HR DELIVERY / STEP-BY-STEP SERIES

Engagement & Wellbeing

D1

PORTAL USER GUIDE

Learn to prepare employee listening, build and review surveys, share participation routes, interpret results, organise follow-up, use benchmarks and facilitate HR Delivery Live sessions.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

From employee voice to accountable action

Use this guide in the order that matches your responsibility: survey owner, analyst, facilitator or participant. Start with purpose and access, then follow the task cards for preparation, collection, reporting and action.

Each task tells you what to prepare, how to proceed, what to check and what should result. Public screens are directly observed. Protected Studio screens are official published demonstrations; detailed options must be confirmed in your authorised workspace.

WHAT YOU CAN DO

01 Design and review a purposeful survey

02 Manage participation links and collection

03 Interpret reportable results and export findings

04 Give actions owners and review dates

05 Use compatible engagement and wellbeing references

06 Prepare and join interactive Live sessions

WHO THIS GUIDE IS FOR

HR and employee-experience teams • Survey administrators and analysts • Workshop facilitators • Managers acting on findings

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In this guide

Use the chapter pages to find a task. Follow each numbered sequence and check the result before continuing.

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FOREWORD

A note from Dr Phillip

Good listening earns its value when the evidence leads to a clear decision, a named owner and visible follow-through.

Employee listening is useful when people understand why they are being asked, trust the process and can see what happens afterwards. A well-run programme starts with a question the organisation is prepared to act on. The technology then helps make the work organised, repeatable and easier to explain.

This guide follows that practical sequence. It connects survey design with the participant experience, reporting and follow-through. It also distinguishes a live discussion from a published survey, and a benchmark reference from the evidence collected inside your organisation. Those distinctions matter when you interpret results and agree action.

Use the checklists as working prompts. Confirm the audience, privacy arrangements and approved wording before opening a collection. Read the response base before interpreting a percentage. Give each improvement an owner, a date and evidence of progress. HR Delivery can support the design and interpretation, while your organisation remains responsible for the decisions and the response to its people.

DR PHILLIP

HR Delivery

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

OPEN SOURCE

Meet Lama

Lama is the first point of contact when you need help setting up a listening programme or finding the right department support. Explain the audience, the issue you want to understand and the decision the findings will inform. She can help route access questions, requests for approved question content, workshop support and interpretation enquiries to the appropriate HR Delivery service, including Mariam's engagement and wellbeing area.

ASK LAMA TO HELP WITH

- Department access and role questions
- Survey design or approved content
- Live facilitation support
- Benchmark and report interpretation

HAVE THESE DETAILS READY

- Listening purpose and intended audience
- Survey cycle or Live session name
- Required languages and reporting groups
- Decision owner and planned dates

OPEN LAMA'S RECEPTION

hr.delivery

SIGNING IN / STEPS 1–2 OF 4

OPEN SOURCE

Signing in

01 Open the department sign-in page

Use the Engagement and Wellbeing Department Portal link in the portal directory. Confirm the page says “Listen. Understand. Act.”

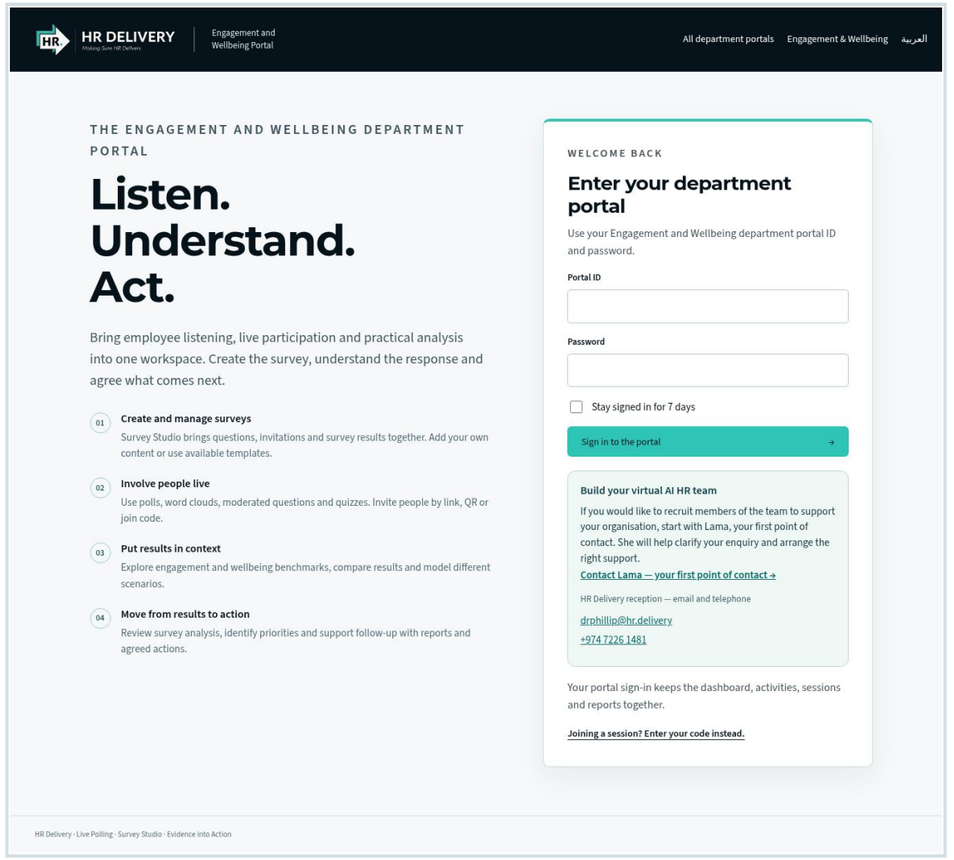
CHECK The Portal ID and Password fields are visible.

02 Enter your issued access details

Complete 'Portal ID' and 'Password'. Keep the details private; this guide intentionally does not print shared credentials.

CHECK Both fields are ready for submission.

CURRENT LIVE SCREEN



Current department sign-in screen; no credentials or private records shown.

SIGNING IN / STEPS 3–4 OF 4

OPEN SOURCE

Signing in

03 Choose whether to retain access

Use 'Stay signed in for 7 days' only on a device whose access you control. Leave it unticked on a shared device.

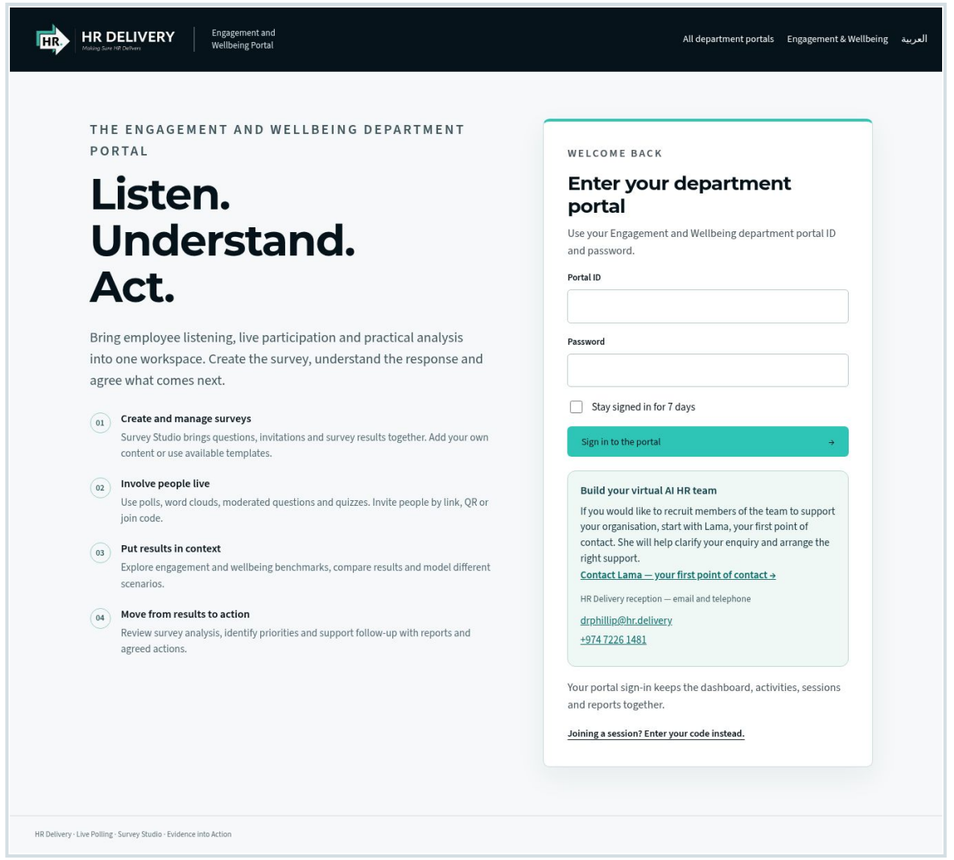
CHECK The checkbox reflects your chosen sign-in duration.

04 Submit the sign-in form

Select 'Sign in to the portal'. If access is rejected, verify the issued credentials with Lama rather than repeatedly retrying.

CHECK Successful access should open the department workspace; this result was not tested.

CURRENT LIVE SCREEN



Current department sign-in screen; no credentials or private records shown.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 Use the portal access issued for your organisation. Different workspaces and roles can expose different options.

02 A participant invitation or public document link is separate from administrator access.

03 Participants can join a Live session or complete a survey from the supplied invitation without a portal administrator account.

04 Administration, reporting and organisation access follow the permissions of the selected workspace.

The sign-in screen was inspected. Protected workflows were not entered during this review because the browser required secure authentication. Published demonstration screens and source-described procedures are identified throughout.

YOUR WORKFLOW MAP

How the tasks connect

Follow the sequence for a complete piece of work, or go straight to the chapter you need.

01

Choose the listening route

PAGE 010

02

Build and review a survey

PAGE 019

03

Collect, interpret and act

PAGE 036

04

Run HR Delivery Live

PAGE 053

05

Use benchmarks carefully

PAGE 070

Each task: prepare the inputs, follow the numbered steps, then confirm the output and the checks.

01 Choose the listening route

Match the method, audience and privacy profile before building.

02 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

CHOOSE THE LISTENING ROUTE / D-01-01

OPEN SOURCE

Choose the right listening approach

Define a listening brief with an appropriate service and reporting plan.

WHO USES THIS Programme owner

BEFORE YOU BEGIN

- A decision or improvement question
- An audience and accountable sponsor

WHAT YOU WILL HAVE

- Listening brief
- Selected service route

CHECK BEFORE YOU FINISH

- The survey has a practical decision owner.
- Question content and sample reports are approved for the intended use.

A named starter contains no questions or scores.

Prepare an approved question set or use a custom draft. Ask Lama for the content status before scheduling launch.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The reviewed site says the eight service starters await approved question sets; current sample report downloads are labelled covers.

CHOOSE THE LISTENING ROUTE / STEPS 1–2 OF 5

OPEN SOURCE

Choose the right listening approach

01 Start from the listening overview

Open 'Find your listening approach' on Engagement and Wellbeing. Review the eight service cards before choosing a starter.

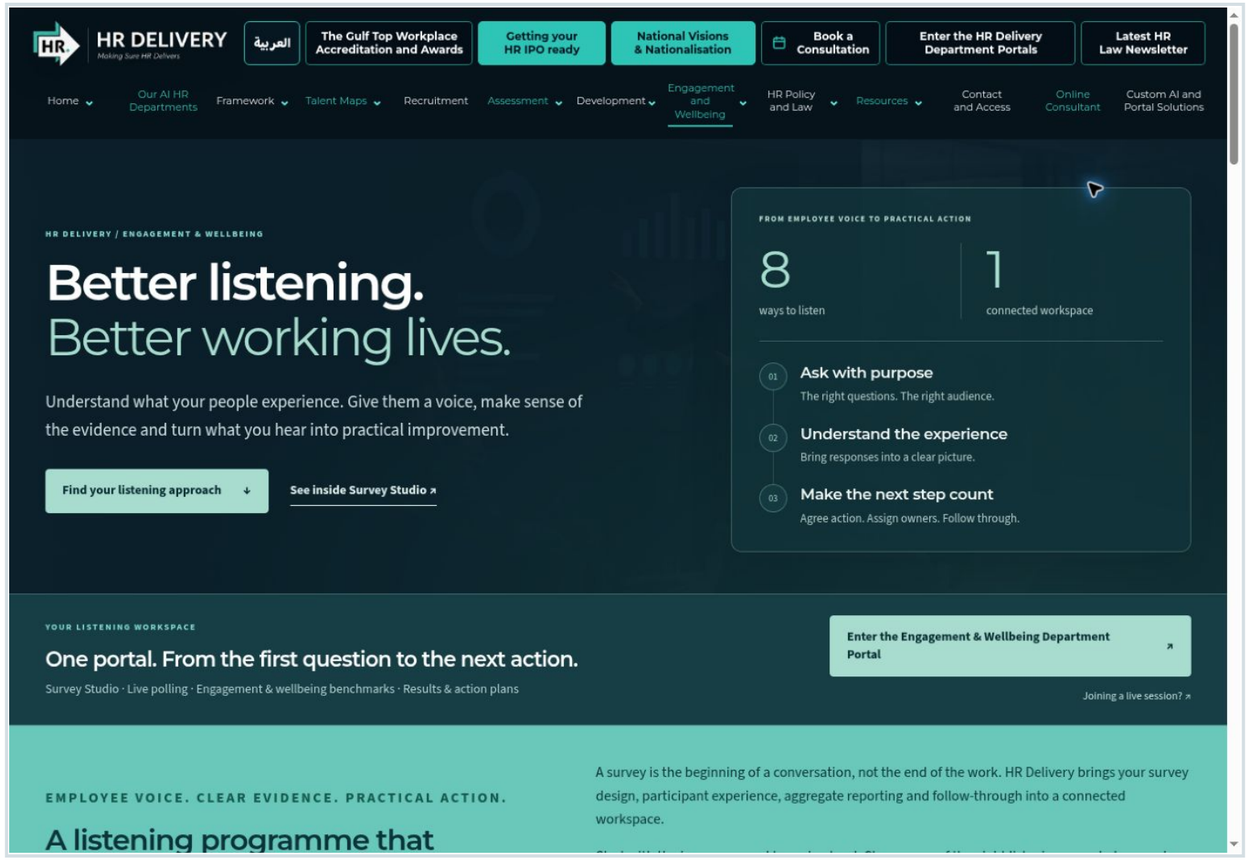
CHECK Each card describes a different point in the employee experience.

02 Match the service to the decision

Use satisfaction for work experience, engagement for connection and contribution, pulse for a focused follow-up, and mood for a brief check-in.

CHECK Your chosen approach matches the question and required depth.

PRIOR REVIEWED SCREEN



Public listening overview and service routes.

CHOOSE THE LISTENING ROUTE / STEPS 3–4 OF 5

OPEN SOURCE

Choose the right listening approach

03 Choose event-specific listening where relevant

Use wellbeing for working conditions; exit for leaving experiences; onboarding for new starters; and HR service-user feedback for support quality.

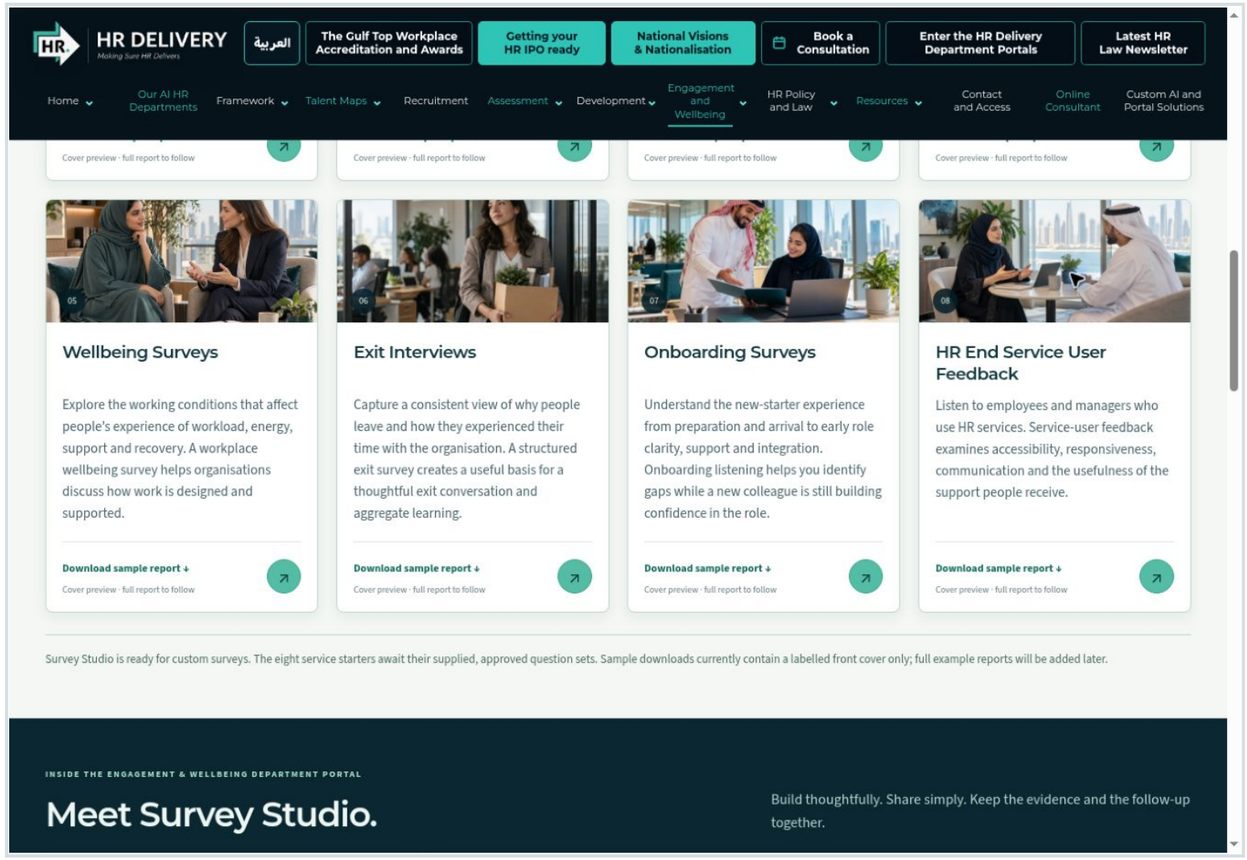
CHECK The audience and timing follow the experience you intend to examine.

04 Write the brief before creating a draft

Record purpose, audience, language, intended reporting groups, collection window and who will act. Agree what participants will be told.

CHECK The sponsor can explain what decisions the responses will inform.

PRIOR REVIEWED SCREEN



Public disclosure about approved question sets and sample report content.

CHOOSE THE LISTENING ROUTE / STEPS 5–5 OF 5

OPEN SOURCE

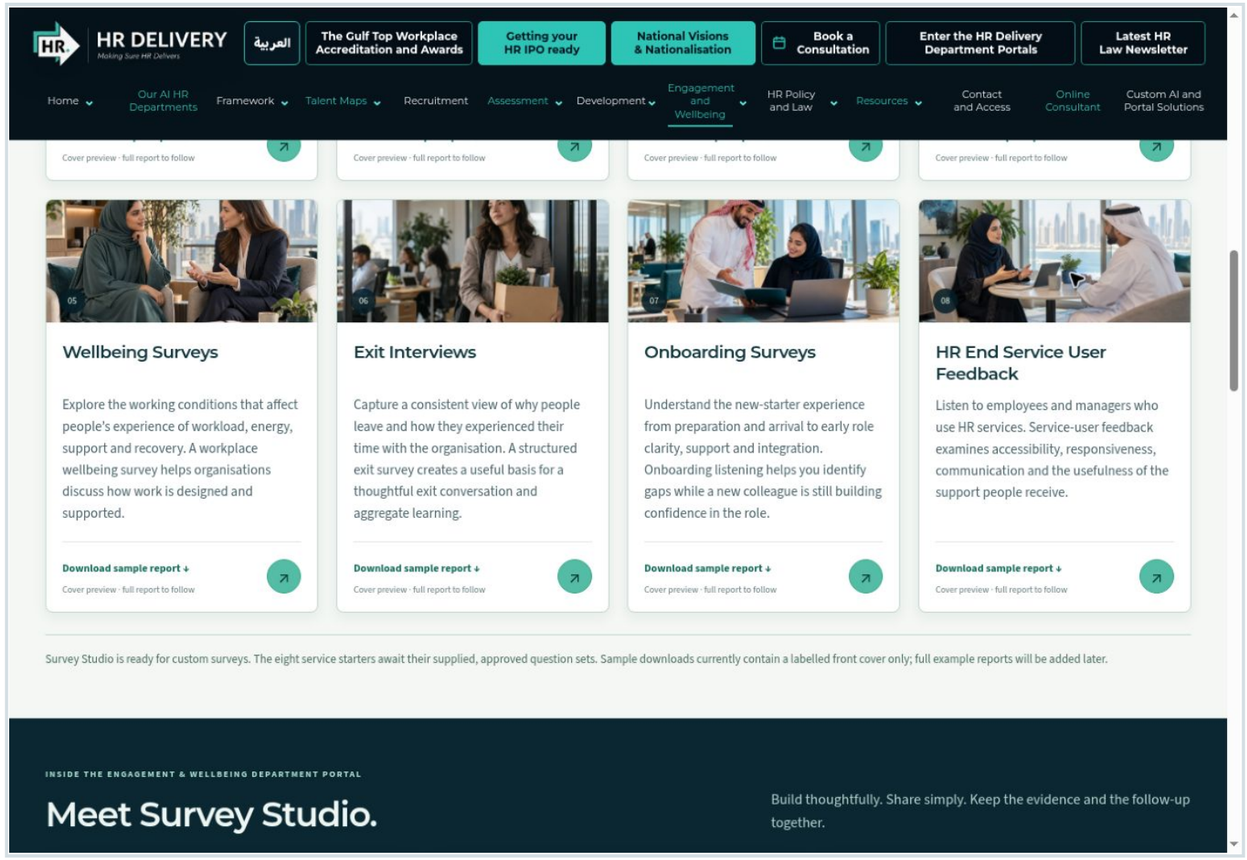
Choose the right listening approach

05 Check the starting content

The public page distinguishes custom surveys from the eight starters. Confirm that an approved question set exists before treating a named starter as launch-ready.

CHECK Unapproved or empty content is identified before distribution.

PRIOR REVIEWED SCREEN



Public disclosure about approved question sets and sample report content.

CHOOSE THE LISTENING ROUTE / D-01-02

OPEN SOURCE

Find your way around the workspace

Move between survey work, live facilitation, benchmarks and help.

WHO USES THIS Authorised portal user

BEFORE YOU BEGIN

- Department access
- Correct organisation workspace

WHAT YOU WILL HAVE

- A clear route to the required tool

CHECK BEFORE YOU FINISH

- Use the correct organisation context.
- Distinguish presenter, participant and reporting access.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

CHOOSE THE LISTENING ROUTE / STEPS 1–2 OF 5

OPEN SOURCE

Find your way around the workspace

01 Confirm your workspace

Check the organisation or training-workspace label before working. Use the department overview to orient yourself.

