Designing Your Approach:

Pulse Surveys

QUANTUM
WORKPLACE

What's inside

Why Pulse Surveys

Imagine that a large change recently occurred in your organization, and you want employees' in-the-moment perceptions about that event. Or maybe your organization conducted an annual engagement survey just a few months ago, and you want to dive deeper into an engagement topic right now. Perhaps you simply want to ask employees about a specific workplace topic, such as what they'd like to discuss during the next all-hands meeting or their perceptions of the health benefits your organization offers.

Shorter surveys—also called pulse surveys—are well-suited to address those situations. Pulse surveys can tap into any employee population at your organization, about any topic, at any time. These quick surveys:

> Allow users to effectively tailor key strategies and initiatives to the unique needs of their divisions, locations, departments, and smaller teams

> Show employees that leadership is interested in receiving employees' feedback and opinions on a more frequent basis

> Allow organizations to check on the progress of key action plans

> Foster a culture that embraces a continuous listening strategy

> Reinforce accountability for follow-up actions

Collecting and taking action on employee feedback signals you care about your employees' input and feelings. Pulse surveys within Quantum Workplace's employee engagement software is one way to collect employee feedback. Using Quantum Workplace's all-in-one toolset means having employee feedback from multiple sources—surveys, 1-on-1s, feedback, goals, and recognition—in one centralized location. This can give you a much better understanding of your organization and people, providing you the data and analytics needed to make meaningful change and more informed decisions.

How It Works

Launching a pulse survey using Quantum Workplace's employee engagement software allows for timely and flexible data-gathering. With our survey feature, users can:

> Launch a survey in 4 quick steps: configure your general settings, add survey questions, add respondents, and set the timing

> Create new survey questions or choose from our library

> Launch surveys to specific employee populations or the entire organization

> Track participation in real time

> Compare results over time and across different demographics

Optimizing the Experience

Like fine wine and artisan cheese or plain ol' peanut butter and jelly, pulse surveys pair well with other Quantum Workplace features. For instance, pulse surveys can supplement annual engagement surveys. They can also identify challenges or opportunities in the organization that can be solved by using other Quantum Workplace features, like recognition, goals, or 1-on-1s.

Curious where to start? Check out a roadmap below or chat with a Quantum Workplace team member for ideas.

What's your main priority?

	PATH **1** **Measuring & Understanding Engagement**	PATH **2** **Driving & Enabling Engagement**
PHASE 1: Start Simple Establish the behaviors with foundational elements to engagement	Engagement Survey & Pulses	Goals, 1on1s, Recognition
PHASE 2: Enhance Add deeper capabilities to capitalize on your priority	New Hire, Exit & Lifecycle Surveys	Feedback & Pulse Surveys
PHASE 3: Supercharge Once the priority is met, don't stop there. Move on to the next one!	Now, let's move on to path 2	Now, let's move on to path 1

Making the Technology Seamless

Before diving into the specific design of your approach to pulse surveys, we recommend that you begin the process of HRIS Integration and Single Sign-On. (If your organization has already done this with Quantum Workplace, you're all set to jump ahead and start launching pulse surveys!)

HRIS Integration allows your organization's roster of employees, their demographics, and all reporting relationships to be accurate and up-to-date in our software. This provides a seamless experience for your users, helps you analyze usage and data in meaningful ways, and allows automation of some of the features. The setup time can take a few weeks, but it's worth it!

Single-Sign On will prevent your employees and managers from needing to remember yet another set of login credentials, making it easier for users to adopt features into their every-day workflow.

We like to get this process started early so it's complete once you're ready to launch the software to users. Not a tech person? No worries! Your Client Success Manager will partner directly with your technical team members.

