical elements of this survey. Compiling the contact list can be cumbersome. This key person will either a.) generate this list, or b.) work with your IT team to generate the list of contacts that will be surveyed.

HOW SHOULD THE REPORTS AND RESPONSES BE SEGMENTED?

If you are participating at the Plus or Enterprise level and are segmenting your data (i.e. segmenting by Location), how your data will be segmented should be decided prior to generating your contact list, and your segments should be reflected in your contact list as outlined in the spreadsheet template included in this package.

WHO WITHIN YOUR COMPANY WILL SIGN THE SURVEY EMAIL INVITATION?

To achieve a strong response rate, it's important that the email invitation sent to your survey recipients be signed by an employee at your company - particularly one who the recipient is familiar with. This aspect gives the invitation a personalized look and feel.

WHO WILL HAVE ACCESS TO THE CLEARLYRATED DASHBOARD AND WHAT LEVEL OF INFORMATION SHOULD THEY BE ABLE TO SEE?

Prior to your survey launching, you will be asked to decide who on your team will have access to the ClearlyRated dashboard and the amount of information they should be able to view.

Important Considerations to Ensure a Successful Survey Program

WHO WILL FOLLOW THROUGH WITH NON-RESPONDERS TO IMPROVE RESPONSE RATE?

Once your survey has been sent, if you are a Premium, Plus or Enterprise level participant, you will be able to access data about who hasn't taken your survey. This information will be available in real-time in the ClearlyRated dashboard under Reports on the upper right side of your screen. Click [this link](#) for a sample script to help guide your team members while reaching out to non-responders.

WHO ON YOUR TEAM WILL RESPOND TO DETRACTORS AND MANAGE ISSUE RESOLUTIONS?

An NPS rating of 6 or lower is a detractor. If you are a Premium, Plus, or Enterprise level participant, prior to the survey launching, you will want to decide who is responsible for responding to detractors. [Click this link](#) for a white paper titled 'Handling Detractors', this will guide you through best practices when responding to your survey recipients. Additionally within the ClearlyRated dashboard, that same team will also manage those detractors issues within the My Issues section of the ClearlyRated dashboard.

HOW WILL POSITIVE FEEDBACK BE CELEBRATED IN YOUR COMPANY?

It's exciting when you receive high scores and positive comments. It's a great idea to consider celebrating with your employees who are recognized for providing an exceptional experience! If you are a Premium, or Enterprise level participant, you will receive Shout Out emails where promoters have identified an individual within your organization that has gone above and beyond.

HOW WILL FEEDBACK BE EVALUATED AND CHANGES IMPLEMENTED WITHIN YOUR COMPANY?

Identify the project team who will be evaluating the feedback and prioritizing next steps to implement any changes within your company. The project team should include a senior leader who has authority to drive change.

HOW AND WHEN WILL YOUR SURVEY RESULTS BE COMMUNICATED EXTERNALLY AND INTERNALLY?

We recommend having a plan in place, prior to the survey launching, for communicating your results. In order for your program to succeed long-term, everyone involved should understand what you are doing with the feedback they have provided.

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Employee Satisfaction Survey

Are your employees engaged?

Do they love working at your company?

An employee survey measures the satisfaction, engagement, loyalty, pride and excitement of your staff. It also provides insight into thoughts, perceptions and struggles that will enable you to grow your bottom line.

Our Solution: Employee Satisfaction Survey

Measure the satisfaction of your employees through a short and simple 20 question online survey, where responses are anonymous and segmented according to the structure of your company.

Preparing Your Employee Contact List

INCLUDED WITH THIS GETTING STARTED PACKET:

- Helpful resources and tips to ensure a successful survey program.
- Blank contact list (CSV file) template you will use to populate your contact list.
- Contact List Template Tutorial (pdf file) contains instructions on how to properly fill out each column in order for it to upload smoothly into our system. This tells you which information belongs in each column and includes three examples.

ACCESSING YOUR FEEDBACK

You will receive information regarding your Dashboard login. If you already have a login to the Dashboard but forgot your password you can reset it by clicking the [“I forgot my password!”](#) button on the [Dashboard login page](#).

