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Analyze Trust Index™ Survey Setup Checklist

Before approving your survey for launch, ensure you've completed all necessary steps for a successful survey.
You can find guidance in the Knowledge Base (https://help.greatplacetowork.com).

Getting started

- [ ] Log in to the Portal
- [ ] Add team members who will support this initiative to the Portal

Tech Support

- [ ] Send your tech team the IT Checklist. In Step 3, click on "Preview Survey" and run email check at least 1 week before survey launch
- [ ] Ensure all employees have a way to take the survey, especially if they do not have their own computer or work email that they check regularly
- [ ] Add our domain names and support email to your safe sending list: @emprising.com, @greatplacetowork.com, hello@greatplacetowork.com, @communicate.greatplacetowork.com

Set up survey

- [ ] Choose your survey dates
- [ ] Decide how employees will access the survey: unique emails or Global Link
- [ ] Add employees' email addresses
- [ ] Add additional languages, if needed

Add custom content (Recommended)

- [ ] If this is your first survey, consider adding a few custom statements, demographics, or open-ended questions
- [ ] Keep length of survey in mind for survey takers when adding custom content
- [ ] If you used custom content in a previous survey, review the survey and decide which items you'd like to use again

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Final survey checks before approving launch

Ensure these details are all correct before you launch your survey. You cannot add or change anything after your survey goes live. **Please confirm these are correct:**

- [ ] Number of employees invited to survey
- [ ] If applicable, preview survey in Step 3, review and verify you have added custom content
  - [ ] Kept custom content to a reasonable amount to prevent an overly lengthy survey
  - [ ] Custom content from previous surveys was set up to trend correctly
- [ ] Survey language(s)
- [ ] Survey launch/invitation date, time, and time zone
- [ ] IT checklist completed and email test successful
- [ ] Global Link created, if needed

  If using Global Link:
  - [ ] Prepared your manual survey invitations and reminders
  - [ ] Scheduled invitations to send on survey launch day

Approve survey to launch

If all the above has been reviewed and completed, it's time to schedule your survey to launch.

- [ ] Go to Step 5 and approve survey for launch

Communicate about the survey: 2 weeks before launch

- [ ] Review communication guidelines to avoid disqualification
- [ ] Use our Survey Communications Library to prepare your survey communication plan:
  - [ ] Announce survey at an all-staff meeting using the Survey Taker Presentation
  - [ ] Letter from CEO, CHRO, or other company leader
  - [ ] Use posters, email invitations, and other graphics
  - [ ] Update Zoom backgrounds
  - [ ] Send at least one mail to announce survey is coming