Sharing Survey Results: Overcoming Obstacles

Goals to focus on to address common challenges around the sharing survey results process

Goal	Best Practice Recommendations
Process step: *Review results*	
Understand the reports or data *Notes:*	❏ Build in time to take the data personally and then move onto a mindset of curiosity (move from WHAT!!! to Why?). ❏ Don't let the one data point (e.g., the Engaged Index) distract you from more actionable changes (specific indicators, behaviors, etc.). ❏ Explore additional reporting tabs to learn more about the data (is it a trend or just a movement from a 9 to an 8?). ❏ If you don't know why something changed, and it seems important, ask your team. ❏ If the change seems to be due to a temporary circumstance, you don't need to focus on it. ❏ Are you a data junkie? Give yourself a time limit and then move on using the insights you've gathered. Remember, you should only focus on one or two things. ❏ Consider bringing the data to other managers for additional perspectives.
Process step: *Make a plan*	
Create a plan for a successful conversation *Notes:*	❏ Plan to talk for half, listen for half. ❏ You don't need to discuss ALL the data. Focus on the items the team finds interesting. ❏ Consider gathering some ideas in one-on-ones before the meeting. 　　"Why do you think this number might…" 　　"What do you hope we talk about?"

	❏ Consider the data you will share in advance to encourage a more thoughtful conversation. ❏ Come with an idea of what you think the team could focus on, but be open to their ideas. ❏ Know that you don't need to have all the answers. Your job is to ensure the conversation happens.
Process step: *Hold the meeting*	
Get employees to talk *Notes:*	❏ Post the data and/or the questions you plan to ask prior to the meeting so your team can take time to consider their replies. ❏ Get them into small groups to share perspective in a safer setting before asking for large group input. ❏ Let them know you are interested in what they have to say and be patient. ❏ Try smaller group discussions of the data with a larger group conversation around findings.
Encourage equal participation *Notes:*	❏ Split the team into small groups so more people feel comfortable sharing their thoughts. ❏ If someone is likely to dominate the conversation, consider talking with them before the meeting: "You are such an influencer; I'd love it if you worked with me to allow others to share their perspective." "Your perspective is helpful, and I may not have time to fully get into it now… can we set up time after the meeting to discuss in more detail?"
Help the team see value *Notes:*	❏ Be visible in promoting participation so the data is more meaningful. ❏ Make it a priority to decide on a focus area that can lead to improvements (simple can be best!). ❏ Be tenacious about following up on survey focus areas so they know you take the feedback seriously.
Address complaints or topics that derail the conversation in a positive and productive way *Notes:*	❏ Be honest in setting expectations. "I can see this is a problem for you, but I don't know how we can influence [it/the issue]. Does anyone have any ideas how we might address this challenge?"

	❑ Refocus the conversation. "I can tell this is creating some challenges and I will make a note of this topic to think on later. I'd like to move on so we have time to think through challenges we can have an impact on." ❑ Follow up with outside resources. "I heard you were challenged by [issue/problem] and I reached out to someone who is more familiar with how it works. Here is what I learned…"
Decide on a focus area *Notes:*	❑ Look for a theme to address. "It seems like a lot of our challenges are linked to [communication]. Let's decide on something we can all focus on that would help with these challenges." ❑ When in doubt, focus on specific behaviors. "Which behaviors could we all do more consistently that would have the biggest impact on improving our culture in the coming months?" ❑ Try a Continue/Stop/Start exercise to get people focused on next steps. "What are we already doing well that we should continue to do?" "What should we stop doing?" "What should we start doing?" ❑ Do you have a lot of scores in the passive (7/8) category? Try asking, "While a score of 7 or 8 is good, I don't want us to settle. What would it take for us to feel comfortable getting to a 9 or a 10?" ❑ If you run out of time, schedule another meeting. ❑ If you have a list of ideas, post them and have people vote (circle stickers, hashes on the board, etc.) or run a poll.
Process step: *Take action*	
See positive change *Notes:*	❑ Schedule additional meetings if necessary. ❑ Follow up with team members who didn't speak or seemed frustrated in a one-on-one (with curiosity!).

	❏ Be intentional at recognizing people on your team (and outside your team!) that deliver on your focus area. ❏ If you "drop the ball," pick it back up again. ❏ Intentionally communicate progress on your focus area. ❏ Set aside time to check in on the focus area. Use one minute at the start of regular meetings: 　　"Who has seen someone doing a great job of [focus area]?" 　　"Can anyone think of a time when they could have done [focus area] more or better?" 　　"Who has an idea of how we can get even better at [focus area]?" ❏ If the focus area you picked starts to feel stale, move on to another idea that was shared in the meeting.