



Setting-up your account

What we need from you



Basic information required.

User details – Page 3

The list of license holders - the members of your team that will be using Harkn. We need full name (First and Last name), a work email address, and the team/group that they will belong to.

Organisational structure – Page 3

A hierarchy for the teams/groups you'd like to add on the platform.

Permissions (security) settings – Page 4

We'll provide a set of predetermined permissions based upon what works elsewhere that gives the right amount of transparency without compromising safety or becoming distracting we just need to know which to give different populations.

Demographic filters – Page 5

We'll provide a standard set of demographic filters which can be adjusted to suit your population. Choose your demographic filters and response options

Pulse questions (if using) – Page 6

Select questions and frequency of pulse surveys. Pick from our library of questions, edit ours or create your own.

Registration process – Page 7

An outline of the registration process your people will experience when we go live.



Organisational Structure & People

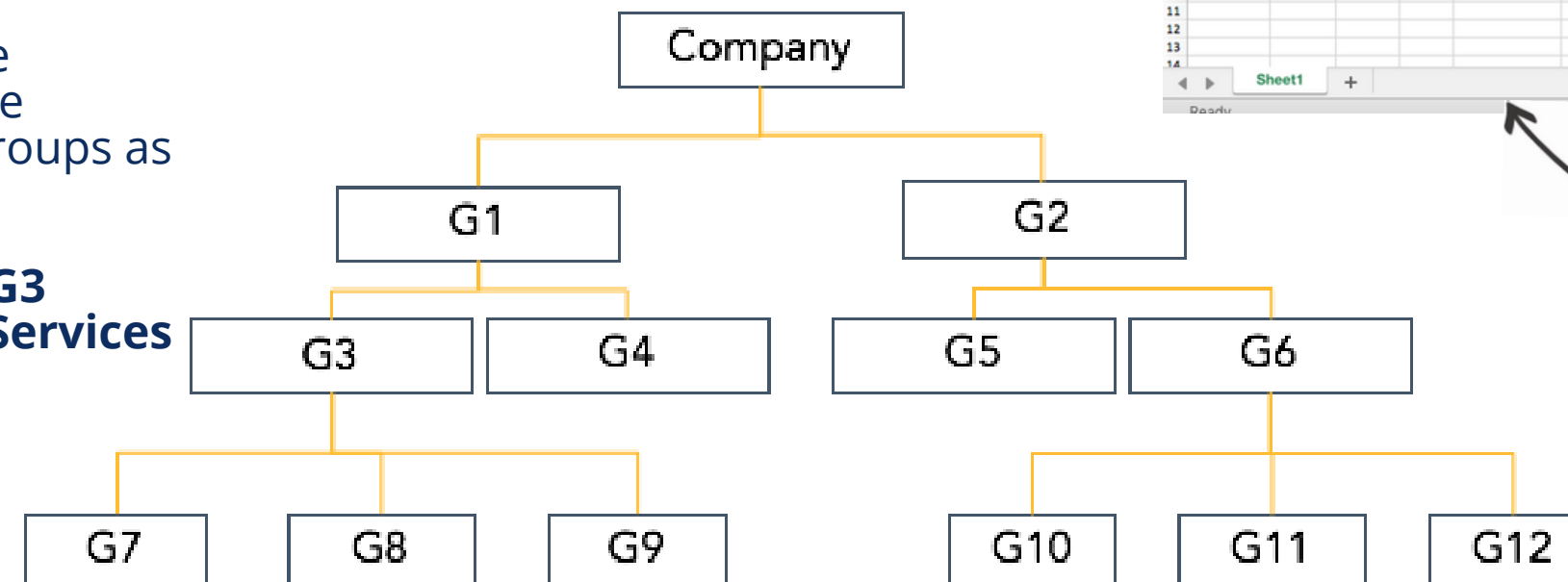
A hierarchy for the teams/groups on the platform

What we need

We set up Harkn to report data in a way as close to your organisational structure as possible

To do that we need to know the structure (as right) as well as the names for each of the teams/groups as you would expect to see them.

e.g. **G1** might be **Operations**. **G3** might therefore be **Customer Services** etc..



