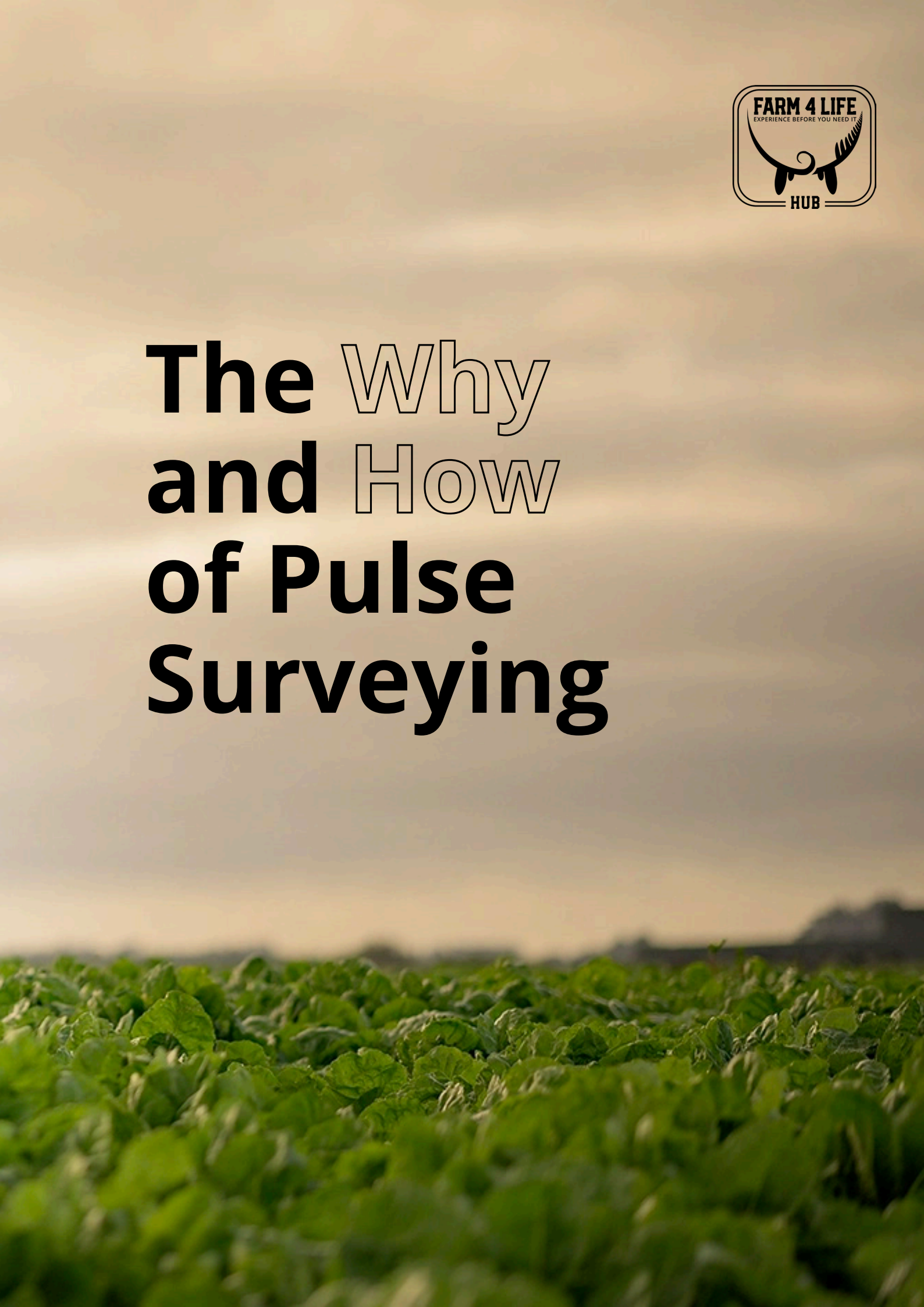


The Why and How of Pulse Surveying

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What is a pulse survey?

An important component of employee engagement is the provision for employee voice.