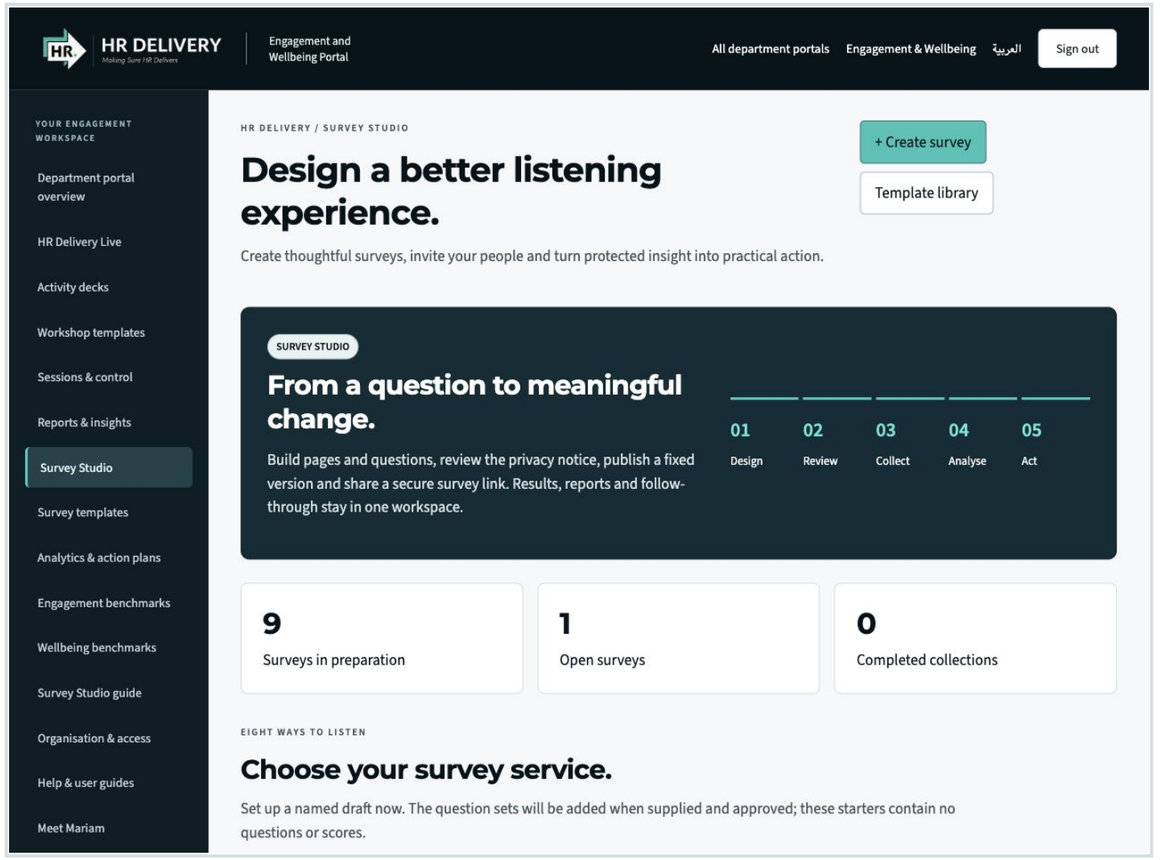
CHECK The organisation context is correct for the task.

02 Choose the survey route

Use 'Survey Studio' for survey records, 'Survey templates' for starting content, and 'Analytics & action plans' for follow-through.

CHECK The selected section matches survey preparation or analysis.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

CHOOSE THE LISTENING ROUTE / STEPS 3–4 OF 5

OPEN SOURCE

Find your way around the workspace

03 Choose the Live route

Use 'Activity decks', 'Workshop templates', 'Sessions & control' and 'Reports & insights' for interactive sessions.

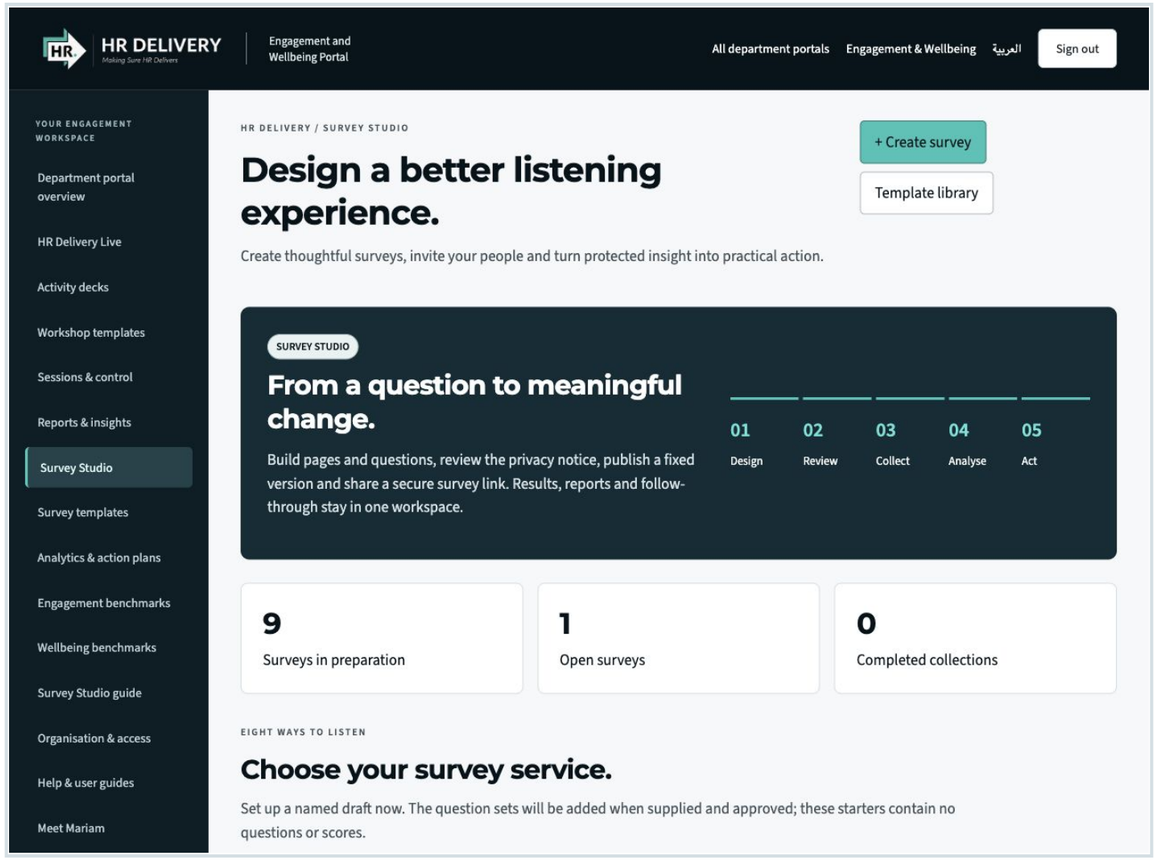
CHECK Live participation remains separate from the survey collection.

04 Find references and help

Use 'Engagement benchmarks', 'Wellbeing benchmarks', 'Survey Studio guide', 'Help & user guides' or 'Meet Mariam' as needed.

CHECK The next action is supported by the relevant guidance.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

CHOOSE THE LISTENING ROUTE / STEPS 5–5 OF 5

OPEN SOURCE

Find your way around the workspace

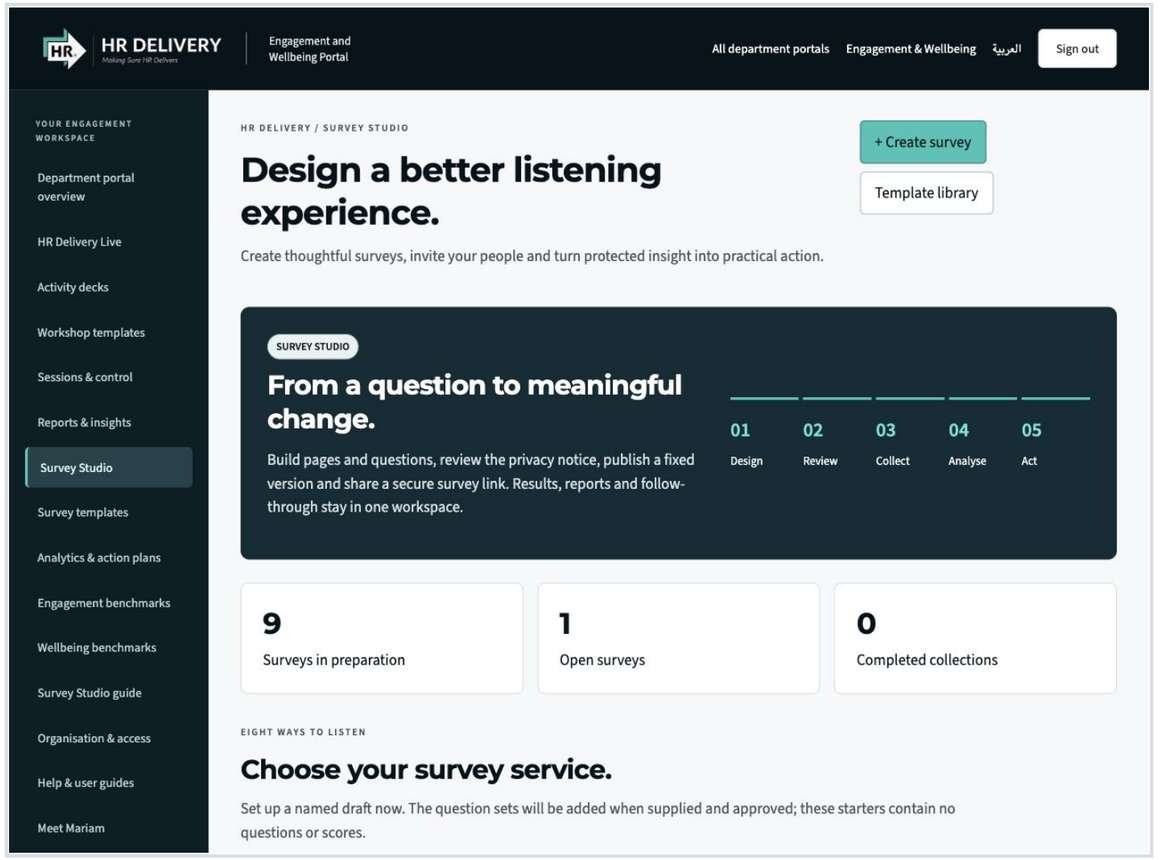
05

Reserve access administration for authorised users

Use 'Organisation & access' only when you hold the appropriate responsibility. Confirm scope before inviting or changing a member.

CHECK Access decisions stay with the designated organisation administrator.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

02

Build and review a survey

Prepare questions, logic, language and publication checks.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

BUILD AND REVIEW A SURVEY / D-02-01

OPEN SOURCE

Create a draft and organise its pages

Build a readable survey draft from a blank start or suitable template.

WHO USES THIS Survey author

BEFORE YOU BEGIN

- Approved listening brief
- Question wording and response options

WHAT YOU WILL HAVE

- Named draft
- Page and question structure

CHECK BEFORE YOU FINISH

- Each question asks one thing.
- All response options needed for interpretation are present.
- The final page order is coherent.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested. The claimed total of 17 formats was not independently counted.

BUILD AND REVIEW A SURVEY / STEPS 1–2 OF 6

OPEN SOURCE

Create a draft and organise its pages

01 Start the survey

In 'Survey Studio', choose '+ Create survey' or 'Template library'. Use a name that identifies purpose, audience and cycle.

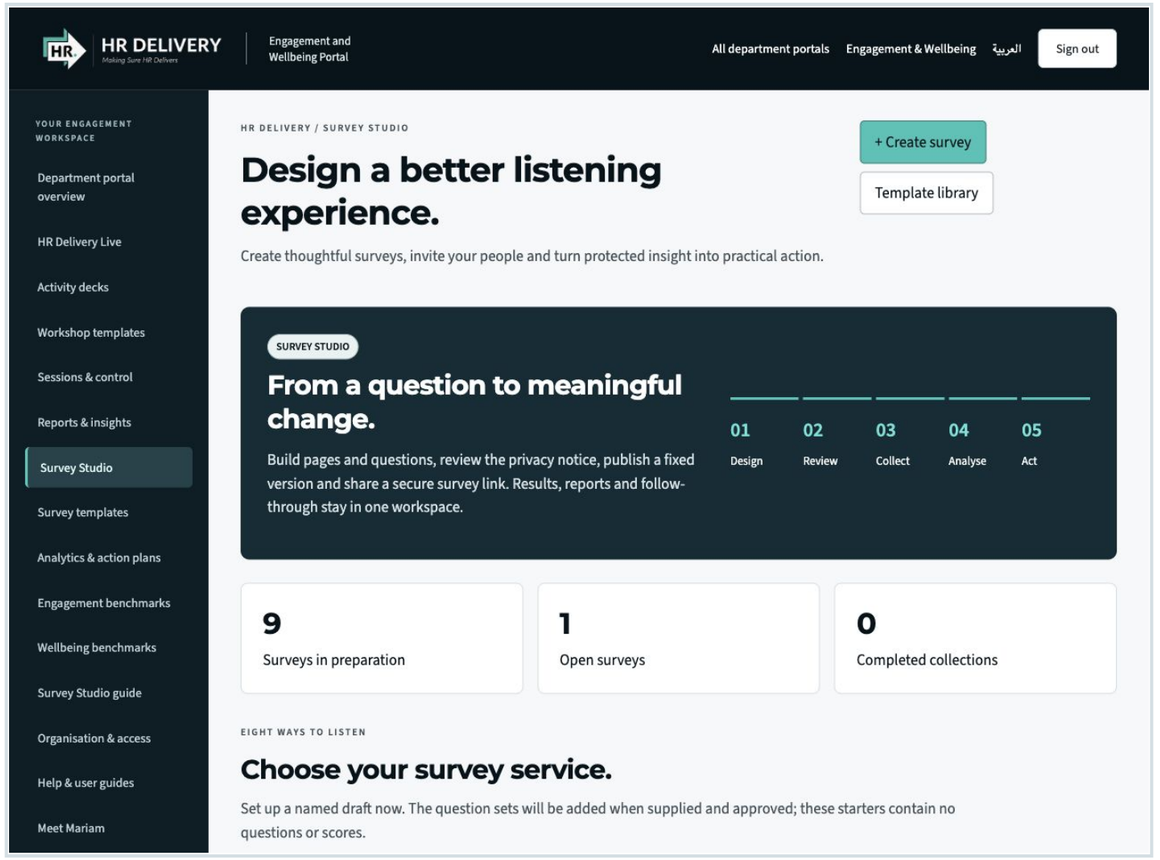
CHECK A draft should be distinguishable from open or completed collections.

02 Arrange the pages

In 'Build', use '+ Add page' to group related questions. Use 'Rename page' to give each page an informative heading.

CHECK The page tabs show a logical participant journey.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

BUILD AND REVIEW A SURVEY / STEPS 3–4 OF 6

OPEN SOURCE

Create a draft and organise its pages

03 Add an appropriate response format

Choose '+ Single choice', '+ Multiple choice', '+ Agreement scale', '+ Short text', '+ Long text' or '+ Dropdown'; inspect 'More question types' for other formats.

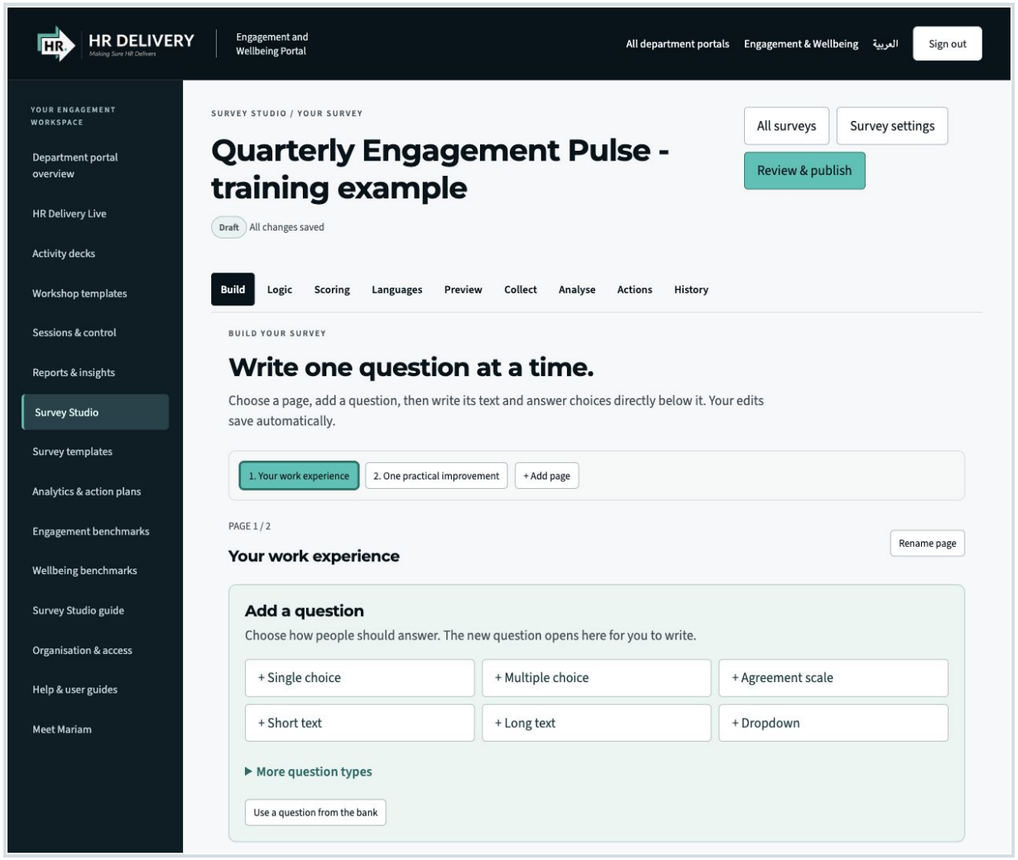
CHECK The response method matches the information you need.

04 Write the question and answer choices

Use clear, single-purpose wording. Keep scale direction consistent and distinguish optional questions from questions needed for the intended calculation.

CHECK A respondent can understand the question without help from the author.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 5–6 OF 6

OPEN SOURCE

Create a draft and organise its pages

05 Use an approved bank item when suitable

'Use a question from the bank' is shown in the demonstration. Check the item wording and intended use before incorporating it.

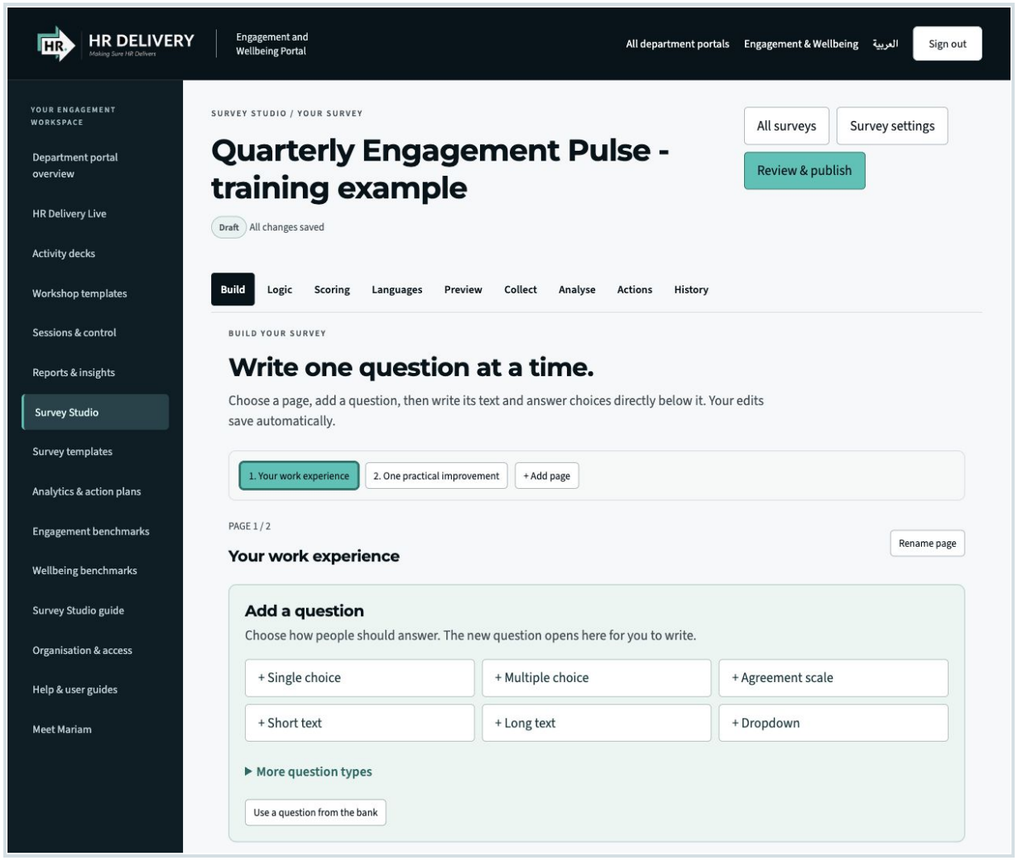
CHECK The selected item fits the purpose and scoring plan.

06 Review the draft state

Check the displayed draft and save status before moving on. The published demonstration shows “Draft” and “All changes saved”; verify your own current state.

CHECK You can identify the version you are reviewing.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / D-02-02

OPEN SOURCE

Set logic and scoring deliberately

Make follow-up questions relevant and calculations interpretable.

WHO USES THIS Survey author or analyst

BEFORE YOU BEGIN

- A reviewed question draft
- Written branch rules and scoring specification

WHAT YOU WILL HAVE

- Branch specification
- Scoring specification
- Preview test record

CHECK BEFORE YOU FINISH

- No branch points to an unreachable or irrelevant item.
- Negative wording is scored in the intended direction.
- A change in question meaning triggers a scoring review.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

BUILD AND REVIEW A SURVEY / STEPS 1–2 OF 5

OPEN SOURCE

Set logic and scoring deliberately

01 Define the intended branches first

Write a small decision list: triggering answer, next question or page, and what should happen when the trigger is not met.

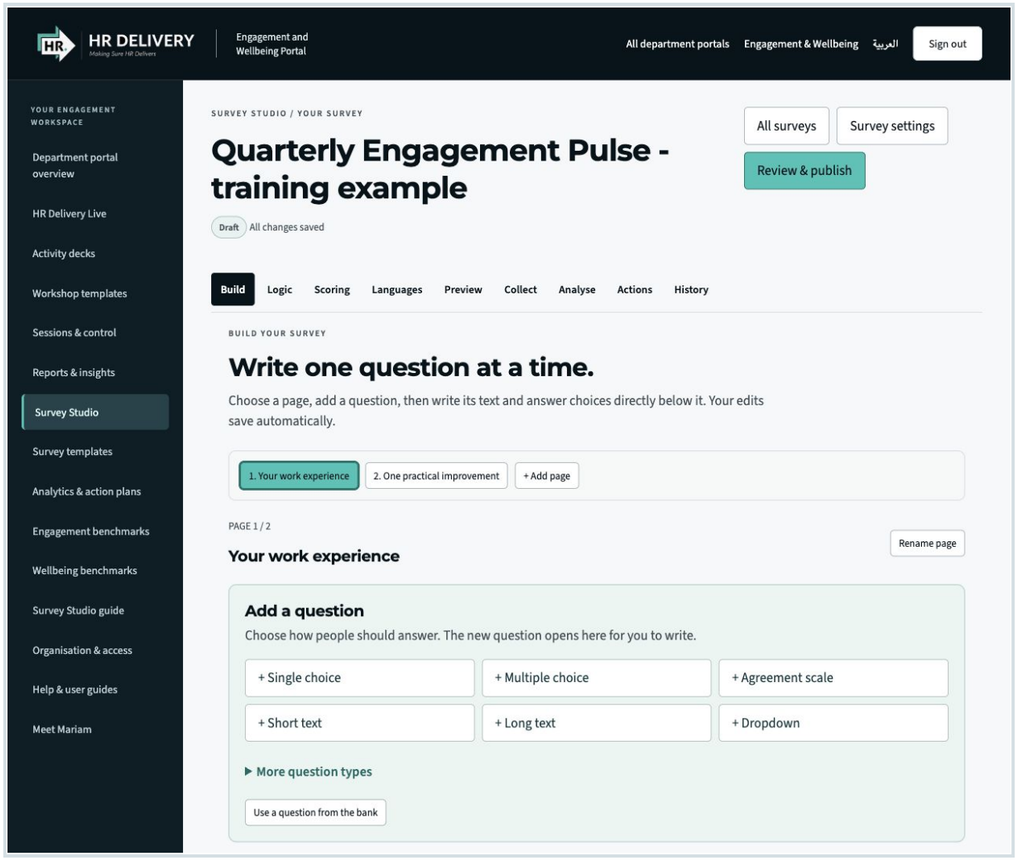
CHECK Every respondent route has a clear destination.