Team Sizes

We suggest keeping teams as large as possible and wherever possible to a minimum of 10 people. Fear of being isolated or identified tends to discourage participation where groups are too small.

For smaller teams, consider combining with other similar teams or those in the same department if possible or consider using 'team' as one of the demographic questions we ask at set up.

In reporting terms, we limit the data shown or available for analysis wherever fewer than 5 people appear in a dataset to avoid risk of identification.

User Upload File

We use a simple excel file to upload your people to the platform.

	A	B	C	D	E	F	G
1	Email Address	First Name	Last Name	Job Title	Manager/Role Flag		
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							

The information we need is pretty straightforward; email address, First Name, and Last Name. Job Title and the Manager/Role Flag are not essential, the former just pre-populates job title in the account and the latter indicates anyone not in the Team Member security group (see next slide).

Each team/group as it appears on the system should have its own tab with the same name as the group e.g. **Operations** or **Customer Services**

Account name and logo

We also need the name of your company or account name as you'd like it to appear on the platform (visible to all), and a square logo preferably 500x500



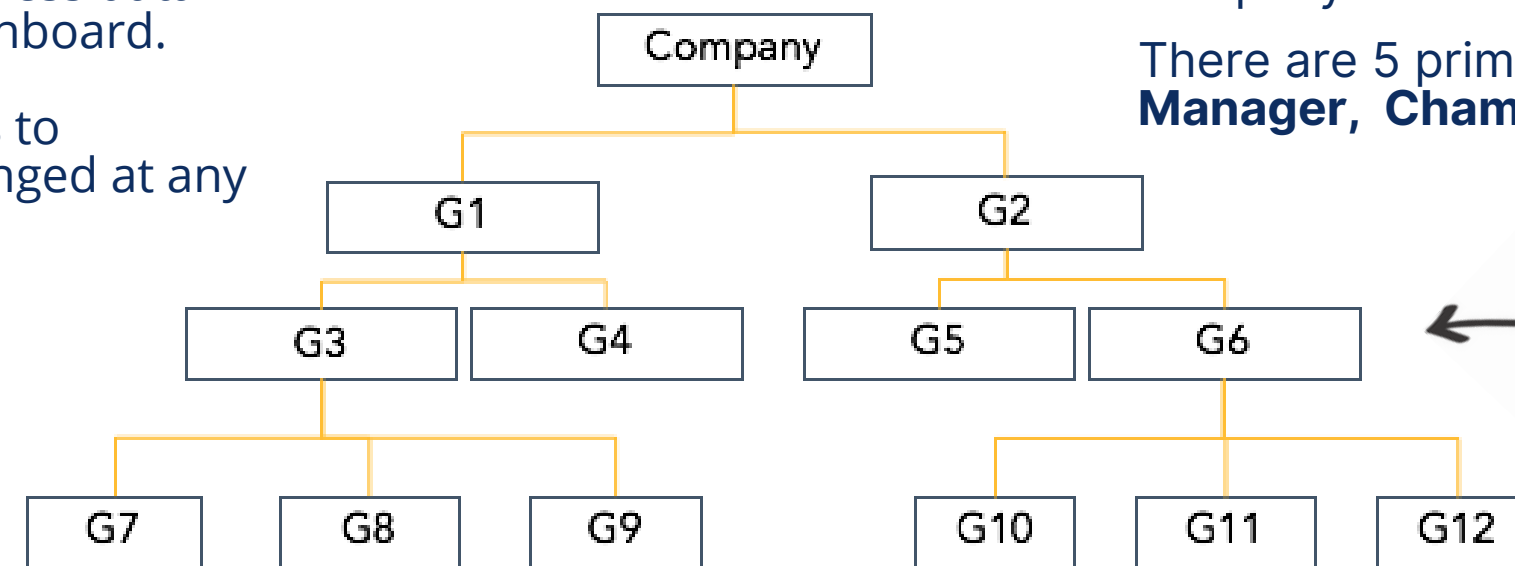
Organisational Structure: Permissions & Security

Controlling access to data and features.

