



# The #BeHeard Engagement Survey Checklist

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This checklist is designed to help you overcome the common survey pitfalls to increase employee participation and get quality feedback to increase engagement in your workplace. To access more tips and best practices for each section visit our Resource Page **HERE**.

## STEP ONE: EXECUTIVE BUY-IN

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Show Return on Investment  
Resource: Free Cost Analysis

Have a Solution Ready to Present  
Resource: FREE #BeHeard  
Engagement Survey

Download the Customizable  
Action Plan

## STEP TWO: SURVEY IMPLEMENTATION

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Select a Survey Partner

Create Custom Questions with  
Leadership Team

Create a Survey Purpose  
Statement - "The Why?"

Set a Realistic Participation Goal

Set a Survey Marketing Campaign  
Timeline (Start / End Date)

Set a Survey Launch Timeline  
(Start / End Date)

Set Employee Reminder Email  
Schedule - After Survey Launch  
(if not in place with survey partner)

## STEP THREE: SURVEY LAUNCH

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Send Manager Email with Survey Messaging + Details

Have an Executive + Manager Survey Q&A Meeting (from CEO or another Executive)

Send Out a Company Wide Survey Introduction Email

Set a Company or Department Q&A Meeting Date

Send Survey Reminder Email the Week Before Launch  
(from HR or Direct Managers)

Ask Managers to Remind Team of the Survey Launch in Department Meetings

Identify Other Visible Areas to Promote the Survey (newsletter, intranet, etc...)

## STEP FOUR: TAKE ACTION

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Review and Interpret the Results with Executives

Identify Strengths and Priority Areas

Determine Company Action Items based on Priority Areas

Create Engagement Plan with Action Items

Send Company Email with High Level Results + Engagement Plan

Set Company Q&A Meeting to Review Results + Engagement Plan

Share Department Survey Results with Each Manager (if applicable)

Managers Shares Department Results with Team + Develop Action Items for their  
Engagement Plan (if applicable)

Set Goals and Schedule Action Plan Updates with Teams + Company

Set Timeline for Next Survey to Measure Progress