Designing Your Approach to Pulse Surveys

1 ## Determine the Purpose(s) of Your Pulse Surveys

Before learning about the bells and whistles in Quantum Workplace's survey feature and how you might use them, define the purpose(s) of your pulse surveys and how frequently they should occur. Although pulse surveys are highly flexible to suit most needs, consider the following common reasons for conducting a pulse survey:

Track progress on engagement efforts

When measuring employee engagement, we at Quantum Workplace believe a comprehensive annual survey is best practice. It's like getting an annual physical for your workplace: lots of tests and measures to assess overall health and determine what's working well, what needs changing, and where more testing may be required. This type of pulse survey is best when you want to track or dive deeper into specific results from your organization's "annual physical."

Quickly assess engagement levels

This type of pulse survey is similar to tracking progress on engagement efforts, depending on the specific survey questions used and how the results will be utilized. That said, this pulse survey can also be viewed as a super light-weight engagement survey. This option is best when you want a quick snapshot of engagement and you're not as interested in dozens of other questions that are common in longer annual engagement surveys.

Assess strategic accountability

Agents of change should be held to some level of accountability for most organizational strategies, whether employee engagement or otherwise. These agents include managers, supervisors, directors, and leadership – anyone who has a responsibility to enact change from survey results. This type of pulse survey is best when you want to understand whether those agents are sharing important information with their teams, creating action plans, having check-ins to assess progress, and so forth.

Gather employee feedback before, during, or after events, meetings, or changes

This type of pulse survey is the most flexible because it can pertain to anything that is of interest to you or others in your organization – it can be almost anything you want it to be! Whether asking about feelings after a big presentation, how new comp and benefits policies will affect individuals, or what kind of food your team members would like at the next potluck holiday party, this type of pulse survey is almost limitless in what you can ask.

Pulse surveys are a great way to quickly gather in-the-moment data points that are important to you and your organization. The suggestions above are just the start! What other types of pulse surveys would benefit your organization's leaders, managers, and employees?

2 Determine the Population that Will be Surveyed

A pulse survey can be conducted for any population within your organization.

Entire population

All employees in your organization are surveyed. This option is ideal for topics that are either relevant to all employees, or all employees may have an opinion about the topic.

Random sample

A random selection of employees from the whole organization are surveyed. This option can be used for pulse surveys that are intended as a quick assessment of engagement levels, tracking progress on engagement efforts, or assessing accountability around engagement or other strategies across your entire organization. This option is ideal when survey fatigue is a concern. However, it's not the best fit if you want to understand team- or department-level results.

Specific groups

Surveys are sent to specific groups, for example certain departments, locations, or a recently-acquired company. This option is ideal for pulse surveys that are intended to create a better understanding of a topic that is more localized or only relevant to specific areas or functions within your organization.

3 Determine the Timing of Your Pulse Survey

The cadence or timing of pulse surveys goes hand-in-hand with their intended purpose. If, for example, you only use pulse surveys to supplement your annual engagement survey, then a quarterly cadence might be best. If an annual survey were conducted in January, then a pulse survey could be launched in April, July, October, and then another annual survey the following January to continue the cycle. This cadence allows enough time for action planning, meaningful change, and perceived change to occur.

Likewise, if a pulse survey is designed to measure perceptions about a specific point in time (e.g. a meeting, event, change), then the timing ultimately depends on how you plan to use the data. If you would like to discuss topics that are top of mind to your employees during an all-hands meeting, then it's best to send a pulse survey several days before the meeting. Or, if a large policy change is going to occur, you could use one pulse survey to gather employees' perceptions, questions, or concerns before the change and another pulse survey after the change regarding what went well and what didn't for future improvement.

Even though pulse surveys are fast and flexible, Quantum Workplace encourages you to think about how frequently these kinds of surveys are utilized. The best frequency is dependent on your organization's culture, how data-driven it is, how flexible to change it is, and how often employees already respond to surveys. Overall, the "golden rule" of conducting surveys is that you should only gather feedback as often as you are able to take action on that feedback.

4 Build Your Pulse Survey

After you've decided on the topic, population, and timing of your pulse survey, building the survey itself comes next. You can create new survey questions or choose from Quantum Workplace's library of questions; questions can be open-ended, scaled, and multiple choice. Click here for a more in-depth breakdown of building a pulse survey.

