WillisTowersWatson

Survey best practice: Survey launch checklist

You are just about ready to launch your survey. You have approval on the content from all stakeholders, your HRIS file has been imported, and your survey is programmed. But now you're second guessing yourself. Did you pull in all the demographics needed to create the reports your leaders will expect? Did you include definitions, so people know exactly what keywords mean? Did you set the survey launch date and time in the correct time zone?

Don't sweat it. We've got you covered. Here is a comprehensive checklist to help you finalize your survey and launch it with confidence.

1 Technical

- Ensure IT has approved your technical requirements, and Willis Towers Watson servers and addresses are whitelisted.
- Confirm the number of emails your organization can receive per hour with your IT department (for HRIS-based surveys).
- Double check your conditions to ensure the right people receive the right questions (if applicable).

2 Survey participants

- Check your list of participants within Willis Towers Watson Engagement Software (for HRIS-based surveys) or offline.

3 HRIS & demographics

- Confirm the demographics for your reports, including hierarchies.
- Confirm data fields contain values that make sense for reporting, e.g. raw data for Age and Tenure should be converted to ranges like 21 – 30 years old or Less than 1 year of service.
- Confirm demographic values are in the correct order, e.g. Levels are listed from most to least senior.

4 Opinion questions

- Ensure your questions are ordered in the way you would like them to appear in the survey.
- Organize your questions into categories to receive a category score.
- Include definitions for keywords that appear in questions.
- Add themes for open-ended comment questions to allow for word clouds in reports.

- Confirm normative and historical benchmark coverage by adding it via “View Comparison Availability” links. Before the survey is live, you should know what benchmark coverage you’ll receive when reports are ready.

- Confirm questions are using an appropriate scale.

5 Communications

- Add text to the survey introduction to inform employees why the survey is being administered, remind them when the survey closes and let them know who to contact if they run into issues.

- Finalize the survey invitation text.

- Develop a plan for sharing response rates with leaders.

6 Translations

- Ensure all translations have been uploaded and reviewed.

7 Preview and publish

- Set the minimum number of respondents to the correct threshold.

- Check the survey launch date and time are correct and are set in the correct time zone.

Sign in to your Willis Towers Watson Employee Engagement Software account today to review your survey setup or contact us for a demo.