



AI-generated Reports

MACORVA EX SAMPLE REPORTS

This brochure showcases the diverse set of reports that Macorva's AI system can generate. Each report utilizes all relevant data at its disposal, including company and team engagement surveys, 360 feedback, manager notes, customer feedback, and time trends. Our AI is designed to simplify complex data. It takes lengthy and detailed datasets, and condenses them into clear, concise reports, always citing the source data when possible. Beyond generating reports, our AI also suggests actions and responses based on the data, providing a more comprehensive view of your company's situation. Explore the capabilities of Macorva's AI-generated reports with the examples in this brochure.

All examples presented are entirely AI-generated, without any manual edits, utilizing synthetic data to replicate a typical Macorva customer environment.

Company-wide engagement report

Production process:

Auto-generated after each employee engagement survey

Access points:

Downloadable PDF, interactive platform dashboard

Purpose:

Provide leadership with data-driven insights and actions to improve overall engagement

Summary

The most recent employee engagement survey was completed by 587 employees across various departments, management levels, seniority, age, gender, and ethnicity. The overall engagement rate was 35%, with some variations across different segments. This report will analyze the strengths and areas for improvement based on the survey responses and provide recommendations for action plans to increase employee engagement.

Strengths

- High completion rate (100%) across all segments, indicating employees' willingness to provide feedback.
- The Marketing department has the highest engagement rate (36%) among all departments.
- Employees with 16–30 reports and 100+ reports have higher engagement rates (50%) compared to other management levels.
- Employees with 5–9 years of seniority show a higher engagement rate (42%) compared to other seniority levels.
- Non-binary employees have the highest engagement rate (41%) among all gender categories.

Areas for improvement

- The Finance department has the lowest engagement rate (33%) among all departments.
- Employees with 0–1 years and 2–4 years of seniority have lower engagement rates (31% and 28%, respectively) compared to other seniority levels.
- Employees who did not disclose their ethnicity have a lower engagement rate (27%).

Employee segments

Significant differences in engagement rates were observed in the following segments:

- **Department:** Marketing had the highest engagement rate while Finance had the lowest.
- **Management level:** Higher management levels showed higher engagement rates.
- **Seniority:** Mid-level employees had higher engagement rates than newer or more experienced employees.
- **Gender:** Non-binary employees had a higher engagement rate than other gender categories.

Trends

Comparing December 2020 and March 2021 data:

- Overall employee engagement increased from 31% to 35%.
- Average Likert scores remained relatively stable across all questions.

Predicted turnover risks

Based on the survey results, the following segments may have higher turnover risks:

- Finance department employees
- Employees with 0–1 years and 2–4 years of seniority
- Employees who did not disclose their ethnicity

Recommendations

1. **Address department-specific concerns:** Investigate the reasons behind lower engagement rates in the Finance department and implement targeted interventions.
2. **Support new employees:** Provide additional support, training, and mentorship for employees with less than five years of seniority to increase engagement.
3. **Promote diversity and inclusion:** Encourage open discussions about ethnicity and create a more inclusive work environment.

Action plan

1. Conduct focus groups or interviews with Finance department employees to identify specific issues affecting engagement.
2. Implement a mentorship program for new employees to help them acclimate to the company culture and develop their skills.
3. Organize diversity and inclusion workshops or training sessions for all employees.

Metrics for success

- Increase overall employee engagement rate by 10% within one year.
- Increase engagement rates in identified segments (Finance department, newer employees, undisclosed ethnicity) by 15% within one year.
- Track participation in mentorship programs and diversity workshops.

Sample employee email

Subject: Thank you for participating in our Employee Engagement Survey!

Dear [Employee],

Thank you for taking the time to complete our recent Employee Engagement Survey. Your feedback is invaluable in helping us understand your needs and concerns as we work together to create a better workplace.

Based on your feedback, we have identified several areas where we can improve employee engagement across different departments, management levels, seniority, age, gender, and ethnicity. We are committed to addressing these issues through targeted interventions such as providing additional support for new employees, promoting diversity and inclusion initiatives, and addressing department-specific concerns.

We will be implementing an action plan that includes conducting focus groups or interviews with specific departments, implementing a mentorship program for new employees, and organizing diversity and inclusion workshops or training sessions for all employees.

We will continue to monitor our progress through regular engagement surveys and strive to create a more engaging and inclusive work environment for everyone.

Thank you again for your valuable input. Together, we can make [Company Name] an even better place to work!