02 Open the logic workspace

Select 'Logic'. Configure only the rules your approved design requires; confirm the current condition and destination controls with your administrator.

CHECK Each rule corresponds to the written branch specification.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 3–4 OF 5

OPEN SOURCE

Set logic and scoring deliberately

03 Define scoring separately

Select 'Scoring'. Document item direction, included responses, missing/N/A handling and any theme composition before configuring the available fields.

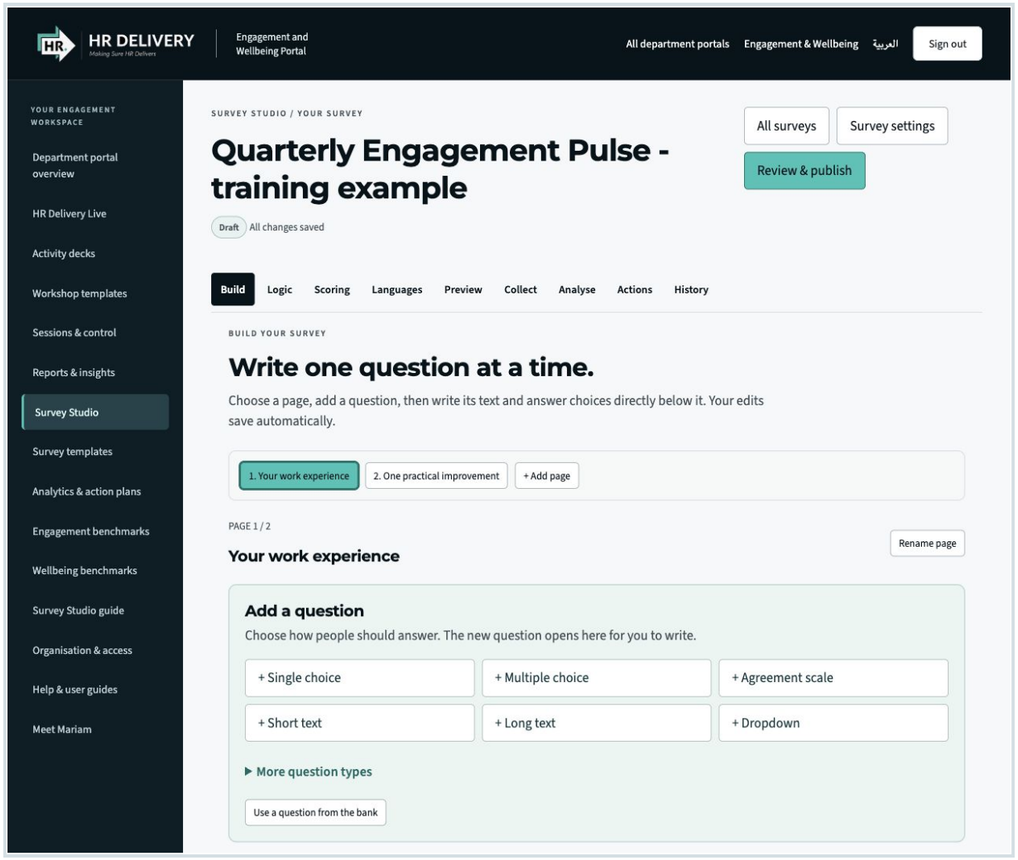
CHECK A reviewer can reproduce the intended calculation.

04 Test contrasting participant routes

Use 'Preview' to walk through both a triggering and a non-triggering answer. Check that irrelevant questions are skipped and required ones remain reachable.

CHECK Each path ends appropriately without trapping the participant.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 5–5 OF 5

OPEN SOURCE

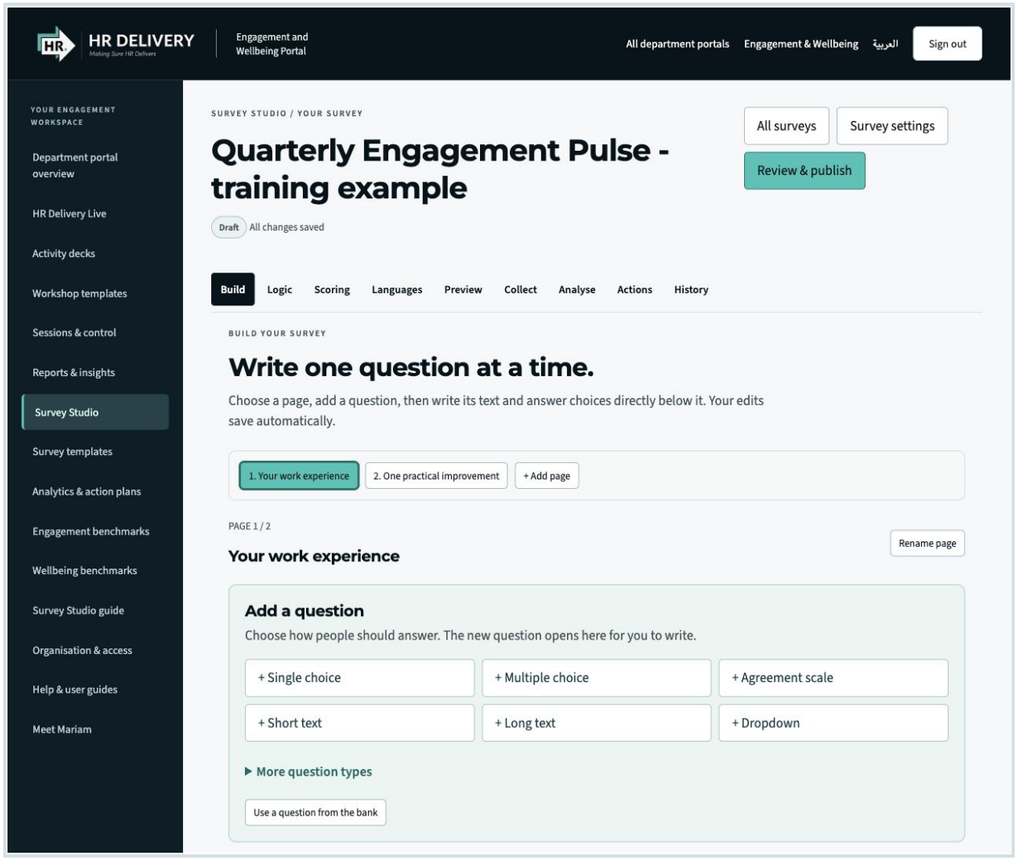
Set logic and scoring deliberately

05 Record the interpretation boundary

A descriptive survey score does not validate a questionnaire. Keep the meaning of each index, denominator and comparison explicit in the reporting brief.

CHECK Readers know what the configured score can and cannot establish.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / D-02-03

OPEN SOURCE

Prepare English and Arabic and preview the journey

Check both language versions before allowing participation.

WHO USES THIS Author and language reviewer

BEFORE YOU BEGIN

- Approved source wording
- A competent reviewer for each language

WHAT YOU WILL HAVE

- Reviewed bilingual draft
- Participant-preview checklist

CHECK BEFORE YOU FINISH

- No untranslated operational text remains in a required journey.
- Scales and branching mean the same thing in both languages.

The expected option is missing. Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

BUILD AND REVIEW A SURVEY / STEPS 1–2 OF 5

OPEN SOURCE

Prepare English and Arabic and preview the journey

01 Open the language area

Select 'Languages' in the survey navigation. Review the configured languages and the available translation fields in your workspace.

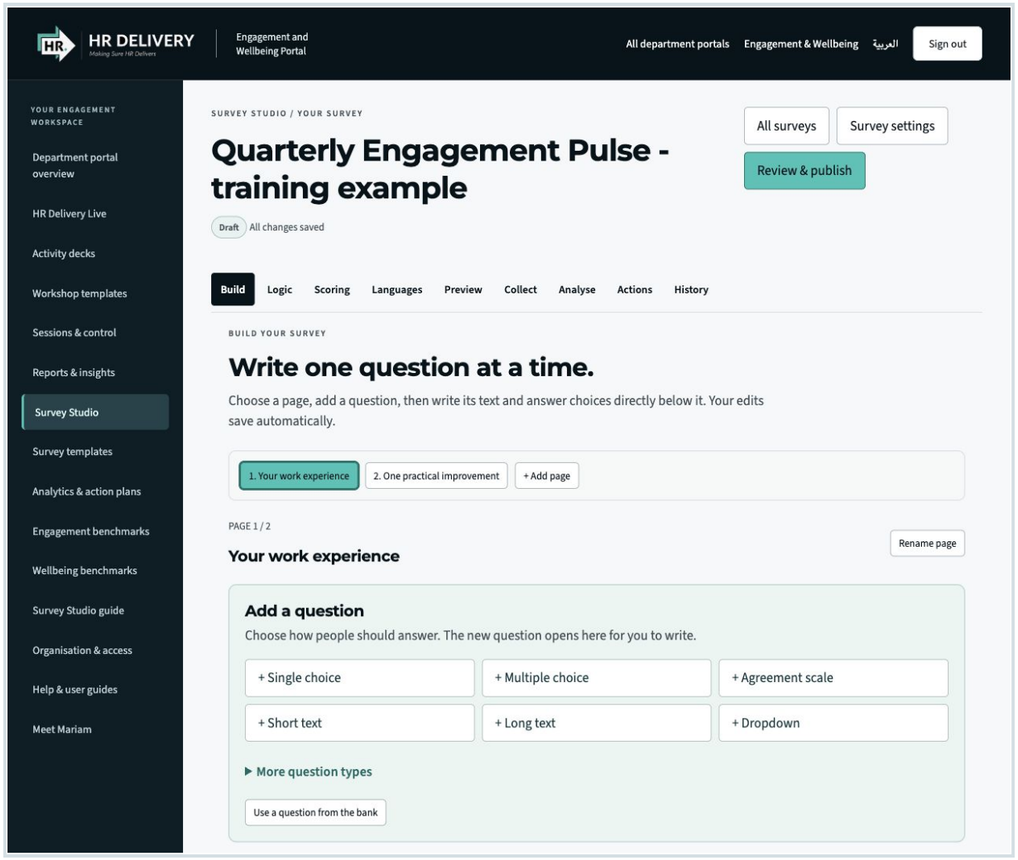
CHECK Each intended participant language has a complete version.

02 Review meaning and response anchors

Check titles, instructions, consent text, questions and answer labels. Keep response-scale meaning and branch conditions equivalent across languages.

CHECK The two versions ask the same substantive questions.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 3–4 OF 5

OPEN SOURCE

Prepare English and Arabic and preview the journey

03 Preview each language

Select 'Preview'. Work through every page and branch in each configured language, including long Arabic text and right-to-left layout.

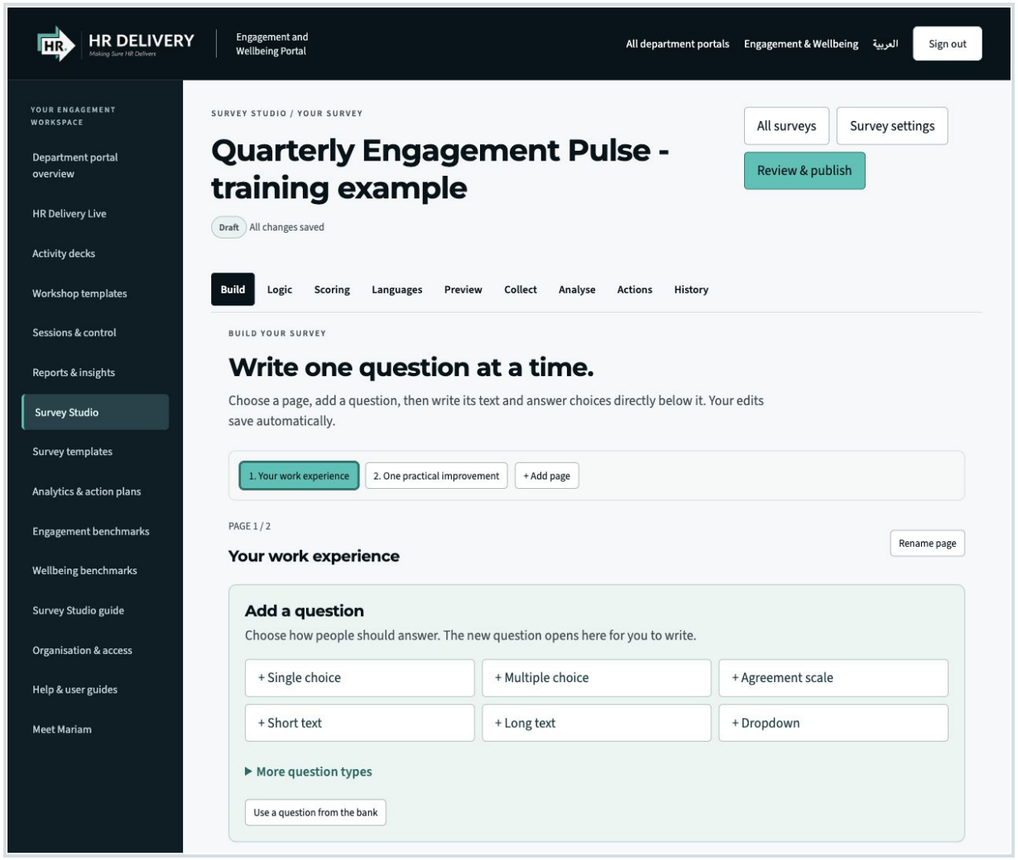
CHECK Instructions and options remain readable throughout the participant journey.

04 Check the end of the experience

Verify what the participant sees after the final question and what they have been told about response handling and follow-up.

CHECK The completion message is consistent with the published purpose.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 5–5 OF 5

OPEN SOURCE

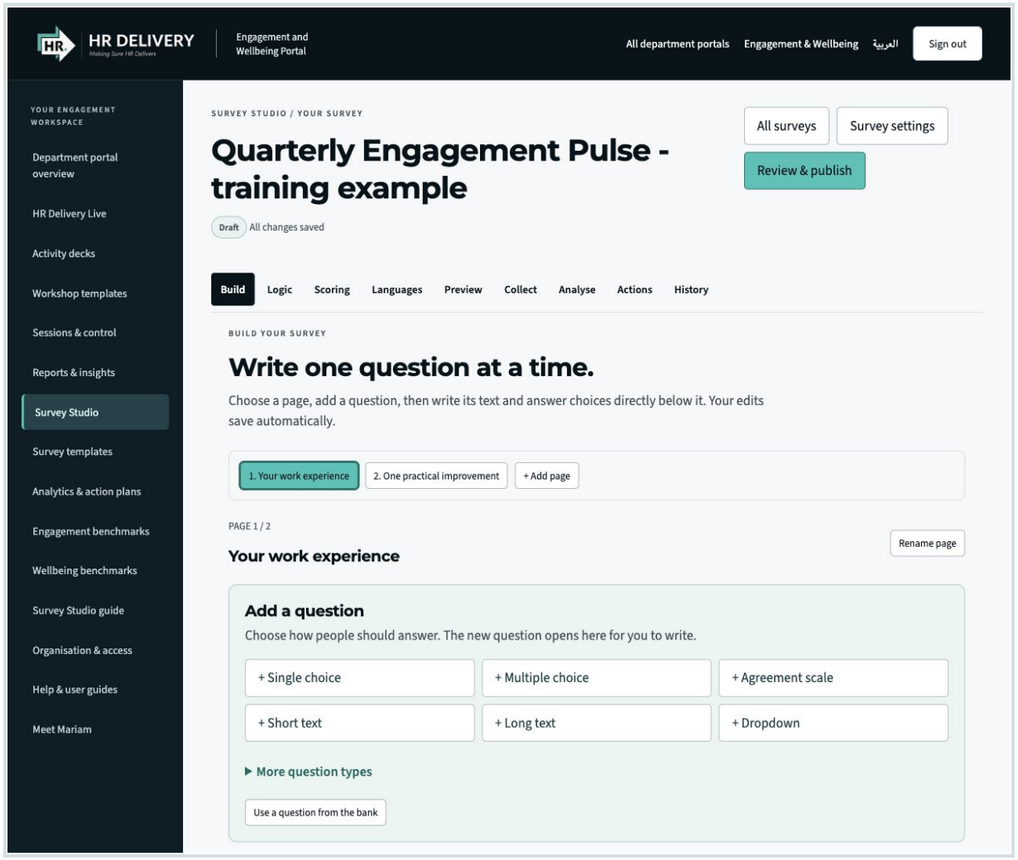
Prepare English and Arabic and preview the journey

05 Resolve issues before approval

Record corrections and repeat affected routes. Do not assume that translating a label preserves its measurement meaning.

CHECK The approved version is ready for the privacy and publication review.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / D-02-04

OPEN SOURCE

Review privacy and publish a controlled version

Release a version whose purpose and participation terms are clear.

WHO USES THIS Authorised survey owner

BEFORE YOU BEGIN

- Approved draft and translations
- Agreed privacy profile and reporting threshold

WHAT YOU WILL HAVE

- Approved survey version
- Participant privacy statement

CHECK BEFORE YOU FINISH

- No live release happens without the designated owner’s agreement.
- Publication status and participant wording match.
- Version changes are traceable.

The expected option is missing. Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

BUILD AND REVIEW A SURVEY / STEPS 1–2 OF 5

OPEN SOURCE

Review privacy and publish a controlled version

01 Review survey settings

Open 'Survey settings'. Confirm the purpose, audience, owner and privacy choices against the listening brief using the fields offered in your workspace.

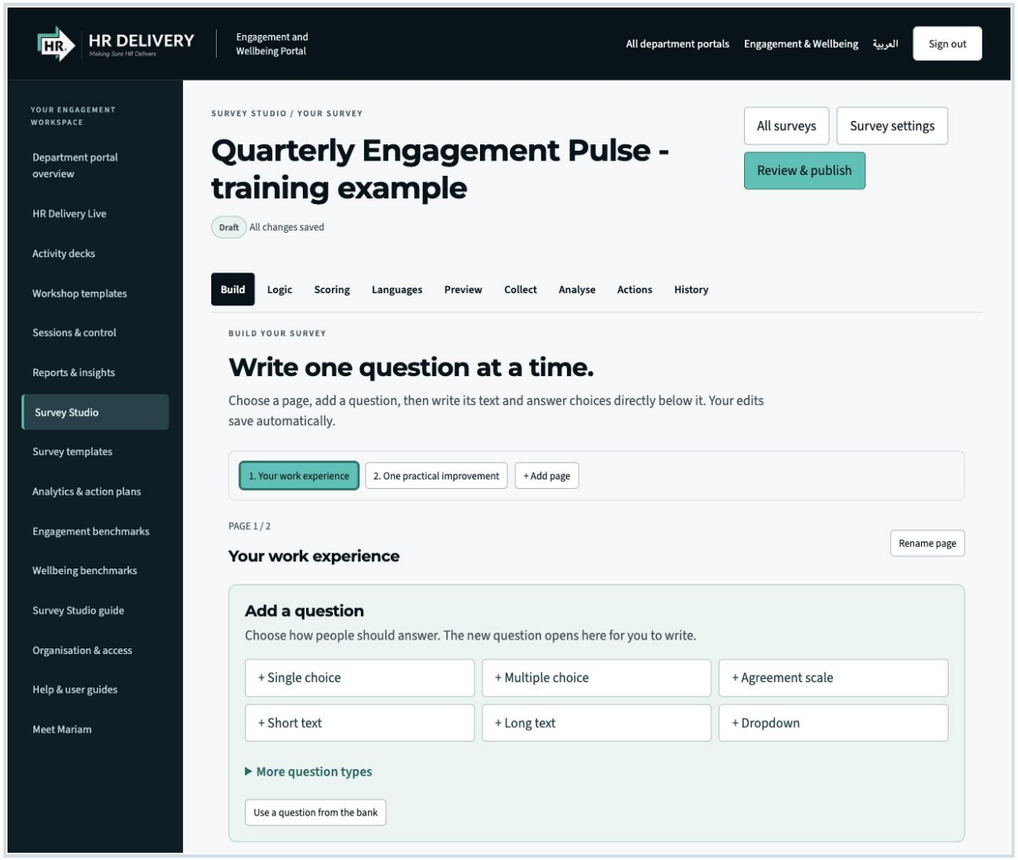
CHECK The collection has a defined purpose and accountable owner.

02 Choose the participation profile

Select the appropriate anonymous, confidential or identified arrangement. Explain who can access responses, how results are grouped and what participants should expect.

CHECK The invitation and portal configuration tell the same privacy story.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 3–4 OF 5

OPEN SOURCE

Review privacy and publish a controlled version

03 Check small-group reporting

Agree minimum reporting groups and any sensitive segments before launch. Consider combinations of country, team, career family and grade that could identify a person.

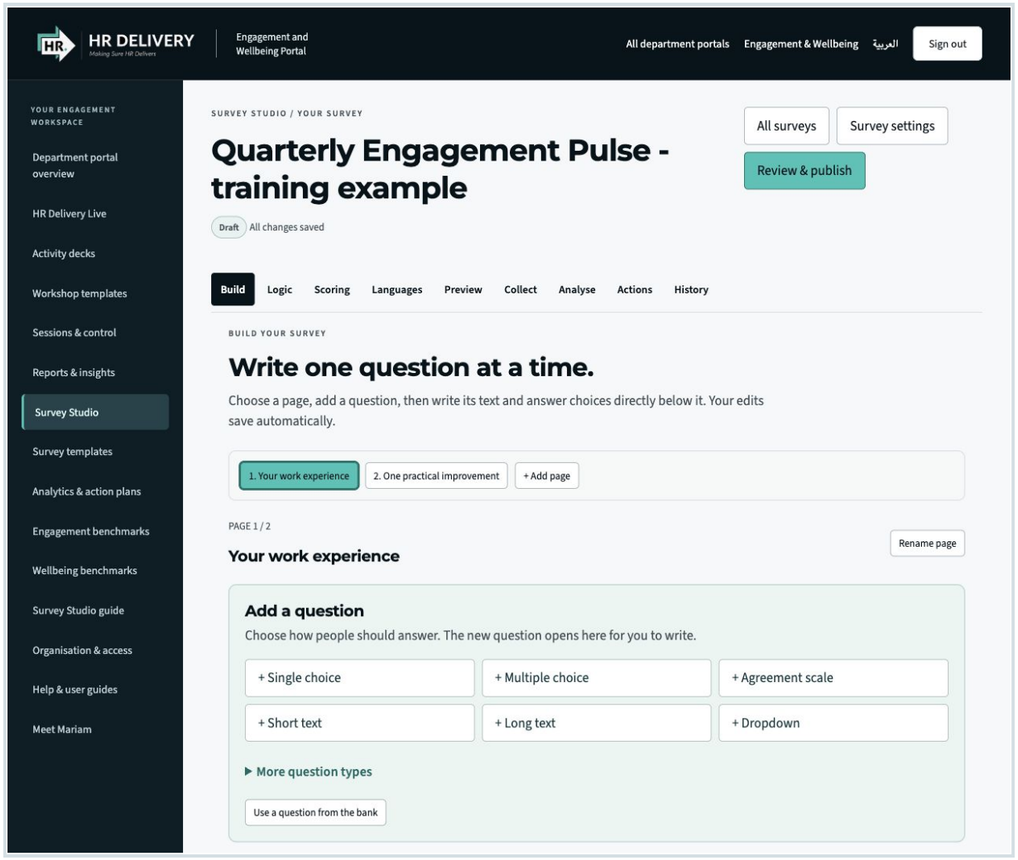
CHECK The reporting plan avoids exposing individuals through small groups.