ASSEMBLING YOUR SURVEY CONTACT LIST

Create a survey contact list with your survey recipients' contact information and data segmentation (if applicable to your package), and upload to the Dashboard.

Don't Forget!

Important Action Items

- LOG IN TO DASHBOARD TO VIEW YOUR KEY SURVEY DATES. USE [THIS GUIDE](#) TO NAVIGATE YOU TO YOUR SURVEY SCHEDULE.
- COMPILE YOUR SURVEY CONTACT LIST AND UPLOAD TO THE CLEARLYRATED DASHBOARD USING THIS [CHECKLIST](#)
- [ADD CLEARLYRATED TO YOUR ALLOWLIST](#) (involve your IT Department)

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Give ClearlyRated Permission to Deliver the Survey Invitation to Your Employees

To help ensure that the employee survey invites arrive in your employees' inboxes, please share the below data with your IT team. These settings will allow our emails to be delivered to their inbox instead of spam.

Domain: mail1.clearlyrated.com ***Double check, this one is easily missed!**

IP: 166.78.69.175

From: survey@clearlyrated.com

Return-Path: we implement VERP, so the left side of the address will be unique for each recipient, but the domain side is mail1.clearlyrated.com

Share [these instructions with your IT team](#).

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Sample Email Invitation

FROM: ClearlyRated
SUBJECT: [brand] – Short Survey

Hi [fname],

I am excited to offer you an opportunity to share your thoughts and ideas about [brand] by completing an **xx-question** employee survey. Your feedback will help [brand] understand the perceptions and needs of employees throughout the entire organization.

Please click the link below to begin the survey:
[link]

We want to assure you that your survey feedback is anonymous and no employee of [brand] will see your response in connection with your name. It is important to note that we do use unique survey links for each survey taker to ensure we only hear from each employee once and to avoid gaming that can happen when a single shared link is used, but no employee of [brand] is able to access the information necessary to correlate your unique link to your survey response. Only ClearlyRated employees who are tasked with fielding this anonymous survey can access that information and they are strictly prohibited from sharing that information with an employee of [brand].

This survey includes optional demographic questions that will be used for reporting purposes only. Your answers to these demographic questions will never be directly connected to your individual survey answers and feedback. Reporting on this important information overall will help improve diversity, equity, and inclusion across the company and industry. Please feel free to skip any questions you are uncomfortable answering.

Please reply to this email if you have any questions regarding the survey.

Thank you in advance for your help with this important survey.

Sincerely,

Eric Gregg
CEO and Founder
ClearlyRated

This survey was sent to you by ClearlyRated on behalf of [Brand]. If you have any questions or problems with the survey, please contact ClearlyRated at 800-921-2640, or by email at survey@clearlyrated.com. Read our Privacy Policy.

ClearlyRated, 522 SW 5th Ave. Suite 600 | Portland, OR 97204

Employee Survey Questions (page 1 of 3)

This is the survey that will be sent to your employees. The survey includes the Net Promoter® Score (NPS) question, 12 questions to help you understand what is driving your employee satisfaction rating (driver questions), and 7 demographic questions that ClearlyRated will use for reporting to help improve diversity, equity, and inclusion across the company and industry.

SURVEY QUESTIONS

1. If asked, how likely would you be to recommend [brand] as a good place to work to a friend or family member?
(Scaled 0 - 10 answer option)
2. What is the primary reason behind the rating that you provided? **[Open-Ended]**
3. I am optimistic about what the next year has in store for me working at [brand]. **[Yes/No & Don't Know]**
4. I **[always/sometimes/never & Don't Know]** enjoy working with my colleagues at [brand].
5. My compensation package (salary, bonuses and benefits) is fair compared to people who do similar work at other companies. **[Yes/No & Don't Know]**
6. I **[always/sometimes/never & Don't Know]** receive recognition when I do my job well.
7. There are opportunities for advancement for me within [brand]. **[Yes/No & Don't Know]**
8. I **[always/sometimes/never & Don't Know]** receive feedback in a timely manner from my immediate manager on my performance.
9. : I am **[always/sometimes/never & Don't Know]** proud to work for [brand].
10. : I **[always/sometimes/never & Don't Know]** feel like I belong at [brand].
11. : The best people **[always/sometimes/never & Don't Know]** get promoted, regardless of gender, race, ethnicity, age, sexual orientation or identity, education or disability.
12. : Management **[always/sometimes/never & Don't Know]** shows that diversity is important through its actions.
13. What can [brand] do to improve your experience as an employee? **[Open-Ended]**

Employee Survey Questions (page 2 of 3)

The following questions will not require a response from your employees. They are optional and will be used for reporting purposes only. If you have purchased an employee survey with data segmentation, you will receive the DEI Benchmarking report for your company overall.

