Macorva

EMPLOYEE LIFECYCLE

Overview of creating and sending surveys

For questions, contact:
support @ macorva.com

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Overview of Default Lifecycle Surveys

Lifecycle surveys are a powerful tool for understanding the employee experience at critical moments. Macorva allows you to send lifecycle surveys to your employees to gauge employee experience at various levels in their lifecycle.

By default, Macorva provides three lifecycle surveys:

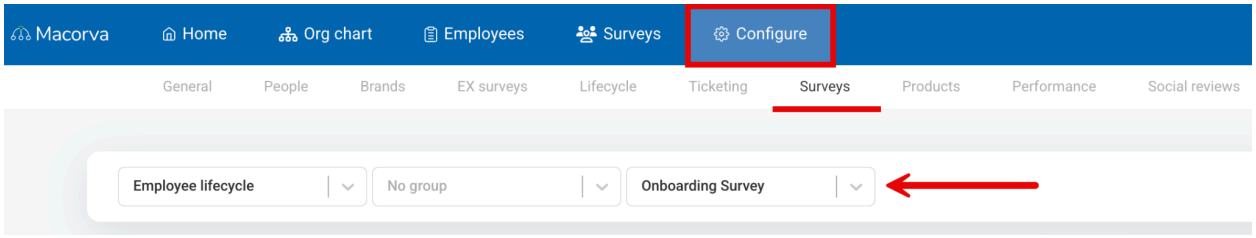
- Onboarding Survey – Understand employee impressions during their first days and weeks.
- Check-in Survey – Capture feedback at regular intervals throughout employment.
- Exit Survey – Learn from departing employees to identify opportunities for improvement.

You can use these templates as a starting point or build a completely new lifecycle survey from scratch.

Create or Edit a Lifecycle survey

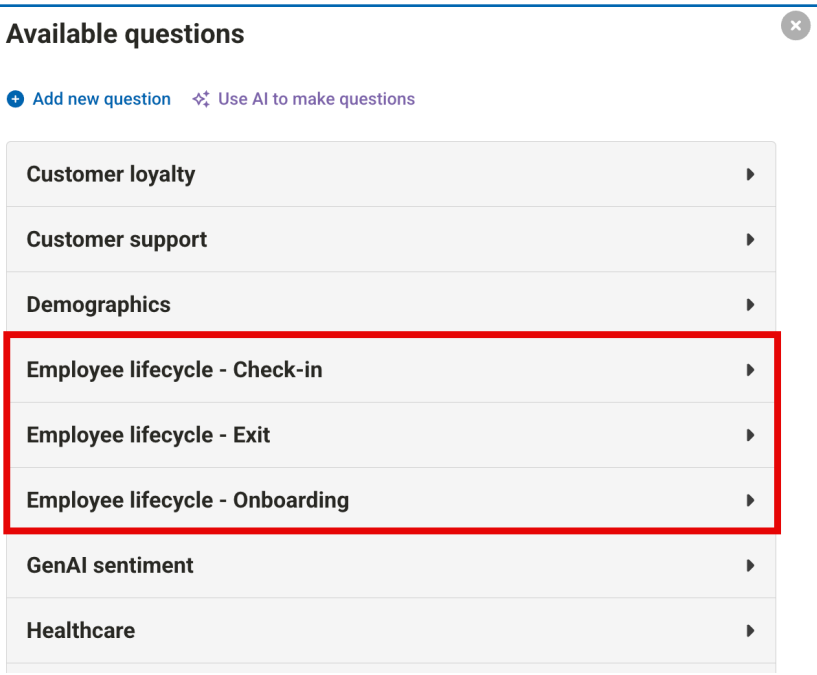
Create a lifecycle survey from scratch:

- Go to **Configure** > **Surveys**.
- From the **Category** dropdown menu, select **Employee lifecycle**.
- In the dropdown menu that appears to the right, you have two options:
    - Customize a template: Select Onboarding, Check-in, or Exit from the list.
    - Start from scratch: Click on **+ New survey**.