Best regards,
[Your Name]

Manager-specific team engagement report

Production process:

Auto-generated after each employee engagement survey

Access points:

Emailed directly to managers, downloadable PDF, accessible from user's homepage, manual generation option in Org Chart

Purpose:

Delivers a personalized report for every manager, featuring team-specific engagement insights and comparisons to company-wide metrics

Summary

The employee engagement survey results indicate a slightly higher completion rate (81%) and engagement level (36%) compared to the company average (74% and 31% respectively). However, the percentage of actively disengaged employees is also higher (14%) than the company average (11%). The team scores for understanding job success requirements and having opportunities to learn and grow are above the company average. However, the scores for receiving recognition, having necessary tools, and job satisfaction are below the company average.

Action items

- **Completion Rate:** The team's survey completion rate is higher than the company average, indicating a high level of participation and interest in providing feedback.
- **Engagement Level:** The team's engagement level is higher than the company average, suggesting a generally positive work environment.
- **Understanding Job Success:** The team's understanding of what it takes to be successful at their job is on par with the company average.
- **Learning Opportunities:** The team perceives more opportunities to learn and grow compared to the company average.

Areas for improvement

- **Recognition:** The team's score for receiving recognition for doing a good job is significantly lower than the company average.
- **Job Tools:** The team's score for having the necessary tools to do their job well is slightly below the company average.
- **Job Satisfaction:** The team's score for job satisfaction is lower than the company average.

Predicted turnover risk

The higher percentage of actively disengaged employees (14%) compared to the company average (11%) indicates a potential risk of increased turnover.

Recommendations

- **Improve Recognition:** Implement strategies to increase recognition for good work.
- **Provide Necessary Tools:** Ensure that all team members have the tools they need to perform their jobs effectively.
- **Increase Job Satisfaction:** Investigate the causes of lower job satisfaction and implement strategies to improve it.

Action plan

- **Recognition Program:** Develop and implement a recognition program to acknowledge and reward good work.
- **Tools Assessment:** Conduct a needs assessment to identify any gaps in tools and resources, and address these gaps.
- **Job Satisfaction Survey:** Conduct a more detailed survey to understand the causes of lower job satisfaction and develop strategies to address these issues.

Radiant AI prompts

- “Generate strategies to improve recognition in the workplace.”
- “Identify potential tools and resources that can enhance job performance.”
- “Suggest ways to increase job satisfaction among team members.”

Employee communication

Dear Team,

We appreciate your participation in the recent employee engagement survey. Your feedback is invaluable in helping us understand our strengths and areas for improvement. The survey results indicate that we have a higher engagement level and understanding of job success requirements compared to the company average. However, we also identified areas for improvement, including recognition for good work, availability of necessary job tools, and overall job satisfaction.

We are committed to addressing these issues and have developed an action plan that includes implementing a recognition program, conducting a tools assessment, and investigating the causes of lower job satisfaction. We believe these steps will help us create a more positive and productive work environment.

Thank you for your continued dedication and contributions to our team.

Best,
[Your Name]

Annual employee performance review

Production process:

Created manually with a single click using data from "Manager notes"

Access points:

Available in the platform's "Manager Notes" section, can be set to read-only and made viewable to the employee

Purpose:

Compresses extensive feedback data and manager notes into a comprehensive, standardized initial draft, potentially saving managers 8-16 hours per employee review

Overview

Tara Rubert, a Consultant in our Special Projects department, has been with us since July 23, 2015. She has shown a consistent ability to execute projects effectively and collaboratively. Her detail-oriented approach has been instrumental in the successful completion of key initiatives such as the website redesign.

Performance evaluation

- **Punctuality:** Tara's record on punctuality needs improvement. She has been late on several occasions (3/12 & 4/2), notably on Monday mornings. This tardiness disrupts meeting schedules and potentially impacts team productivity.
- **Project Execution:** Tara shines in her execution of projects. Her work on the website redesign project was exemplary and demonstrated her keen attention to detail.
- **Teamwork:** Tara's collaborative spirit is commendable. She works well with the team and goes out of her way to be available for queries from her colleagues.
- **Presentation Skills:** Tara's presentation skills could use some enhancement. The Q1 report presentation was reported as difficult to follow by some attendees.

Strengths and achievements

- **Detail-Oriented:** Tara's meticulous approach to work is one of her key strengths. This was particularly evident during the website redesign project.
- **Collaboration:** Her ability to work well with others is another strength that stands out. It not only facilitates project completion but also fosters a positive team environment.

Areas of improvement

- **Punctuality:** Tara needs to work on being more punctual, especially for morning meetings.
- **Presentation Skills:** Enhancing her presentation skills would make it easier for others to understand complex information during meetings.

