



happiness **lab**

# 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 Happiness Lab. We need full name (First and Last name), a work email address, and the team/group that they will belong to on Happiness Lab

## 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.

# Organisational Structure & Your People

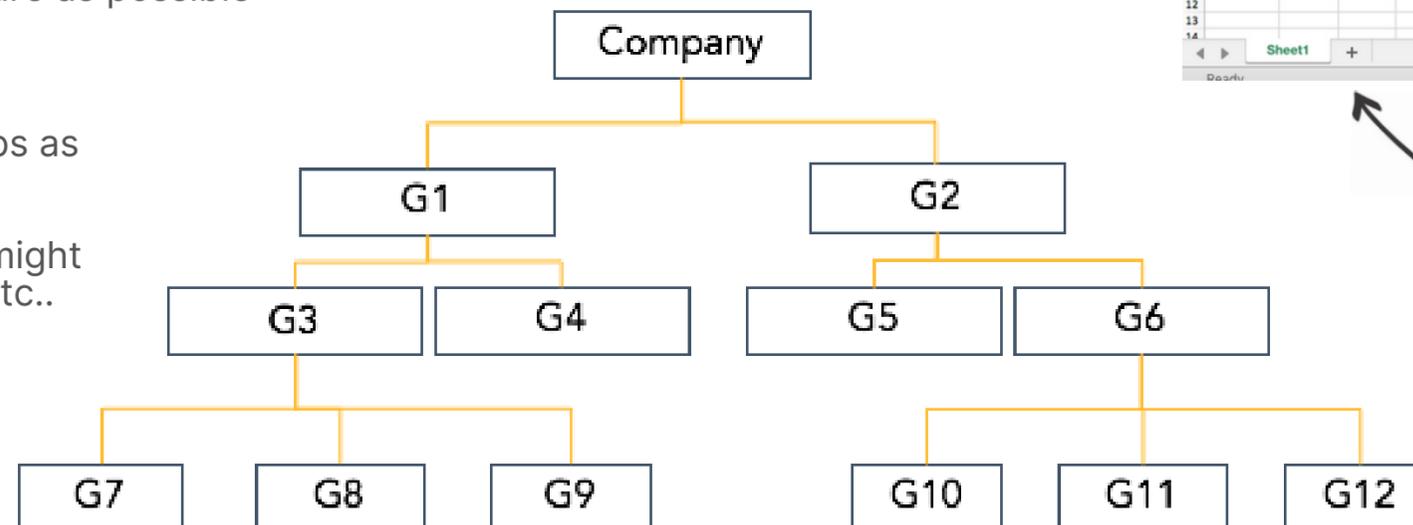
A hierarchy for the teams/groups you'd like to add on the platform.

## What we need

We set up Happiness Lab 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.

1	Email Address	First Name	Last Name	Job Title	Manager/Role Flag
2					
3					
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14					

## User Upload File

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

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

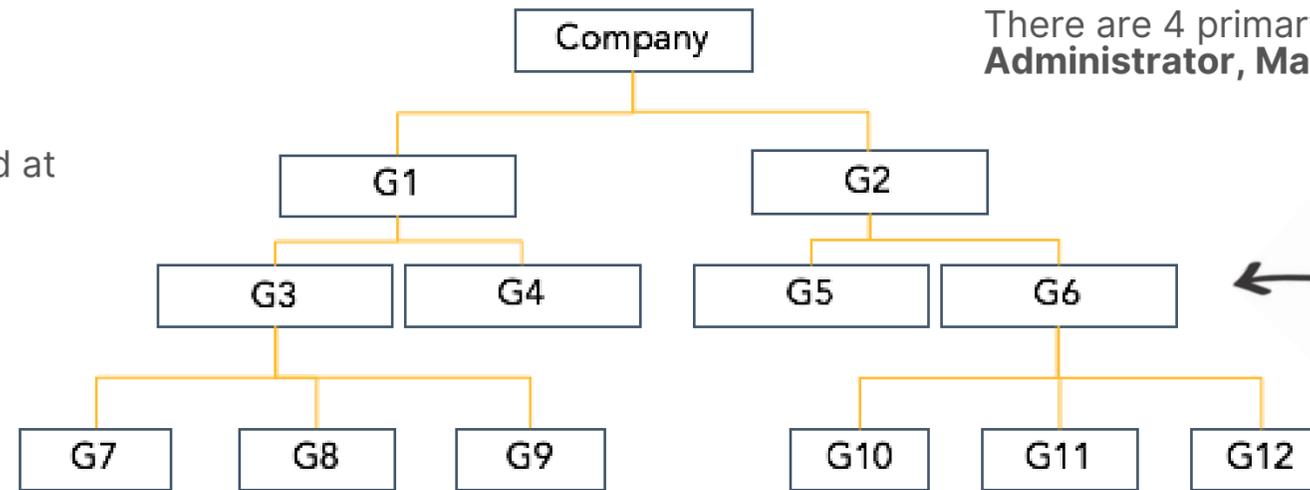
# Organisational Structure: Permissions & Security

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).



