## Using Pulse Surveys to Engage Your Team Worksheet for Creating a Pulse Survey



Job Aid Series: 10 of 10

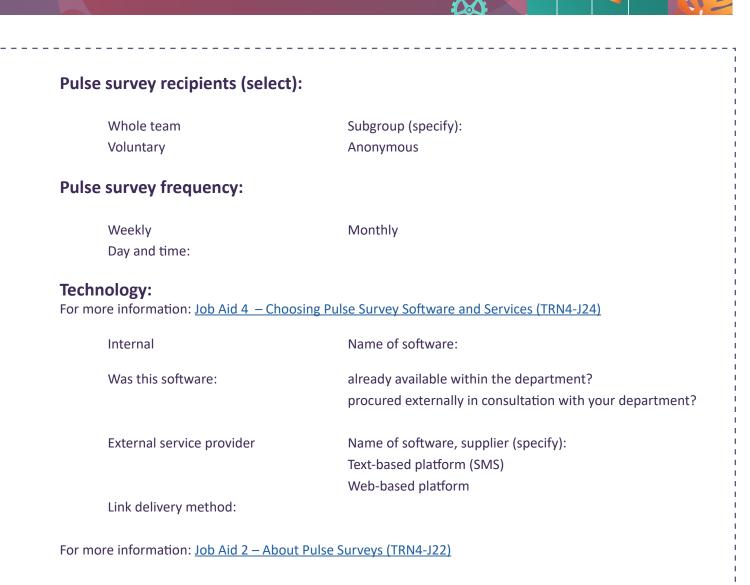
Team pulse surveys are short, easy-to-complete sets of questions sent electronically on a regular basis to do a "pulse check" of employees in areas such as engagement, satisfaction, relationships, and the work environment. They are useful for getting feedback from your team members, monitoring team effectiveness, 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 Establish bundation
	For more information: <u>Job Aid 1 – Engaging Your Team (TRN4-J21)</u>
i I	Pulse survey goals:
	Goal 1:
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 <u>feedback</u> !
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### Survey administration:

Team leads:

Leader involvement (role):

Survey administration protocols and procedures:

- 1.
- 2.
- 3.
- 4.
  - •
- 5.

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## Step 2. Design and validate



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

### **Question development:**

Proposed ques	tion:		
Response type	:		Survey goal:
Benchmarks:			
Order:	Earlier	Later	
Branching (if a	oplicable):		
Question topic	(for sorting):		
	Response type Benchmarks: Order: Branching (if a)		Response type: Benchmarks: Order: Earlier Later Branching (if applicable):

### **Question development:**

 Proposed question: Response type: Survey goal: Benchmarks: Order: Earlier Later Branching (if applicable):

Question topic (for sorting):

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## **Question development:**

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

## **Question development:**

4.	Proposed ques	tion:		
	Response type	:		Survey goal:
	Benchmarks:			
	Order:	Earlier	Later	
	Branching (if a	oplicable):		
	Question topic	(for sorting):		

## **Question development:**

n:

Response type	:		Survey goal:
Benchmarks:			
Order:	Earlier	Later	
Branching (if a	oplicable):		
Question topic	(for sorting):		

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### Pulse survey question review:

CHECKLIST For more	information: <u>Job</u>	Aid 5 – Deve	loping Pulse	Survey Ques	tions (TRN4-J2
			Questions		
Review category	#1	#2	#3	#4	#5
Plain language					
Answer possible					
Response choices					
Official languages (translation)					
GBA Plus factors					
Bias or sensitivities					
Overall flow					
Other considerations					

### sung land gathering

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:

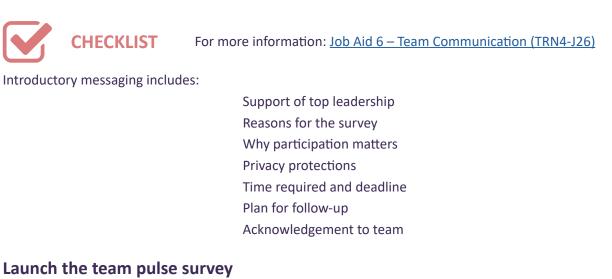
For more information: Job Aid 6 – Team Communication (TRN4-J26)



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

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## Step 4: Report on responses



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

**Interpret results:** 

General impressions:

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### 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.

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### **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: <u>Job Aid 6 – Team Communication (TRN4-J26)</u>

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!

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Repeat for each opportunity and then number by priority.

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6. Cr	eate and imple	ment follow-up plan			
Oł	ojectives = opp	ortunities + activities +	implementation need	ds + due dates	
Plan objec	tive 1:				
	Specific	Measurable	Attainable	Relevant	Time-boun
Plan objec	tive 2:				
	Specific	Measurable	Attainable	Relevant	Time-boun
Plan objec	tive 3:				
	Specific	Measurable	Attainable	Relevant	Time-boun

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### 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!

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