Use the default lifecycle survey questions:

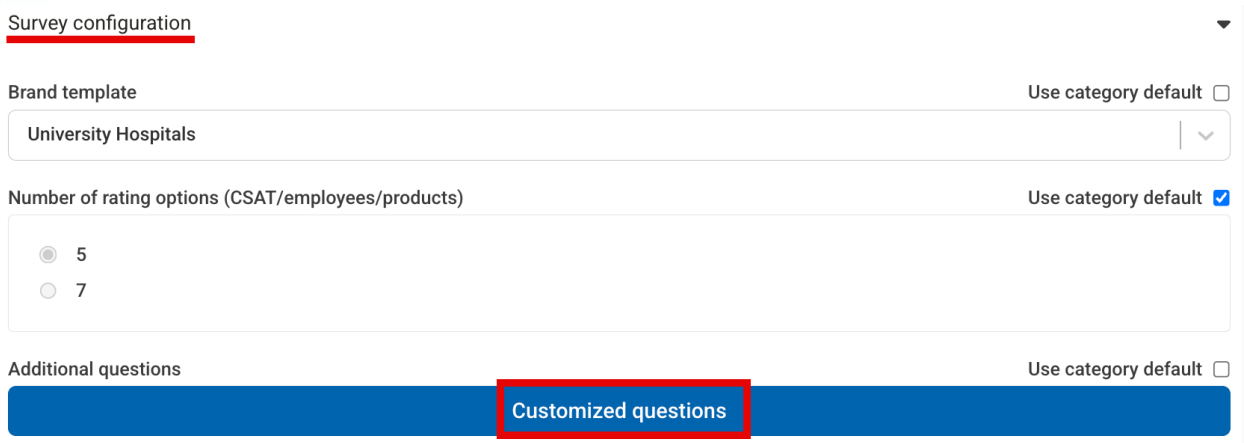
- Under the survey preview (on the right-hand side), click **Add/edit Questions**.
- When the Question Library opens, scroll down to locate the **Employee Lifecycle** question banks. Once you've located them, you can perform the following actions:
    - Browse: Click the arrow icon **>** to expand a category and view its questions.
    - Add: Select the checkbox next to a question to instantly add it to your survey.



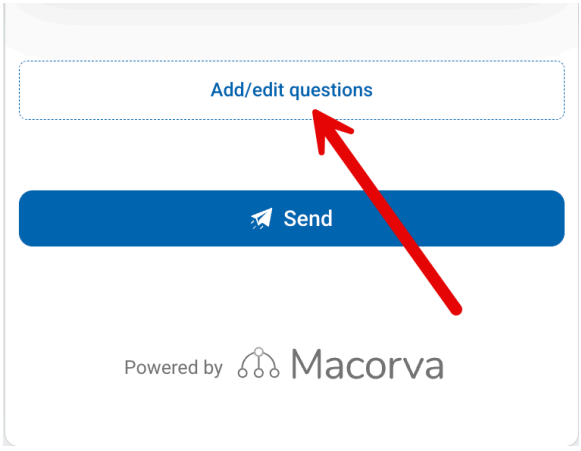
Adding Custom Questions

There are two ways to access the custom question editor:

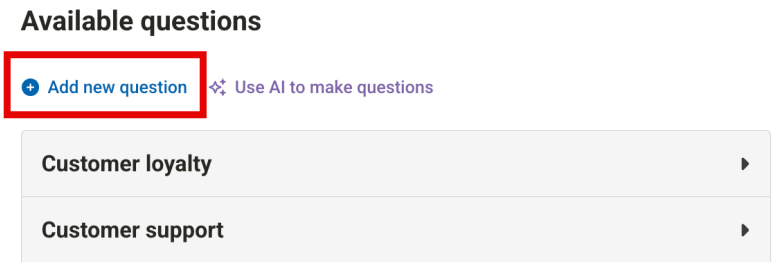
- Option 1: Scroll down to **Survey configuration** and select **Customized questions** to open the Question Library.



- Option 2: From the survey preview on the right-hand side, click **Add/edit questions**.