## 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 4 primary security groups - **Leadership, Company Administrator, Manager, & 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.

## Happiness Wall

When it comes to the Happiness 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 Happiness 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.

# Demographic filters

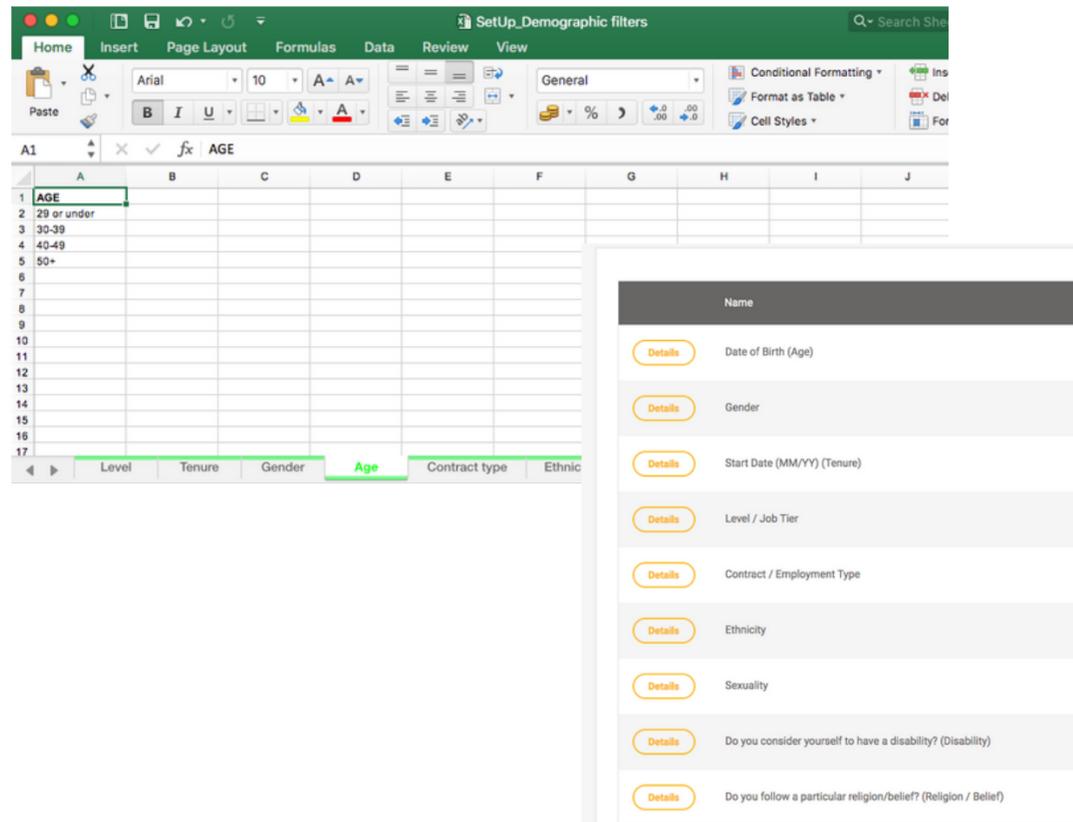
Demographic information we collect is used to filter data to try to understand differences in experiences across your company. It is never used to identify individuals.