Although you have complete control over the design process, Quantum Workplace also wants to make things super easy for you! Your Client Success Manager will initially walk you through this process so you know exactly what this step looks like and to ensure you're set up for success.

What to Expect After the Survey Closes

After a pulse survey is closed, results can be explored on the analytics page associated with that survey. Below is an example of scaled results, based on a 6-pt rating scale.
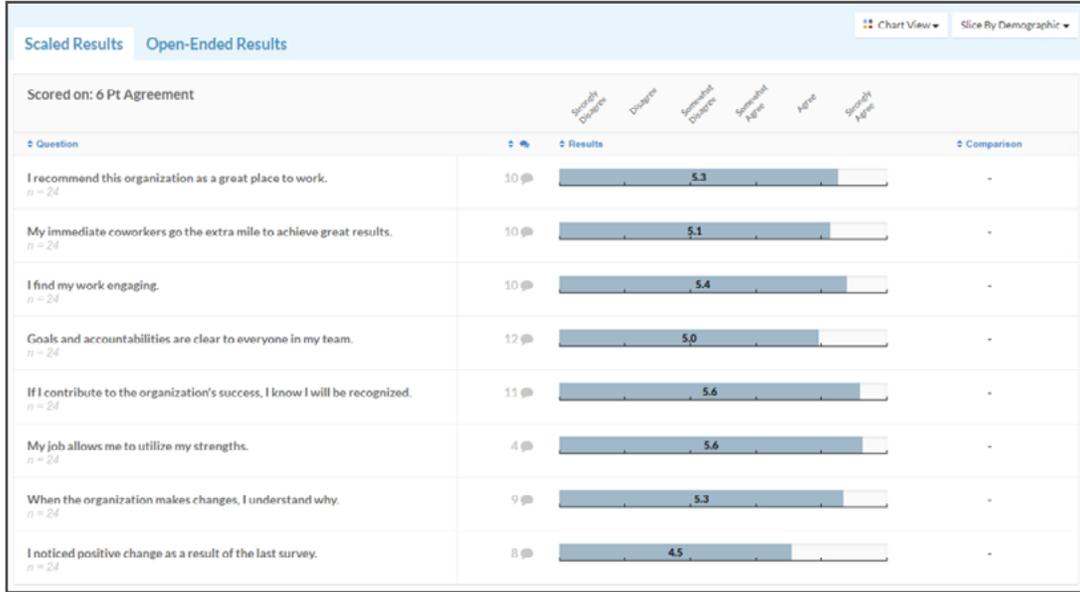
Those results can also be sliced by demographics. The example below expands on the previous example, slicing by the department demographic. Hovering over the black bars shows a breakout of each department's average rating, allowing for very focused breakouts of results.
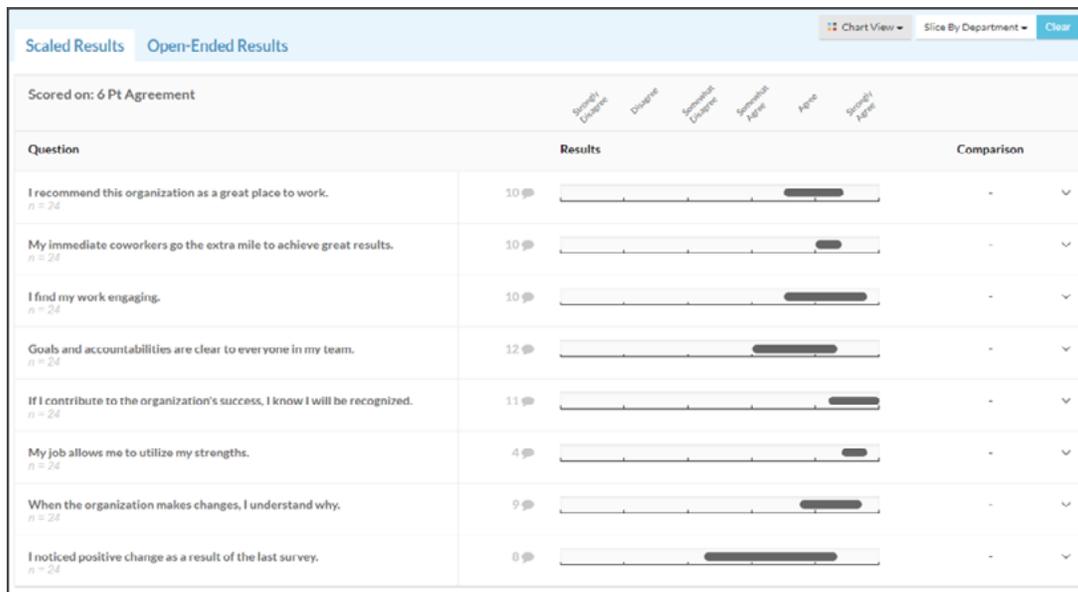
These are just two – of many – ways to view results. Scaled results can also be shown according to different groupings, such as unfavorability, uncertainty, and favorability. Open-ended results can be explored overall, by question, and sliced by demographic. As shown in the picture below, there is also an option to search for keywords if a specific topic or phrase is of interest to you.

