RETAIN™
BY PINNACLE

FREQUENTLY ASKED QUESTIONS

by managers about Retain

What is Retain by Pinnacle?

Retain software helps you communicate with your staff more consistently and effectively, especially in the first 100 days of employment. It surveys new hires over the first three months, identifying employees who are at risk of leaving and prompting managers to check in with employees whether feedback is positive or negative. Exit surveys and annual employee engagement surveys round out the picture. Additionally, its simple dashboard encourages managers to congratulate employees on birthdays and work anniversaries.

Where can I learn the basics of Retain?

Our support site shows you how to use the software and takes you through some best practices. Additionally, you can click the ? circle at the bottom of the app.

How do employees receive the surveys?

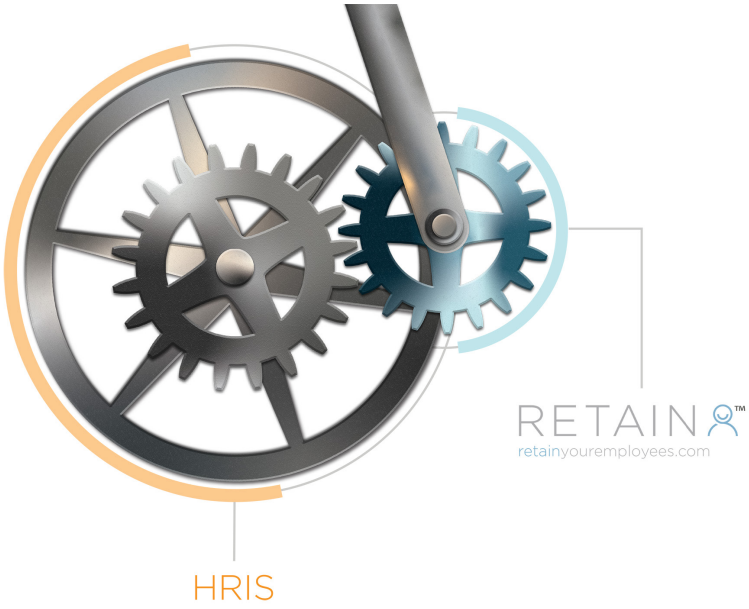
Employees are automatically invited to take surveys via their preferred contact method (email or text). When necessary, reminders to take an open survey are sent in the same way.

Additionally, you can link employees directly to their unique profiles by either opting to print and deliver QR code cards or by sending a direct link URL. Either way, employees can effortlessly update their contact information and access open surveys they haven't taken yet.

How does Retain receive or update employee information?

Retain securely obtains information from your company's HRIS (human resource information software). Anything updated there will be reflected in Retain. **NOTE:** The flow of information goes one way. Retain cannot make any changes to anything in your HRIS.

Keeping the HRIS current allows Retain to maintain the latest information without you having to update multiple locations. Occasionally, when HRIS isn't available, organizations choose to maintain employee information manually.



If I enter information directly in Retain, does it override what was imported from the HRIS?

A few employee fields, such as language preference, can be changed in Retain, but other fields will be disabled. If your company is setup to synchronize with your HRIS, the HRIS will be the primary source for accurate employee information. That way, you won't have to remember to correct or change information in two places and Retain will always remain up to date.

If employees update their information on their respondent profile directly in Retain, that information will be prioritized over the HRIS sync. Users with an HRIS sync can edit their own contact information in Retain, but not that of other employees.

What's the difference between manager accounts and respondent profiles?

The Retain app is divided into two areas:

- Reports and Results (manager account)
- Surveys (respondent profile)

Managers have access to survey results in Retain. These users have invitation-only, password-protected accounts that grant access to reports and survey results for their direct reports. **NOTE**: This access is restricted to direct reports only.

Respondents will be sent a direct link to their employee survey page to take surveys. On this page, they are encouraged to upload a photo and manage their contact information. They can't see survey results or other employee information through these links. Survey respondents don't need a password or a code, only the unique, direct link.

Managers use the same process as all respondents to take surveys. They don't take surveys through the account they use to view reports and survey results.

REPORTS & RESULTS

Manager Account

- For managers of employees/respondents
- Not used to take surveys
- Password-protected
- Access to survey results and reports
- Can comment on surveys and can be tagged in discussions
- Can email employees from app to acknowledge milestones

SURVEYS

Respondent Profile

- For all employees
- To respond to surveys as an employee
- Direct URL link
- Not connected to results or reports
- Upload profile photo
- Keep contact information for survey invitations up to date
- Set preferred contact method

Do employees need a password?

