

# CHECKLIST: Choosing the Right Employee Engagement Software

Ask these questions to find the right partner in less time.

## Survey Design and Methodology

- ☐ Can you describe your survey methodology? How it will help us understand and drive engagement.
- ☐ What other types of surveys do you offer besides engagement?
- ☐ How will this software help my managers drive engagement?
- ☐ How do your tools help empower everyone to play their part in driving employee engagement?

## Survey Launch and Communication

- ☐ What does the survey launch process look like?
- ☐ How much time does a survey launch take?
- ☐ How will you help me communicate about my survey?

## Reporting and Analytics

- ☐ What reporting capabilities exist?
- ☐ Are there benchmarks available? Will I be able to compare our survey results to other organizations like ours? In what ways?
- ☐ What types of analytics and reporting will I have access to and how will they help us make better decisions?

## Action Planning

- ☐ Does your platform provide integrated Action Planning tools that enable teams to easily develop, track, and execute action plans based on survey results



## Integration and Customization

- ☐ What integrations are available and how do they work?
- ☐ Does this software integrate with my HRIS data?
- ☐ What does the HRIS integration process look like?
- ☐ What options do I have in terms of customization?
- ☐ What templates will I have access to and to what extent can I customize them to my organization?

## Support and Resources

- ☐ What options do I have when it comes to software support?
- ☐ Will others in my organization have access to tech support?
- ☐ How will I be trained on new features?
- ☐ What other resources and content will I have access to?
- ☐ What resources will my team and my managers have access to help them navigate change and adoption?

## Innovation and Trends

- ☐ How do you keep your software up to date with the latest engagement trends?
- ☐ What AI features does your software include?
- ☐ How does customer feedback influence the development and enhancement of features within your platform?

## Data & Security

- ☐ How does your platform ensure that new technologies, such as AI, are integrated securely and responsibly?
- ☐ How is my organization's data stored securely within your platform?
- ☐ What procedures do you follow to ensure that all products and features are thoroughly tested for both quality and security before they are released to users?
- ☐ How do you incorporate industry best practices into your security protocols?