Goals and objectives

The following are suggested goals and objectives for Tara:

- **Improve Punctuality:** Make it a priority to arrive on time consistently, especially for early morning meetings.
- **Enhance Presentation Skills:** Attend workshops or training courses aimed at improving presentation skills.
- **Increase Knowledge Base:** Given some feedback about lacking expertise in certain areas, it would be beneficial for Tara to take advantage of training opportunities offered by the company.

Tara has shown great potential and her dedication is appreciated by both colleagues and customers alike. By focusing on the areas outlined above, she can continue to make significant contributions towards our corporate objectives while also furthering her own professional growth.

Objectives and key results (OKRs)

Production process:

Created manually with a single click using data from "Manager notes"

Access points:

Available in the platform's "Manager Notes" section, can be set to read-only and made viewable to the employee

Purpose:

Compresses feedback and manager notes, aligns them with company and/or department objectives to create an initial draft, potentially saving managers 4-8 hours per employee

Objective 1: Enhance Teamwork and Interpersonal Skills

- Key Result 1: Improve relationship with Dwight by initiating at least 2 collaborative projects by Q4 2023.
- Key Result 2: Develop a more patient approach towards slower teammates, demonstrated by a decrease in negative feedback about impatience by 30% in the next internal feedback cycle.
- Key Result 3: Balance directness with empathy in providing feedback, aiming to reduce instances of hurt feelings reported in the next internal feedback cycle by 40%.

Objective 2: Strengthen Expertise and Knowledge Sharing

- Key Result 1: Address perceived lack of expertise by pursuing relevant certification or advanced training course related to current role before end of Q4.
- Key Result 2: Organize bi-weekly knowledge-sharing sessions within the Special Projects department through Q4 to foster learning environment.

Objective 3: Improve Customer Service Skills

- Key Result 1: Decrease instances of negative customer feedback (distracted, not helpful, rude) by at least a third before end of Q3.
- Key Result 2: Maintain and improve upon positive customer ratings (helpful, friendly, attentive) with an aim for over a score increase of at least 10% each by end of year.

Objective 4: Continue Driving Revenue Growth and Project Success

- Key Result 1: Aim for another revenue increase through special projects work - target an additional growth rate of at least 15% by end of year.
- Key Result 2: Maintain current level of project success as measured by meeting deadlines and client satisfaction, aiming for a perfect record throughout the review period.

Specific, measurable, achievable, and time-based goals (SMART goals)

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1. Time Management Improvement

- **Specific:** Improve punctuality and reduce instances of tardiness.
- **Measurable:** Strive for a 100% on-time arrival record for the next review period.
- **Achievable:** Adjust morning routine to ensure timely arrival at work, especially on Mondays.
- **Relevant:** Timeliness is critical to maintaining a professional image and ensuring effective team collaboration.
- **Time-bound:** Target to achieve this goal by the end of Q4 2023.

2. Presentation Skills Development

- **Specific:** Enhance presentation skills to communicate more effectively during meetings or reports presentation.
- **Measurable:** Attend at least one presentation skills training or workshop by Q4 2023.
- **Achievable:** Utilize in-house resources or external online courses for skill development.
- **Relevant:** Effective presentations are crucial in conveying ideas and information clearly in a business setting.
- **Time-bound:** Demonstrate improved presentation skills in the Q4 report.

3. Strengthening Expertise

- **Specific:** Deepen knowledge and expertise in the role of Consultant.
- **Measurable:** Attend at least two relevant training courses or seek mentorship from a senior colleague by Q4 2023.
- **Achievable:** Leverage Dunder Mifflin's commitment to employee training and development opportunities.
- **Relevant:** Strong expertise is essential for job performance, customer satisfaction, and team collaboration.
- **Time-bound:** Show noticeable improvement in role expertise by end of Q4 2023.

4. Improving Organizational Skills

- **Specific:** Improve organizational skills to manage tasks more efficiently and avoid scheduling mistakes.
- **Measurable:** Implement a new organizational system or tool by the end of Q3 2023.
- **Achievable:** Utilize digital tools like project management software or time management apps.
- **Relevant:** Good organizational skills contribute to productivity, efficiency, and overall job performance.
- **Time-bound:** Demonstrate improved organization by having no meeting scheduling errors for Q4 2023.

5. Team Collaboration Enhancement

- **Specific:** Improve willingness to help others in all situations, reinforcing Dunder Mifflin's core value of teamwork.
- **Measurable:** Increase positive feedback on collaborative behavior from peers in next internal 360 feedback cycle.
- **Achievable:** Seek constructive feedback from colleagues regularly to identify areas for improvement in collaboration efforts.
- **Relevant:** Teamwork is vital for achieving departmental objectives and fostering a supportive work environment.
- **Time-bound:** Show significant progress on this aspect by end of Q4 2023.

