Using Pulse Surveys to Engage Your Team
## Model for Team Pulse Surveys

Team pulse surveys are short, easy-to-complete sets of questions sent electronically on a regular basis to do a "pulse check" of employees in areas such as engagement, satisfaction, relationships, and the work environment. They are useful for getting feedback from your team members, monitoring team effectiveness, and identifying opportunities for improvement.

This third job aid in the series presents a six-step best practices model for designing and implementing team pulse surveys:
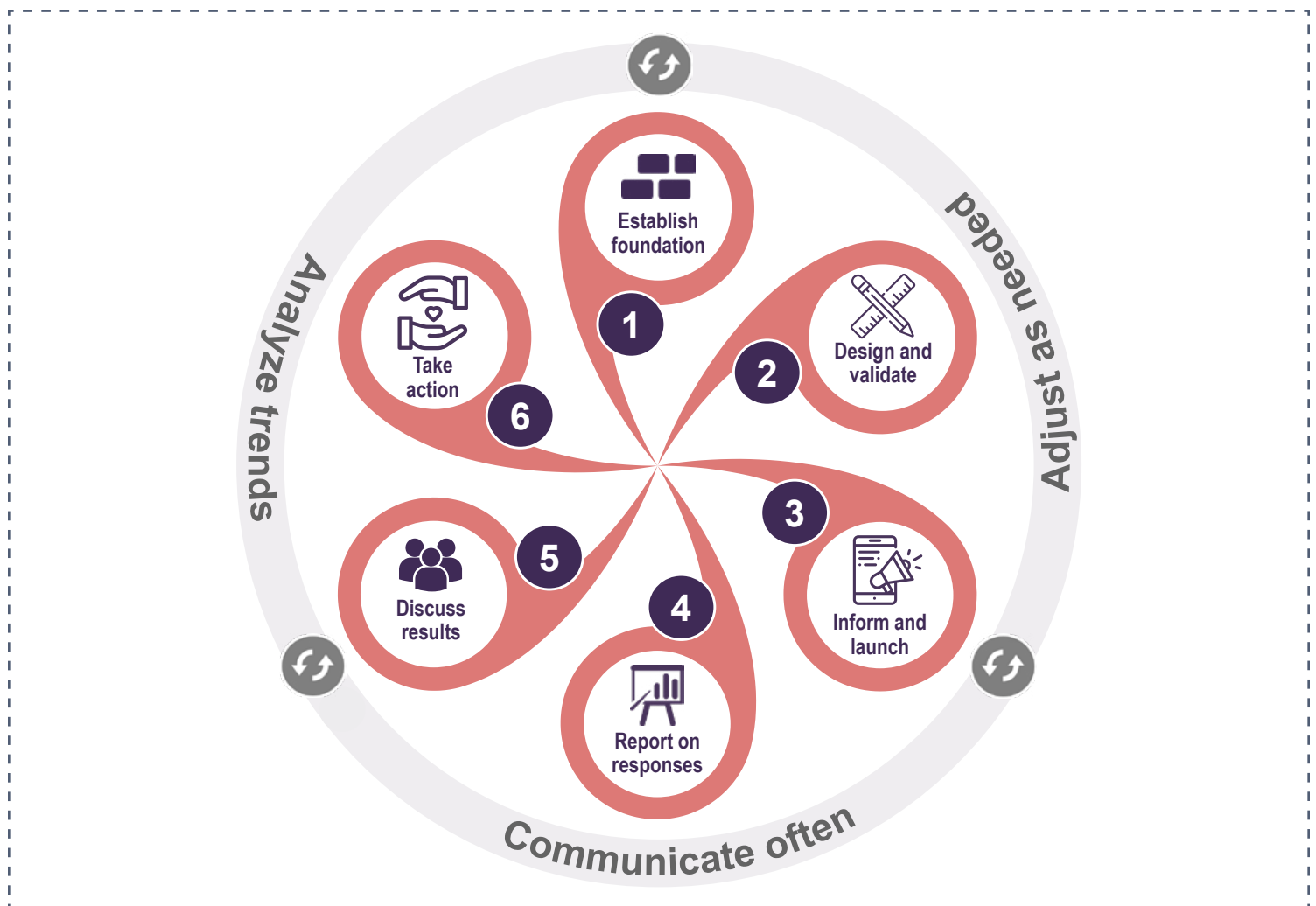
This series of ten job aids explains how to design and administer pulse surveys to support team engagement, positivity, and productivity in the workplace. Each job aid offers background information and covers the key steps in the process of developing team pulse surveys. We welcome your feedback!