04 Open the publication review

Select 'Review & publish'. Resolve the purpose, privacy, consent, content and language checks required by the workspace before release.

CHECK The release decision is based on the reviewed version.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

BUILD AND REVIEW A SURVEY / STEPS 5–5 OF 5

OPEN SOURCE

Review privacy and publish a controlled version

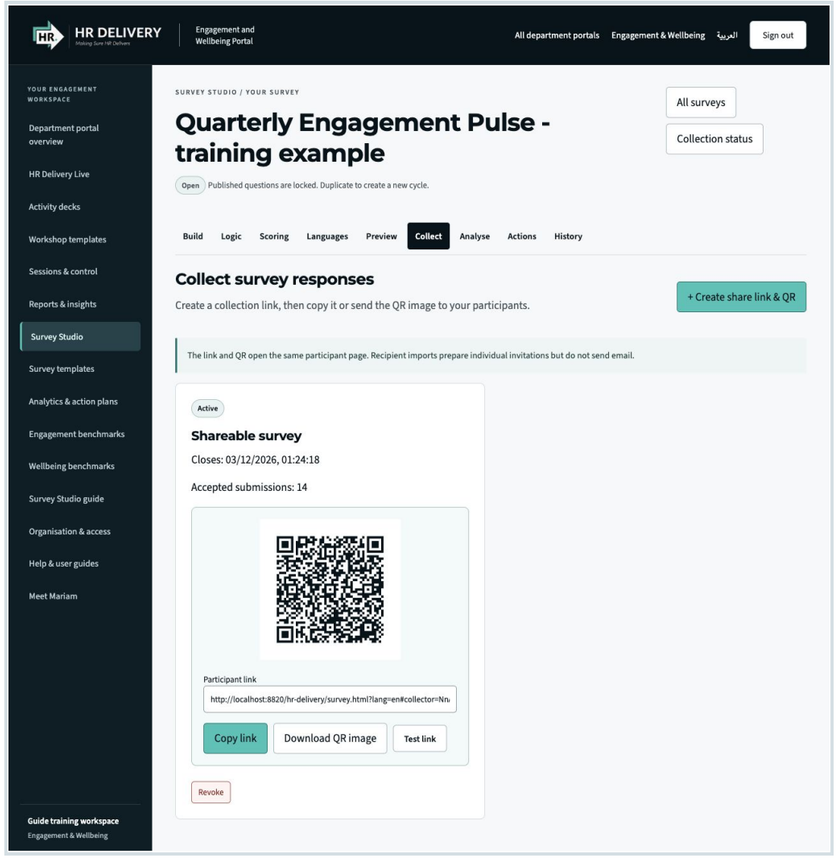
05

Confirm the published state

The demonstration explains that published questions are locked. Use a new cycle for substantive wording changes instead of changing the meaning mid-collection.

CHECK You can identify which fixed version produced the collected responses.

PUBLISHED DEMONSTRATION



Official collection demonstration. QR and link are illustrative and must not be used as a real invitation.

03 Collect, interpret and act

Share the correct invitation and turn reportable evidence into owned improvements.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

COLLECT, INTERPRET AND ACT / D-03-01

OPEN SOURCE

Create and check participation links and QR codes

Give participants a tested route into the approved collection.

WHO USES THIS Survey owner

BEFORE YOU BEGIN

- Published survey version
- Agreed collection window and distribution list

WHAT YOU WILL HAVE

- Participant link
- Downloadable QR image
- Collection monitoring record

CHECK BEFORE YOU FINISH

- Use your own live link; never scan the guide's illustrative QR.
- Test the route before communication.
- Confirm outbound sender configuration separately.

A participant cannot open or finish the survey.	Check the exact invitation, closing date and collection status. Ask for the error text without collecting the person's answers.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested. The illustrated collection link and QR are from a training demonstration, not an invitation.

COLLECT, INTERPRET AND ACT / STEPS 1–2 OF 5

OPEN SOURCE

Create and check participation links and QR codes

01 Open the collection tab

Select 'Collect' for the correct survey and cycle. Check the published status before creating participation routes.

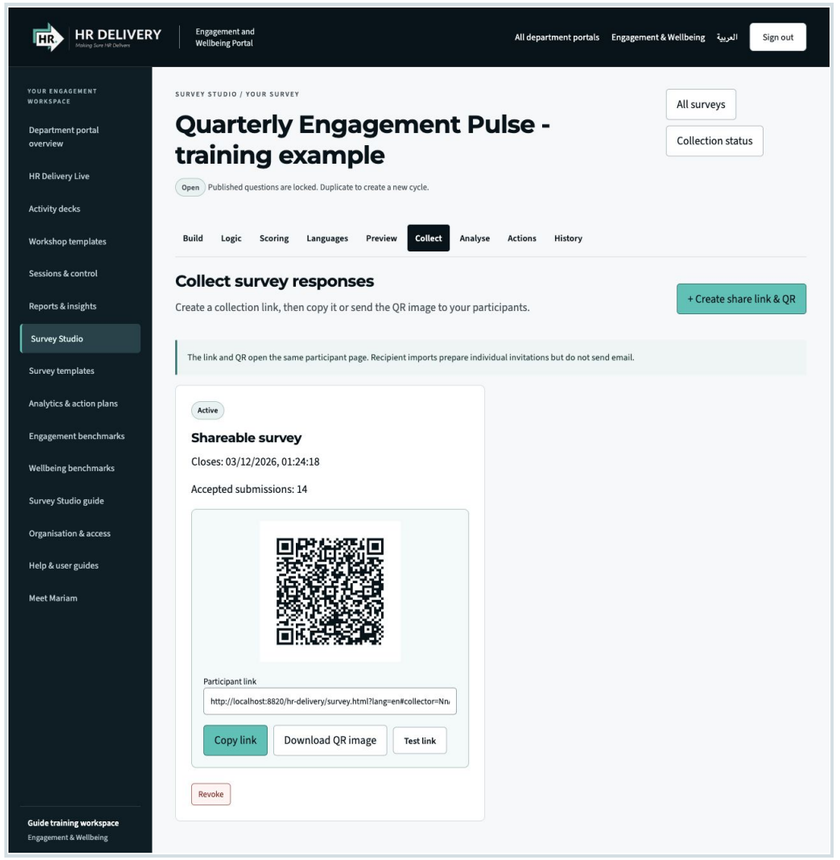
CHECK The selected collection belongs to the intended fixed question set.

02 Create the share route

The demonstration shows '+ Create share link & QR'. Confirm the closing date and collection settings in your own workspace.

CHECK An active collection card should show a participant link and QR image.

PUBLISHED DEMONSTRATION



Official collection demonstration. QR and link are illustrative and must not be used as a real invitation.

COLLECT, INTERPRET AND ACT / STEPS 3–4 OF 5

OPEN SOURCE

Create and check participation links and QR codes

03 Test the route

Use 'Test link' before distribution. Check the opening instructions, language, privacy notice and every required route without submitting a real response.

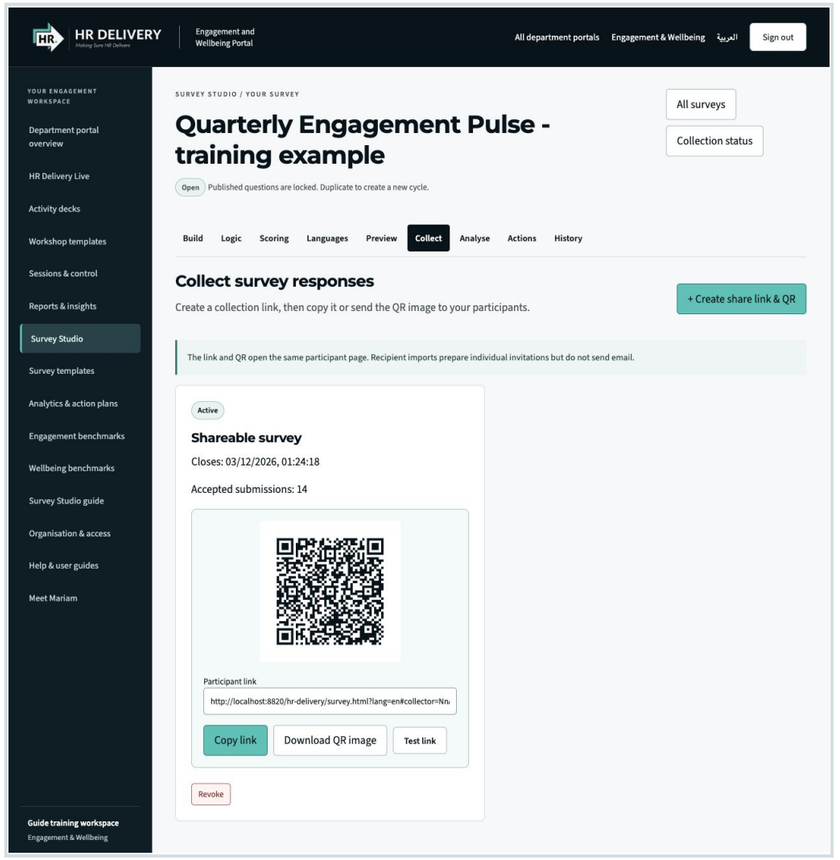
CHECK The invitation opens the intended survey and participant experience.

04 Copy or download the invitation asset

Use 'Copy link' for a browser invitation or 'Download QR image' for a poster or presentation. Keep the complete QR image legible.

CHECK The distributed asset points to the same intended participant page.

PUBLISHED DEMONSTRATION



Official collection demonstration. QR and link are illustrative and must not be used as a real invitation.

COLLECT, INTERPRET AND ACT / STEPS 5–5 OF 5

OPEN SOURCE

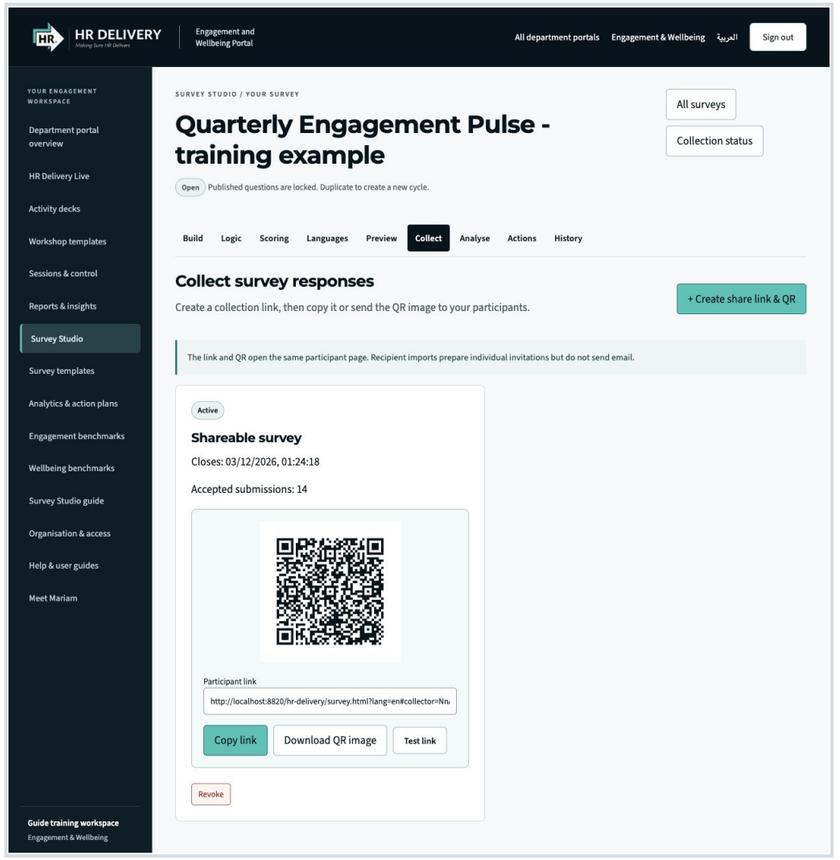
Create and check participation links and QR codes

05 Review collection status

Check 'Collection status', the closing date and 'Accepted submissions'. Recipient imports prepare invitations; they do not by themselves send email.

CHECK Participation is monitored without confusing prepared invitations with delivered messages.

PUBLISHED DEMONSTRATION



Official collection demonstration. QR and link are illustrative and must not be used as a real invitation.

COLLECT, INTERPRET AND ACT / D-03-02

OPEN SOURCE

Read the response base before interpreting a chart

Analyse descriptive findings within the available reporting rules.

WHO USES THIS Authorised analyst

BEFORE YOU BEGIN

- Completed response collection
- Agreed interpretation and segmentation plan

WHAT YOU WILL HAVE

- Aggregate PDF, Excel or CSV output where permitted
- Interpretation notes

CHECK BEFORE YOU FINISH

- A missing or suppressed result is not zero.
- Descriptive indices are not automatic benchmark or clinical conclusions.
- Country, industry, career-family and grade segments have adequate bases.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

COLLECT, INTERPRET AND ACT / STEPS 1–2 OF 6

OPEN SOURCE

Read the response base before interpreting a chart

01 Open the analysis

Select 'Analyse'. Identify the 'Published version', 'Minimum reporting group', reportable completed responses, question count and configured themes.

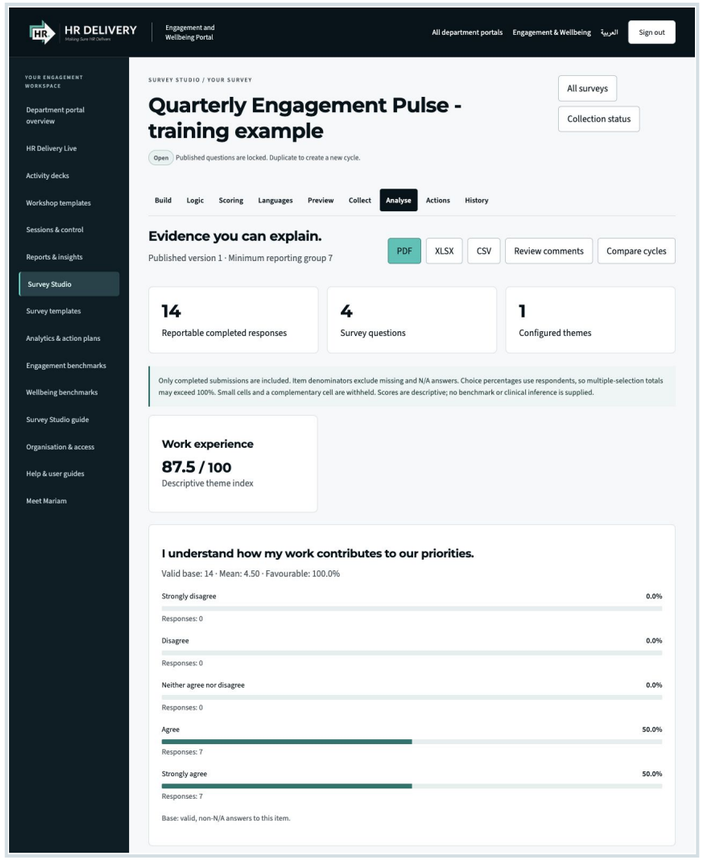
CHECK You know the version and response base behind the display.

02 Read the denominator

The demonstration includes completed submissions only; item bases exclude missing and N/A answers. Review the valid base for each item before comparing percentages.

CHECK A change in base is recognised instead of mistaken for a performance change.

PUBLISHED DEMONSTRATION



Official analysis demonstration: descriptive results, reporting threshold and exports.

COLLECT, INTERPRET AND ACT / STEPS 3–4 OF 6

OPEN SOURCE

Read the response base before interpreting a chart

03 Interpret the item distribution

Read the counts and percentages across the response categories. Multiple-choice totals may exceed 100% because a respondent can select more than one option.

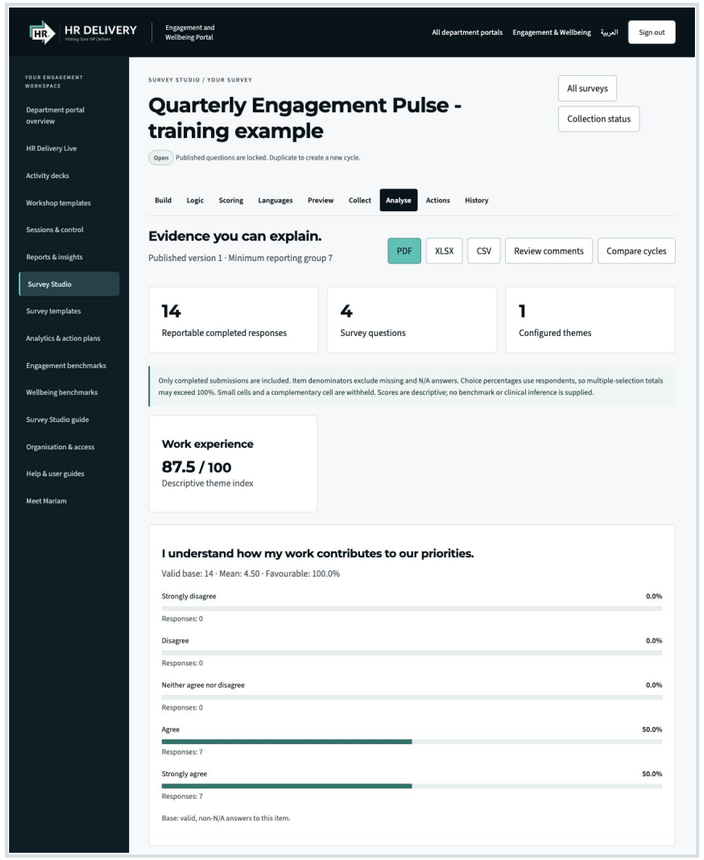
CHECK The chart is interpreted according to its response format.

04 Review comments and groups carefully

Use 'Review comments' where permitted. Apply available segments only when their response base meets the reporting rules; small cells may be withheld.

CHECK Interpretation respects the reporting restrictions shown on the screen.

PUBLISHED DEMONSTRATION



Official analysis demonstration: descriptive results, reporting threshold and exports.

COLLECT, INTERPRET AND ACT / STEPS 5–6 OF 6

OPEN SOURCE

Read the response base before interpreting a chart

05 Compare compatible cycles

Use 'Compare cycles' where available. Check that wording, scoring, population and period permit comparison before describing movement.

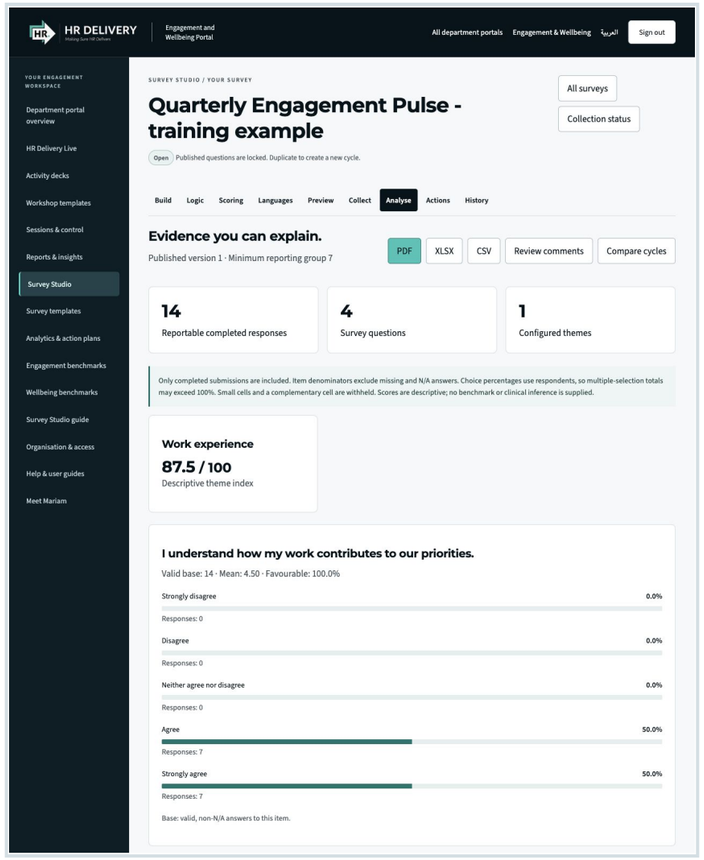
CHECK Any trend is qualified by the comparability of its underlying evidence.

06 Export the appropriate aggregate report

Choose 'PDF', 'XLSX' or 'CSV' as needed. Open the exported file and check its title, version, base and suppression before sharing.

CHECK The export reproduces the intended aggregate result, subject to permissions.

PUBLISHED DEMONSTRATION



Official analysis demonstration: descriptive results, reporting threshold and exports.

COLLECT, INTERPRET AND ACT / D-03-03

OPEN SOURCE

Turn findings into tracked actions and a new cycle

Maintain a clear record of decisions, ownership and follow-up.

WHO USES THIS Action owner and programme lead

BEFORE YOU BEGIN

- Agreed findings and priorities
- People with authority to deliver actions

WHAT YOU WILL HAVE

- Owned action plan
- Progress and review record
- New-cycle brief

CHECK BEFORE YOU FINISH

- Each action has one clear accountable owner.
- Completion means a checked result, not only an assigned task.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

COLLECT, INTERPRET AND ACT / STEPS 1–2 OF 5

OPEN SOURCE

Turn findings into tracked actions and a new cycle

01 Select a small set of priorities

For each proposed improvement, state the finding, affected work process and practical change. Distinguish a hypothesis needing discussion from an agreed action.