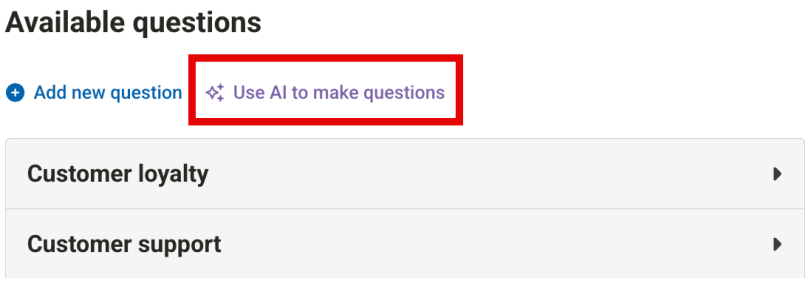
- Under **Available questions**, click on **Add new question**.



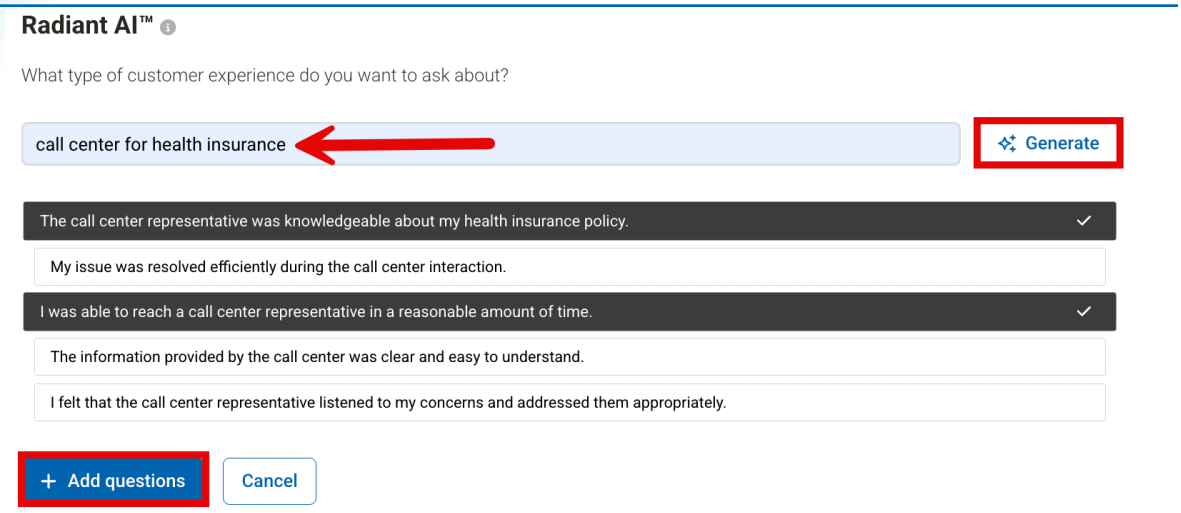
Using AI to create custom questions

Macorva's Radiant AI technology can assist you in creating custom CX questions. Have a question but you aren't sure how to ask it? Let our AI help you! To do so, follow the instructions below:

- Scroll down to **Available questions**, select **Use AI to make questions**.



- In the text box provided, type a topic or idea for your question, then click **Generate**.

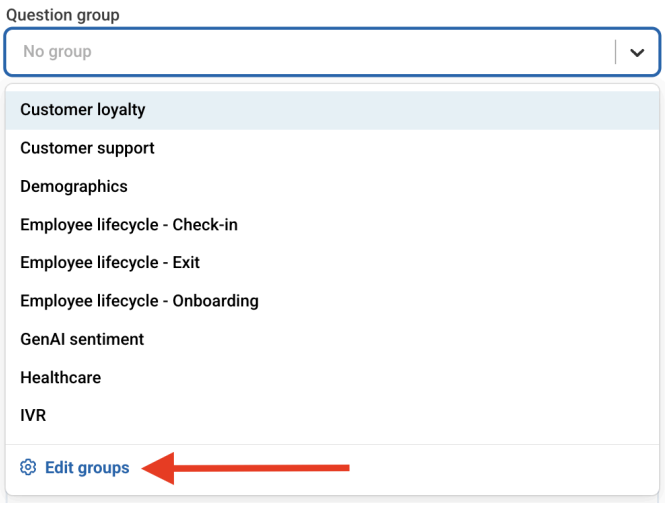


- Radiant AI will provide a list of suggested questions. Review the results, click on the ones you'd like to use and click **+ Add Questions** to move it into your question library.

