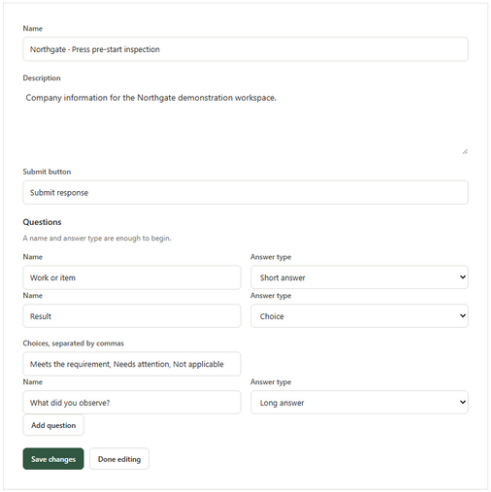
RUN A TEAM PULSE SURVEY AND ACT ON IT TOGETHER

Give the pulse survey discussion a clear sharing rule

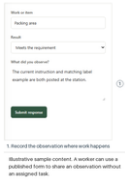
Use the selected response threshold to decide which results to share, then record one or two actions with owners or mark results withheld.

Answer the pulse > Review the results with the team and agree actions > Complete an agreed action (when triggered)

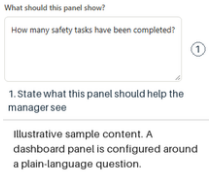
SkillSmith · Configure work-item, result and observation questions



SkillSmith · Share an observation through a published form



SkillSmith · Describe the question a dashboard panel should answer



Configure work-item, result and observation questions

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Assigned team member	Answer the pulse	Respond with one optional comment and ratings.
Team lead	Review the results with the team and agree actions; Complete an agreed action	Respond with done, one or two actions, owners - or 'withheld: fewer than the threshold answered' and results shown (only when responses ≥ the threshold).

Withhold results below the selected threshold

In a worked example, the response group is below the selected sharing threshold; withhold that result rather than presenting a group view that should not be shared.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Survey	Open the selected material for this occurrence.
Recorded response	results shown (only when responses ≥ the threshold), one or two actions and owners - or 'withheld: fewer than the threshold answered'	Save the response with its work context.
Review point	one or two actions and owners - or 'withheld: fewer than the threshold answered'	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Run a team pulse survey and act on it together

Bring survey into the prepared work. Assigned team member and Team lead each receive the context needed for their part.

01 Answer the pulse

Record ratings and one optional comment.

02 Review the results with the team and agree actions

Record results shown (only when responses ≥ the threshold), one or two actions and owners - or 'withheld: fewer than the threshold answered'.

03 Complete an agreed action

When an action was agreed, record done and told the team.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Run a team pulse survey and act on it together

A short confidential pulse every quarter with SkillSmith's own plainly worded questions, results shown to the team only when enough people answered, and one or two actions the lead and the team agree and finish. Confidential means the platform records who answered; it does not show anyone what an individual said.

Quarterly pulse · Assembly

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Survey The task uses this material	The pulse survey: 8-12 original items with plainly described constructs, or a licensed instrument the customer has the right to use (recorded in the resource's rights field).
Guidance The task uses this material	How to run the results conversation.
Report template The task uses this material	Pulse results by team, aggregated with the suppression rule applied.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose survey from the resources your team uses.

02 Agree the responsibilities

Confirm assigned team member and team lead for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Walk through these conditional steps: “Complete an agreed action”.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains results shown (only when responses ≥ the threshold), one or two actions and owners - or 'withheld: fewer than the threshold answered'. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring survey. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do the conditional steps become part of the method?

The conditional route is used when an action was agreed. Select the variant or respond to the recorded condition before treating that step as required.

What is the outcome for the wider workflow?

Results shared with the team (or withheld below the threshold); actions agreed and done.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
Missing information is read as a confirmed result.	Inspect supporting records and distinguish missing evidence from a confirmed outcome.
Automation activity is used as a substitute for assessed quality.	Use Real Metric to inspect change accuracy, process adherence, human review and understanding checks separately.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Which results can the lead share with the team, and what action follows?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact