Set Up and Use Employee Pulse Survey

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@salesforcedocs

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EMPLOYEE PULSE SURVEY

Use the Employee Pulse Survey to gather information from your employees on their well-being and on how you can support them during this crucial period. The Employee Pulse Survey gets added to your Salesforce Care org using an unmanaged package. You can also add this unmanaged package to your other existing orgs.

Set Up the Employee Pulse Survey

Before you install the Employee Pulse Survey package, you must enable Surveys for the Salesforce Care org. After you get the package, you can provide permissions to users in your org so that they can modify and send the survey.

Enable Surveys

Before you add the Employee Pulse Survey package to your Salesforce Care org, you enable Surveys for your org.

1. From Setup, enter `Survey Settings` in the Quick Find box, then select **Survey Settings**.
2. Enable Surveys.
3. If you want to send surveys to your customers, select **Salesforce Care Customer Help Center** as the default public community for public survey invitations.

Get the Employee Pulse Survey Package

Get the Employee Pulse Survey unmanaged package for your org. After you get the package from the AppExchange, the Employee Pulse Survey is added to your org.

1. From Setup, enter `AppExchange Marketplace` in the Quick Find box, then select **AppExchange Marketplace**.
2. Search for Employee Pulse Survey, and select it.
3. Click **Get It Now**.
4. Click **Open Login Screen**.

   The Salesforce login page opens in a new tab.

5. Log in to your Salesforce Care org.
6. Allow appexchange_api access to your basic information.
7. Click **Install Here**.
8. Agree to the terms and conditions.
9. Click **Confirm and Install**.
10. Select **Install for Admins Only**, and click **Install**.

    It takes some time to install the package. The Employee Pulse Survey is added to your org and you receive an email notification after installation is complete.

Allow Users to Modify and Send the Survey

You can assign your users a profile that allows them to modify and send the Employee Pulse Survey. Or you can create and assign a permission set that allows users to modify and send the survey.

Assign a Profile

Assign your users a profile that allows them to modify and send the Employee Pulse Survey.

1. From Setup, enter `Users` in the Quick Find box, then select **Users**.
2. Click the username of the user who can edit, create, or send surveys.
3. Click **Edit**.
4. In the User License field, select **Salesforce**.
5. In the Profile field, assign one of the following profiles:
    - Contract Manager
    - Marketing User
    - OtherStandard
    - Standard User
    - System Administrator
6. Save your changes.

Create and Assign a Permission Set That Allows Users to Modify and Send the Survey

You can create and assign a permission set that allows users to modify and send the surveys if their profile doesn't allow them to create and modify surveys. For the permission set, you must give users read, create, edit, and delete permissions on the Survey, Survey Invitations, and Survey Responses objects.

1. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter the name and API name of the permission set.
4. In the License field, select **Salesforce**.
5. Save your changes.
6. Click **System Preferences**.
7. Click the **Surveys** object.
8. Click **Edit**.
9. Enable the following object permissions for each of the Surveys object:
    - Read
    - Create
    - Edit
    - Delete
10. Save your changes.
11. Repeat steps 7–10 for the Survey Invitations object and the Survey Responses object.

Skill Users	No Access
Social Personas	--
Social Posts	No Access
Solutions	No Access
Streaming Channels	No Access
Survey Invitations	Read, Create, Edit, Delete
Survey Responses	Read, Create, Edit, Delete
Surveys	Read, Create, Edit, Delete
Survey Subjects	No Access
Tasks	--
Territory Aggregations	No Access
Territory Aggregation Settings	No Access
Territory Nodes	No Access
Territory Planning	--

12. Navigate back to Permission Set Overview, and click **Manage Assignments**.
13. Click **Add Assignments**.
14. Select the users who can modify and send surveys, and click **Assign**.

Ensure Employees Can Respond Using the Surveys Component in Communities

To allow employees to respond to the Employee Pulse Survey using the Surveys component in the Salesforce Care Employee Experience community, ensure that the Employee Standard User profile is:

- Assigned the Company Community permission set
- Member of the Salesforce Care Employee Experience community