Organize with Question Groups

Question Groups allow you to group together similar questions to easily identify and add these to future surveys. Once you add a question, it joins your library and can be inserted into any of your surveys.

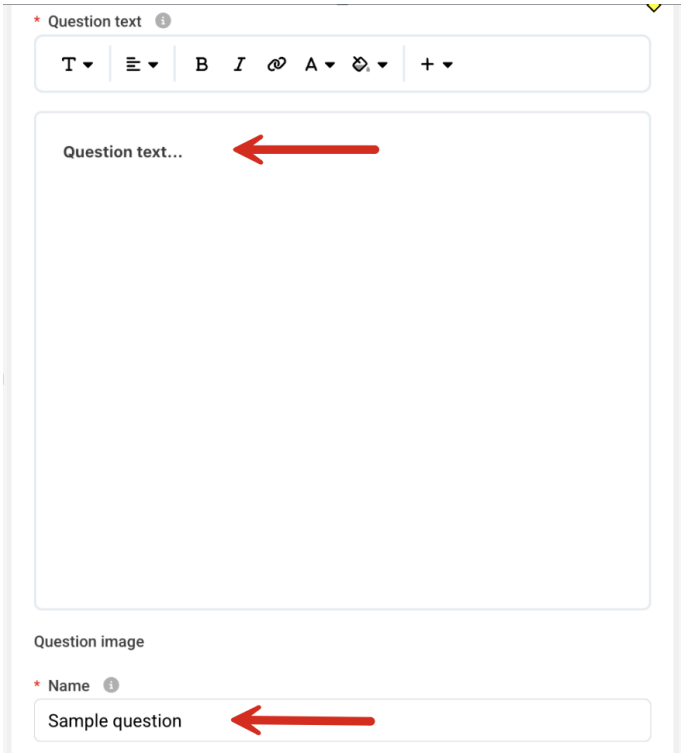
- Select an existing **Question group**, or create a new group by selecting **Edit groups**



Question Types

Most question types contain these common fields:

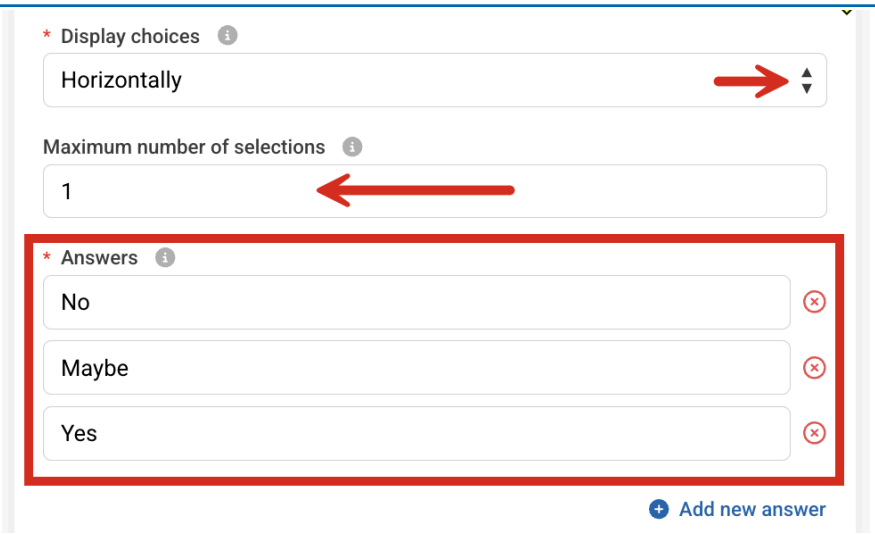
- **Question Text**: The question or statement your employees will see. Use the formatting options to customize its appearance.
- **Name**: A short, internal-facing label for the question. This is used for easy identification in reports and data filters.



