



Survey Engagement Guide

The Leader's Guide to Team Engagement
and Future-Forward Action, Post-Survey

*"Leaders who don't listen will eventually be surrounded by people
who have nothing to say."*

-Andy Stanley

CONTENTS

03

The Importance of
Survey Engagement

04

The Process

05

Thank Your Team
(Email Template)

06

Review & Reflect

07

Prepare Your Team
(Email Template)

08

All-Hands Facilitation

10

Additional Resources






The Importance of Survey Engagement

The first steps towards making meaningful change are asking the right questions and listening intently. By deploying this survey and giving your entire employee population a platform to provide their honest feedback, you and your organization have demonstrated the desire for making that change.

Beyond the first-hand insights you've gained, there's more to be celebrated. Your team's willingness and courage to share their input shows that they care about the growth and success of your organization—and they deserve to be rewarded for their efforts. Once your leadership team has reviewed the data and responses and started to craft an action plan, it's time to ensure your employees feel heard and demonstrate that their input matters.

This is achieved through the **Survey Engagement Process**, a proven method for following through with your team, using the results of the survey to elevate and grow the organization, and engaging employees in the process.

This not only speaks to your leadership team's commitment to their promise and the process, but also acts as a critical opportunity for your leadership team to build trust and shape the future.





The Process

1

Thank Your Team for Their Participation

Sharing gratitude with your team should take place soon after your survey is closed. This is a critical step in the process. An email template can be found on page 5.

2

Review & Reflect With Your Leadership Team

Share the survey results, discuss their reactions and reflections during a leadership team meeting, and think critically about how you'll address the team's feedback.

3

Schedule an All-Hands Meeting

Put time on the calendar or use a recurring meeting to debrief and discuss the survey results with your full team.

4

Prepare Your Team for the All-Hands Meeting

Send an email to explain the meeting's purpose, provide the survey results for review and reflection, and express your enthusiasm for hearing their reflections. An email template can be found on page 7.

5

Facilitate the All-Hands Meeting

Our recommended approach, best practices, and facilitation prompts can be found on page 7.

6

Follow Through on Your Commitments

Align on the immediate next steps and longer-term strategies to address the feedback, start executing those action items, and keep your team informed about the progress.



Thank Your Team

Sharing gratitude with your team should take place soon after your survey is closed. Below is an email template you're welcome to use and tailor to your voice.

Template

Team,

Thank you for your participation in our recent survey. Your honesty and input is the force that drives our forward progress and growth as an organization. It's because of you that we're where we are today and it's with you that we'll advance as a team. Our X% completion rate is proof that we're all in this together.

Our leadership team is thoughtfully reviewing and absorbing the invaluable feedback you shared and beginning to develop an informed action plan that will make us even better. In the near future, we'll share the survey findings for your review, meet as a team to discuss our collective reflections, and roll out a proposed plan that will require your help to activate.

We look forward to sharing more with you very soon.

Our deepest gratitude,

Signature

To access this template as an editable Microsoft Word file, [click here](#).



Review & Reflect

We recommend organizations transparently share exactly what is collected, including comments. There are rare cases in which names are used or opinions are inappropriately stated requiring deletion or editing of particular comments.

Withholding comments immediately incites people to wonder what is being hidden, and that triggers the invention of narratives that are far more corrosive than the one you can shape with what was actually shared.

Encourage leaders—and later employees—to share their reactions and reflections, and provide some context in which you invite them to go do something that will influence the future direction of the company.

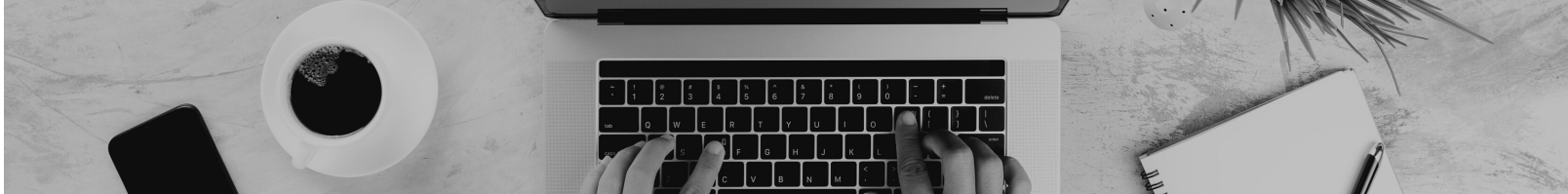
This is a critical opportunity to extend the experience and continue to make all employees an ongoing part of the process.

Reflection Prompts:

- 3 things the data confirmed
- 3 things that were surprising
- 3 ideas for action moving forward

“Without reflection, we go blindly on our way, creating more unintended consequences, and failing to achieve anything useful.”