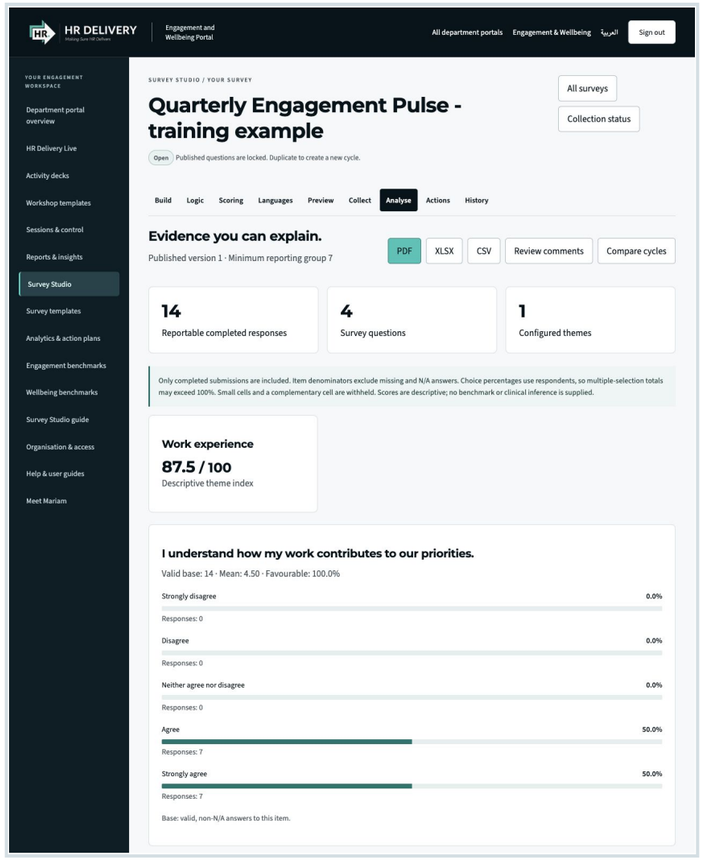
CHECK The action addresses an identifiable finding rather than an abstract aspiration.

02 Open the action area

Select 'Actions' or the workspace's 'Analytics & action plans'. Record an owner, due date and evidence that will demonstrate progress.

CHECK Each commitment has an accountable owner and a review point.

PUBLISHED DEMONSTRATION



Official analysis demonstration: descriptive results, reporting threshold and exports.

COLLECT, INTERPRET AND ACT / STEPS 3–4 OF 5

OPEN SOURCE

Turn findings into tracked actions and a new cycle

03 Review progress with evidence

Update progress after checking what actually changed. Record obstacles and any revised date with a reason rather than closing an action on activity alone.

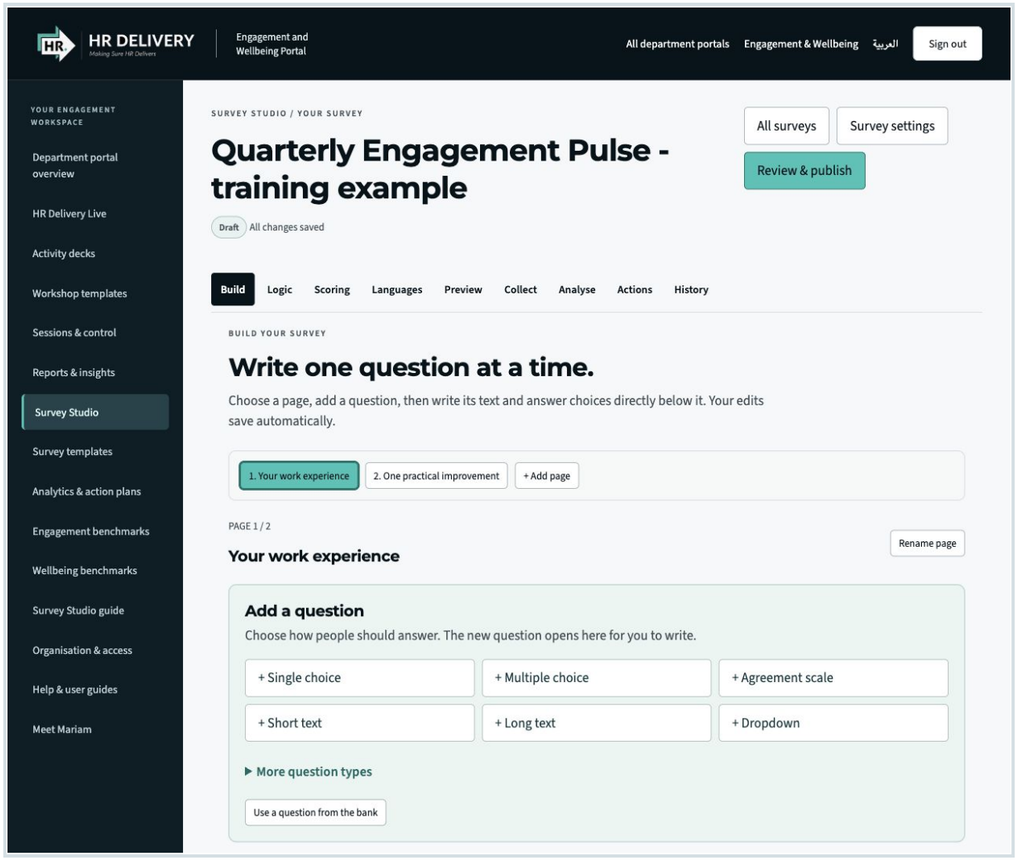
CHECK The status reflects delivery and practical effect.

04 Use the history record

Select 'History' to identify the relevant survey cycle and decisions. Preserve the context when explaining results to stakeholders.

CHECK The result can be traced back to its collection and version.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

COLLECT, INTERPRET AND ACT / STEPS 5–5 OF 5

OPEN SOURCE

Turn findings into tracked actions and a new cycle

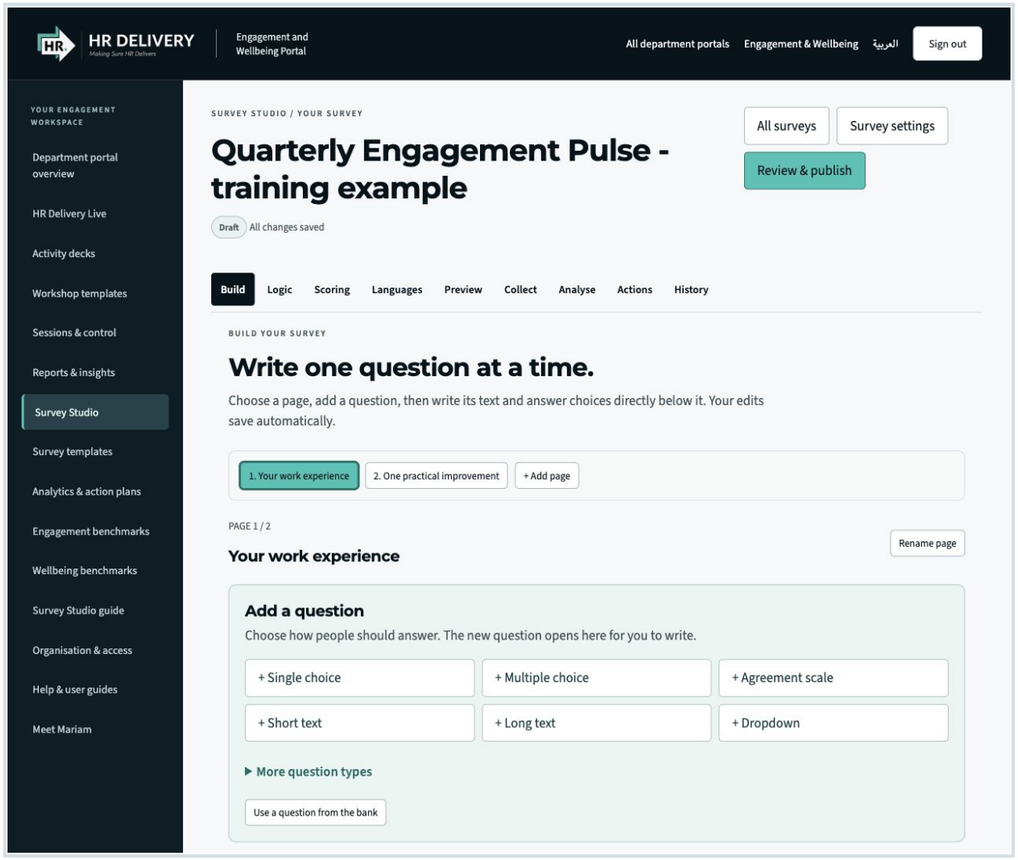
05

Prepare the next cycle

Duplicate a cycle when developing a new question version, as described on the site. Recheck changed wording, privacy and comparisons before republishing.

CHECK The next cycle has a clear relationship to the previous evidence.

PUBLISHED DEMONSTRATION



Official builder demonstration: pages, question controls and workflow tabs.

COLLECT, INTERPRET AND ACT / D-03-04

OPEN SOURCE

Use specialised listening workspaces

Choose the right follow-up process for strategy, voice and employee transitions.

WHO USES THIS Programme lead

BEFORE YOU BEGIN

- An agreed listening purpose
- Confirmation of enabled workspace access

WHAT YOU WILL HAVE

- Workspace implementation brief
- Response and escalation arrangements

CHECK BEFORE YOU FINISH

- Do not promise an anonymous mode without checking configuration.
- Separate organisational insight from individual case handling.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The six named private workspaces were supplied in the inventory; their detailed screens and controls were not inspected.

COLLECT, INTERPRET AND ACT / STEPS 1–2 OF 5

OPEN SOURCE

Use specialised listening workspaces

01 Confirm the workspace is enabled

The supplied inventory names Strategy Pulse, Mood Check-in, Tell the CEO, Exit Intelligence, Onboarding and Wellbeing & Support. Ask your administrator which routes are enabled.

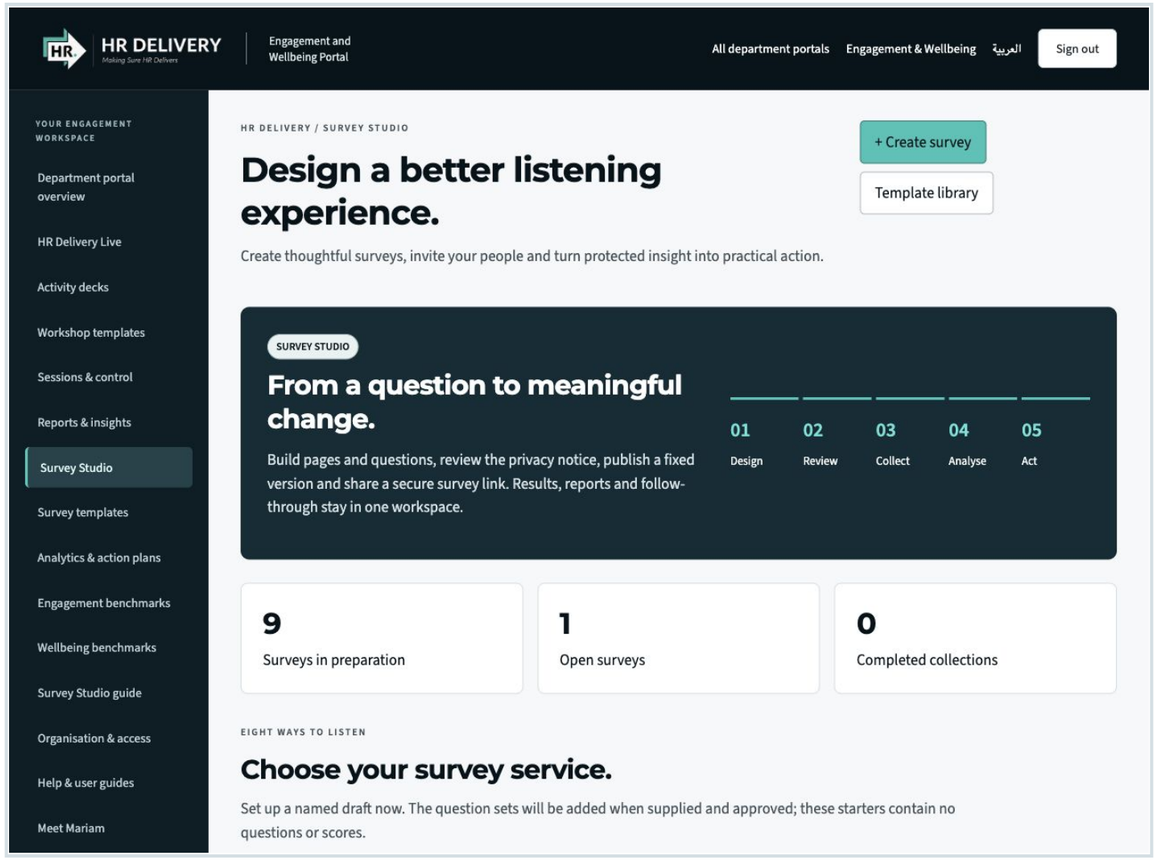
CHECK You have the correct route and authorised role before entering records.

02 Agree the receiving owner

Assign a sponsor for strategy feedback, a response owner for employee voice, and process owners for exit, onboarding and wellbeing themes.

CHECK Every type of input has a defined destination.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

COLLECT, INTERPRET AND ACT / STEPS 3–4 OF 5

OPEN SOURCE

Use specialised listening workspaces

03 Set the process and confidentiality

Agree timing, questions, escalation boundaries and who may read individual material. Do not treat a general survey as an urgent support or case-management channel.

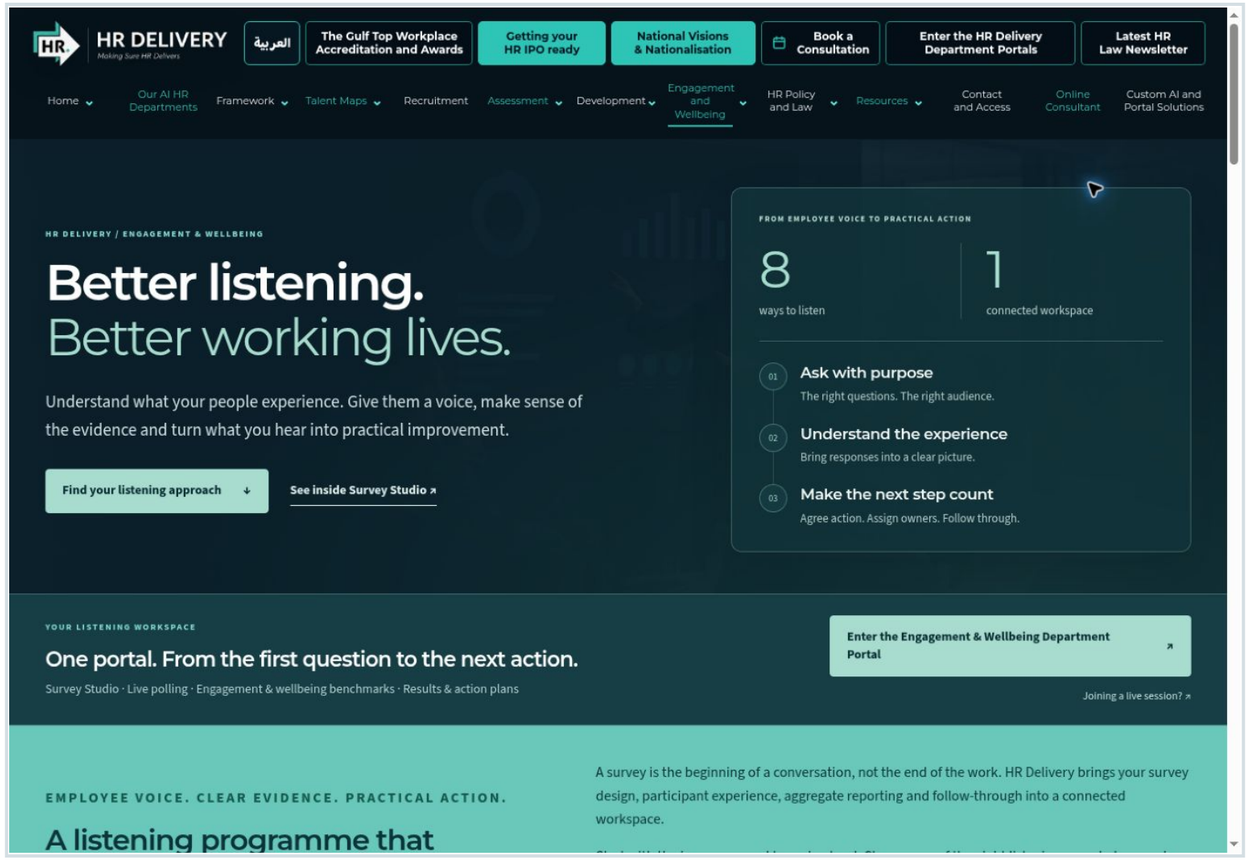
CHECK Participants know the purpose and how a response will be handled.

04 Connect the input to action

Review reportable themes, agree practical improvements and record owners and dates using the available workspace controls.

CHECK Findings feed an explicit operational follow-up.

PRIOR REVIEWED SCREEN



Public listening service map; specialised private workspace controls were not inspected.

COLLECT, INTERPRET AND ACT / STEPS 5–5 OF 5

OPEN SOURCE

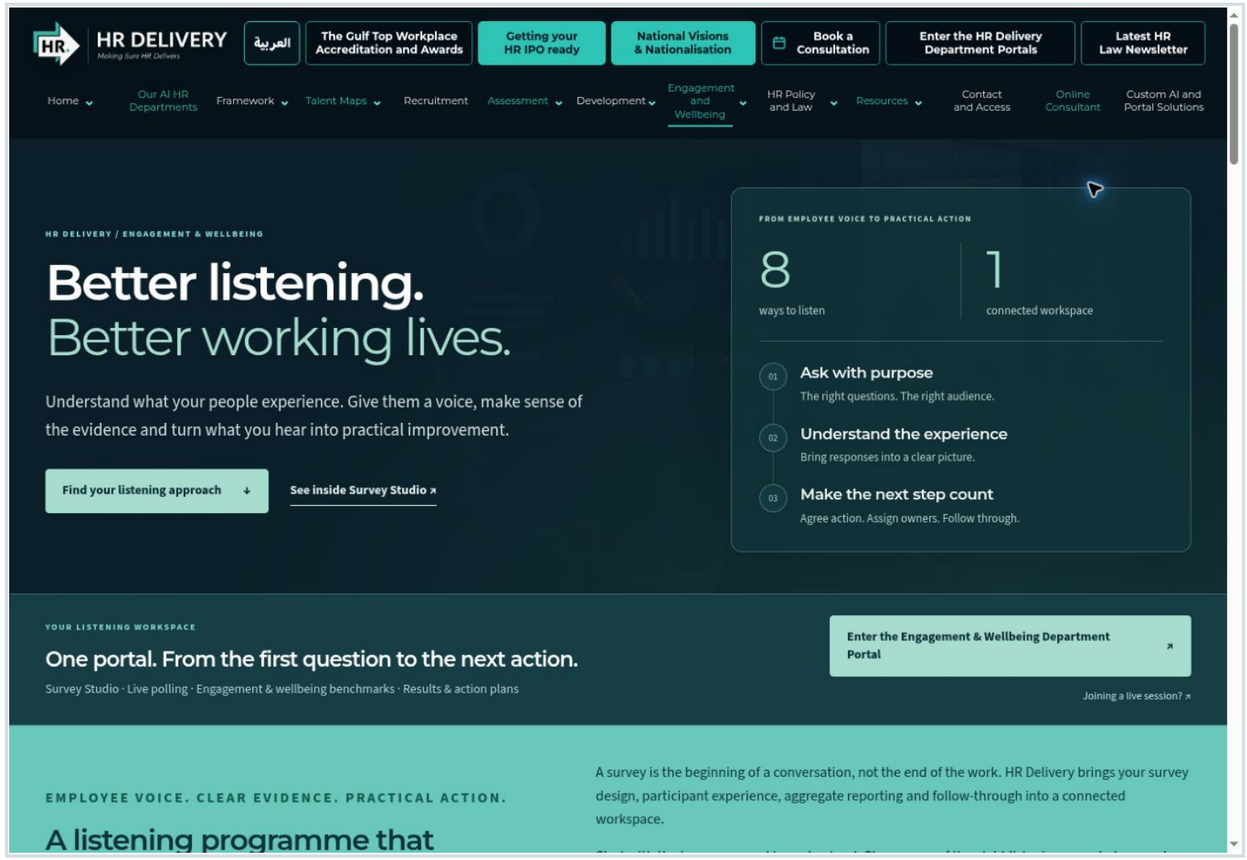
Use specialised listening workspaces

05 Close the loop

Communicate the action or decision through the organisation's approved channel. Plan a suitable follow-up rather than repeatedly asking without responding.

CHECK People receive an appropriate account of what happened next.

PRIOR REVIEWED SCREEN



Public listening service map; specialised private workspace controls were not inspected.

04 Run HR Delivery Live

Prepare activities, invite participants and manage a facilitated discussion.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

RUN HR DELIVERY LIVE / D-04-01

OPEN SOURCE

Prepare an activity deck or workshop template

Build a session sequence that supports a clear discussion or learning purpose.

WHO USES THIS Facilitator

BEFORE YOU BEGIN

- Session purpose and audience
- Agreed participation and privacy mode

WHAT YOU WILL HAVE

- Prepared activity deck
- Facilitation plan

CHECK BEFORE YOU FINISH

- Quiz answers and scoring are reviewed.
- The discussion has a clear next step after each activity.

The expected option is missing.

Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

RUN HR DELIVERY LIVE / STEPS 1–2 OF 5

OPEN SOURCE

Prepare an activity deck or workshop template

01 Choose the starting route

Use 'Activity decks' for your own sequence or 'Workshop templates' for an existing workshop structure in the portal navigation.

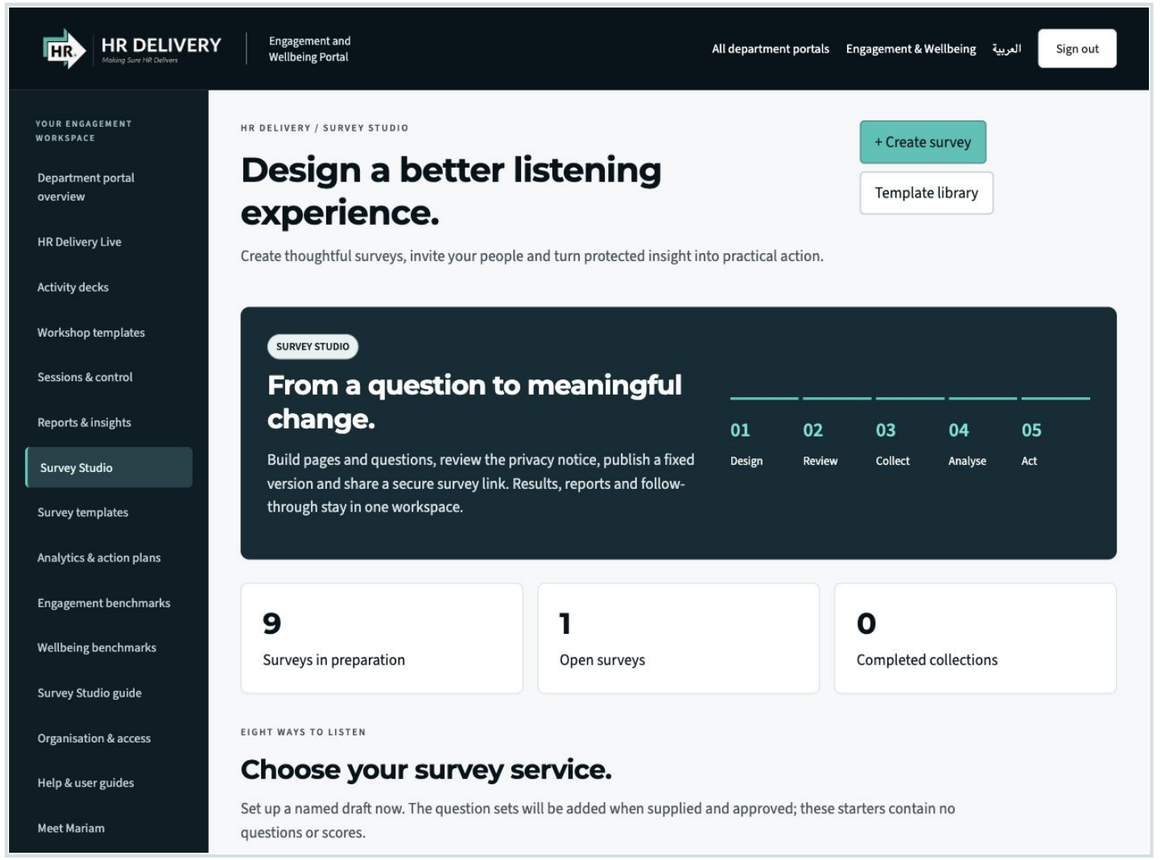
CHECK The activity sequence matches the planned session.