Multiple Choice

Allows survey recipients to select one or more predefined answers.

- **Display answers**: Show answer choices Horizontally or Vertically.
- **Maximum number of selections**: Set the limit of how many options a user can choose. (For example, set to 1 for a standard multiple-choice or higher for “select all that apply”).
- **Answers**: Enter the text for each answer choice.



Rating Scale

Asks survey recipients to provide a rating on a numerical scale.

- **Display choices**: Choose from various visual styles, including Horizontally, Vertically, Stars, Faces, or a Slider. You can also choose as numbers, large middle or as numbers, boxes.
- **Scale**: Set the rating range (1-5, 1-7, or 0-10).
- **Labels**: Customize the text for the low and high ends of the scale. (For example, "Strongly disagree" and "Strongly agree").

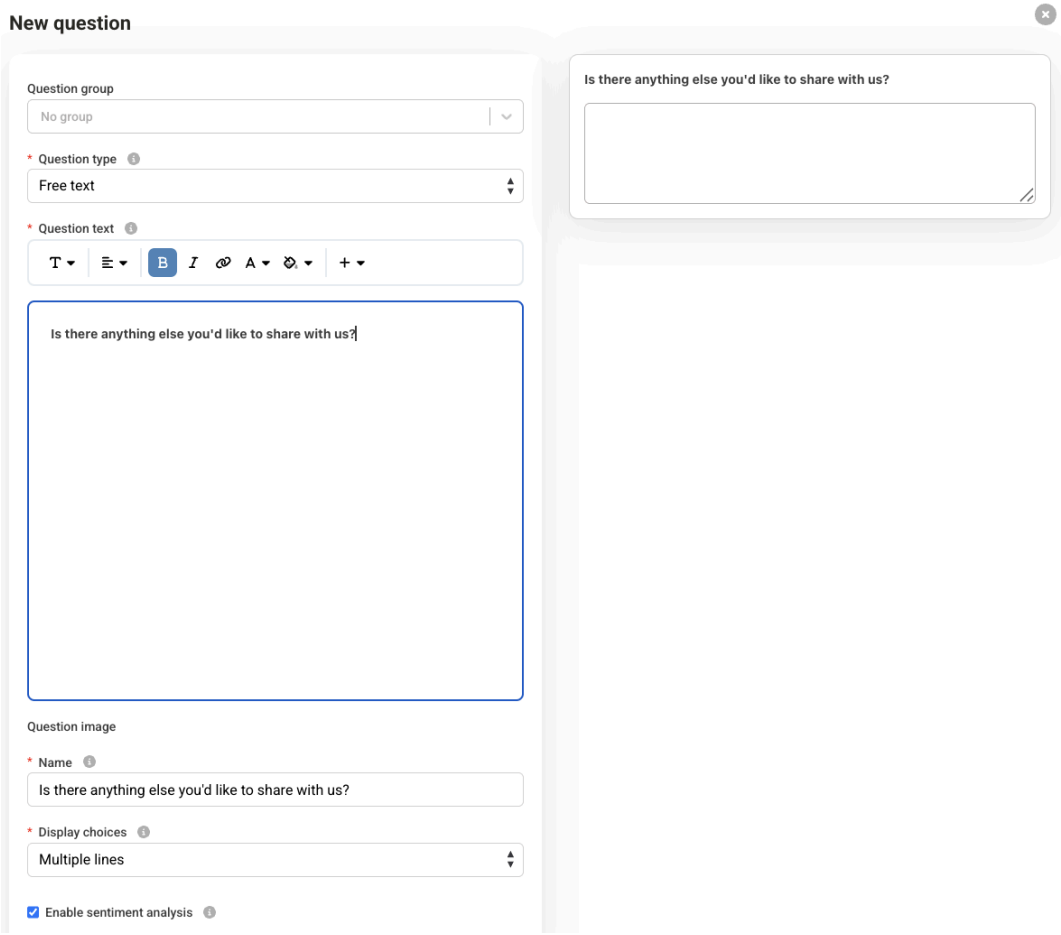


Free text

Allows for open-ended, written responses.