Employee development plan

Production process:

Created manually with a single click using data from "Manager notes"

Access points:

Available in the platform's "Manager Notes" section, can be set to read-only and made viewable to the employee

Purpose:

Provides a more detailed plan than is created in a "performance review" to suggest steps for professional development that can be aligned with available company resources

Professional goals

1. **Increase Collaboration:** Irene needs to work more closely with her team members to enhance the spirit of teamwork.
2. **Improve Workload Management:** Irene should learn to manage multiple projects without getting overwhelmed or stressed.

Skill assessment

1. **Strengths:** Irene is dedicated, hardworking, and committed. She has excellent communication skills and a positive attitude. She's a problem solver who thinks creatively and innovatively.
2. **Areas for Improvement:** Irene needs to improve her collaboration skills and workload management abilities.

Performance metrics

1. **Project Completion Rates:** We will track the number of projects completed on time by Irene.
2. **Collaboration Metrics:** We will measure how effectively she collaborates with her colleagues through peer feedback and participation in team tasks.
3. **Stress Management Indicators:** We will monitor signs of stress or overwhelm in Irene, such as missed deadlines, errors in work, or feedback from colleagues.

Training and development activities

1. **Team Building Exercises:** These activities will foster a sense of unity among team members and improve collaboration skills.

Training and development activities

2. **Time Management Workshop:** This training can help Irene manage multiple projects simultaneously without getting overwhelmed.
3. **Stress Management Course:** Techniques taught here can help Irene handle stress effectively.

Timeline

- August 2023: Begin team building exercises
- September 2023: Start time management workshop
- October 2023: Commence stress management course
- November 2023 - December 2023: Evaluate progress

Progress tracking and evaluation

We will track progress through regular check-ins with Irene about her experiences with the training courses and exercises, as well as observing changes in her interactions with colleagues, project completion rates, and signs of stress levels.

We commend Irene for her dedication to her work, attention to detail, excellent communication skills, creativity in problem-solving, and commitment to project completion (as reflected in manager notes). However, we also acknowledge areas that need improvement such as collaboration with colleagues (as indicated by manager notes) – something we believe can be improved through team building exercises.

In relation to customer feedback summary for Irene Fritts – the majority have found her friendly (63%), attentive (57%), fast (53%) & helpful (53%). This reflects positively on Dunder Mifflin's core value of customer focus which emphasizes understanding their needs & providing personalized solutions while establishing long-lasting relationships based on trust & satisfaction.

This EDP aims at enhancing these strengths while addressing areas where improvement is needed so that she continues contributing positively towards achieving Dunder Mifflin's corporate objectives set for 2023 – especially relating to operational objectives like digital transformation where collaboration & workload management skills would be crucial for successful implementation within the set timeframe.

1:1 manager / employee meeting agenda

Production process:

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Access points:

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Purpose:

Helps managers quickly brainstorm a list of potential topics to discuss with employees

Category	Discussion
Feedback	Discuss the positive feedback Anita has received, highlighting her strengths such as cost-cutting, identifying growth opportunities, fundraising, and cross-departmental collaboration. Also, address areas for improvement like time management and delegation.
Project Updates	Discuss progress and performance against the company's financial objectives for 2023 (Revenue Growth, Gross Margin, Net Profit Margin, Cost Reduction), including specific achievements and challenges.
Goal Setting	Discuss ways to continue driving revenue growth and operational efficiency. Establish goals around improving organizational skills and delegating tasks to avoid overcommitting.
Professional Development	Discuss Anita's professional development plans in light of the feedback from the internal 360 review and customer feedback summary. Identify training opportunities to address areas where she lacks expertise or needs improvement based on this feedback.

Category	Discussion
Personal Concerns	Address any personal concerns Anita may have about her role or work environment based on the Engagement survey results for her team compared to company averages. Discuss ways to improve team engagement if necessary.
Team Collaboration	Discuss how Anita can continue leveraging her ability to work well with other departments (Sales, Marketing, HR) to meet overall company objectives. Also discuss strategies for improving internal relationships based on the internal 360 feedback summary.

9 box analysis

Production process:

Created manually with a single click using data from "Manager notes"

Access points:

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Purpose:

Prioritizes manager notes and 360 feedback to create an initial draft of a 9 box analysis

Performance metrics

Susan has demonstrated high performance in her role as COO. Key achievements include:

1. **Operational Efficiency:** Increased by 35%
2. **Cost Reduction:** Significant savings reported due to operational efficiency.
3. **Key Performance Indicators (KPIs):** All KPIs show good growth.
4. **Decision Making:** Demonstrated strong strategic thinking and decision-making skills.
5. **Communication:** Clear and concise communicator.
6. **HR Management:** Quickly and fairly resolves HR issues.