DEMOGRAPHIC SURVEY QUESTIONS

This survey includes demographic questions that are optional for your employee to answer and will be used for reporting purposes only. The answers to these demographic questions will never be directly connected to the individual survey answers and feedback. Reporting on this important information overall will help improve diversity, equity, and inclusion across the company and industry. Please feel free to skip any questions you are uncomfortable answering.

***1. Gender: What is your gender identity? Please mark all that apply. [Multiselect]**

- a. Male
- b. Female
- c. Non-binary or gender non-conforming
- d. Other

***2. Race or Ethnicity: What is your race or ethnicity? Please mark all that apply [Multiselect]**

- a. American Indian or Alaska Native
- b. Asian
- c. Black or African American (Non-Hispanic)
- d. Hispanic or Latin
- e. Native Hawaiian or Other Pacific Islander
- f. Two or more races
- g. White (Non-Hispanic)
- h. Other (not listed)

***3. Identity: Do you identify in any of the following ways? Please mark all that apply. [Multiselect]**

- a. LGBTQIA+ and/or sexual orientation minority
- b. Trans (gender identity/expression does not match sex assigned at birth)
- c. Single parent or guardian family
- d. Parent or guardian with a dependent living in the home
- e. Armed Service Veteran
- f. Physically disabled
- g. Disabled in another way (intellectual, sensory, mental illness)
- h. Have been convicted of or pled guilty to charges other than minor traffic violations
- i. Other underrepresented group
- j. I do not identify as any of these groups

***4. Age: What is your age? [Select]**

- a. 25 years old or younger
- b. 26 to 40 years old
- c. 41 to 55 years old
- d. 56 to 74 years old
- e. 75 years old or older

*The answers to these questions will not be displayed in your ClearlyRated dashboard. ClearlyRated will report on this important information for your company overall in the DEI benchmarking report. This report is available to packages with data segmentation.

Employee Survey Questions (page 3 of 3)

DEMOGRAPHIC SURVEY QUESTIONS (Continued)

***5. Which of the following best describes your current job within your firm?**

(Note: this question has different answer options based on industry)

- a. Executive (C-Level/Owner/Partner) (Staffing, RPO)
- b. Branch/Office Manager (Staffing, RPO)
- c. Sales Account Executive (Staffing, RPO)
- d. Recruiter (Staffing, RPO)
- e. Support/administrative/staff (Staffing, RPO)
- f. Director/VP/Regional Manager (HR, Staffing, RPO)
- g. Executive (C-Level/Owner/Partner) (HR)
- h. HR Consultant (HR)
- i. Sales/Business Development (HR)
- j. Partner/Shareholder (Accounting)
- k. Accountant (Accounting)
- l. Equity Partner/Shareholder (Legal)
- m. Non-Equity Partner (Legal)
- n. Attorney (Legal)
- o. Staff (HR, Accounting, Legal)
- p. Other (HR, Accounting, Legal)

***6. How many years of experience do you have in your current job? Please include time in this job role at [brand] as well as at other firms. [Select]**

- a. Less than 1 year
- b. Between 1 and 2 years
- c. Between 2 and 3 years
- d. Between 3 and 5 years
- e. Between 5 and 10 years
- f. More than 10 years

***7. What is your total annual base salary? (Please do not include bonuses, commissions, healthcare or other benefits) [Numeric input]**

*The answers to these questions will not be displayed in your ClearlyRated dashboard. ClearlyRated will report on this important information for your company overall in the DEI benchmarking report. This report is available to packages with data segmentation.

Employee Testimonials & Shout Outs

Testimonials and Shout Outs are asked to every employee that completes your employee survey. All Testimonials and Shout Outs are anonymous and excellent tools to celebrate your workplace and your employees.