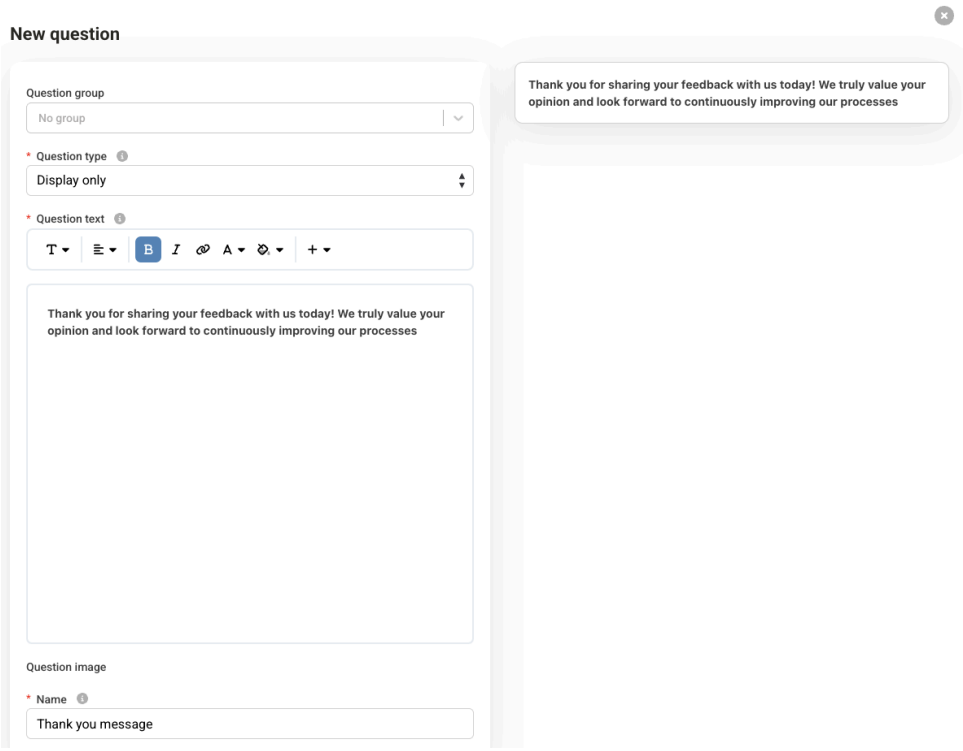
- **Display answers**: Configure the size of the text box: Single line, Multiple lines, or various Inline sizes.

(Note: For a Free text question, you also have the option to **Enable sentiment analysis**. To do this, click on the checkbox.)



Display only

This is not a question but a way to add informational text, instructions, or a section break anywhere in your survey.



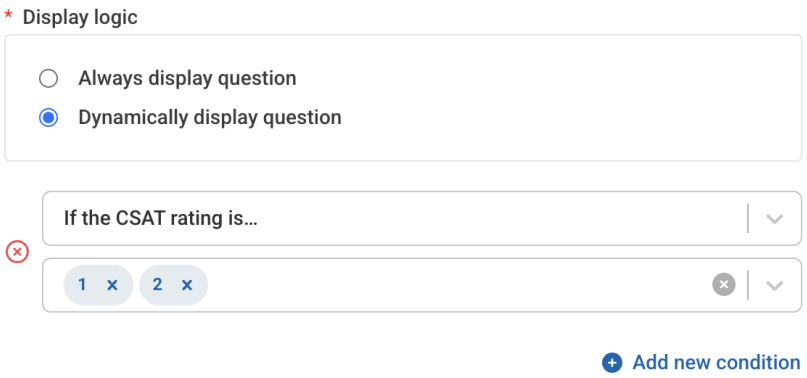
Dynamic Questions

For any question, you can decide whether it should always be displayed or shown conditionally (dynamically) based on responses to previous questions.

