

Microsoft Viva Pulse

# User Quick Guide – Pulse Overview

Viva Pulse empowers leaders and managers to build engaged, productive, and resilient teams with easy-to-deploy, democratized capabilities that enable leaders and managers to gather continuous sentiment and progress-oriented feedback when it matters most.

Use Viva Pulse to facilitate insightful, real-time check-ins with your teams. Then use the feedback to implement actions for improvement. This guide will help you make the most of your Viva Pulse survey.

## Viva Pulse can be used to:

- **Support AI transformation and adoption:** Gather feedback on user readiness, adoption status, and impact over the course of your Microsoft 365 Copilot adoption journey.
- **Follow up after organization-wide surveys:** Check in with your teams after organization-wide survey results are released. Track progress on areas of focus leading up to the next organization-wide survey.
- **Support change management:** Understand how team members think and feel at specific times during organizational change.
- **Promote project team success:** Help a team be successful over the course of a project. Understand what works well and what could be improved.
- **Debrief:** Use project insights and lessons learned. Apply them to future projects and project teams.

## Viva Pulse surveys aren't intended to:

- **Evaluate employee or manager performance:** Respondents won't feel comfortable providing candid feedback if they believe it might impact performance ratings or compensation decisions.
- **Collect sensitive employee data:** Viva Pulse is not intended to be used for the collection of sensitive or highly regulated data. You may wish to consult your HR and legal personnel before collecting this type of data.
- **Gather broad organizational insights:** Viva Pulse is a tool for managers to gather feedback from their own teams. It isn't intended to gather broader organizational insights. *Use Viva Glint recurring surveys to gather broader insights.*



**Viva Pulse** surveys allow authors to gather feedback on relevant topics in real time.

- Use survey templates and pre-written questions to streamline survey creation.
- Send surveys immediately, schedule them to send in the future, or schedule them to resend on a specific cadence.
- Access results as soon as the survey closes.

**Organizational engagement surveys** are intended for HR, senior leaders, and managers to gather organizational and team-level feedback.

- Surveys can be sent in a preset, thoughtful cadence.
- Leaders can uncover broad trends.
- Administrators can help roll out results to managers and act on feedback.

**Leverage both types of surveys** for a top-down and bottom-up perspective. This combination supports meaningful action at all levels of your organization.

# User Quick Guide – Sending a Pulse

## Sending a Pulse FAQs

<p><b>Who can send a Pulse?</b></p>	<p><b>Anyone with a Viva Pulse license can send pulses to support a team or project.</b></p> <p><b>Leaders can assign someone to create and send Pulses on their behalf.</b> Both the leader and their delegate can view survey results.</p> <p><b>Survey authors should reach out to their Human Resources representative with questions about the Viva Pulse process.</b></p>
<p><b>What are best practices when writing new questions?</b></p>	<p><b>When writing your own questions, use these best practices:</b></p> <ul style="list-style-type: none"> <li>• Pre-written questions are available and can be added to your survey and edited as needed.</li> <li>• If none of the pre-written questions fit your needs, your company may provide instructions and guidance.</li> <li>• Measure only one driver or theme per question.</li> <li>• Phrase rating questions as a statement designed to elicit a range of responses. Be careful not to ask a yes/no question.</li> <li>• Use neutral wording. Avoid leading questions aimed at a preferred answer.</li> <li>• Keep the language simple and understandable for all populations. Avoid slang or jargon.</li> </ul>
<p><b>Who do you invite?</b></p>	<p><b>Seek feedback from everyone who can provide valuable insights.</b> Don't avoid sending Pulses to those who may respond negatively. Seek <b>whole</b> and <b>accurate</b> feedback.</p> <p>Include <b>all</b> members of a team or group. For example, a manager requesting feedback on what went well and what could be improved should include all members of the project team, regardless of their role within the team.</p>
<p><b>How long should a Pulse stay open?</b></p>	<p>We recommend <b>seven days</b> to allow for everyone time to complete their Pulse. However, this can vary depending the length of the Pulse and the availability of the team to complete it.</p> <p>Keep the Pulse open for enough time to get <b>representative feedback</b> from the recipients of the survey. The goal is to hear from as many people as possible.</p>
<p><b>How often should you be sending Pulses?</b></p>	<p><b>Pulse cadence varies</b> depending on its use case.</p> <ul style="list-style-type: none"> <li>• A long-term project may require monthly pulses to keep the team on track.</li> <li>• A team undergoing significant change may benefit from a Pulse once or twice during the change implementation.</li> </ul> <p><b>Best practice:</b> Pulse no more than once monthly and try to avoid sending a Pulse when another survey is live.</p>
<p><b>How do you communicate about a Pulse?</b></p>	<ul style="list-style-type: none"> <li>• Communicate early so there's time to align expectations, address concerns, and help a team understand why they're being asked to provide feedback.</li> <li>• Be transparent about the purpose of the Pulse and how feedback is used. If people don't see their feedback being used, they'll stop providing it.</li> <li>• Reinforce that the Pulse is an opportunity to understand the team's perspectives on what is going well and what could improve. Be clear that the Pulse is not to monitor performance or evaluate employees.</li> <li>• Authors can remind recipients to complete the Pulse but shouldn't push hard for responses. Thoughtful and honest feedback generally can't be delivered under pressure.</li> </ul>

# User Quick Guide – Results and Conversations

Authors are the owners of their Viva Pulse feedback results and are encouraged to hold themselves accountable. They can do this by **sharing results with their teams and their leaders or other key stakeholders, setting a goal for themselves** around acting on results, and **committing to regular follow up** with their teams.

**Share the results** with your team and **use the results** to start a conversation.



**Collaborate with your team** and determine the best **one area** to focus your collective efforts.

## FAQs

<p><b>What if the response threshold isn't met?</b></p>	<p>To increase participation, use reminder communications that reinforce the purpose of the Pulse and the importance of feedback. It's also helpful to reinforce the commitment to acting based on feedback.</p> <p>Viva Pulse sends automated nudges to the survey author. Authors receive the option to extend the survey if the close date is approaching and it doesn't appear that the response threshold will be met.</p>
<p><b>Who has access to the Pulse results?</b></p>	<p>Once a Pulse closes, the results are only visible to the sender of the Pulse. They can share results with the survey's participants or anyone else, at their discretion. Pulse data isn't accessible to HR or other leaders unless the Pulse administrator has given them permission within their role. Personally identifiable information is hidden from survey authors but may be viewable by administrators and privileged users.</p>
<p><b>Who should Pulse results be shared with?</b></p>	<p>Share a summary of the results with all employees who were invited to provide feedback. This builds trust and enables collaboration on action taking and can also serve to encourage participation in future pulses.</p> <p>Consider who else might benefit from viewing results. You may also choose to share results with your upper-level management, a project's executive sponsor, or an HR partner – anyone that has a vested interest in helping the author and their team.</p>
<p><b>Are there any situations where the Pulse results shouldn't be shared?</b></p>	<p>Share results even when the feedback is difficult to hear. This ensures people know their feedback is valued and enables collaboration on acting on feedback.</p> <p>If you're concerned about the content of a response or unsure whether it should be shared with all participants, consult your organization.</p>



The best way to identify action steps is to **collaborate directly with your team**. **Schedule time to share results**. **Ask each member** of the team to play a role in the action plan. **Focus on one action at a time**. **Small steps** allow you to stay focused and make progress.