Margaret J. Wheatley



Prepare Your Team

Send this email in advance of the all-hands meeting, we recommend a minimum of three business days to allow ample time for your team to review and reflect on the survey results. Below is an email template you're welcome to use and tailor to your voice.

Template

Team,

The time has come for us to convene as a team and discuss how the results of our survey will inform our next steps as an organization.

Our leadership team has thoroughly reviewed the survey results and it's no surprise that your feedback reinforced our strengths and thoughtfully pointed to areas where we can (and will) do better. Now—in advance of our all-hands meeting—it's your turn to dig in, observe what your fellow team members shared, and extract your key takeaways.

Our time together is designed to be informative, collaborative, and engaging. So here is the prep work we'd like you to do to ensure we maximize our time:

- Read through our survey results (attached)
- Identify and record:
 - 3 things that were confirmed for you
 - 3 things that surprised you (good, bad, or indifferent)
 - 3 ideas for action moving forward
- Come prepared to share your reflections

We all should leave the session clearer and more confident about our commitment to the future and individual contributions. We have very meaningful work ahead of us and we're excited to be working together.

Please reach out to any member of the leadership team with questions.

Best,

Signature

To access this template as an editable Microsoft Word file, [click here](#).



All-Hands Facilitation

Depending on the distribution of your team, the all-hands meeting can be conducted in-person or virtually. If done virtually, Zoom's capacity to show more faces and to create and use breakout rooms for smaller group interactions makes it the best choice currently as your meeting platform.

To ensure you set the right tone, consider the following tactics:

- Create an environment that safeguards respectful candor
- Promote a creative, relaxed atmosphere
- Actively listen (e.g. paraphrasing)
- Accurately record ideas
- Solicit equal participation
- Interpret non-verbal cues (as best you can if executing virtually)
- Act and speak with neutrality
- Use "we" language to ensure this feels like a team effort
- Show optimism and manage your emotions
- Follow up and follow through to ensure your team observes action and progress

For successful execution, we recommend the approach outlined below. This includes key talking points that will help guide the conversation.

Start With Why

Reiterate why your organization made the decision to conduct the survey.

- *Our team is our top priority and our most important asset, and ensuring we're delivering the best employee experience for you matters to us as leaders and as an organization*
- *We're committed to building the best possible place to work and collaboratively developing an action plan that helps us align our efforts with our intentions*

Share your Gratitude

Ensure your team feels heard and valued by thanking them again for their participation, insights, and commitment to your progress and growth as an organization.

- *On behalf of our leadership team, thank you for sharing your invaluable insights and working alongside us to achieve our goals.*

State Your Desired Outcomes

Provide a clear agenda and establish a good flow for productive discussion and collaboration. Be explicit about what you want your team to know, feel, and do as a result of the meeting.

- *The purpose of our conversation today is to discuss your survey reflections, think critically about our short- and long-term approach to change, and share our proposed action plan for moving forward.*
- *We'll need your continued support to activate the ideas that will move us forward.*

Facilitate the Reflection

Make this a productive and collaborative session where all employees have the opportunity to share additional insights and ideas. For larger teams, consider using small group breakouts (consisting of 5-7 people) followed by a full-group debrief of key takeaways collected by each group. Be sure to designate a team member (or ask for a volunteer) to capture notes during the survey reflections portion of the meeting and record key takeaways/actions.

Discuss the Proposed Action Plan

Reinforce your commitment to applying selected insights with notice of what's next to be shared, providing an approximate time frame).

- *Be specific about what actions will be taken and when.*
- *Share how your team can stay involved in the process and how you'd like them to help support various initiatives.*

Close With Intention

Aim to leave people feeling inspired and excited to take action. The ultimate objective is to achieve buy-in from your team so they rally behind the organization to accelerate progress.

- *This is just the beginning of the meaningful work that lies ahead. We couldn't ask for a better group of people to help lead us forward.*
- *If you have any additional input, ideas, or questions please don't hesitate to reach out to our leadership team.*



Leading Through Change

Additional Resources



Tiger Teams

Success in the future belongs to organizations that adapt, grow, and innovate, despite obstacles. Tiger Teams are cross-functional teams of internal and external future leaders that are formed to solve organizational challenges or implement change. SHIFT's simple four-step approach can help you stand-up the right teams to develop, rollout, and implement the right solutions.



[Download Now](#)



Remote Work Resources Collection

Top tools designed to help your team maximize their time, increase productivity, and accelerate performance while working from home or within a hybrid model. From blogs and webinars to routines and podcasts, we share proven assets to accelerate personal and professional growth.

[Download Now](#)



“In order to build a rewarding employee experience, you need to understand what matters to your people.”

Julie Bevacqua, Rise CRO