Questions can be dynamically displayed based on:

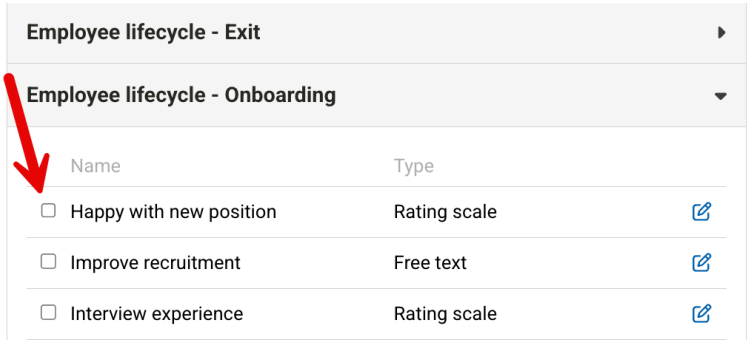
- CSAT rating
- CSAT driver(s)
- NPS rating
- NPS driver(s)
- Employee rating
- Employee driver(s)
- Product rating
- Product driver(s)
- Custom questions
- Notes

Below is an example of a dynamically displayed question according to low CSAT ratings.



Adding Questions to your survey

- Click **Save question**. Your custom question is now saved to the Question group you selected and is available for use in any survey.
- In the **Available questions** section, find the question you just created within its group and select the checkbox next to it to add it to the current survey.



- Your new question will automatically appear up top at the end of the survey. In the **Selected questions** section, click on the 6 dots and simply drag and drop it to the desired position.



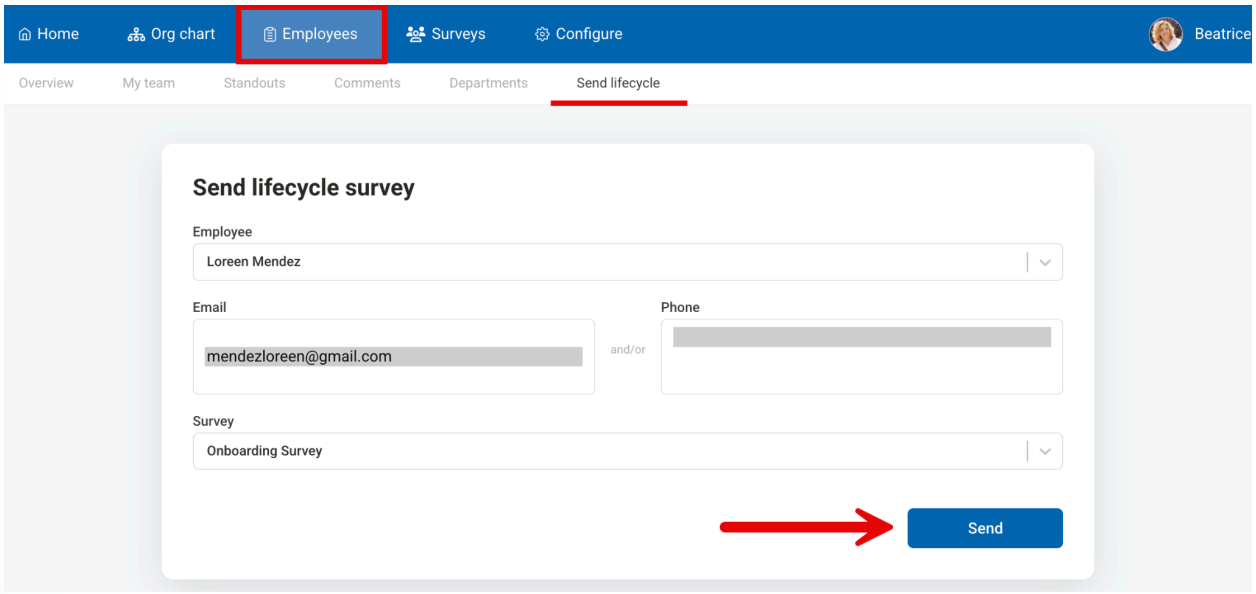
How to send lifecycle surveys

There are two ways to send lifecycle surveys:

- Manually – for specific, one-time sends.
- Scheduled – sent automatically based on employee milestones.