02 Select suitable activity formats

The public Live page describes choice polls, scales, word clouds, rankings, questions and quizzes. Use each format for a specific contribution or learning check.

CHECK Each activity has a reason to be in the deck.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

RUN HR DELIVERY LIVE / STEPS 3–4 OF 5

OPEN SOURCE

Prepare an activity deck or workshop template

03 Write prompts and response instructions

Keep questions concise, explain whether several answers are allowed and check quiz answers before using them for learning. Avoid collecting unnecessary personal detail.

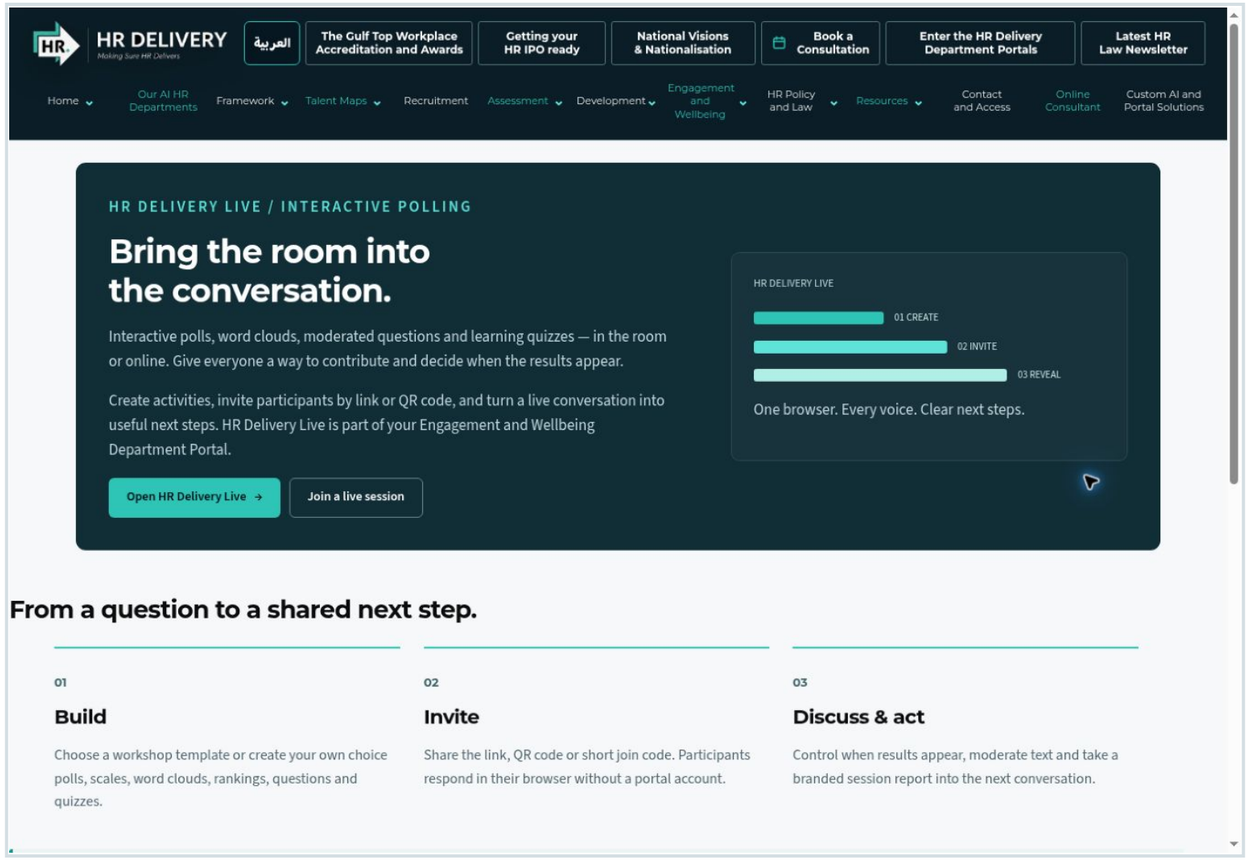
CHECK Participants can understand what to contribute.

04 Choose the delivery mode

The supplied inventory includes presenter-led and self-paced sessions. Confirm the available mode and navigation in the session controls before sending an invitation.

CHECK The mode fits live facilitation or independent completion.

PRIOR REVIEWED SCREEN



Public Live overview describing supported activity formats and session flow.

RUN HR DELIVERY LIVE / STEPS 5–5 OF 5

OPEN SOURCE

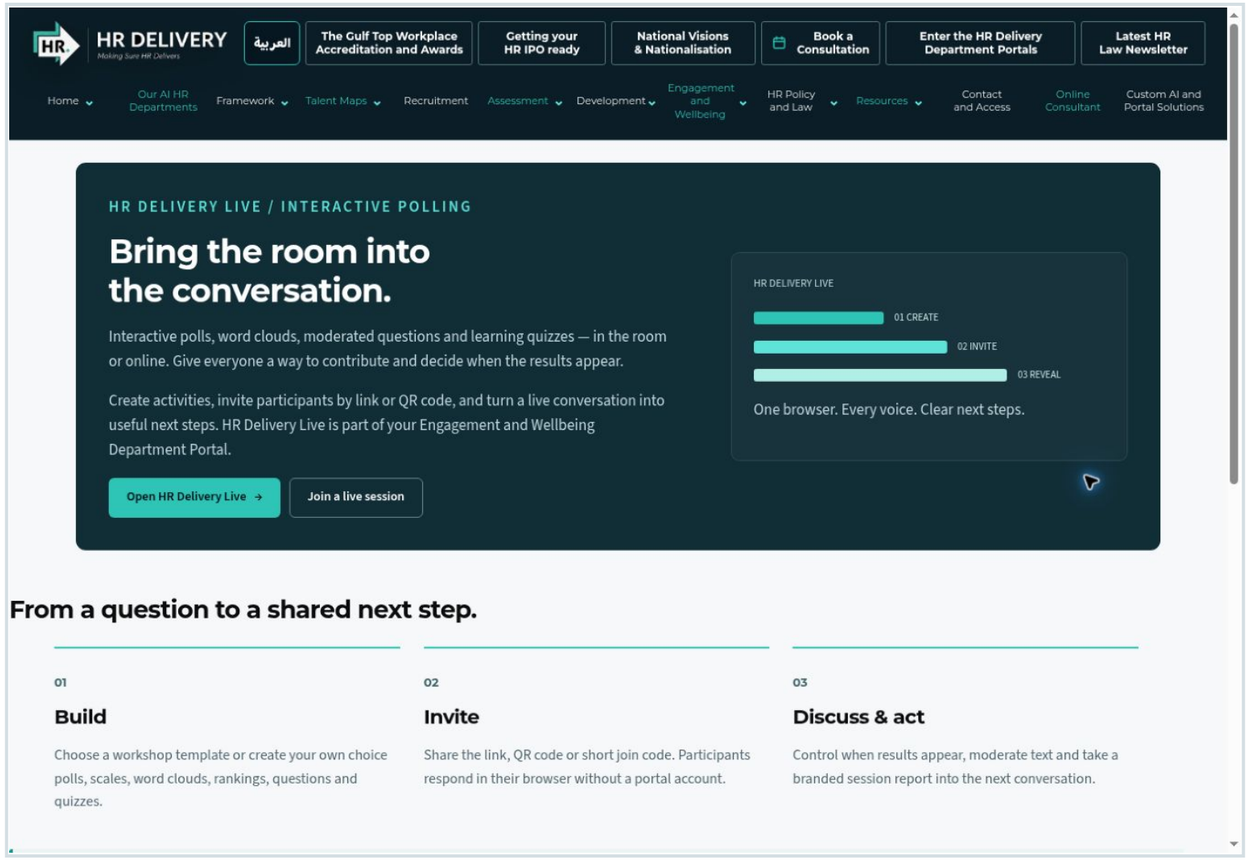
Prepare an activity deck or workshop template

05 Rehearse the sequence

Preview the activities and prepare discussion prompts, moderation responsibilities and the point at which results will appear.

CHECK The facilitator knows what happens after each response.

PRIOR REVIEWED SCREEN



Public Live overview describing supported activity formats and session flow.

RUN HR DELIVERY LIVE / D-04-02

OPEN SOURCE

Prepare facilitator controls and the audience screen

Set up a controlled, understandable live experience.

WHO USES THIS Facilitator and moderator

BEFORE YOU BEGIN

- Prepared deck
- Authorised session access and presentation device

WHAT YOU WILL HAVE

- Facilitated session
- Moderated audience output

CHECK BEFORE YOU FINISH

- Private control views are not projected.
- Privacy mode matches the introduction given to participants.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

RUN HR DELIVERY LIVE / STEPS 1–2 OF 5

OPEN SOURCE

Prepare facilitator controls and the audience screen

01 Open the session workspace

Use 'Sessions & control'. Confirm the deck, session identity and participation arrangements before starting the event.

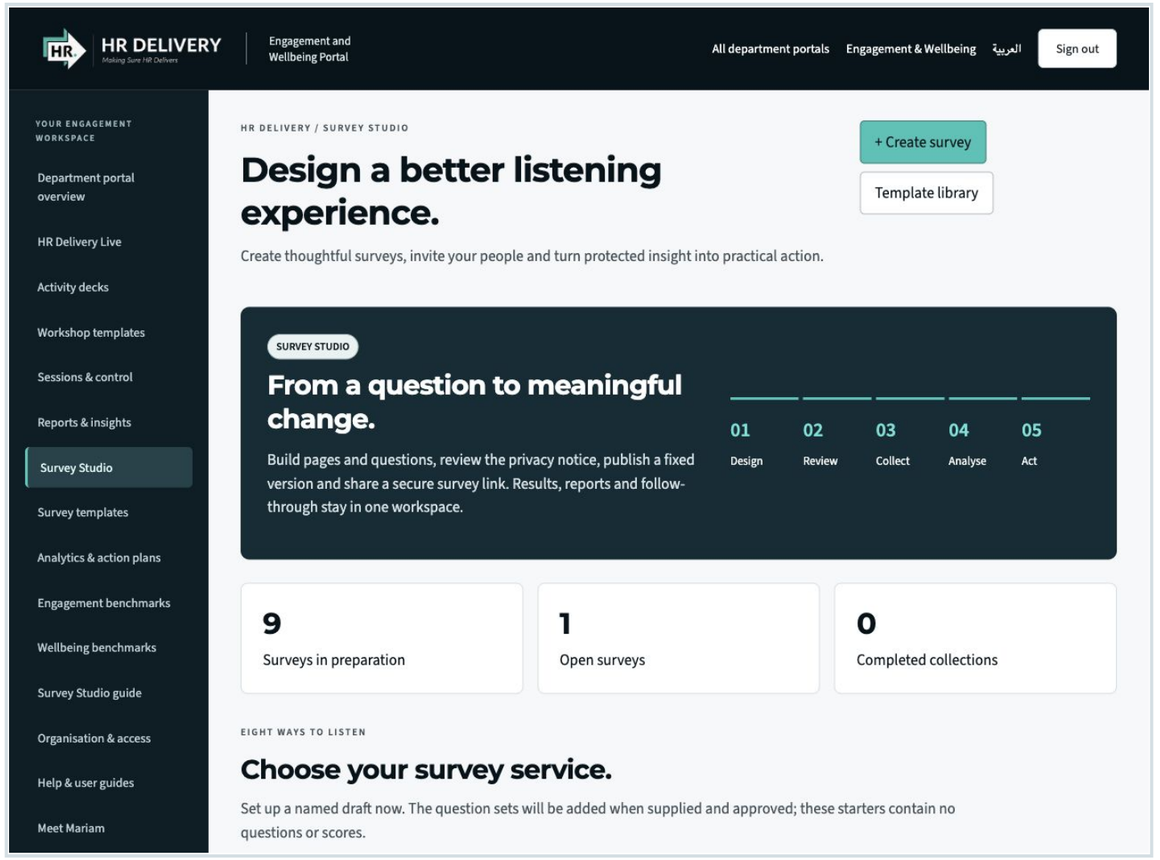
CHECK The intended activities are attached to the correct session.

02 Separate operator and audience views

Open the audience or presentation screen using the session's available control. Check that private controls and administrative information are not projected.

CHECK The audience sees the activity and permitted results.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

RUN HR DELIVERY LIVE / STEPS 3–4 OF 5

OPEN SOURCE

Prepare facilitator controls and the audience screen

03 Explain participation

Tell participants how to join, whether responses are identified and when results will be displayed. Describe how text contributions will be moderated.

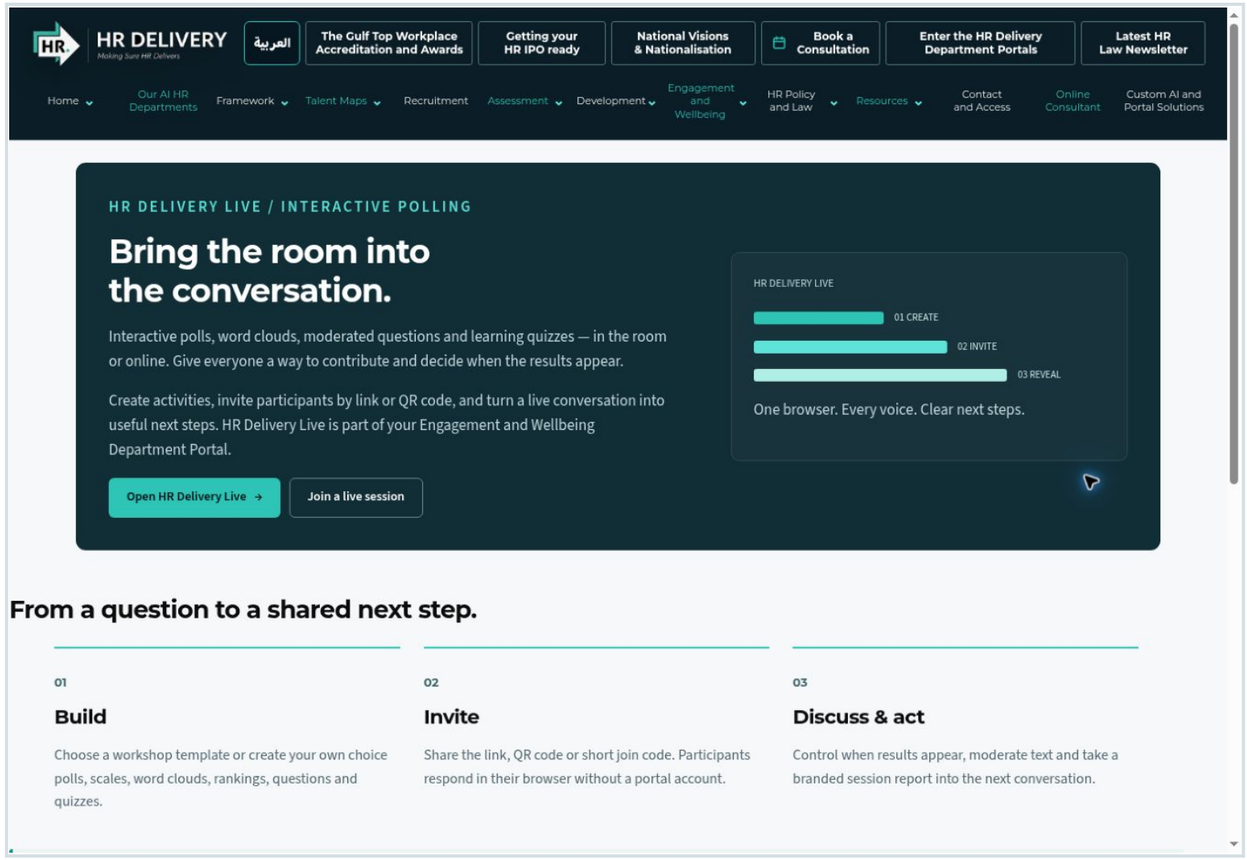
CHECK Participants understand the agreed participation mode.

04 Control the flow and reveal

Run the planned activity, allow thinking time and reveal results when it serves the discussion. The public site confirms control over when results appear.

CHECK Results support a purposeful conversation rather than interrupting it.

PRIOR REVIEWED SCREEN



Live feature overview; facilitator controls themselves were not accessed.

RUN HR DELIVERY LIVE / STEPS 5–5 OF 5

OPEN SOURCE

Prepare facilitator controls and the audience screen

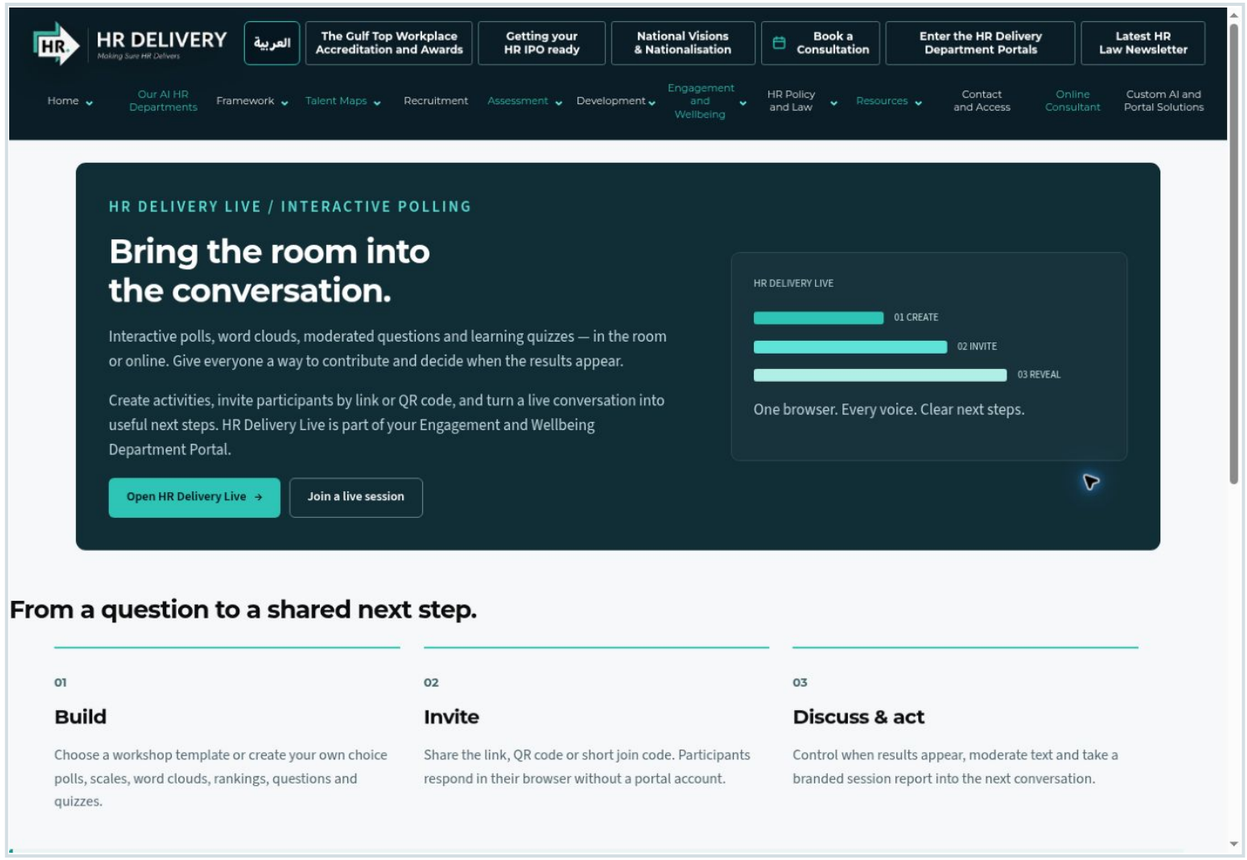
05

Moderate and interpret

Check open text before display where moderation is enabled. Use learning leaderboards only in a disclosed identified-learning context and interpret quiz results proportionately.

CHECK Audience output is suitable for the agreed session and reporting purpose.

PRIOR REVIEWED SCREEN



Live feature overview; facilitator controls themselves were not accessed.

RUN HR DELIVERY LIVE / D-04-03

OPEN SOURCE

Join a Live session as a participant

Reach the session shared by your facilitator without a portal account.

WHO USES THIS Participant

BEFORE YOU BEGIN

- Facilitator-issued code, link or QR
- A browser and internet connection

WHAT YOU WILL HAVE

- Access to the invited session

CHECK BEFORE YOU FINISH

- Confirm the session identity.
- Use only a code or invitation supplied for your event.

The code does not find a session.	Check the exact code, the session timing and whether the facilitator has made it available. Ask the facilitator for a fresh invitation if needed.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Entry controls were inspected. No live session was joined and no participant response was submitted.

RUN HR DELIVERY LIVE / STEPS 1–2 OF 5

OPEN SOURCE

Join a Live session as a participant

01 Open the participant route

Select 'Joining a live session?' from the public listening page or open the supplied participant link. The page says 'Join the conversation.'

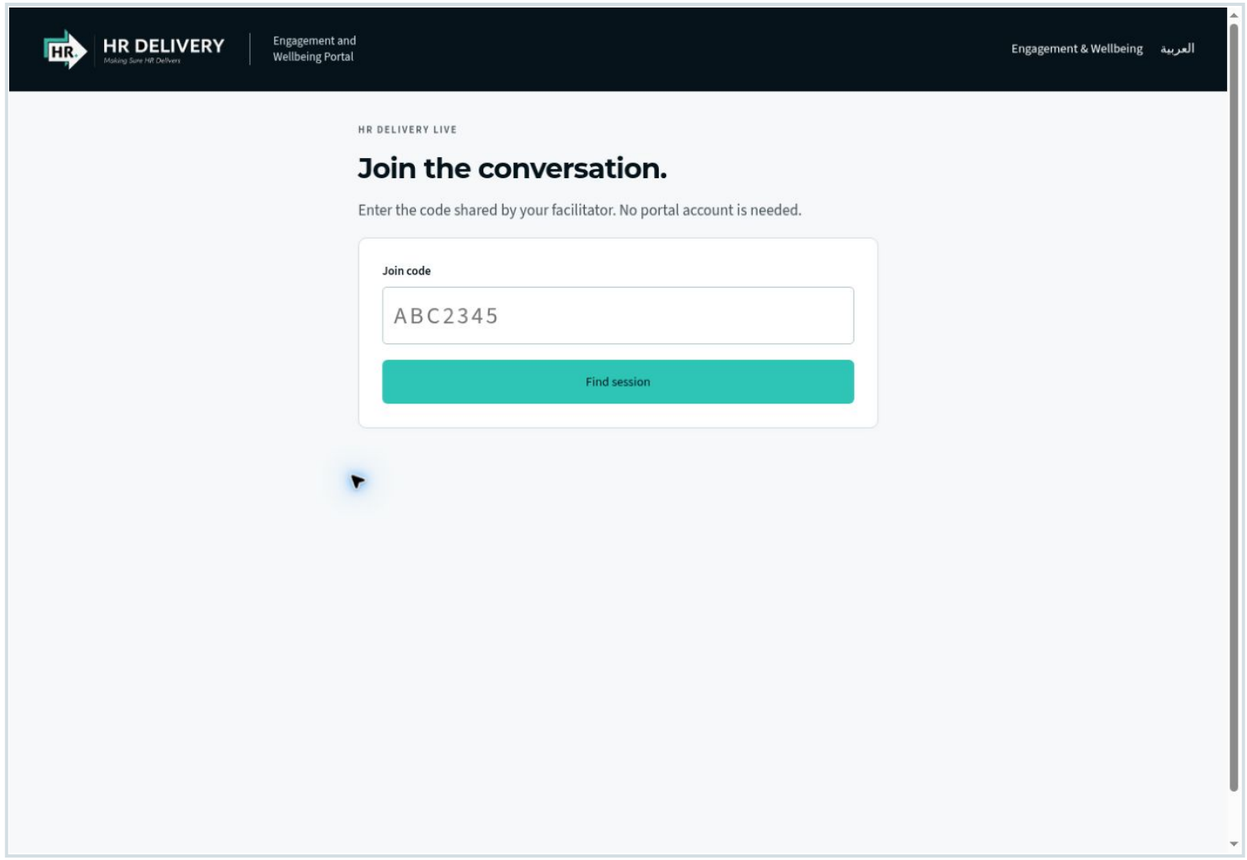
CHECK A Join code field and Find session button are visible.