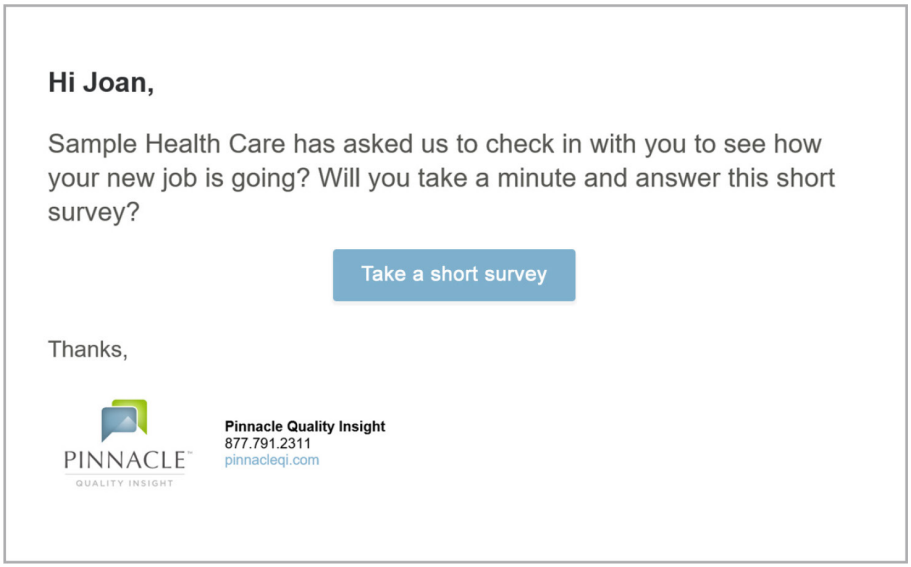
Employees have profiles, which don't require a password. Check out the "Users & Employees" page for thorough explanation of the difference between a user account and an employee profile.

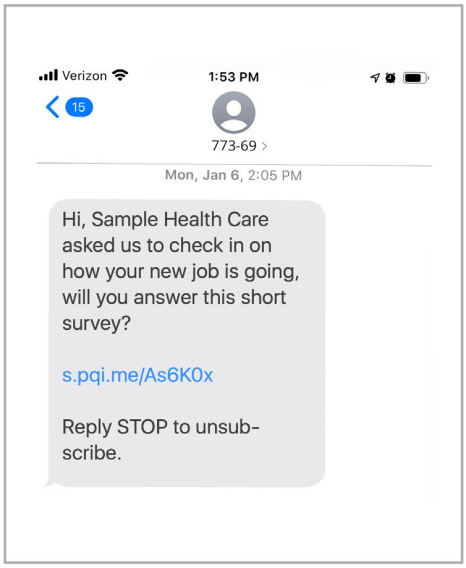
What do the emails and texts from Retain look like? Is it clear that they've been sent by Retain?

Rest assured, it's clear they've been sent by Retain. Messages sent by Retain to employees will include your company name. This helps reassure employees that the message is secure and not spam.

"PQI" appears in the URL, the Pinnacle Quality Insight logo is at the bottom of emails, and the survey is designated as a Retain survey once the employee opens the link.

NOTE: Some organizations prefer for the location or facility to be the source of the survey invitation, rather than from the larger company. Your Retain account manager can this set up.





Do you need a code to take a survey on Retain?

Instead of requiring access codes, surveys are available only through unique links, obtained in one of the following ways:

- Email or text sent by Retain.
- QR code or direct link to respondent profile provided by employer.

When employees enter their profiles, they are prompted to take or delay any open surveys. If they delay participation, the survey remains on their profile until they take it or it expires.

Survey invitations sent via email or text to specific employees will include unique URL access. Note: Occasionally, a link may span two text lines in an email, causing part of the URL to be mistaken for a code. Instruct employees to copy/paste the full link into a browser to avoid any formatting issues.

How much time does it take to complete a survey?

All Retain surveys are designed to be short but targeted. Employees usually spend between three

to five minutes taking a survey, but some may take ten minutes, depending on time spent adding comments.

We recommend employers provide employees with a dedicated 15-minute block of time during regular working hours to take the survey. The engagement survey is open for the entire month, so employees can take the survey outside of work hours if needed.

How many minutes will employees have to complete the survey once they open the survey link?

While surveys don't have a time limit overall, they can be timed out due to lack of activity.

The amount of inactive time needed for a survey to time out varies and can be influenced by the following:

- Browser and other settings on the respondent's device.
- Caching, firewall, and VPN rules for devices connected to a corporate network.

