Pulse Checks: During and After a Change

Overview

Pulse checks are a way of “checking in” with people who may be affected by a significant institutional change to learn their perceptions about the change. This tool contains two pulse check interview protocols and two sets of survey items that can be used during, or after a change.

It can be beneficial to conduct pulse checks when the institution is undergoing a significant change in structure, policies, systems, work flow, culture, or strategy.

Two types of pulse checks that may be beneficial include:

- An “early” pulse check: When a change has been announced (to capture early impressions); and
- A “post-change” pulse check: After people have experienced the change for a period of time (to learn how well the change is working).

Review and modify the following interview guide to reflect the specific post-budget reduction changes in question. Conduct interviews with people who are affected by the change to gather their perceptions and suggestions.
Early Pulse Check Interview Guide

These questions can be asked of employees after the post-budget reduction change has been announced (“early implementation period”).

1. Now that you’ve learned a bit about the post-budget reduction changes, what is your sense of how it will impact us?
   - Your team, department, division, institution?
   - You personally?
   - Our customers/partners?

2. How ready do you think people are for the post-budget reduction changes?
   - How supportive or resistant do you think your colleagues will be to adopting the post-budget reduction changes?
   - What are they most anxious about? What are their remaining concerns? What are you most anxious about? Concerned about?
   - How comfortable are they with post-budget reduction changes? How comfortable are you?

3. What aspects of the post-budget reduction changes, if any, would you like to learn more about?
   - What questions do you have?

4. What else do you need to feel ready and comfortable?

5. What do your colleagues need?

6. What advice would you have to help ensure that we are successful during the transition and beyond?
   - What are some potential obstacles we should be aware of?
   - Who is responsible for making the change a success?
Post-Change Pulse Check Interview Guide

These questions can be asked of employees after they have experienced the change for a little while.

1. Based on your initial experiences with the post-budget reduction changes, what’s working well and what concerns do you have?
   - What are the benefits of the post-budget reduction changes? What obstacles to success still exist?
   - How can you tell post-budget reduction changes are working? Can you provide an example? Any data?

2. What have been the biggest adjustments you and others have needed to make as a result of the post-budget reduction changes?

3. What questions do you still have about the post-budget reduction changes?
   - What would you like to know more about?
   - How would you describe post-budget reduction changes such as: your new role; the reasons for the post-budget reduction changes; the new expectations for you or your team; etc?
   - What information, if any, do you need that you haven’t yet received?
   - Whom can you go to if you have questions about post-budget reduction changes?
4. Overall, what is your assessment of how well the post-budget reduction changes are progressing?
   • How are your colleagues reacting?
   • [if applicable] How have customers been reacting?

5. Based on your experiences to date, what suggestions would you have as we move forward? What should we stop doing, start doing, or continue doing? What would help you and your team be more successful during the transition and beyond?

<table>
<thead>
<tr>
<th>Start (start doing this, I think it would help)</th>
<th>Stop (stop doing this or do this less, it isn’t helpful)</th>
<th>Continue (keep doing this, it is helpful)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Pulse Checks: During and After a Change

Pulse Check Survey (Post-Change Version)

Place an X in the appropriate cell to indicate your level of agreement with each statement.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neither Agree nor Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I understand <strong>why</strong> our institution is making the budget-reduction changes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I understand what is <strong>expected of me</strong> now.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I understand <strong>how</strong> the change will help [employees] [partners] [customers].</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I am <strong>ready</strong> to handle the changes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Our [team] [department] [division] is fully ready for the changes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. I can answer [others’] [partners’] [customers’] questions about the change (e.g., what they are, why we changed).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. My manager has been <strong>actively helping</strong> us handle the changes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. I’m confident I can <strong>succeed</strong> in my work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. I can go to my manager if I have <strong>concerns</strong> or <strong>difficulties</strong> with the changes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. <strong>Senior leaders</strong> have been visible throughout the post-budget reduction change efforts.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11. How would you describe the current reaction to the post-budget reduction changes [in your team]? (Select only one.)

- [ ] Everyone is concerned about the change
- [ ] Most people are concerned about the change
- [ ] Mixed reactions (or unsure)
- [ ] Most people are supportive of the change
- [ ] Everyone is supportive of the change
12. What is your own reaction to the post-budget reduction changes today? (Select only one.)

- I’m very concerned
- I’m concerned
- I’m not sure
- I’m supportive
- I’m very supportive

13. Please share your observations about the post-budget reduction changes so far:

- Things that are working well (or that we’ve done right)...

- Things you have concerns about...

- Ideas and suggestions for the future...