

# Using Pulse Surveys to Engage Your Team

## Worksheet for Creating a Pulse Survey

Job Aid Series: 10 of 10



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 tenth job aid in the series serves as a fillable worksheet that you can use to develop your own team pulse survey. It is based on the best practices model featured in Job Aid 3 – Model for Team Pulse Surveys. Checklists inspired by other job aids in this series are included. Get inspired by the example provided in Job Aid 9 – Case Study of a Team Pulse Survey.

For more information:

[Job Aid 3 – Model for Team Pulse Surveys \(TRN4-J23\)](#)

[Job Aid 9 – Case Study of a Team Pulse Survey \(TRN4-J29\)](#)

### Step 1. Establish foundation



#### Purpose of the pulse survey

For more information: [Job Aid 1 – Engaging Your Team \(TRN4-J21\)](#)

#### Pulse survey goals:

Goal 1:

Possible measure:

Goal 2:

Possible measure:

Goal 3:

Possible measure:



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-J30



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### Pulse survey recipients (select):

Whole team  
Voluntary

Subgroup (specify):  
Anonymous

### Pulse survey frequency:

Weekly  
Day and time:

Monthly

### Technology:

For more information: [Job Aid 4 – Choosing Pulse Survey Software and Services \(TRN4-J24\)](#)

Internal

Name of software:

Was this software:

already available within the department?  
procured externally in consultation with your department?

External service provider

Name of software, supplier (specify):

Text-based platform (SMS)

Web-based platform

Link delivery method:

For more information: [Job Aid 2 – About Pulse Surveys \(TRN4-J22\)](#)

### Survey administration:

Team leads:

Leader involvement (role):

Survey administration protocols and procedures:

- 1.
- 2.
- 3.
- 4.
- 5.



## Step 2. Design and validate



For more information: [Job Aid 5 – Developing Pulse Survey Questions \(TRN4-J25\)](#)

### Question development:

- Proposed question:  
 Response type: \_\_\_\_\_ Survey goal:  
 Benchmarks:  
 Order:            Earlier            Later  
 Branching (if applicable):  
 Question topic (for sorting):

### Question development:

- Proposed question:  
 Response type: \_\_\_\_\_ Survey goal:  
 Benchmarks:  
 Order:            Earlier            Later  
 Branching (if applicable):  
 Question topic (for sorting):



**Question development:**

- 3. Proposed question:
- Response type: \_\_\_\_\_ Survey goal: \_\_\_\_\_
- Benchmarks: \_\_\_\_\_
- Order:            Earlier            Later
- Branching (if applicable): \_\_\_\_\_
- Question topic (for sorting): \_\_\_\_\_

**Question development:**

- 4. Proposed question:
- Response type: \_\_\_\_\_ Survey goal: \_\_\_\_\_
- Benchmarks: \_\_\_\_\_
- Order:            Earlier            Later
- Branching (if applicable): \_\_\_\_\_
- Question topic (for sorting): \_\_\_\_\_

**Question development:**

- 5. Proposed question:
- Response type: \_\_\_\_\_ Survey goal: \_\_\_\_\_
- Benchmarks: \_\_\_\_\_
- Order:            Earlier            Later
- Branching (if applicable): \_\_\_\_\_
- Question topic (for sorting): \_\_\_\_\_



### Pulse survey question review:



#### CHECKLIST

For more information: [Job Aid 5 – Developing Pulse Survey Questions \(TRN4-J25\)](#)

	Questions				
	#1	#2	#3	#4	#5
Review category					
Plain language					
Answer possible					
Response choices					
Official languages (translation)					
GBA Plus factors					
Bias or sensitivities					
Overall flow					
Other considerations					

### Pulse survey pretesting (and gathering feedback):



#### CHECKLIST

- Individual testing
- Small group testing and discussion
- Technical dry run
- Further pretesting to validate fixes (as needed)

## Step 3: Inform and launch



### Develop a promotion plan:

For more information: [Job Aid 6 – Team Communication \(TRN4-J26\)](#)



#### CHECKLIST

- Develop and test messages
- Give advance notice to the team
- Align pulse survey with existing departmental branding
- Prepare volunteers to spread the news



### Introductory messaging:



#### CHECKLIST

For more information: [Job Aid 6 – Team Communication \(TRN4-J26\)](#)

Introductory messaging includes:

- Support of top leadership
- Reasons for the survey
- Why participation matters
- Privacy protections
- Time required and deadline
- Plan for follow-up
- Acknowledgement to team

### Launch the team pulse survey

## Step 4: Report on responses

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Report on responses

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

### Interpret results:

General impressions:



## Sorting and comparing results:

Positive results (strengths)

Key positive result:

Compared to:

Related survey topics:	Aligns	Differs
Recent results:	Aligns	Differs
Benchmarks:	Aligns	Differs
Subgroups:	Aligns	Differs

Repeat for each additional key positive result.