02 Enter the issued code

Type the facilitator’s code into 'Join code'. Copy it carefully; the placeholder is an example, not an active session.

CHECK The field contains the code from your own invitation.

CURRENT LIVE SCREEN



Current participant Join code screen; no session or personal details entered.

RUN HR DELIVERY LIVE / STEPS 3–4 OF 5

OPEN SOURCE

Join a Live session as a participant

03 Find the session

Select 'Find session'. Check the returned session identity before joining or providing any requested participant information.

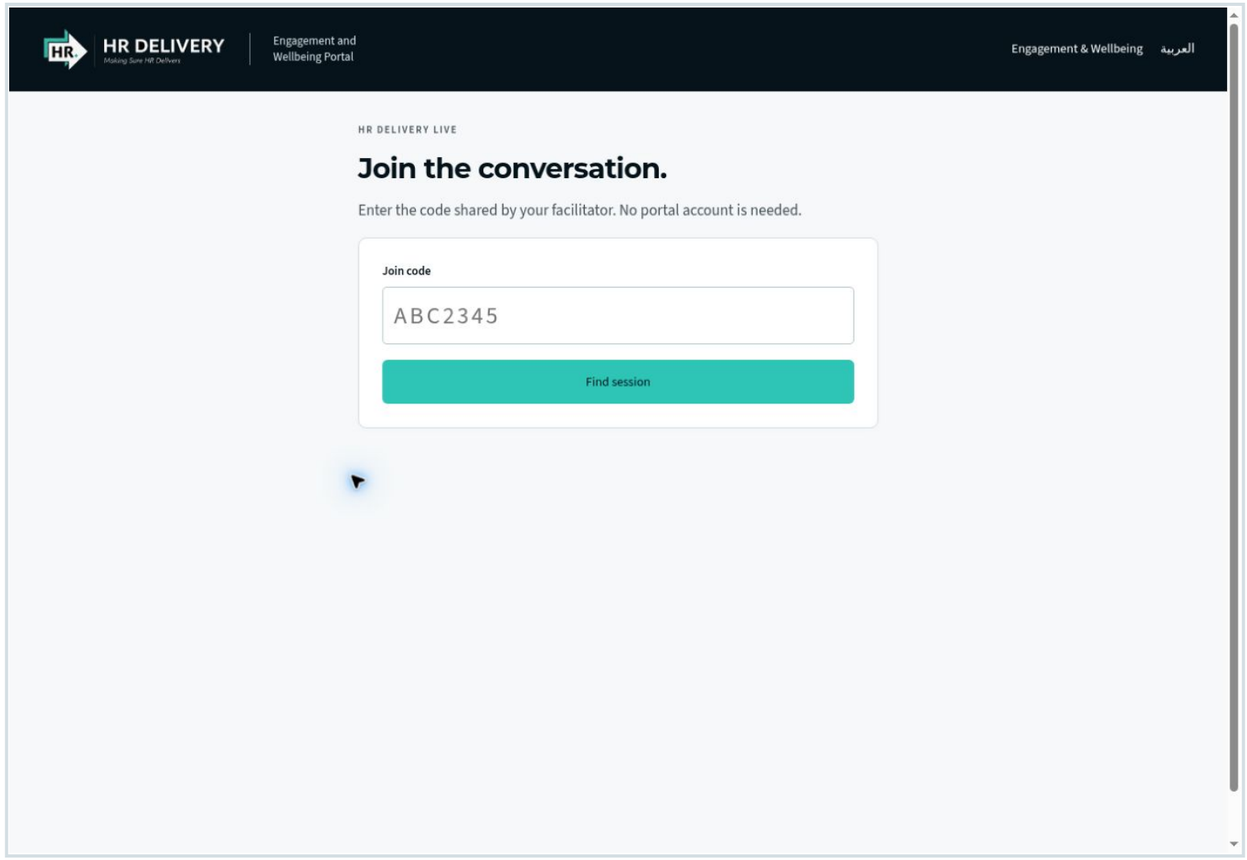
CHECK A valid invitation should identify the intended session; no live session was joined in review.

04 Follow the participation instructions

Use the link or QR route when provided; these may take you directly to the session. Read the privacy and display instructions before contributing.

CHECK You understand whether and how your responses will be shown.

CURRENT LIVE SCREEN



Current participant Join code screen; no session or personal details entered.

RUN HR DELIVERY LIVE / STEPS 5–5 OF 5

OPEN SOURCE

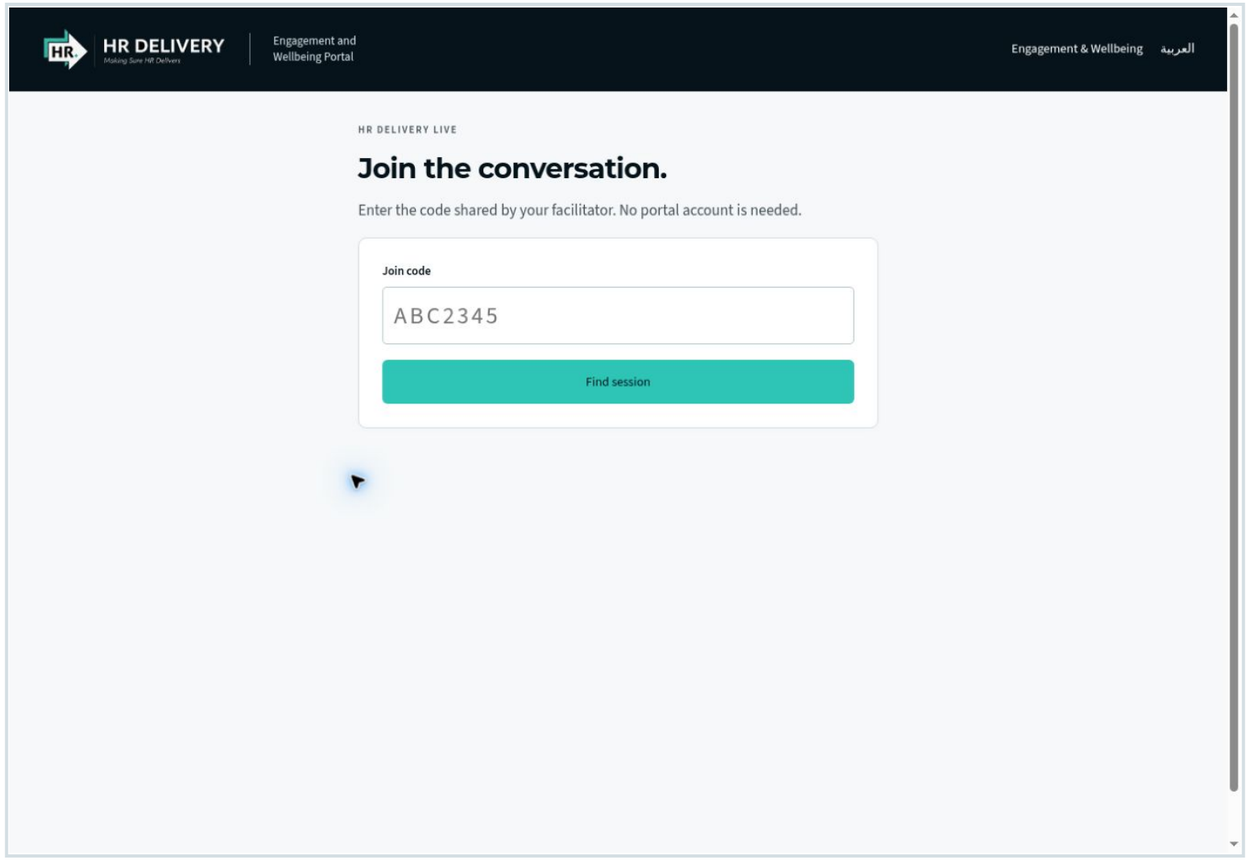
Join a Live session as a participant

05 Respond and wait for the facilitator

Answer the current activity and follow on-screen instructions. In a presenter-led session, the facilitator controls progression and the result reveal.

CHECK Your next action follows the session's chosen delivery mode.

CURRENT LIVE SCREEN



Current participant Join code screen; no session or personal details entered.

RUN HR DELIVERY LIVE / D-04-04

OPEN SOURCE

Review Live reports and assign follow-up

Carry learning and discussion outcomes into practical action.

WHO USES THIS Facilitator and programme owner

BEFORE YOU BEGIN

- Completed session
- Agreed audience for the output

WHAT YOU WILL HAVE

- Session report
- Facilitator follow-up plan

CHECK BEFORE YOU FINISH

- Do not equate a live poll with a validated employee survey.
- Report recipients match the disclosed privacy arrangement.

The expected option is missing. Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow. Navigation is evidenced by the published demonstration; deeper controls and transactions were not tested.

RUN HR DELIVERY LIVE / STEPS 1–2 OF 5

OPEN SOURCE

Review Live reports and assign follow-up

01 Open the reporting route

Use 'Reports & insights' for the relevant session. Confirm the date, deck and participation mode before reviewing the output.

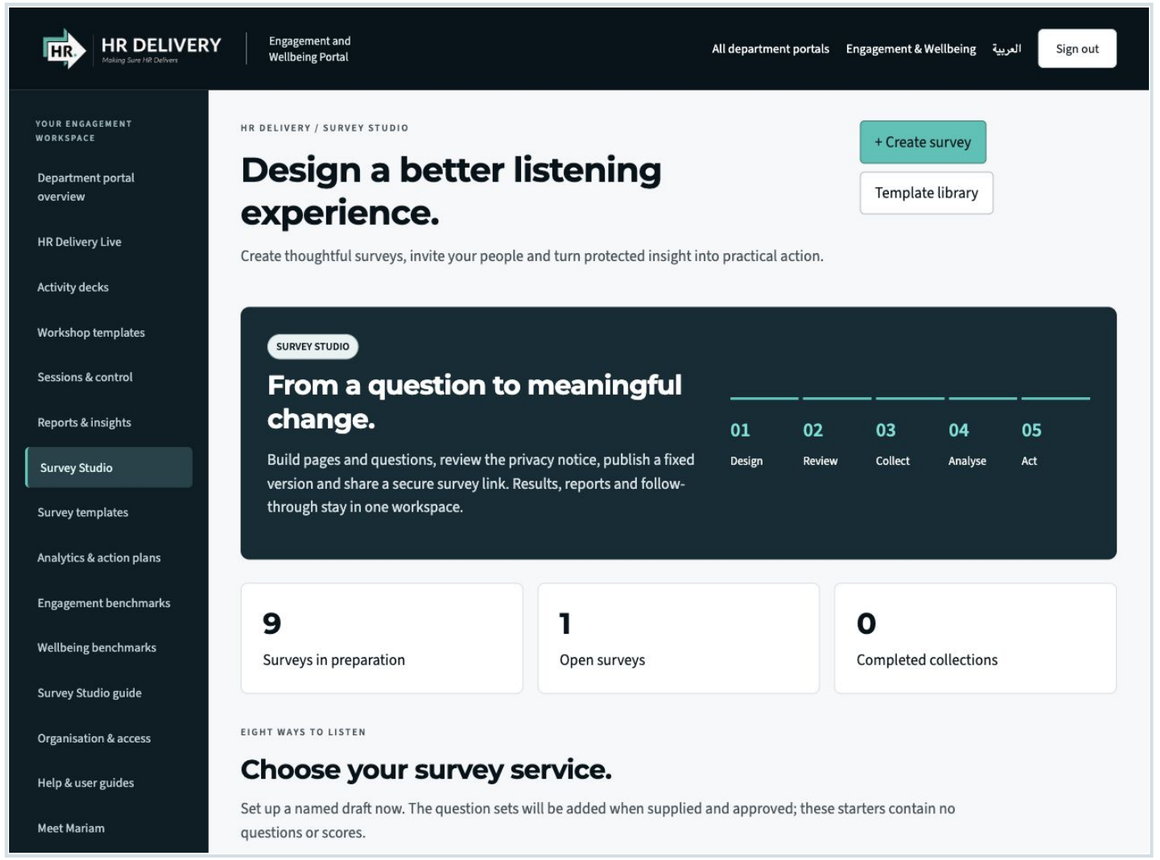
CHECK You are interpreting the correct session and evidence.

02 Read the response context

Distinguish attendance, submitted responses and learning-quiz outcomes. Review any moderation and small-group restrictions before presenting a result.

CHECK The report is explained within the session's purpose and privacy settings.

PUBLISHED DEMONSTRATION



Official Survey Studio demonstration: sidebar navigation, create survey and template library.

RUN HR DELIVERY LIVE / STEPS 3–4 OF 5

OPEN SOURCE

Review Live reports and assign follow-up

03 Prepare the session output

Use the available branded report controls. Check that the report contains only information appropriate for the intended recipients.

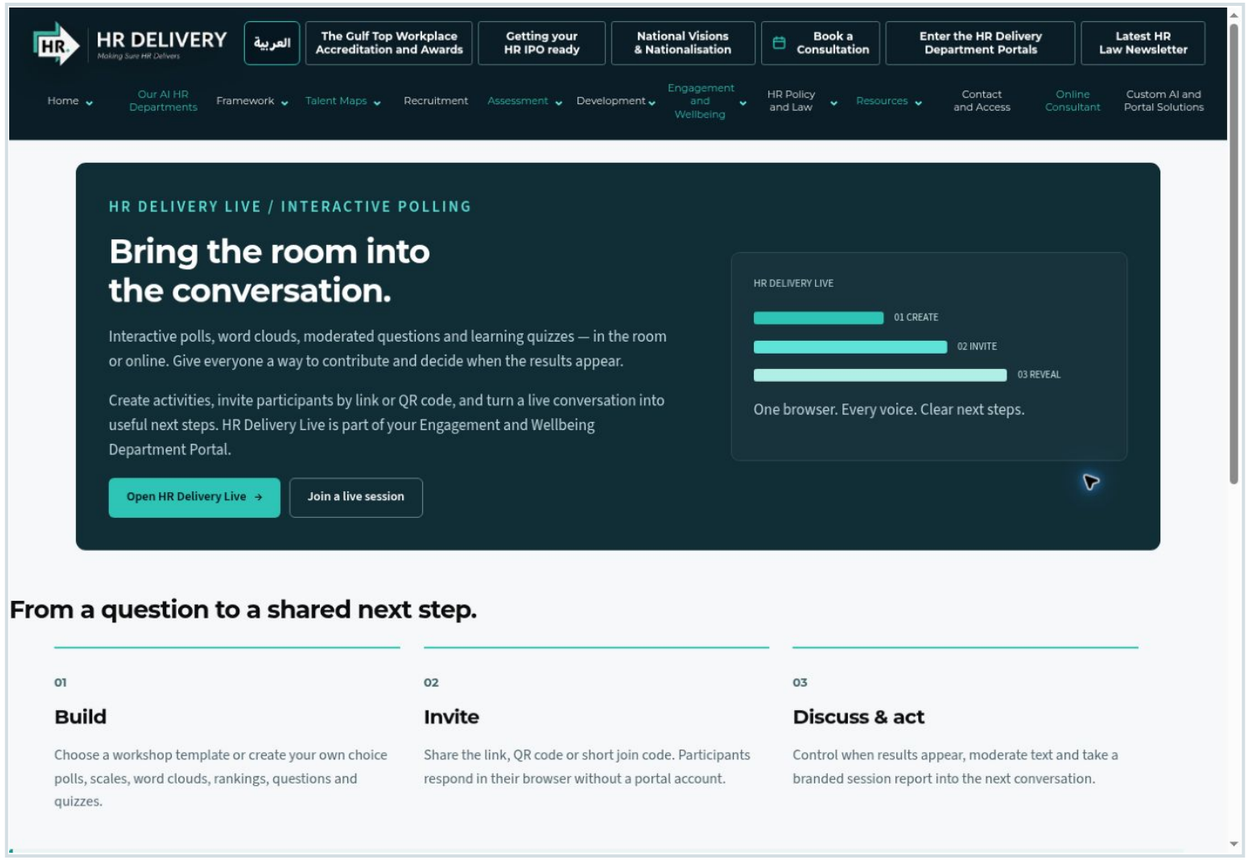
CHECK A report supports the next conversation without disclosing unintended detail.

04 Assign and review actions

Capture facilitator follow-up with an owner, date and practical outcome. Review progress at the next appropriate meeting or learning session.

CHECK Session insights lead to visible responsibilities.

PRIOR REVIEWED SCREEN



Public session-report and participation description; detailed reporting controls require authorised access.

RUN HR DELIVERY LIVE / STEPS 5–5 OF 5

OPEN SOURCE

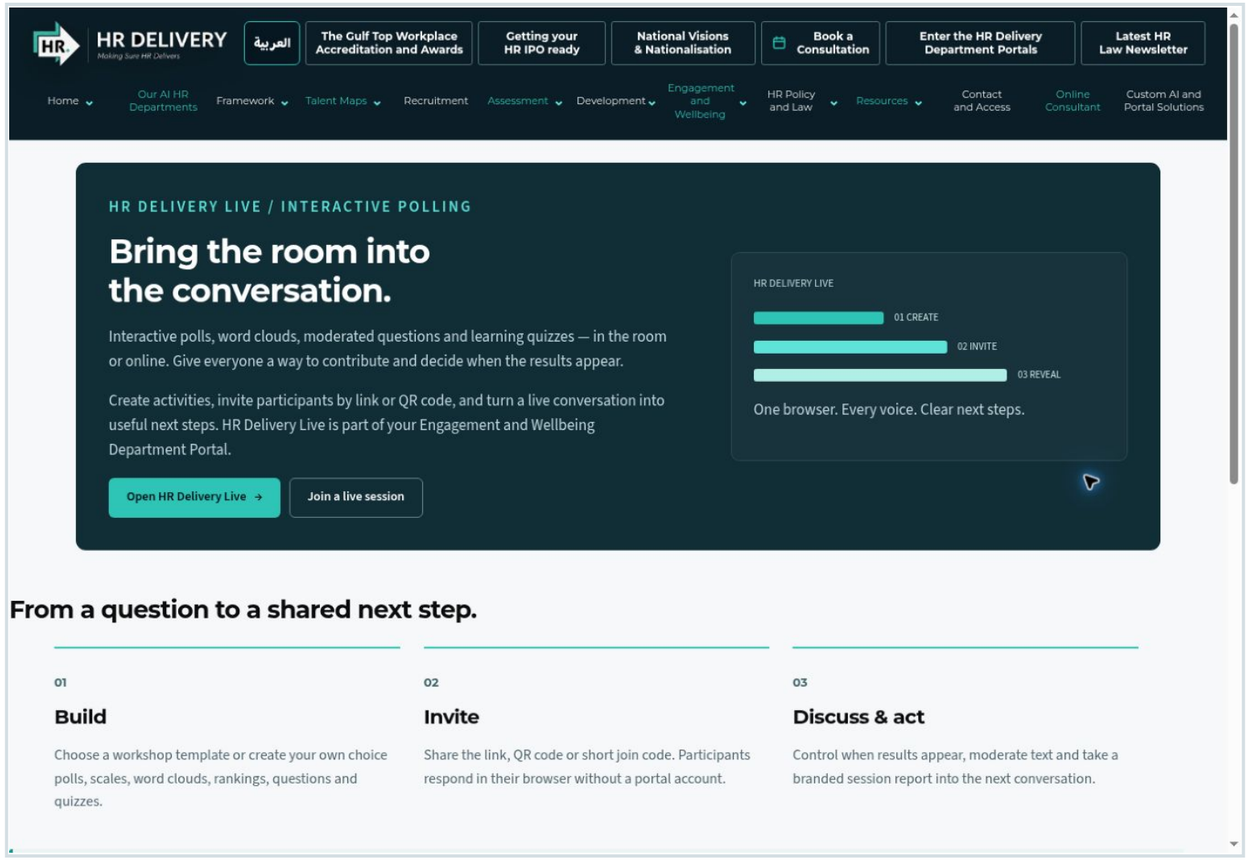
Review Live reports and assign follow-up

05 Review organisation access

Use 'Organisation & access' only through the designated administrator for invitations and member permissions. Confirm the scope before any change.

CHECK Workspace membership reflects current responsibilities.

PRIOR REVIEWED SCREEN



Public session-report and participation description; detailed reporting controls require authorised access.

05 Use benchmarks carefully

Find a reference, check comparability and plan a justified target.

02 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

USE BENCHMARKS CAREFULLY / D-05-01

OPEN SOURCE

Find and interpret an engagement reference

Select a relevant published observation and understand its basis.

WHO USES THIS Analyst

BEFORE YOU BEGIN

- Your measure and scoring method
- Workforce and period to compare

WHAT YOU WILL HAVE

- Selected reference and scope note

CHECK BEFORE YOU FINISH

- Match the measure as well as the location.
- Never pool overlapping references into an invented market average.

The filter returns no exact reference. Use 'Reset filters' or broaden one filter at a time. Document the resulting scope difference; do not replace missing data with an assumed score.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

USE BENCHMARKS CAREFULLY / STEPS 1–2 OF 6

OPEN SOURCE

Find and interpret an engagement reference

01 Choose the location and measure

Open Engagement Benchmarks. Use 'Country or region' and 'What would you like to measure?' before drawing conclusions from a displayed score.

