

Assess 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 \(https://help.greatplacetowork.com\)](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

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
- 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

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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
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- 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