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

Negative results (potential opportunities for the team)

Key negative result:

Compared to:

Related survey topics:	Aligns	Differs
Recent results:	Aligns	Differs
Benchmarks:	Aligns	Differs
Subgroups:	Aligns	Differs

Considerations for follow-up:

Impact on team if not addressed?	Yes	No
Consult team for clarification?	Yes	No
Monitor for possible trend?	Yes	No

Repeat for each additional key negative result.



## Revisiting pulse survey questions:



### CHECKLIST

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

- Inconsistent/random results for questions on the same theme?
- Possible follow-up suggested by results?
- Responses at both positive and negative extremes?
- Neutral responses suggesting lack of clarity?
- No responses or low completion for some questions?

## Participation rate review:

Goal (%):

Actual (%):

Compared to last pulse survey:

Lower

Same

Higher

## Prepare report on results:



### CHECKLIST

For more information: [Job Aid 6 – Team Communication \(TRN4-J26\)](#)

- Use both official languages
- Have accessible formats
- Consider design
- Thank team members

- Focus on priority results first
- Report all results
- Verify accuracy of numbers
- Include approach for discussion/follow-up

## Sharing report on results:

Distribution methods:

## Share pulse survey results!





## Step 5: Discuss results



Discuss results

For more information: [Job Aid 6 – Team Communication \(TRN4-J26\)](#)

### Hold discussion on pulse survey results:



#### CHECKLIST

- Welcome honest input and questions
- Discuss participation rate
- Discuss results

- Seek reasons behind results
- Outline next steps
- Thank participants

Channels for further discussion of results:

## Step 6: Take action



Take action

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

### Follow-up planning (when results warrant):



#### CHECKLIST

- Involve team leaders
- Involve team members
- Recruit follow-up leads
- Embrace urgency
- Be honest about what's possible

- Concentrate efforts
- Embrace accountability
- Communicate follow-up plans
- Communicate progress on plans
- Thank participants



**Follow-up planning pathway:**

1. Identify opportunities for improvement
2. Prioritize identified opportunities
3. Compile list of suggested follow-up activities
4. Prioritize suggested follow-up activities
5. Consider implementation needs

Opportunity for improvement (number by priority):

Urgent                      Less urgent                      High impact                      Low impact

Follow-up activity (number by priority):

High potential                      Low potential

Implementation needs:

Completion target:

Follow-up activity (number by priority):

High potential                      Low potential

Implementation needs:

Completion target:

Follow-up activity (number by priority):

High potential                      Low potential

Implementation needs:

Completion target:

Repeat for each opportunity and then number by priority.



**Follow-up planning pathway (continued):**

6. Create and implement follow-up plan

Objectives = opportunities + activities + implementation needs + due dates

Plan objective 1:

Specific                      Measurable                      Attainable                      Relevant                      Time-bound

Plan objective 2:

Specific                      Measurable                      Attainable                      Relevant                      Time-bound

Plan objective 3:

Specific                      Measurable                      Attainable                      Relevant                      Time-bound



## Follow-up planning pathway (continued):

### 6. Create and implement follow-up plan

Prepare follow-up plan document:



#### CHECKLIST

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

Use both official languages  
Focus on priority objectives  
Use accessible formats

Consider design  
Share plan with whole team  
Thank participants

Launch and communicate follow-up plan as soon as possible

### 7. Measure and communicate progress



#### CHECKLIST

Measure progress on planned follow-up  
Provide regular updates to team  
Adjust and communicate adjustments to follow-up plan  
Adapt pulse survey to measure any improvements in results



The Canada School of Public Service wants to hear about your experience in launching a team pulse survey. How did our series of job aids help your team?

We welcome your [feedback!](#)