## 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.

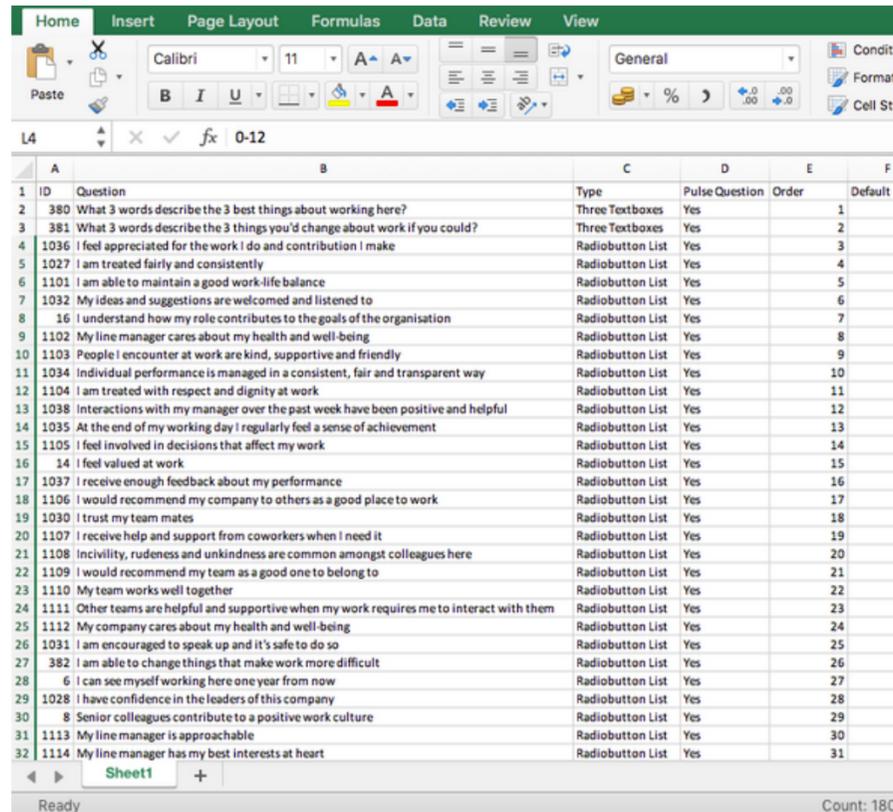


Demographics become the questions we ask people as part of their registration process (next slide).

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.

# Pulse survey questions

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



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

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.

## Recommended approach

Given these questions can be enabled and started at any time, we'd recommend getting started and then working out the specific questions and frequency once we're up and running.

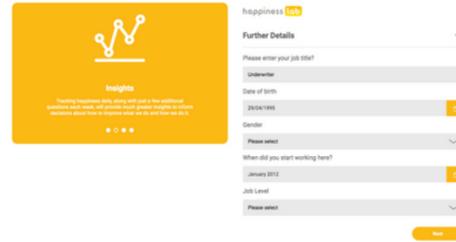
# Registration process - explained

Your first interaction with Happiness Lab 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

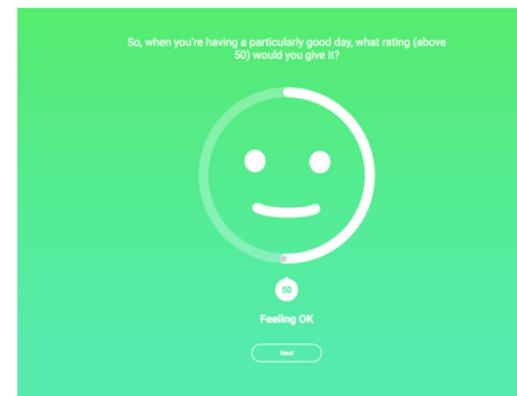
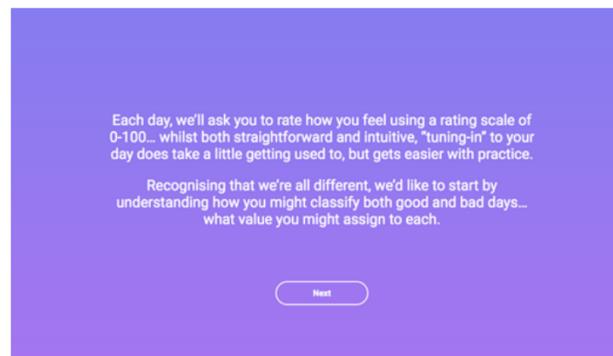
Set up your profile by completing a short form that includes the additional information (**demographic filters**) that your company has requested.



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.

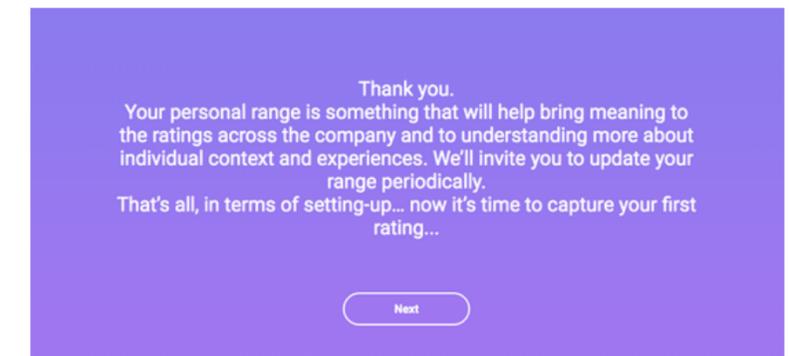
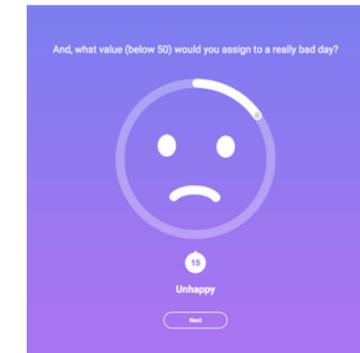
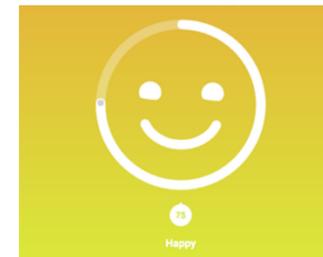
## Step 2 – Set your personal range

As you'll see, we use a 0-100 rating scale... the second step of the set-up process is to help us understand the differences between people in how they view and assign value to good days and bad days... we've learned that where one person might describe a good day as 90, another might consider it to be 65... understanding that as a starting point helps us bring additional meaning to how people feel



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



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