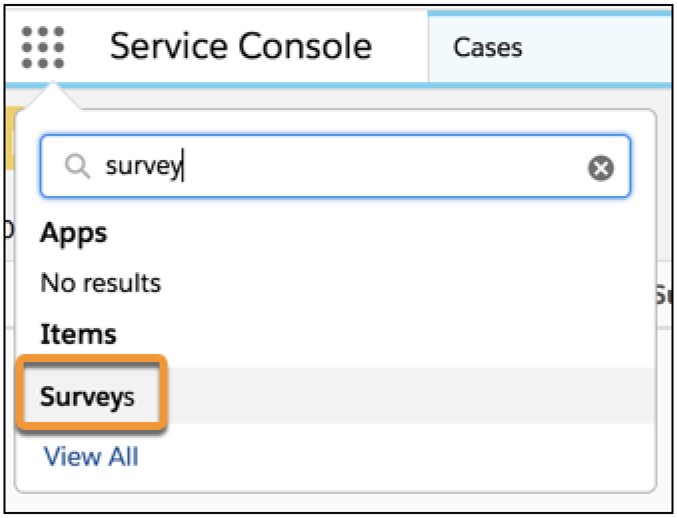
View and Modify the Employee Pulse Survey

You can modify the survey and the survey questions as you like.

View the Employee Pulse Survey

Take a look at the Employee Pulse Survey and check out the questions in it.

1. From the App Launcher, find and select Surveys.



2. Click beside Employee Pulse Survey, and select **Open Latest Version**.

   The Survey Builder opens in a new tab.

3. Review the contents of the survey:
   - Welcome Page: This is the first page that participants see when they open the survey.
   - List of pages: Each page can contain one or more questions.
   - Thank You Page: Participants see this page after they submit their response.

Modify the Survey

The Employee Pulse Survey is added to your org in active state. You can’t edit active surveys. Create a new version to make changes.

1. Open the Employee Pulse Survey in the Survey Builder, click , and select **Create New Version**.
2. You can make the following changes:
   - Modify the welcome message
   - Add or remove survey pages
   - Add, modify, or remove questions on each survey page
   - Modify the thank you message
3. Save your changes.
4. Click **Activate**.
   Only activated surveys can be distributed.

Distribute the Survey

You can distribute a survey to employees using an invitation link. You can also add the Surveys component to the Salesforce Care Employee Experience community.

Get Survey Invitation Link for Employees

You can generate a survey invitation link and post in it on Chatter or on the Salesforce Care Employee Experience community.

1. Open the Employee Pulse Survey in the Survey Builder, and click **Send**.
2. Click **Get Link**.
3. On the Participants in Your Company tab, you can choose these options:
    - Auto-Expires: Select and add a date if you want to stop receiving responses on a particular date.
    - Anonymize responses: Select if you don't want to identify the participant.
    - Let participants see their responses: Select if you want to allow participants to view their responses after submitting the survey.
4. Click **Copy Link**.
   The invitation is copied.

Post Invitation Link on Chatter

You can post the survey invitation link on Chatter. Employees click the link to respond.

1. From the App Launcher, find and select **Chatter**.
2. You can post the link on the Chatter homepage to make it available to all the users in your org.
3. You can also navigate to a Chatter group and post it there.

Post Invitation Link on Community

You can include the survey invitation link within a question or post it in a group on the Salesforce Care Employee Experience community.

Note: Make sure that the Salesforce Care Employee Experience community is published.

1. From Setup, enter `All Communities` in the Quick Find box, then select **All Communities**.
2. Click the URL beside Salesforce Care Employee Experience.

   The community opens in a new tab.

Note: Users with the Employee Standard User profile must copy the community URL and use it to open the community.

3. To post the survey invitation link as a question, complete the following steps:
    a. Click **I have a question**.
    b. Click **Ask a Question**.
    c. Choose the forum you want to post the question to.
    d. Add the survey invitation link in the question or add it as a hyperlink in the details.
    e. Click **Ask**.
4. To post the survey invitation link in a group, complete the following steps:
    a. Click **Groups**.
    b. Select the group you want to post the survey invitation link to.
    c. Add the survey link in a new post or announcement.

Tip: You can add the survey invitation as a hyperlink in a post.

Send Survey Invitation Link by Email

You can share the survey invitation in an email using Salesforce Marketing Cloud or an email client of your choice.

Gather Responses Using the Surveys Component in the Community

You can add the Surveys component to the Salesforce Care Employee Experience community. This component only uses invitations that are meant for users outside your org. You can share the invitation record with your employees.

