

Using Pulse Surveys to Engage Your Team

Choosing Pulse Survey Software and Services

Job Aid Series: 4 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 fourth job aid in the series explores a decision you will have to make before launching a survey: whether to administer the pulse survey in house or hire an outside service provider. It also looks at how to select the appropriate software for the task at hand.

Staying internal or opting for a service provider

Here are some factors to consider in making your choice:



Budget

Costs can vary widely depending on whether you use existing survey software, go with an online survey company, or work with a full-service survey research firm.



Subject matter

The more complex the survey topics, the more you may want to call on professional help.



Size of the team

The more respondents you get, the more options you have for a deeper analysis.



Internal capacity

Verify your team’s ability to manage the survey distribution and reporting processes internally.



Benchmarking

Some survey firms have large databases of questions for teams to access; this also allows them to benchmark their results.



Report complexity

The more detailed you need your results reports to be, the more you may want to involve an outside expert.



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-J24



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Internal options

Begin by verifying whether your organization's existing software will meet your survey needs.



Many email programs allow you to create simple instant polls. This method is best for straightforward, noncontroversial topics.



Then there is the group chat function in videoconferencing software. It is often useful for creating simple quizzes or surveys, but again, it is best for gathering feedback or making quick group decisions.



In addition to a suite of email, spreadsheet and word processing software, your organization may have a fully functional survey program built right in. This is perfect for your team pulse survey.



Your organization may have already purchased survey software licences for purposes like getting learner feedback, for example. You may be able to get additional licences to conduct your pulse survey.

Using existing internal software has many advantages: No additional costs, existing technical support, interfaces that respect official languages, and established compliance with procurement and security standards.



Choosing survey software

What to look for in team pulse survey software:



Mobile friendly

Convenient and high response rates



User interface

User friendly and efficient



Respondent identity

Anonymous option available, with full privacy protection



Multiple languages

Respects official languages (interface and questions)



Results reports

Analyses are clear, flexible and easily shared



Accessibility

Ensure accessibility features are available for those with differing abilities*

*Consult the vendor's Voluntary Product Accessibility Template (VPAT)



Choosing a service provider

Where internal options are unavailable or inadequate for your needs, consider the following when researching a service provider:



Security

Data safety protocols are in place to secure the survey and related data.



Privacy

Measures are in place to properly protect personal information.



Pricing

Actual costs and any added fees, charges and penalties related to the service are clear.



Commitment

The full extent of the commitment, including the length of the service agreement, the need for a contract, any subscription model and exits, is understood.



Reliability

Technology is reliable, with regular data backups and data recovery protocols and low server downtimes.



Support

Client support services are fast and reliable, bilingual and fully accessible.



Do not hesitate to seek advice from your organization:

- Verify if its existing suite of software offers a survey function (e.g., Microsoft 365 has MS Forms)
- If applicable, check with your organization's research unit to ensure you follow their procedures for conducting survey research
- Obtain guidance to evaluate external service providers and software
- Follow proper procedures for contracting with external service providers and for software procurement and installation



Privacy protection

Anonymity

Anonymity leads to higher participation rates and more honest answers. All pulse survey questions and software settings should fully support anonymity.



Open-ended questions

Provide guidance on responding to open-ended questions. Remind team members not to share personal or classified information in their answers.



Administrative protocols

If the pulse survey is administered internally, set up proper procedures to protect anonymity and privacy (e.g., restrict access to responses and separate identifying information from results).



Communication and trust

Communicate that privacy and security protections are a priority. Keep reminding your team of what they are doing well.



Voluntary participation

Respect team members' choices and address concerns about the protection of personal information.



Additional security

The service provider or software vendor may be able to provide local data hosting, authentication, encryption or data retention. Consult your organization's IT team.



We welcome your [feedback!](#)



Up next
[Job Aid 5 – Developing Pulse Survey Questions \(TRN4-J25\)](#)