By giving your people the opportunity to have their say and responding positively/proactively to those messages; you increase buy-in from your team, and reduce the chance of blindspots that can impact you and your business.

Pulse surveying is the term given to a short and regular questioning process. It's designed to monitor staff sentiment on specific topics, tracking engagement in real time, and over time.

So, let's dig in...



"The single biggest problem in communication is the illusion that it has taken place."

— GEORGE BERNARD SHAW

— PULSE SURVEYING

Why survey in this way?

Here's six research-proven reasons:

Boost engagement:
Consistent opportunities to have your say, contribute ideas and insights ensure team members feel valued and connected to the business.

Values awareness and alignment:

By ensuring your people are repeatedly asked to reflect on the status of your cultural foundations, reminds them of the importance of these fundamentals.

Catch issues early:
Regular review periods ensure any changes in perception become visible and mitigation/ minimisation strategies can be employed before things deteriorate.

Spotlight topics:
The opportunity exists to include questions about on-trend topics while they remain at the front of peoples' minds or are about to become the most relevant.

Faster feedback loops:
Changes in policy or process, for example, can be (re)evaluated at a faster rate with these insights potentially used to inform your next steps.

Fight survey fatigue:
Conventional survey practices require a lot of time from both those who participate and those who process the results. Pulse surveys are fast for all those involved - ensuring no one loses interest or the energy to engage.



How do we do it?

There are many survey providers in this space who have different methods, some allow you to customise, some generate the questions for you.

Nearly all use digital tools to capture and process the data. The limitation of many of these options is that they use "corporate" language and concepts that don't necessarily work in a rural context.

Our approach can be either done manually (as follows) or digitally by simply transferring the questions to a simple data capture tool.

What should we ask?

For maximum effectiveness, no more than 10 questions should be asked, each of them should be concise and require limited detail in a response.

It's also important to keep the topics quite similar in nature from one survey to the next. Our suggested approach uses the following topics:

1. Holistic wellbeing and self management
2. Team alignment and collaboration
3. Role fit and development
4. Recognition, empowerment and efficiency
5. Providing clarity, direction and building shared trust
6. Employee engagement and advocacy

It's often recommended that an open-ended question is included for employees to give specific feedback on a single topic, along with an opportunity for them to provide more general and unprompted feedback. Our examples replicate these suggestions.

How often do we survey?

While some off-the-shelf solutions will default to monthly surveying, most research suggests that quarterly is sufficient. We recommend avoiding any seasonal peaks and find most teams land on three times per year as a happy medium.

What about new recruits?

The first 3 months is a critical window for an employee joining your team and is proven to be when the greatest risk to retention exists. Hence, it's very important that specific questions at specific milestones are considered. We have provided two examples - one for each of the critical periods of 4-6 weeks and 8-10 weeks respectively.

Using these examples...

For you: The "established team" surveys that follow are numbered, but can be used in any order (just keep track of which ones you have used). They can also be used multiple times if you so choose (ideally not for consecutive periods). The "new to team" surveys however should be used in the prescribed order with at least 4 weeks between them. In both situations, give a response period of 2-4 days for submissions. These surveys should ideally be optional (rather than mandatory), and if at all possible, anonymous.

For your team: The scale-based questions are written as statements, decide the extent to which you agree or disagree with them, selecting the number which best corresponds with this viewpoint. The open text questions are just seeking brief responses based on your opinions and experiences. The entire process should take no more than 5 minutes (i.e. don't overthink it).

OPTION SET 1

Pulse Survey

ESTABLISHED TEAM

"Work has a positive impact on my sense of well-being"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I know I can depend on the other members of my team"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"This job supports my career goals"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I have all the physical resources I need to do my job well"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My boss is open and honest with me"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I have a sense of pride in working here"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

What are the most important aspects of work-life balance for you?

Do you have any other insights, ideas or input you would like to provide?

OPTION SET 2

Pulse Survey

ESTABLISHED TEAM

"Generally speaking, I am happy in my work "

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"Our team works well together and we seldom argue"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My work gives me a sense of achievement"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"The incentives currently on offer motivate me to perform at my best"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My boss actively coaches me to continually improve/develop myself"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I have great mates at work"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

What has the most positive impact on morale and motivation in your team?

