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Survey launch checklist

A week-by-week timeline with owners, who hears what and when, the FAQ checklist and a one-page action plan.

A suggested timeline

When	What	Who	Done
8 weeks before	Agree the objectives in writing; confirm budget and owners for follow-up action	Senior team, HR	☐
7 weeks before	Settle the questions and add the organisation's own language; decide the breakdowns and the minimum group size	Survey group	☐
6 weeks before	Choose how people will complete it (online, paper or both); plan access for people without a work email or desk; check dates against the business calendar	Survey group, IT	☐
4 weeks before	Name the survey; nominate champions; brief the senior team on their part	Survey group	☐
2 weeks before	Brief line managers; publish the FAQs; a senior leader announces it is coming	Survey group, managers	☐
Launch	Invitation from a senior leader; the survey stays open for two to three weeks	Senior leader	☐
While open	Weekly response updates by area (only for areas above the minimum); reminders in different formats and from different people	Survey group, managers, champions	☐
Close	Thank everyone; share the overall response rate and when results will appear	Senior leader	☐
2–4 weeks after	Results to the senior team, then headline results to everyone, good and bad	Senior team	☐
4–8 weeks after	Team discussions and action plans; organisation-wide actions owned by the senior team	Managers, senior team	☐
3 and 6 months after	Progress update on what has changed; check whether the actions are having an effect	Senior team	☐

Compress or stretch the weeks to fit, but keep the order: objectives and follow-up budget before questions; managers briefed before launch; results shared before action planning.

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Who hears what, and when

Phase	Senior leaders say	Line managers hear and pass on	Employees hear
Planning	Why we are doing it; our commitment to act on the results; visible support	The objectives and timing; that responses go to an independent party; how they will be involved in action	What it is for; why their views matter; when and how to take part; exactly who sees what
While open	Taking part matters; people can be candid without comeback	Their area's response rate; how to take part; time left	How to take part; how long it takes; time left
Results	Thanks; the overall response; what happens next	Their area's results against the whole; how they will lead action	A summary of results, good and bad; the actions; how to get involved

Before launch: the FAQ checklist

- ☐ Is it anonymous, or confidential? Who sees individual answers, if anyone?
- ☐ What is the minimum group size for any result?
- ☐ Could my comments identify me? (Say yes, they could, and how comments are anonymised.)
- ☐ How long does it take, and can I do it in work time?
- ☐ How do I take part without a work email or computer?
- ☐ When will results be shared, how, and with whom?
- ☐ What happened after the last survey?
- ☐ Who do I ask if I have a question?

Line manager briefing: the don'ts

Do not ask who has responded. Do not ask anyone what they said. Do not suggest answers. Do not promise changes before the results are in.

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Action plan

One sheet per action. Two or three actions done well beat ten started.

Field	The question to answer	Our answer
Area for improvement	What is the problem? What effect is it having on people and customers? What is causing it?	
What needs to happen	The specific change that will address it	
How it will happen	The steps and the process	
Timescale	A realistic completion date	
Owner	The one person responsible for it happening	
Resources	Money, people, materials or support needed	
Target	The measure that will show it is working, such as the same survey items next time	
Review date	When it will be reviewed, and by whom	

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Does any of this sound familiar?

The organisations we work with rarely come to us asking for a survey. They come with something that is costing them money, time or people. These are the ones we hear most often.

MAKING MONEY

"We hire well on paper and still get it wrong in the role."
Personality, leadership and competency assessment matched to the job, so interviews test what matters and offers go to people who will perform. (FindingPotential)

"Our best people leave and we only find out why afterwards."
Exit intelligence in the leaver's final weeks: what was avoidable, who would come back, and what to change first. (LastOpinion)

"Leaders get feedback once a year and nothing changes."
Forward-looking 360 feedback that lands as development rather than judgement, with the actions built in. (FeedForward)

SAVING MONEY

"Too many new starters are gone inside a year."
New-starter surveys at the points the first-year leak opens, so you act at three months instead of reading about it at exit. (OnBoarder)

"References take weeks and tell us nothing."
Automated referencing with questions that predict, most returned within 48 hours. (ReferenceExpert)

"We run an engagement survey and the results sit in a drawer."
Engagement reporting down to team level in plain English, with the three moves each team's own people chose. (WinningFormula)

SOLVING PROBLEMS

"The board wants evidence on culture, conduct and speaking up."
A confidential always-on channel and a harassment-prevention audit that give you the evidence before a regulator asks for it. (SafeSpace)

"We publish an inclusion statement and cannot show whether it is true."
Inclusion measured at every stage from hire to exit, so you can see where the experience differs and act on it. (ED&I)

"We have the data and cannot turn it into a decision."
Twenty years of UK benchmark data and analysts who turn results into a board paper, not a dashboard. (Workforce intelligence)

Who we are

great{with}talent is a UK workforce-intelligence consultancy, founded in 2003. We help organisations hire better, keep people longer, improve leadership, strengthen inclusion and reduce workplace risk, with a connected set of tools that turn employee data into clear, fast action across the whole employee lifecycle. Independent, GDPR-compliant and Cyber Essentials certified, hosted on Microsoft Azure.

Not on the list? It will not always be. If you are working on something you think we might be able to help with, drop us a note describing what you are trying to do and we will come back to you.

On the list or not, let's talk.

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