Get Survey Invitations for Users Outside Your Org

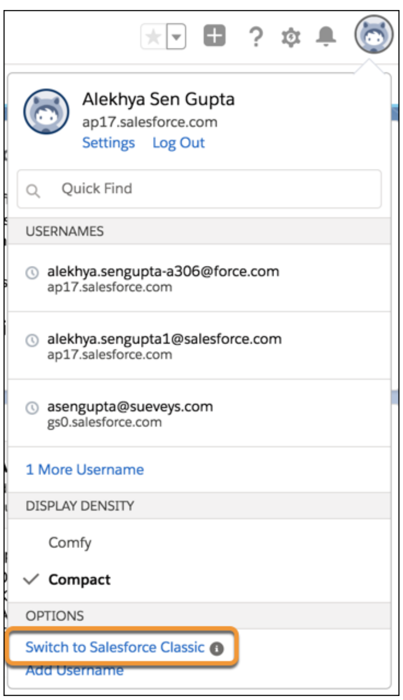
Before you add the Surveys component to the Salesforce Care Employee Experience community, you generate an invitation for users outside your org.

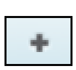
1. Open the Employee Pulse Survey in the Survey Builder, and click **Send**.
2. Click **Get Link**.
3. Open the Participants Outside Your Company tab.

Share Survey Invitations with Employees Using Salesforce Classic

You can now share with your employees the invitation you generated for participants outside your org.

1. Switch to **Salesforce Classic**.



2. Click .
3. Click **Surveys**.
4. Click **Employee Pulse Survey**.

5. Click the invitation that you generated for participants outside your company.

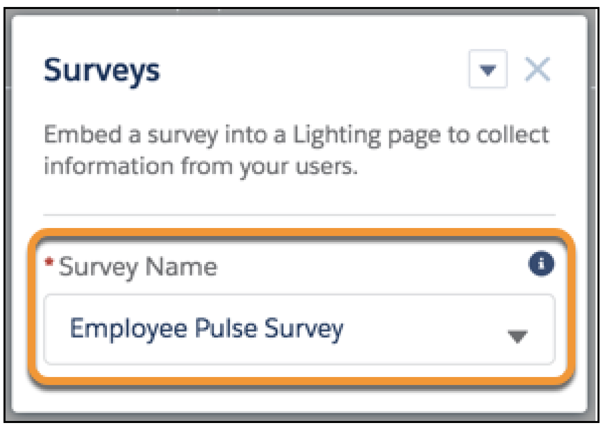
Tip: The invitation ends with alphanumeric characters.

6. In the Survey Invitation Detail section, click **Sharing**.
7. Click **Add**.
8. In Search, select Users.
9. Add the employees that you want to invite to respond to the survey, and give them Read Only access.
10. Save your changes.

Add the Surveys Component to the Community

You can add the Surveys component on the Salesforce Care Employee Experience community.

1. From Setup, enter `All Communities` in the Quick Find box, then select **All Communities**.
2. Click **Builder** beside Salesforce Care Employee Experience.
3. Click .
4. Search for the **Surveys** component.
5. Drag and drop the Surveys component on the community page.
6. In the component settings, select **Employee Pulse Survey**.



Analyze the Responses

You can learn from your survey responses using the Analyze tab of the Survey Builder. Or you can create custom reports tailored to your questions.

Analyze Responses in the Survey Builder

In the Build tab of the Survey Builder, you can view a breakdown of employee responses for each question. You can also look at the total employees who either completed the survey or are in progress. You can also export the responses from the Analyze tab.

1. Open the Employee Pulse Survey in the Survey Builder, and click **Analyze**.
2. In the Survey Metrics section, view the count of employees who have responded or are in progress.
3. In the Response Dashboard, view the breakdown of the responses by question.

4. To export the responses, click **Export Response**.
5. Select the date range that you want to export responses for, and click Send Email.
   The responses are emailed to you in a .csv file. You can use this file to analyze responses with a business intelligence (BI) tool of your choice.

Analyze Responses Using Custom Report Types

You can get even more detail on your survey responses. In Report Types, you can use a Survey object to create custom reports.

1. From Setup, enter `Report Type` in the Quick Find box, then select **Report Type**.
2. Click **Continue**.
3. Click **New Custom Report Type**.
4. Select a Survey object as the Primary Object, define the report type, and select where you want to store the report type.
5. Click **Next**.
6. Choose the related object, and save your changes**.**

Track Responses Consumption

Salesforce Care provides the first 300 survey responses for free. You can track the number of responses you receive.

1. From Setup, enter `Company Information` in the Quick Find box, then select **Company Information**.
2. In the View Usage-Based Entitlements section, view the total responses you received to-date.

Don't worry, you won't stop receiving responses after the first 300 responses. You can purchase additional response packs as per your company's requirements.

Resources

Trailhead:

- Survey Basics
- Salesforce Surveys for Admins

Salesforce Help:

- Set Up Surveys
- Create and Design Surveys
- Translate Your Surveys
- Distribute Surveys
- Analyze Responses
- Customer Lifecycle Analytics