Scaled Results   **Open-Ended Results**   Chart View ▾   Slice By Demographic ▾

All Items ▾   Search By Keyword   🔍

What is one thing we could do differently to allow you to recommend this organization as a great place to work?

? Anonymous
I'm not satisfied with our health insurance plan.
Add Reply

? Anonymous
While I understand the importance of metrics, and the impact of closely tracking wins and specific metrics by professional clearly has benefited the company, one concern that I have relating to the emphasis of metrics over all else is that people feel as though they are just 1 person out of hundreds.
Add Reply

? Anonymous
I believe that the company has made SO much progress in the close to four years that I have been part of it. It almost feels like a completely different experience - in great ways.
Add Reply

? Anonymous
Glassdoor comments are very troubling for someone like myself who takes pride in my work and the company I work for. Do we have strategy to address such troubling reviews?
Add Reply

? Anonymous
We have far too many internal meetings, whether they are bi-weekly, weekly or monthly.
Add Reply

? Anonymous
This company has provided an unbelievable experience for me as a young professionals - great opportunities, ownership, and experience. However, it's harder to see opportunities past the 3-4 year mark. It doesn't feel sustainable having to always be on-call to clients the work diversification past 3-5 years seems minimal.
Add Reply

Additional Features

Your Client Success Manager will walk you through all the functionality of pulse surveys. Here is some functionality worth noting. Users can:

> Comment on open-ended responses to further clarify or acknowledge feedback

> Make employee responses attributed or anonymous, depending on the survey's purpose

> Adjust the minimum number of responses needed for anonymous surveys

> Customize the survey question scales to best fit their needs

> Set single-use or automated pulse surveys

> Send email notifications

We could go on and on about all the bells and whistles, but we'll save some topics for the conversation with your Client Success Manager.

Prepare to Launch

Before launching your first org-wide pulse survey, be sure to send an email (or other type of communication) to all employees to inform them of the upcoming survey. Then following the survey, send another email of appreciation with your plans to follow-up as well. This is just like the best practice communication plans with annual engagement surveys. If org-wide pulse surveys are eventually used more frequently, then pre- and post-communication isn't needed for every single survey - doing so may result in "communication fatigue" and response rates or response quality may decline.

Whether you plan to launch a pulse survey to your entire organization or a smaller population, it's good practice to include a brief description of the survey when sending the survey link to employees. This communication should include what the survey is about, such as the kinds of questions employees will be responding to, as well as the reason for the survey itself. This is especially important because providing employees with the underlying purpose of a survey allows for more transparent communication, which is crucial for maximizing honest and valuable feedback.

Ready to get started? Us, too! Your Client Success Manager will walk you through next steps, and we're happy to answer any questions not covered for you in this guide.