

# Survey Results Conversation Planning Guide



Steps to help you and your team get the most value from your survey results

Phase	Key Steps
Review results	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review the survey results reports for your group.</li> <li><input type="checkbox"/> Explore reporting tabs and filters to get additional insight.</li> </ul> <p>Concerned or confused about data or trends? Try showing it to another manager for additional perspective.</p>
Make a plan	<ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule one meeting (if possible) or multiple (if necessary) to discuss the results.</li> <li><input type="checkbox"/> Determine which data or trends you'd like to ask your team about to create conversation or to learn more.</li> <li><input type="checkbox"/> Consider posting or sending out questions in advance of the meeting to allow quieter, more thoughtful members of the group to consider their responses.</li> </ul> <p>Not sure what to focus on? Try sharing the data in advance so you can ask the team for their insights in the meeting.</p>
Hold the meeting	<ul style="list-style-type: none"> <li><input type="checkbox"/> If your group is more than 8 people, consider getting the team into small groups to discuss each question before gathering answers from the large group.</li> <li><input type="checkbox"/> Schedule enough time that can have your discussion and get the team to pick actions to focus on.</li> </ul> <p>Not sure what to focus on first in the discussion? Start with something simple (e.g., "Ask questions when you aren't clear," or "Look for opportunities to call rather than email").</p>
Take action	<ul style="list-style-type: none"> <li><input type="checkbox"/> If you don't get to a specific focus area in your first meeting, schedule a follow-up to focus on next steps.</li> <li><input type="checkbox"/> Consider adding the focus area to an agenda or post it in a break room to remind you to reference it.</li> <li><input type="checkbox"/> Look for people delivering on the focus area and recognize them in person and online.</li> </ul> <p>Forget to follow up? Just start again! Even after a few months, reminding about the focus area can make a difference.</p>