Employee Testimonials Question:

The screenshot shows a survey question titled "We are collecting employee testimonials to use online or in recruiting materials. Will you share what you like best about working here?". It features two radio button options: "No thanks" and "Yes, I'll share an anonymous testimonial", with the latter selected. Below the options is a text input field with a placeholder message: "This box is not prefilled for Employee". A "Submit" button is located at the bottom right of the form. At the bottom of the page, it says "Survey Powered By clearlyrated" and includes a small note: "If you have a problem with the survey you can contact ClearlyRated for help."

How to get the most out of your employee testimonials?

Each employee will be asked if they'd like to leave a testimonial about their experience working at your company, **regardless of the NPS rating they give**. These testimonials are anonymous and are a great tool for you to use for recruiting efforts or to share online.

The ClearlyRated Employee Survey is the only survey that we ask for a testimonial and shout out from ALL survey respondents regardless of their NPS rating to protect anonymity of the survey taker.

Employee Shout Out Question:

The screenshot shows a survey question titled "Thank You!". The question is "Has a coworker at Dunder Mifflin gone above and beyond for you?". Below the question is a sub-instruction: "Fill out the form below to anonymously recognize them for a job well done." The form includes a text input field for "Employee Name (required)" with the value "Pam Beesly" entered. Below that is another text input field for "What did they do to go above and beyond for you?" with the value "They left a friendly note at my desk on my first day!". A "Send" button is at the bottom of the form. At the bottom of the page, it says "Survey Powered By clearlyrated" and includes a small note: "(This will be forwarded anonymously to the employee survey administrator at your company and will potentially be shared with your coworkers, peers, and online)".

How will positive feedback be celebrated in your company?

It's exciting when you receive high scores and positive comments from your employees. Each employee will be asked if they'd like to recognize a co-worker who has gone above and beyond. These are called Shout Outs and it's a great idea to celebrate these recognitions

Best Practices to Ensure a Successful Survey Program

Anonymity in survey responses

We promise anonymity to your employees when they respond to the survey. This gives them an opportunity to share candid feedback without concern of any repercussion. Anonymity is achieved by hiding all employee contact information and restricting reporting abilities to filter and sort responses.

One of our best practices is for the email inviting your employees to participate in the survey is signed by ClearlyRated's CEO, Eric Gregg. Within this email we invite your employees to contact us directly with any questions or concerns, again providing them with another level of anonymity. Internal Employee survey programs are a true partnership, we want to become an ally for all employees at your firm.

Who should be involved in the survey process?

We suggest those in a senior leadership position to have full access to the survey results. At a minimum your HR team should be involved in compiling the employee contact list.

Clarity on expectations from leadership

As you [announce the survey to staff](#) we suggest shaping the message with an expectation of participation, explain the survey is anonymous and the purpose is to make the organization a better place to work. You'll accomplish this by tapping into staff ideas on how you can grow and improve.

We encourage you to set an expectation that all results will be reviewed and shared with the organization by a specific timeframe.

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Best Practices to Ensure a Successful Survey Program

Action Plan

Once the survey has closed review the results, specifically the open-ended survey questions. Find common themes in the data and begin to create an action plan with potential process changes, automation adjustments, internal communication, ect.

Your ClearlyRated account manager will help you explore ideas of how to review the results. One exercise we find helpful is [Start, Stop, Continue](#).

Sharing Results

First share results with senior leadership and managers. We recommend sharing the results with the entire organization. When you share results include your Action Plan so employees know what changes they should expect to see and when they will be implemented.

Sharing results with the organization should be a positive experience. All organization from one level to another have shortcomings, these should be recognized addressed and given specific examples of how it will improve. Overall the tone should be appreciative of the time staff spent responding to the survey and excited that for what's to come.

Incentives for Participation

We all love perks for participation, and it does impact response rate.

Here are some examples of how an incentive can be used:

1. If 80% of employees respond, then everyone will receive a \$5 coffee card
2. If 80% of employees respond, then everyone gets donuts in the break room.
2. If 80% of employees respond, then everyone gets 2 hours of extra PTO.

Get creative!



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