However, there are areas of improvement including:

1. Focus on people aspect along with numbers.
2. Setting realistic work-life balance expectations.
3. Avoiding micromanagement tendencies.

Potential metrics

Based on her performance and self-evaluation, Susan shows high potential for future growth in the company:

1. Strong strategic thinker: This is a critical skill for leadership roles.
2. Effective delegator: Empowers managers to take ownership of their responsibilities.
3. Respected leader: Maintains a strong rapport with CEO and other executives.

Areas where growth potential could be enhanced include:

1. Improving the balance between focusing on numbers and considering the people aspect of her role.
2. Setting more realistic work-life balance expectations for her team to prevent burnout and enhance employee well-being.

Feedback

Positive feedback includes:

1. Effective communication skills that foster understanding among team members.
2. Demonstrated leadership abilities through effective delegation and problem-solving skills.
3. Successful cost reduction initiatives leading to significant savings for the company.

Negative feedback includes:

1. Tendency towards micromanagement which can hinder team autonomy and creativity.
2. Overemphasis on numbers at the expense of people-oriented considerations which can impact morale and productivity.

9 box grid placement

Based on the assessment above, Susan's placement would be as follows:

- Potential: High
- Performance: High

Despite some areas for improvement, Susan's overall performance has been exceptional in driving operational efficiency and cost reductions for the company while demonstrating strong leadership skills through effective communication, decision-making, delegation abilities, and maintaining a positive rapport with executives within the company.

Additionally, she shows high potential with her strategic thinking ability which is critical for future leadership roles within the organization along with her ability to empower other managers showing promise as a leader who can groom future leaders within the organization.

Her focus going forward should be on improving people skills by balancing number-oriented focus with more people-centric considerations while avoiding micromanaging tendencies to foster greater trust within her team members which will further enhance her potential as an effective leader in the organization.

Performance improvement plan (PIP)

Production process:

Created manually with a single click using data from "Manager notes"

Access points:

Available in the platform's "Manager Notes" section, can be set to read-only and made viewable to the employee

Purpose:

Focuses on documenting an improvement process clearly, ensuring managers effectively convey expectations for professional growth

Employee information:

- Employee Name: William Gordon
- Position: Chief Marketing Officer
- Department: Marketing
- Manager: Beatrice Bierman
- Location: New York, NY
- Date: July 21, 2023

Performance issues identified

1. Lack of respectful communication with direct reports.
2. Inadequate expertise in the role of Chief Marketing Officer.
3. Perceived as being disorganized and slow.

Company policies and procedures

All employees at Dunder Mifflin are expected to adhere to company policies regarding respectful communication and behavior towards colleagues. Additionally, all employees are expected to possess a level of expertise necessary for their role, and to manage their time effectively.

Performance improvement goals

1. Improve respectful communication with direct reports.
2. Enhance expertise in the role of Chief Marketing Officer.
3. Improve organization and time management skills.

Goal	Action Steps	Resources/Support	Timeline
Improve Respectful Communication	Engage in leadership training focused on effective and respectful communication; Regularly solicit feedback from direct reports.	Leadership training courses/workshops; Feedback from direct reports.	Q3 - Q4 2023
Enhance Role Expertise	Attend industry conferences, webinars, or online courses related to marketing; Seek mentorship or guidance from experienced colleagues or external experts.	Industry events; Mentorship; Online resources.	Ongoing throughout 2023
Improve Organization & Time Management Skills	Enroll in a time management workshop; Utilize organizational tools/software; Regularly reassess tasks and priorities.	Time management workshops; Organizational tools/software.	Q4 2023

Progress meetings

Regular check-ins will be scheduled monthly with William's manager Beatrice Bierman to discuss progress towards the performance improvement goals.

Consequences of not meeting PIP goals

Failure to meet the goals outlined in this PIP may result in disciplinary actions such as additional training or possible termination.

Communication to employee

This PIP will be communicated to William Gordon by his manager Beatrice Bierman during a one-on-one meeting where he will have an opportunity to ask questions and provide input on the plan.

Documentation

This PIP will be documented and any discussions related to it will be recorded. A record of William's progress throughout the improvement period will also be maintained.

The goal of this Performance Improvement Plan is not punitive but supportive - providing guidance for William Gordon so he can improve his performance, succeed in his role as Chief Marketing Officer at Dunder Mifflin, and contribute positively towards achieving our corporate objectives for 2023.