Job aid: TRN4-J23

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Step 1: Establish foundation

1 — Establish foundation

- Set survey objectives and determine how to measure and achieve them
- Decide on role of management
- Select an outside service provider and software, if applicable
- Determine digital survey distribution methods and survey frequency

For more information:
Job Aid 1 – Engaging Your Team (TRN4-J21)
Job Aid 4 – Choosing Pulse Survey Software and Services (TRN4-J24)

Step 2: Design and validate

2 — Design and validate

- Match questions to response types and optimize question order
- Use branching to improve survey flow
- Verify question design using a quality checklist
- Pilot survey process from initial invitations to final thank-you messages
- Conduct pre-tests and technical dry runs, and adjust as needed

For more information:
Job Aid 5 - Developing Pulse Survey Questions (TRN4-J25)

Step 3: Inform and launch

3 — Inform and launch

- Promote the survey among team members and team leaders using multiple channels of communication
- Use introductory messages to convey survey purpose, benefits, privacy protections and timelines
- Launch the survey first thing in the morning to maximize responses

For more information:
Job Aid 6 – Team Communication (TRN4-J26)

Job aid: TRN4-J23

Step 4: Report on responses

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Report on responses

- Sort and analyze survey responses, both positive and negative
- Consider opportunities for follow-up, as needed
- Remind about anonymity and share response rate
- Focus on presentation and graphics
- Share results with all team members in a timely manner

For more information:
Job Aid 7 – Pulse Survey Results (TRN4-J27)

Step 5: Discuss results

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Discuss results

- Be open, honest and impartial about the results, and grateful for team input
- Clearly discuss positives and negatives
- Welcome questions and follow up to confirm understanding of results
- Outline any next steps to follow up on the results, as required
- Use multiple channels to further discuss results, like email, group chat, individual and team meetings

For more information:
Job Aid 6 – Team Communication (TRN4-J26)

Step 6: Take action

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Take action

- Use feedback to pursue opportunities for improvement, which will boost engagement among your team members
- Involve team leaders and members in developing and implementing follow-up plans
- Take immediate steps where possible and embrace ambitious timelines in general
- Ensure team accountability for pursuing follow-up plans and measuring progress

For more information:
Job Aid 8 – Team Follow-Up (TRN4-J28)

Job aid: TRN4-J23

Ongoing step: Communicate often

- Regularly repeat the overarching objectives and benefits of the survey
- Keep team members informed of progress to build trust and boost future survey response rates
- Seek volunteers to promote survey goals and participation

For more information:
Job Aid 6 – Team Communication (TRN4-J26)

Ongoing step: Analyze trends

- Interpret survey results over time to find trends
- Compare results against benchmarks and among different groups using the analytic capabilities of your survey software
- Present trends graphically
- Monitor response rates over time; high responses can indicate team engagement

For more information:
Job Aid 7 – Pulse Survey Results (TRN4-J27)

Ongoing step: Adjust as needed
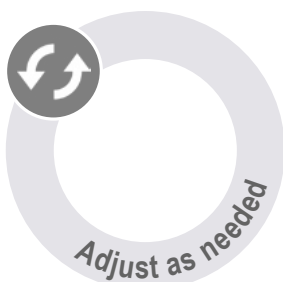
- Ensure questions continue to align with survey goals
- Modify questions that elicit no responses or unclear or neutral responses
- Add targeted questions to address new areas or monitor progress on follow-up plans
- Encourage higher participation rates by sending out reminders, adjusting timing or repeating anonymity and privacy protections, for example

For more information:
Job Aid 7 – Pulse Survey Results (TRN4-J27)

We welcome your feedback!

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