Pulse Check in a Box

📌 Overview

Pulse checks are short, recurring surveys designed to identify sources of stress in the workplace. They help organizations:

- Improve communication
- Identify issues early
- Demonstrate leadership's commitment to workplace health
- Make data-informed decisions

💡 Why Pulse Checks Matter

Research[1] shows the top contributors to employee stress are:

- **Uncertainty**
- **Lack of information**
- **Loss of control**

Pulse checks directly address these by creating a feedback loop between leadership and staff.

🛠️ How to Implement

- Deploy pulse checks during regular team meetings
- Share insight and answer questions in the following meeting
- Keep it anonymous and simple
- Keep track of your data

🧭 Steps to Launch

1. **Get appropriate approval**: Use the overview as your elevator pitch
2. **Build the Pulse Check**: (examples to follow)

1. Keep it simple. The example in this tool shows two baseline questions followed by one or maximum two follow up questions. Keeping a baseline allows you to see trends overtime.
2. Use a format your team is already comfortable with, making it easy for employees to engage (e.g., **Menti or MS Forms**).
3. Check with your privacy officer to see if your format requires a PIA.
4. Use a tool that allows employees to respond anonymously and include a reminder to be respectful in the workplace.
5. Ensure the tool allows you to save the data (see follow up actions).

3. **Frame the questions**:

    1. Focus on workplace factors leadership can influence.
    2. Encourage shared ownership of workplace culture and pose your questions to lead a productive conversation.

⚠ Considerations

- Don't ask if you're not ready to act on the responses or if you already know what issues are facing the team and have not yet addressed them.

Follow-Up Actions

Communicate back

- Respond to the pulse check in the next meeting

    - Thank participants and share participation rates
    - Answer key questions and outline next steps
      for example: any questions that need more follow up or that resulted in an action being taken, the next steps in the pulse check process

- Leaders can discuss questions or feedback in smaller teams, if it is more appropriate.

Track your data

- Track data over time to identify trends

- Keep and consolidate your baseline data and consider how best to keep and consolidate responses and feedback from open ended questions

Repeat

- Only repeat the pulse check after responding to the previous one

Sample Pulse Check Questions

Baseline Questions (repeat each time to track trends)

1. **What impact is stress having on you?**

   Select one on a scale of 1-5:

   1. **None at all** – I'm feeling strong and healthy
   2. **Slight impact** – I notice some stress but it's manageable
   3. **Moderate impact** – Stress is affecting some areas of my life
   4. **Significant impact** – Stress is affecting many aspects of my life
   5. **Severe impact** – Stress is impacting every aspect of my life and I am no longer able to cope

2. **What level of stress are you experiencing in the following areas?**

   Rate your stress (1–10) in: Workplace, Home, Health, Financial

   Tip: Use a scale 1-10 and a spider graph to report on the results.

Follow-Up Questions (rotate or customize as needed)

1. **What work-related question do you have that leadership can speak to?**

   Tip: Include a reminder to keep responses respectful.

2. **How do you feel about work?** On a scale 1-10, for example:

   - My workload is manageable
   - It is clear what I am supposed to do
   - We are focusing on the right things
   - I have everything I need to do my job
   - I know which directions we are heading
   - I enjoy coming to work
   - I know who to ask when I need clarity

   Tip: Use responses to identify gaps in tools, training, or support.

3. **In the next 30 days, what's one thing that, if provided or improved, would make a meaningful difference for you in your work?**

   Open-ended question to surface actionable ideas or concerns.

Sample Summary Template

Date conducted: [Insert Date]

Executive Summary

Brief overview of why the pulse check was conducted and what it aims to achieve.

Participation Metrics

- Total FTEs: [Insert]
- Meeting Attendees: [Insert]
- Survey Respondents: [Insert]

Impact of stress (scale 1 (no stress) -5 (no longer able to cope))

- 1: [insert] 2: [insert] 3: [insert] 4: [insert] 5: [insert]
- Supportive conversations handout (IDIR restricted)

Stress Sources (Scale 1 (no stress) – 10 (no longer able to cope))

- Workplace: [insert] Home: [insert] Health: [insert] Financial: [insert]

Open-Ended Responses

- Total responses: [insert]
- Key themes: (Theme or group the responses and provide theme along with paraphrased examples of the questions to protect anonymity)
    - Ex. Theme: **Compensation & Recognition**
    - Ex. Question Summary: Questions asked around pay and wage increases
    - Ex. Theme: **Collaboration & Efficiency**
    - Ex. Question Summary: Questions asked around silos and improving collaboration
    - [Add more as needed]