



2026 Operating Practices Survey

Submission Instructions

The 2026 Operating Practices Report (OPR) survey consists of six tabs: Profile, Financials, Benefits, Recruiting, Hiring, and Clients. All fields must contain a value or have N/A selected before you can save and advance to the next tab. The new survey format has 90% fewer questions and should take much less time to complete than the prior survey.

Creating Your Login Credentials

You will use your Company Name and a password to save and retrieve your data throughout the survey. Create your password before you begin — it must meet all of the following:

- 8 to 12 characters in length
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- At least one special character

i Retrieving Saved Data & Team Completion of the Survey

To reload a previously saved session: enter your Company Name and Password at the top of any tab, then click Retrieve Data. The survey will confirm your password is Acceptable (shown in green) once requirements are met.

You can have others on the team help complete the survey. To access the survey, they will need to input your company name as you originally entered it along with the password (case sensitive).

Navigating the Survey & Saving Your Work

- **Overall progress bar:** The dark bar at the top of the page shows completion across all six tabs (e.g., 99% Complete).
- **Per-tab progress bar:** Each tab has its own green progress bar. When it reaches 100% and shows "100% Complete – Please Save," you are ready to save.
- **Click Save before advancing:** Data is NOT saved automatically. Always click the Save button at the bottom of the tab before clicking another tab or closing your browser.
- **Browser warning:** Closing or refreshing your browser before saving will lose all unsaved entries on that tab.
- **Tab navigation:** You may click any tab name in the top navigation bar to jump between sections — tabs do not have to be completed strictly in order, but all must be complete before you can submit.

N/A vs. Zero: A Critical Distinction

⚠ Zero is not the same as N/A

- Enter 0 if the true answer is zero (e.g., no engineering staffing revenue, no salaried billable consultants).
- Check N/A only if your company does not track that metric at all.
- Entering N/A when the answer is actually 0 distorts the aggregate data for all members.

Temporary N/A workaround: If you need time to look up a specific figure, you may temporarily check N/A on that field to save your progress and advance. When you have the correct value, return to the tab, uncheck N/A, enter the number, and click Save again.

TOP LINE REVENUE

- Enter Top Line Revenue for both 2024 and 2025. The survey automatically calculates the Growth/Decline %.
- 2025 Top Line Revenue becomes the target that the Revenue by Segment section must match.

REVENUE BY SEGMENT

- Enter 2025 revenue for each segment: IT Staffing, Engineering Staffing, IT Solutions/IT Projects, Direct Hire/Permanent Placement, Payrolling, Other.
- The counter "Difference from Top Line" must reach \$0.
- Use the Other (\$) field to capture any revenue not fitting the listed categories — do not leave a gap unreconciled.

⚠ Segment reconciliation is required before you can submit

The survey tracks the running difference between your segment entries and your Top Line Revenue. You cannot submit until this difference equals \$0. If your segments legitimately don't sum cleanly, use the Other (\$) field to capture the remainder.

SG&A EXPENSES

- **Grand Total SG&A Expenses (\$):** Enter your firm's total SG&A for 2025. This is the target for the two subsections below.
- **Total SG&A Payroll (\$):** Enter the payroll subtotal, then fill in subcategories. The "Difference from Total SG&A Payroll" counter must reach \$0.
- **Total SG&A Expense Excluding Payroll (\$):** Enter the non-payroll subtotal, then fill in subcategories. The "Difference from Total SG&A (Excluding Payroll)" counter must reach \$0.
- **Grand Total check:** Grand Total SG&A = Total SG&A Payroll + Total SG&A Expense (Excluding Payroll).

Submitting Your OPR

- **Click Submit OPR** at the bottom of the final tab. This finalizes and locks your survey. Review all entries carefully before clicking — changes after submission require contacting support.
- **After submitting**, enter your Company Name and Password and click Retrieve Data to view your completed responses in read-only mode.
- **If you need to change data post-submission**, email support (see below) from your company email domain.

Common Errors to Avoid

Potential Errors	How to Avoid It
Entering N/A when the answer is 0	Use 0 for true zero values; N/A only for metrics you genuinely don't track
Revenue segments don't reconcile to Top Line	Watch the "Difference from Top Line" counter; use Other (\$) to close any gap
SG&A subcategories don't sum to their totals	Watch both difference counters (Payroll and Non-Payroll); blank fields and stray N/As are the most common culprits
Closing the browser before clicking Save	Always click Save at the bottom of each tab before navigating away
Using inconsistent Company Name on retrieval	Your Company Name must match what you entered on first save

Questions or Technical Issues?

Contact us for help at any stage — not just after submission:

Email: michael.allen@datamindsoptimization.com

Contact us for any technical questions or problems at any step, post-submission data corrections, and username or password problems.