Who'll see what?

Everyone will see aggregate happiness data for the whole company on the dashboard.

Security groups determine access to features and data (and can be changed at any time).



The Wall

When it comes to the Wall, people tend to prefer to see comments from people in their location, their function or within their division.

Using the example here, we could set the Wall to whole company, but if there are sufficient numbers then G2 and subsidiary groups would be a good population for those working in it.

Security Groups

We can set permissions to an individual but would recommend visibility of data up/down the reporting line as a general rule (see examples below)

Certain people, like those in leadership or that we assign as company administrators normally have company-wide access.

There are 5 primary security groups - **Leadership, Administrator, Manager, Champion, and, Team Member**

Example 1.

If I manage **G6** (and therefore **G10, G11, G12**) what would I see?

- my own team **G6** (anonymously)
- data for **G10, G11 & G12**
- **G2** (as an aggregation of **G5 & G6**) and,
- aggregate company data

This gives me visibility upwards and downwards in the line without revealing any detailed information about teams other than the ones I am responsible for.

Example 2.

If I was working in team **G11** what would I see?

- my own team **G11** (anonymously)
- aggregate data for the group **G6** (made up of **G10, G11 & G12**)
- **G2** (as an aggregation of **G5 & G6**) and,
- aggregate company data

This gives me visibility upwards in the line without revealing anything sensitive about any team other than the one I belong to.

Demographic filters

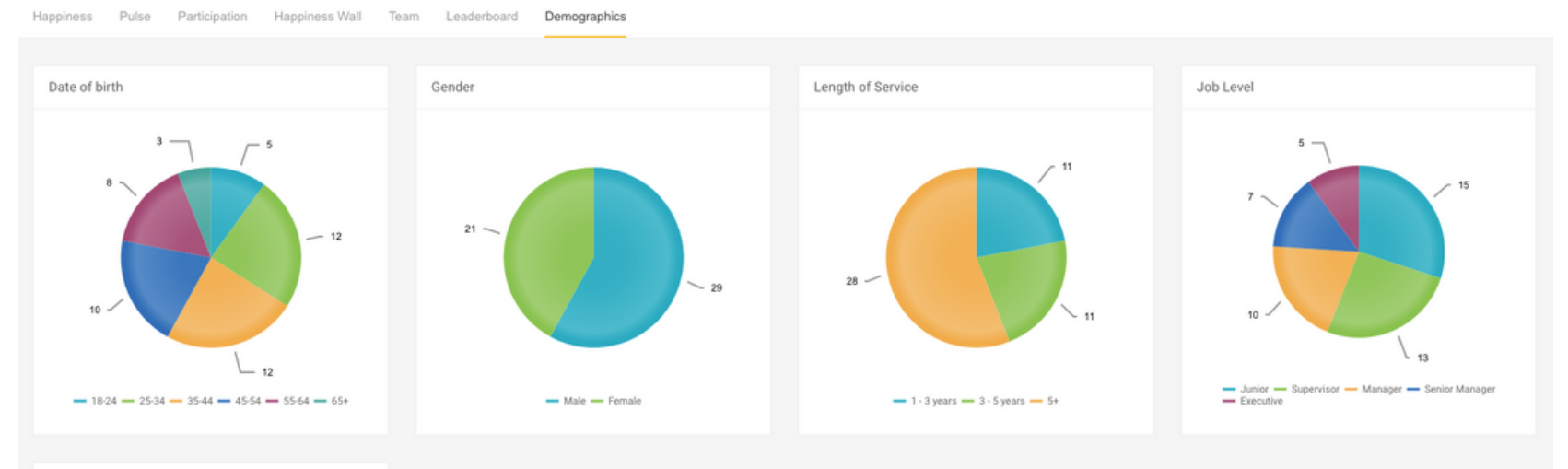
The demographic information we collect is determined by you and is only used to filter data to understand differences in experiences across your populations. It is never used to identify individuals.