Do you have any other insights, ideas or input you would like to provide?

OPTION SET 3

Pulse Survey

ESTABLISHED TEAM

"I maintain a healthy balance between work and my other priorities"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I feel comfortable providing feedback to my teammates directly"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I am encouraged to set personal targets on a consistent basis"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"The direction of the business is in alignment with where I would like to see it head"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I trust my boss has my best interests at heart"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My role is an excellent fit with my strengths"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

What recent training has been particularly useful in your career growth?

Do you have any other insights, ideas or input you would like to provide?

OPTION SET 4

Pulse Survey

ESTABLISHED TEAM

"Mental health is something we often discuss"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"Our business has a culture that is open to testing new ideas and approaches"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I am in a role that makes good use of my skills"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"It is easy for me to discuss and resolve work-related challenges"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"Overall, I am satisfied with how decisions are made here"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"The culture here is a good fit for me"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

What types of recognition or rewards do you find most meaningful and motivating?

Do you have any other insights, ideas or input you would like to provide?

OPTION SET 5

Pulse Survey

ESTABLISHED TEAM

"More often than not, my work is enjoyable"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My teammates respect me and vice versa"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I have ample opportunity to apply my full range of skills"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I feel empowered to make decisions in my role"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My boss makes good, timely decisions"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I feel a sense of belonging here"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

What type of direction/instruction do you best respond to?

Do you have any other insights, ideas or input you would like to provide?

OPTION SET 6

Pulse Survey

ESTABLISHED TEAM

"We have plenty of fun at work"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"When I ask for help, others step up and help me"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I can do what is expected of me with my current skills and abilities"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"Our business adapts well to external changes and/or challenges"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"In challenging times, my boss models optimism, perspective and calmness"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I am excited about the business's future"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

What three words would you use to describe our team?

Do you have any other insights, ideas or input you would like to provide?

Pulse Survey

"Communication was effective throughout the recruitment process"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My duties and tasks are what I expected them to be"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"My boss took the time to effectively induct me"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"The actual work environment is what was described in the recruitment/induction process"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I'm enjoying the role, and being part of the team"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

As a fresh set of eyes in the business, do you have any ideas of how we could improve?

Do you have any burning questions, yet to be answered or asked? Y/N - If Y - What?

OPTION SET 2

Pulse Survey

ESTABLISHED TEAM

"I like my job"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"Our company values are clear, and are lived into on a regular basis"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I have access to all the key resources that I need to be successful"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I can see a clear progression pathway for career growth"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I believe work-life balance is considered and catered for here"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"I feel safe in my work and around my teammates"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

"If asked - is this a good place to work - I would say YES"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Do you have any burning questions, yet to be answered or asked? Y/N - If Y - What?



Now what?
How do I deal with the data?

TOP TIPS:

Don't shoot the messenger!
If this process is to remain a useful feedback tool, your approach to your team can't be negatively impacted by the feedback received. This process is designed to build trust, collaboration and effective two-way communication. That won't happen if people are scared to speak their truth. Keep calm and listen for the opportunities and suggestions they make.

Stay Curious
Numbers and short comments don't always communicate the entire story and are often representative of a snapshot in time. Is there more to this? Do they still hold this view? Is that true in all situations? These are just a few important questions to consider as you reflect on the responses received.

Ask-Listen-Act
This process is all for nothing if we don't use the information to make positive changes and build on any momentum we've gained. Be receptive to the feedback and let your team know how their insights have informed your decisions and actions.

What are the themes?
Look for the commonalities and differences over time and across your team, consider how the actions you've taken have helped (or hindered) the perceptions of your people, then use this to guide your next steps

What wins have been had?
It's easy (and normal) to focus on the low scores of negative comments, but challenge yourself to see where wins have been had. Leadership can feel like a thankless task at times, be sure to note and celebrate the successes you have achieved.

Parting thought

Implementing a regular pulse surveying rhythm will give you greater confidence that good communication pathways are in play at your place, and helps build a better, more resilient business as a result.

Stay connected, Stay curious!