An error message isn't displayed when the survey times out. The employee can still take the survey by refreshing the page or using the link they were sent. Restarting the survey causes you to lose any unsubmitted responses but won't interfere with the ability of the survey to be filled out and submitted.

Can employees submit incomplete surveys?

Certain questions require answers before the survey can be submitted. We've made these required questions quick and easy to answer by formatting them on a scale such as: strongly disagree, disagree, neutral, agree, strongly agree. Any additional comments are optional.

How long is the employee engagement survey or follow-up survey open?

It's open for a calendar month, starting on the first of the month. A survey conducted in April is open April 1–30. A December survey would run December 1–31.

What's the difference between the employee engagement survey and the follow-up survey?

The biggest difference between the engagement and the follow-up surveys is the number of questions asked. An engagement asks 15 to 20 questions, while a follow-up asks an average of five. The engagement survey asks more comprehensive questions. The follow-up survey checks in to make sure things are going well between the broader annual surveys.

Which employees are eligible to participate in employee engagement surveys?

Employees become eligible when they have been with the organization for under 100 days at the time the survey opens. Employees that have been with the organization for less than 100 days participate in the new hire journey surveys and will be invited to join the next company-wide engagement or follow-up survey.

Do employees first have to participate in an engagement survey to get an invitation to a follow-up survey? What about new employees vs. those who've simply changed locations?

Each time an engagement or follow-up survey begins, Retain invites all eligible employees to participate, regardless of participation in the last survey. In other words, being invited to the follow-up survey isn't based on first taking an engagement survey, but rather who is currently an eligible employee at all locations.

When will employees receive an invitation to the employee engagement survey and/or follow-up survey?

Surveys are sent out the first business day of the month. Reminder invitations are sent after seven inactive days and, as needed, again approximately five business days before the month's end. Reminder invitations are only sent until an employee has responded to the survey.

If an employee deletes their invitation, will a new one be sent? What if their contact info changes?

Regardless of whether or not an employee deletes their survey invitation, reminders are sent on a regular schedule. These reminders will include a link to the survey. The exception is if an employee marks previous Retain invitations as spam or junk.

If employees change their contact preferences on their profiles or if it's updated in the HRIS system, the next survey invite or reminder will be sent to their new contact information. Open surveys can also be found on employee profiles, which can be accessed via employee access cards or links.

When will they receive an invitation sent to their updated contact information?

The employee will receive a survey invitation when the next round of reminder invitations to all employees goes out.

For example: An engagement survey begins June 1, 2021 and an employee updates their contact information on June 2, 2021. This employee will receive a reminder notification using the updated contact information the next time reminder invitations are sent out, in this case on June 8. If the information is updated after the final reminder, in this case June 25, the employee will not receive a reminder.

Can you extend the deadline for an employee to complete their survey?

While we're unable to extend individual employee survey deadlines, we can, under special circumstances, extend company-wide employee engagement surveys.

What's the survey schedule for a new employee?

New hires are invited to participate in the 15-, 30-, 60-, and 90-day new hire survey journey. Days are counted from the first day of employment.

When will I be notified if a new hire skips a survey?

You are notified 14 days after an employee misses two consecutive surveys. For example, if the 30-day and 60-day surveys are skipped, you will be notified 14 days after the 60-day survey was sent out.

We notify you after two skipped surveys in a row due to a higher risk of employee separation. This allows the manager to follow up directly in an attempt to ensure satisfaction and avoid potential turnover.

When are employees invited to take an exit survey?

Employees that separate will get a survey invitation three days after their final date of employment is reported to Retain.

Exit surveys can be set to only include voluntary separations or to include all types of separations.

How many days do employees have to participate in the exit survey?

Employees have 30 days from the day the survey invitation was sent to respond.

Retain sends a reminder seven days after the initial invite and then a last-chance reminder one day before it expires at 30 days.

How can we boost participation in exit surveys?

Ask existing employees to have a text number or personal email on their Retain profile. Sometimes company email accounts are deactivated sooner than the exit survey invitation would be sent, so employees who have provided a cell number or personal email have a higher chance of having an opportunity to take the exit survey.

When Retain is implemented in our organization, how far back do you send exit surveys to employees who have recently voluntarily terminated?

Exit surveys are sent to anyone who has voluntarily terminated in the last 60 days and has an active contact method. From then on, employees that separate will get a survey on the regular exit survey schedule, three working days or more after their termination date.

I am unable to send a happy birthday or anniversary message from the news feed. What should I do?

This is most likely due to the settings on your computer. Learn how to check or adjust your email settings.