Demographic xls.

This spreadsheet shares some demographic filters for your consideration.

Popular ones include - Age, Gender, Job Level, Length of Service, Primary Work Location etc... but they can be anything.

Decide which filters you'd like to use and response options/groupings for response which will become populations in their own right in the data.



Demographics become the questions we ask people as part of their registration process (next slide).

Our Demographics tab in the reporting tabs shows the current breakdown of the demographic groupings i.e. how your population is shaped, giving us the opportunity to redefine groups to ensure no risk of identifying people or loss of data due to the system not reporting small groups.

The screenshot displays the Microsoft Excel interface. The top ribbon includes tabs for Home, Insert, Page Layout, Formulas, Data, Review, and View. The 'Home' tab is active, showing font settings (Arial, size 10) and paragraph alignment options. Below the ribbon, a table is visible with columns labeled A through J. The first column (A) contains age groups: 'AGE', '29 or under', '30-39', '40-49', '50+', and empty rows for '6', '7', '8', '9', '10', '11', '12', '13', '14', '15', '16', and '17'. The table has a green header row. To the right of the table, a sidebar titled 'SetUp_Demographic filters' is open, listing various demographic filters with 'Details' buttons next to them: Date of Birth (Age), Gender, Start Date (MM/YY) (Tenure), Level / Job Tier, Contract / Employment Type, Ethnicity, Sexuality, Do you consider yourself to have a disability? (Disability), and Do you follow a particular religion/belief? (Religion / Belief).





















	A	B	C	D	E	F	G	H	I	J
1	AGE									
2	29 or under									
3	30-39									
4	40-49									
5	50+									
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										

Summary Sidebar: Setup_Demographic filters

- [Details](#) Date of Birth (Age)
- [Details](#) Gender
- [Details](#) Start Date (MM/YY) (Tenure)
- [Details](#) Level / Job Tier
- [Details](#) Contract / Employment Type
- [Details](#) Ethnicity
- [Details](#) Sexuality
- [Details](#) Do you consider yourself to have a disability? (Disability)
- [Details](#) Do you follow a particular religion/belief? (Religion / Belief)

Pulse survey questions

We use pulse surveys – high frequency, low intensity to add additional context and insight.

Home							Insert		Page Layout		Formulas		Data		Review		View		
				Calibri		11													
Paste																			
L4								0-12											
	A	B										C	D	E	F				
1	ID	Question										Type	Pulse Question	Order	Default				
2	380	What 3 words describe the 3 best things about working here?										Three Textboxes	Yes	1					
3	381	What 3 words describe the 3 things you'd change about work if you could?										Three Textboxes	Yes	2					
4	1036	I feel appreciated for the work I do and contribution I make										Radiobutton List	Yes	3					
5	1027	I am treated fairly and consistently										Radiobutton List	Yes	4					
6	1101	I am able to maintain a good work-life balance										Radiobutton List	Yes	5					
7	1032	My ideas and suggestions are welcomed and listened to										Radiobutton List	Yes	6					
8	16	I understand how my role contributes to the goals of the organisation										Radiobutton List	Yes	7					
9	1102	My line manager cares about my health and well-being										Radiobutton List	Yes	8					
10	1103	People I encounter at work are kind, supportive and friendly										Radiobutton List	Yes	9					
11	1034	Individual performance is managed in a consistent, fair and transparent way										Radiobutton List	Yes	10					
12	1104	I am treated with respect and dignity at work										Radiobutton List	Yes	11					
13	1038	Interactions with my manager over the past week have been positive and helpful										Radiobutton List	Yes	12					
14	1035	At the end of my working day I regularly feel a sense of achievement										Radiobutton List	Yes	13					
15	1105	I feel involved in decisions that affect my work										Radiobutton List	Yes	14					
16	14	I feel valued at work										Radiobutton List	Yes	15					
17	1037	I receive enough feedback about my performance										Radiobutton List	Yes	16					
18	1106	I would recommend my company to others as a good place to work										Radiobutton List	Yes	17					
19	1030	I trust my team mates										Radiobutton List	Yes	18					
20	1107	I receive help and support from coworkers when I need it										Radiobutton List	Yes	19					
21	1108	Incivility, rudeness and unkindness are common amongst colleagues here										Radiobutton List	Yes	20					
22	1109	I would recommend my team as a good one to belong to										Radiobutton List	Yes	21					
23	1110	My team works well together										Radiobutton List	Yes	22					
24	1111	Other teams are helpful and supportive when my work requires me to interact with them										Radiobutton List	Yes	23					
25	1112	My company cares about my health and well-being										Radiobutton List	Yes	24					
26	1031	I am encouraged to speak up and it's safe to do so										Radiobutton List	Yes	25					
27	382	I am able to change things that make work more difficult										Radiobutton List	Yes	26					
28	6	I can see myself working here one year from now										Radiobutton List	Yes	27					
29	1028	I have confidence in the leaders of this company										Radiobutton List	Yes	28					
30	8	Senior colleagues contribute to a positive work culture										Radiobutton List	Yes	29					
31	1113	My line manager is approachable										Radiobutton List	Yes	30					
32	1114	My line manager has my best interests at heart										Radiobutton List	Yes	31					