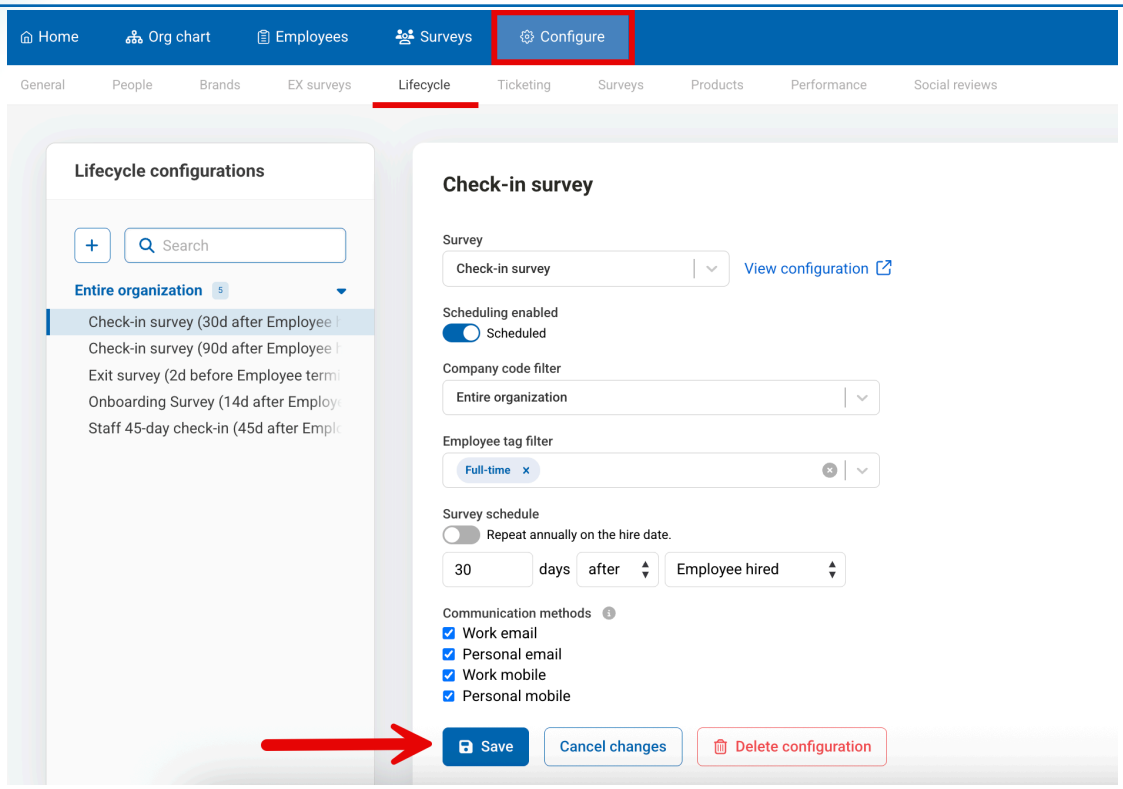
Sending lifecycle surveys manually

- Go to **Employees** > **Send Lifecycle**.
- Select the target Employee, Email and/or Phone, and the specific **Survey** you wish to send.
- Click **Send**, and the survey will be delivered immediately. In the upper right corner, a green notification will populate to confirm the survey has been sent.



Scheduling lifecycle surveys

- Go to **Configure** > **Lifecycle**.
- Click the **+** button under **Lifecycle configurations** to create a new survey schedule.
- Choose the **Survey** you want to schedule.
- (Optional) Apply a **Company code filter** or **Employee tag filter** if you'd like to limit the survey to a specific group.
- Set the survey schedule by defining the number of days before or after an employee is hired or terminated. (You can also **Repeat annually on the hire date** by clicking on the toggle, and this setting will automatically update to 365 days after an employee was hired.)
- Select the **Communication methods** (email and/or SMS) for the survey.
- Click **Save**. The configuration will be saved, and Macorva will send out the surveys automatically based on the criteria you've set.



Contact Support

For more information on Employee Lifecycle surveys, check out our Help Center or email us at support@macorva.com.



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