Ready

Count: 180

If you're using Pulse surveys alongside daily check-in requests, we'll need to decide which questions to ask.

We recommend 3 questions once every week or once every fortnight. This number of questions works well everywhere, the frequency seems to be dependent upon the organisational context.

Pick from our list of questions in the attached spreadsheet, edit ours or add your own, along with the response options also shown on the spreadsheet.

This feature can be enabled at any time and questions added/removed as you see fit.

Selecting the order of questions

Pulse surveys can be set to random or ordered (recommended).

In random, questions are selected by the platform but won't be repeated until all questions have been asked.

Choosing the order of your questions gives you the most control, and once the list of your questions has been completed, the sequence will be repeated unless changed.



Registration process - explained

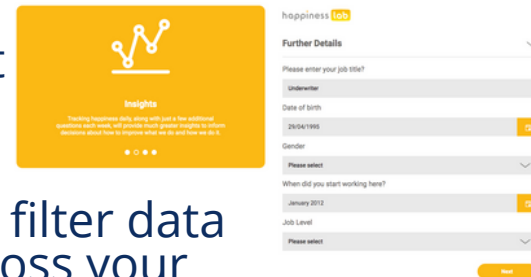
Your first interaction with Harkn will follow receipt of your welcome email. Once you click the link embedded in that email you'll be taken through our registration process.

It doesn't take long and here's what to expect.

Step 1 – Set up your profile

Set up your profile by completing a short form that includes the additional information (**demographic filters**) that your company has requested.

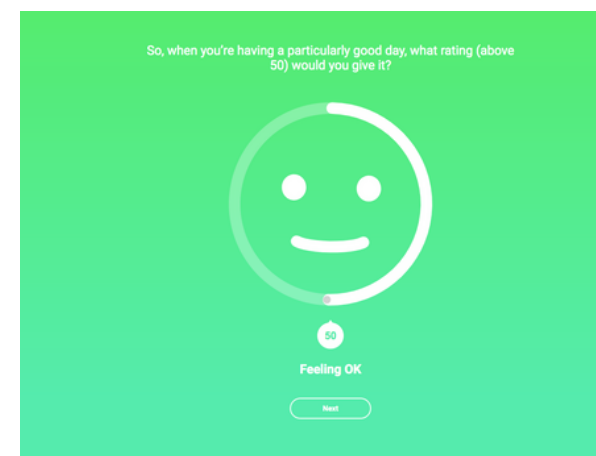
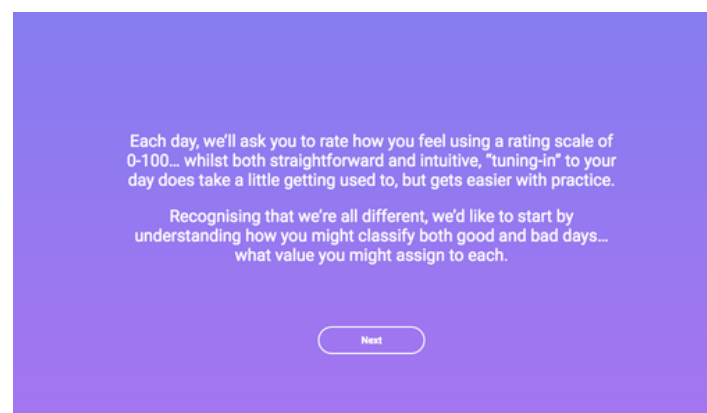
The demographic information we collect is used to filter data to try to understand differences in experiences across your company. It is never used to identify you as an individual.

A screenshot of a registration form titled 'Further Details'. It includes fields for 'Please enter your job title?', 'Date of birth' (with a date picker showing 20/04/1995), 'Gender', 'When did you start working here?' (with a date picker showing January 2012), and 'Job Level'. There is a 'Next' button at the bottom right.

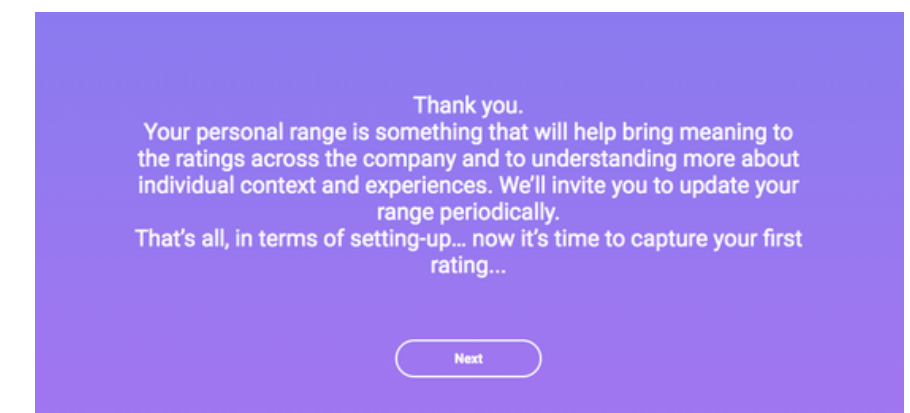
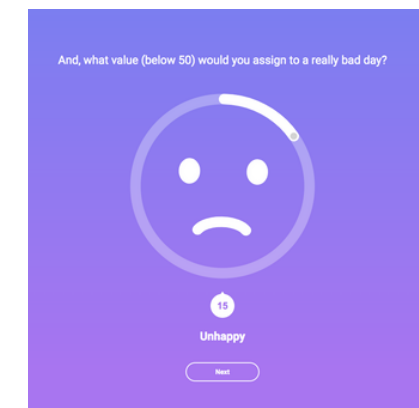
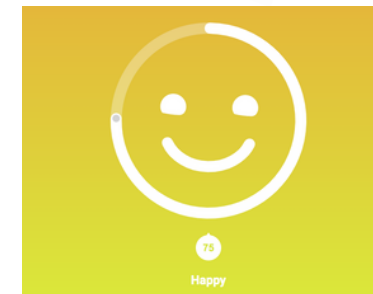
... and then to a bad day, applying the same principle as before only this time ensuring that you offer a rating **below 50**

Step 2 – Set your personal range

The second step of the set-up process is to help us understand how your people view and assign value to great days and really bad days. This



We'll ask you to assign a value to a good day at work... because it's a good day, on this occasion you'll only be able to offer a rating **above 50**...



And that's it... that's the set-up process complete. All that's left is to share how you're feeling today.



If you need further help or have any questions about this document or Harkn in general, please get in touch:

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