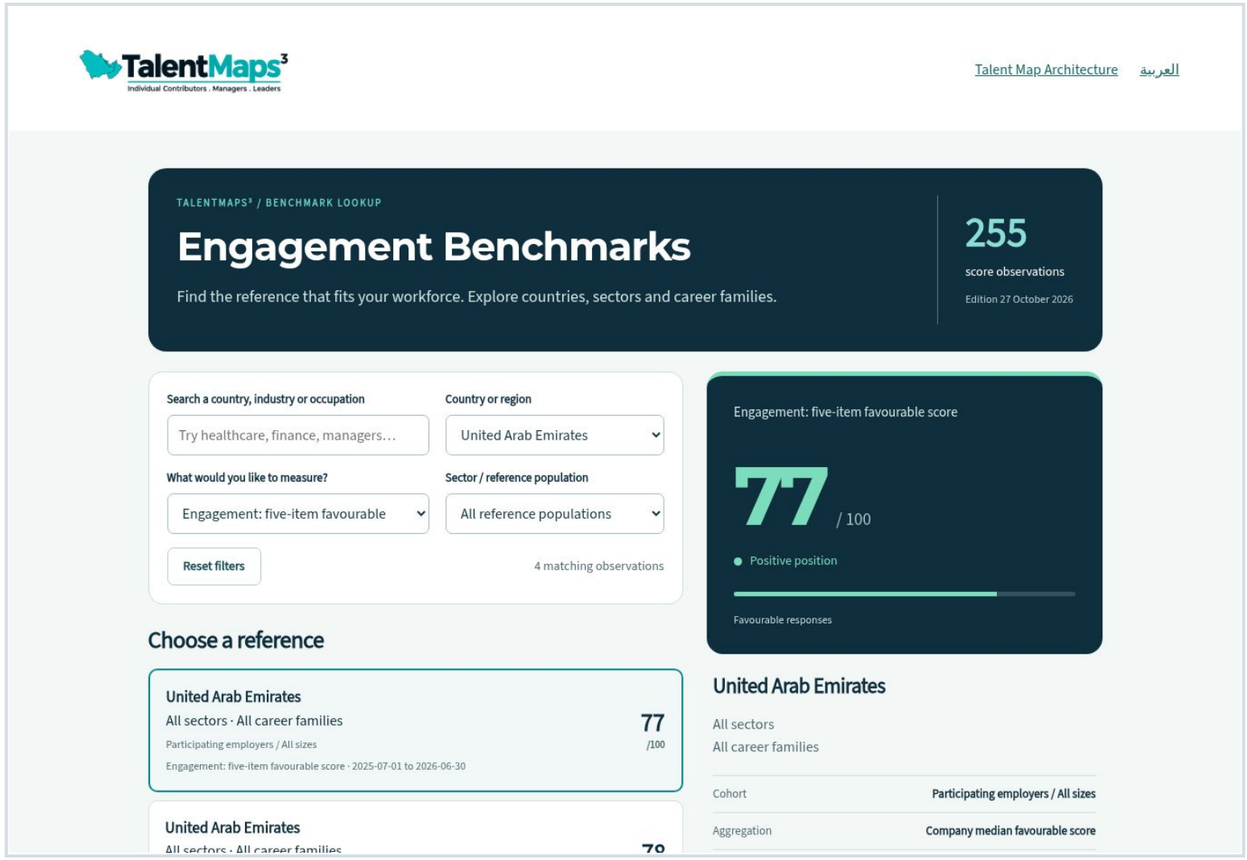
CHECK The matching-observation count reflects your filters.

02 Narrow the reference

Use 'Sector / reference population' and 'Search a country, industry or occupation'. Select a result under 'Choose a reference'.

CHECK The reference details identify cohort, aggregation and observation period.

CURRENT LIVE SCREEN



Current public benchmark filters and a UAE reference display.

USE BENCHMARKS CAREFULLY / STEPS 3–4 OF 6

OPEN SOURCE

Find and interpret an engagement reference

03 Check comparability

Compare actual question wording, scoring, workforce, period and original scale. A favourable percentage, rescaled mean and classification are different measures.

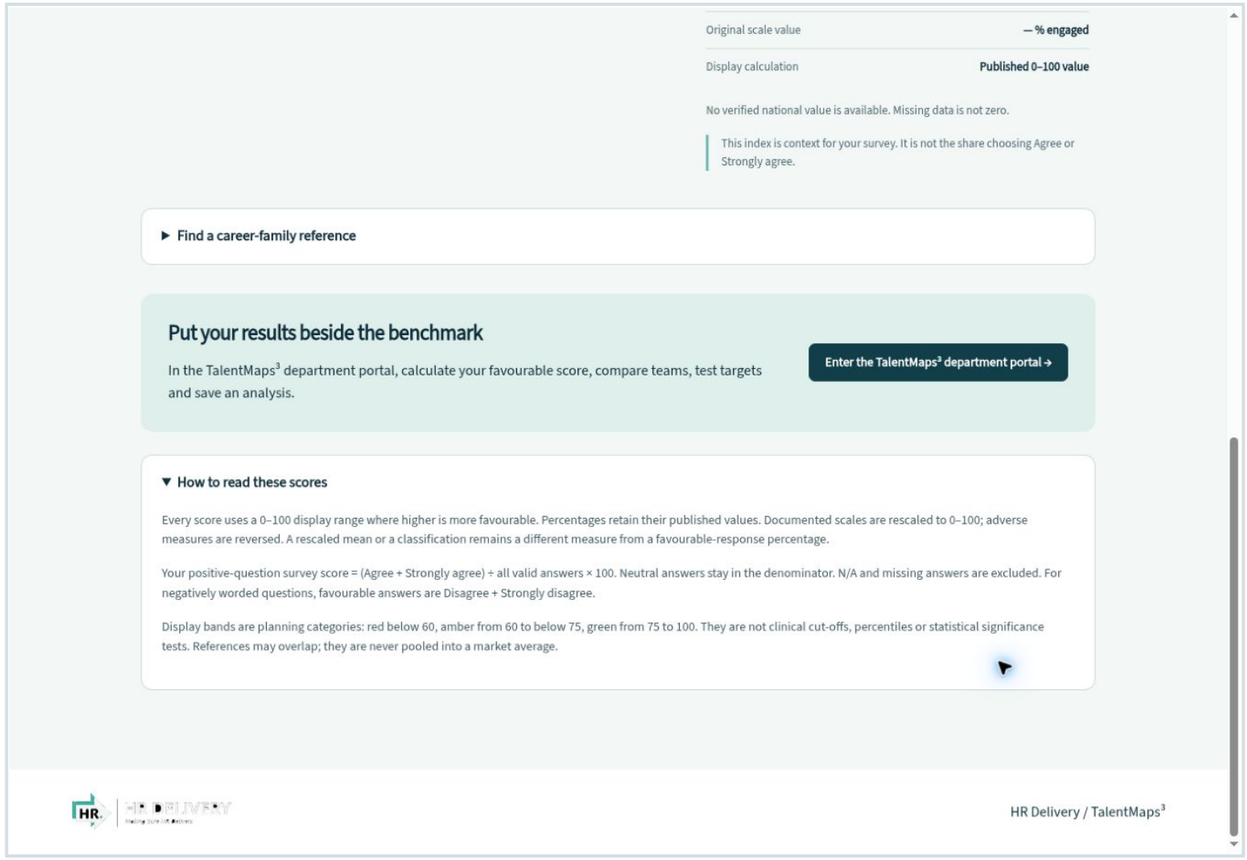
CHECK Only an appropriately matched reference is used to interpret a gap.

04 Handle missing references honestly

If no exact reference matches, change the measure or view all locations. The observed Qatar example showed “Not available”; missing data is not zero.

CHECK A gap in the reference library remains explicit.

CURRENT LIVE SCREEN



Current score-reading guidance and route into protected analysis.

USE BENCHMARKS CAREFULLY / STEPS 5–6 OF 6

OPEN SOURCE

Find and interpret an engagement reference

05 Read the interpretation notes

Open 'How to read these scores'. For positive items, favourable score is (Agree + Strongly agree) divided by valid answers, multiplied by 100.

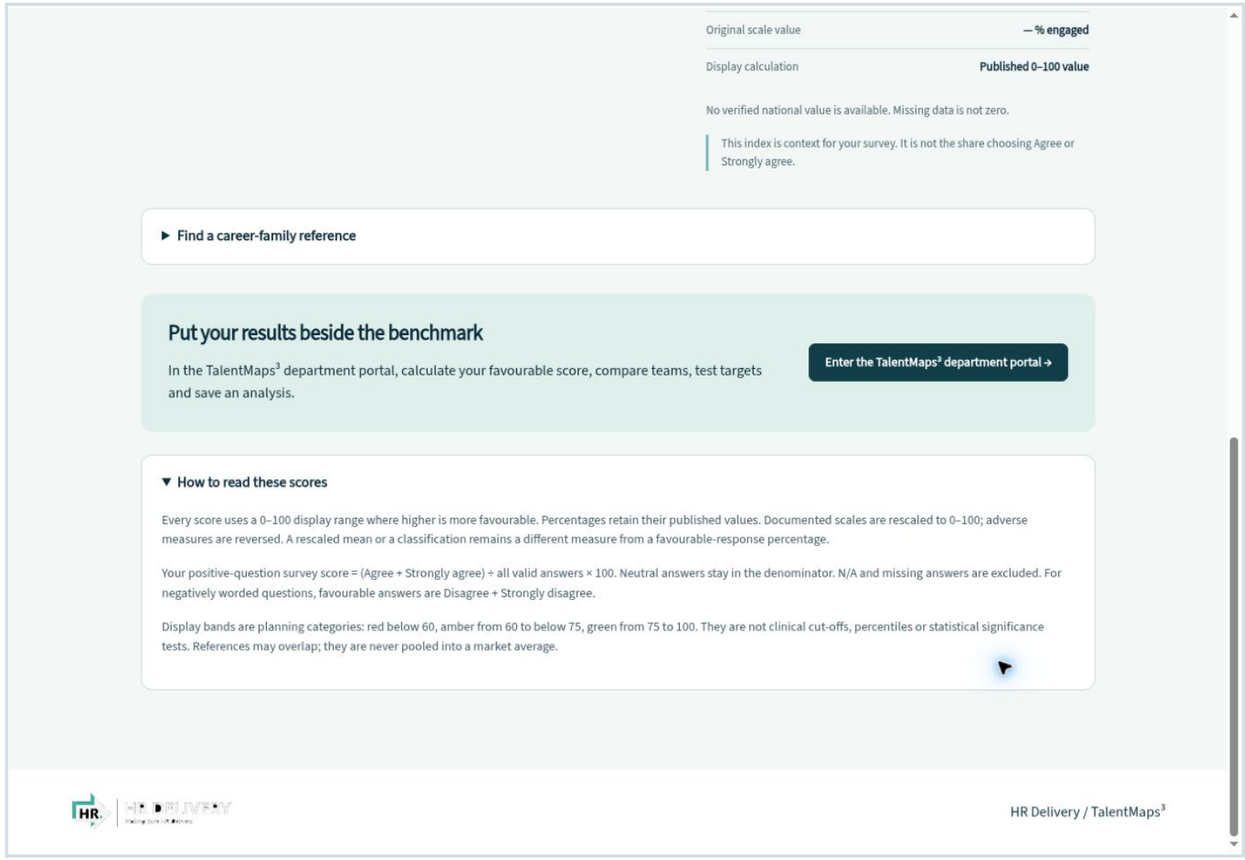
CHECK Neutral responses remain in the denominator; missing and N/A responses are excluded.

06 Use planning bands as planning bands

The site uses below 60, 60 to below 75 and 75–100 display bands. These are not clinical cut-offs, percentiles or significance tests.

CHECK Interpretation remains proportionate to the evidence.

CURRENT LIVE SCREEN



Current score-reading guidance and route into protected analysis.

USE BENCHMARKS CAREFULLY / D-05-02

OPEN SOURCE

Use wellbeing references and save a target analysis

Move from a compatible reference to an explicit improvement scenario.

WHO USES THIS Authorised analyst and action owner

BEFORE YOU BEGIN

- Defined wellbeing measure
- A compatible reference and valid survey base

WHAT YOU WILL HAVE

- Wellbeing reference note
- Target scenario and saved analysis where enabled

CHECK BEFORE YOU FINISH

- Do not present a wellbeing planning band as a medical conclusion.
- Saved output must distinguish baseline, reference and target.

The expected option is missing.	Check your role and workspace with the administrator. Send Lama the page name and a non-sensitive screenshot; do not send a password.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public lookup was reviewed. Own-result calculation, saved analyses and report exports remain protected and were not executed.

USE BENCHMARKS CAREFULLY / STEPS 1–2 OF 5

OPEN SOURCE

Use wellbeing references and save a target analysis

01 Open the wellbeing reference route

Use 'Wellbeing benchmarks' from the department navigation or the public wellbeing link. Select the location, measure and reference population available.

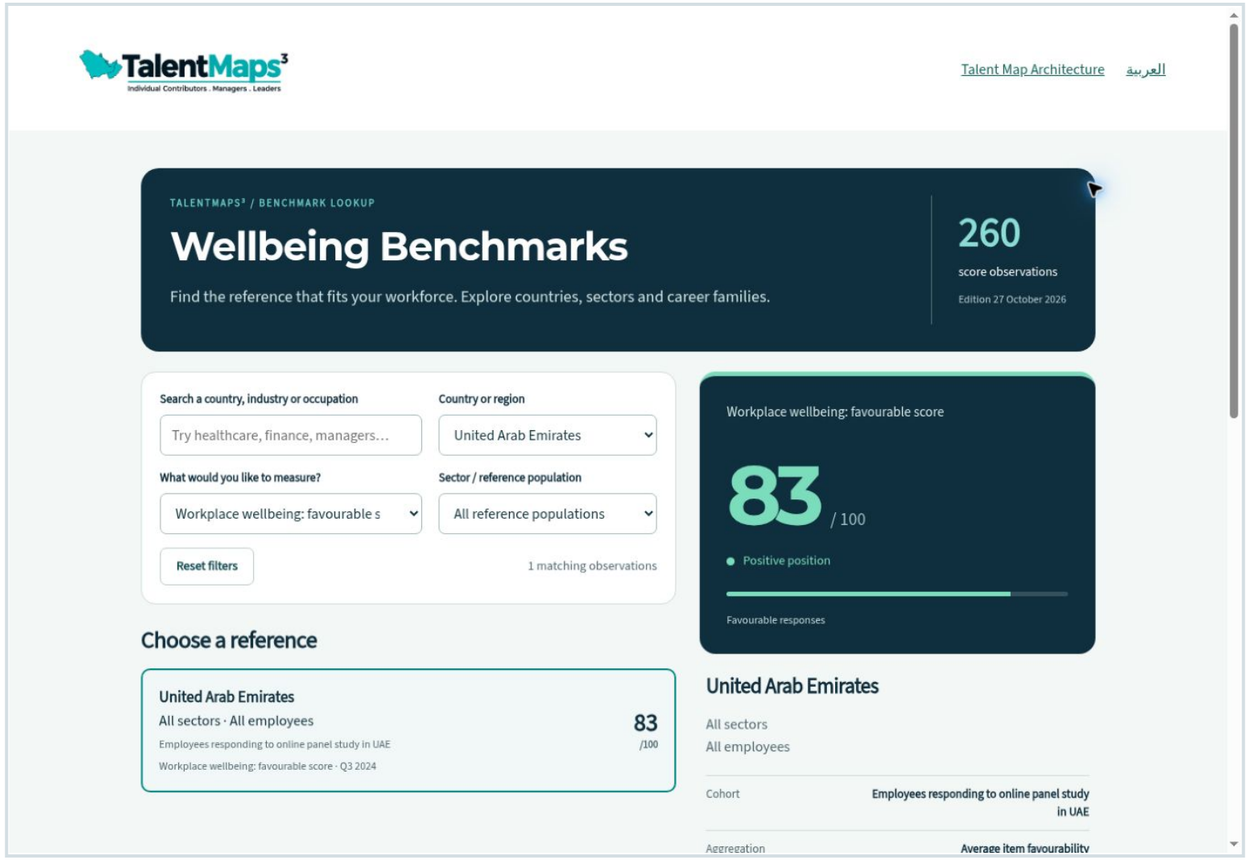
CHECK The displayed observation is relevant to the measure being examined.

02 Read the source context

Check original scale, direction, aggregation and period. Adverse measures can be reversed for display; this does not turn them into favourable-response percentages.

CHECK You understand what a higher displayed value means for this measure.

PRIOR REVIEWED SCREEN



Previously reviewed public wellbeing lookup; no employee data entered.

USE BENCHMARKS CAREFULLY / STEPS 3–4 OF 5

OPEN SOURCE

Use wellbeing references and save a target analysis

03 Enter the protected analysis route

The public benchmark page links to the TalentMaps department portal for own-result calculations, team comparisons, targets and saved analysis. Confirm your entitlement with the administrator.

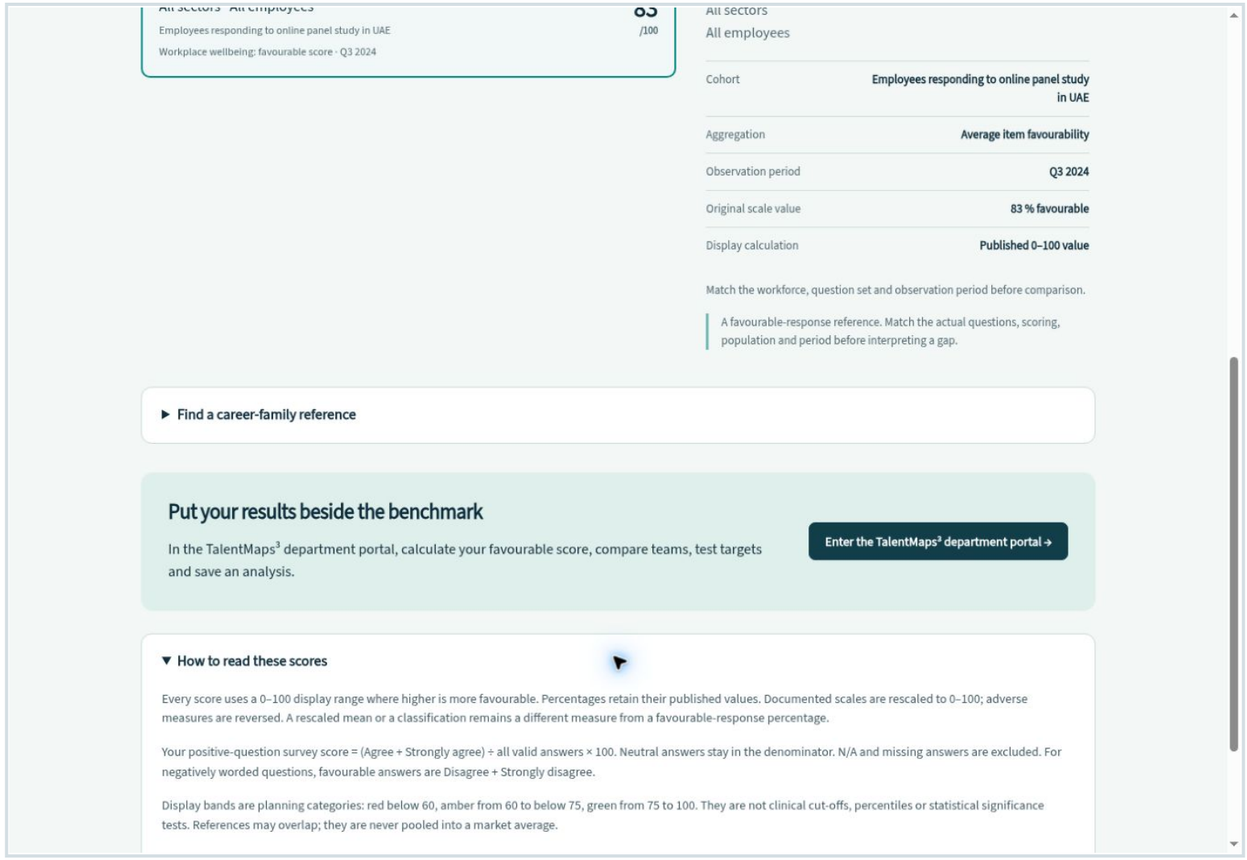
CHECK The calculation workspace matches the intended engagement or wellbeing module.

04 Prepare a documented baseline and target

Use valid response counts and the specified scoring rule. Define a realistic target and assumptions; distinguish a modelled target from an observed result.

CHECK The scenario can be explained and checked by a colleague.

PRIOR REVIEWED SCREEN



Previously reviewed wellbeing reference and interpretation context.

USE BENCHMARKS CAREFULLY / STEPS 5–5 OF 5

OPEN SOURCE

Use wellbeing references and save a target analysis

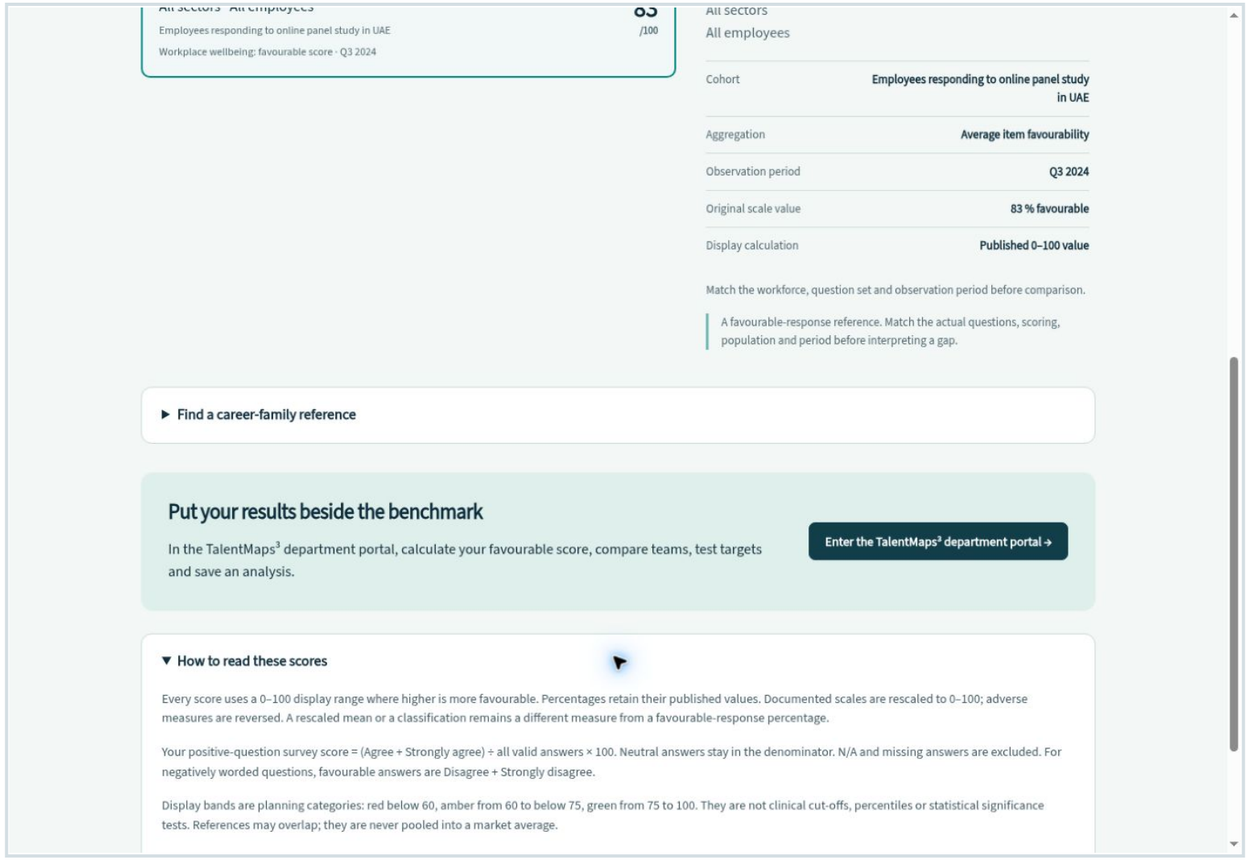
05

Save and report with context

Use the authorised workspace's available save and reporting controls. Check that the output includes measure, cycle, reference, assumptions and planned follow-up.

CHECK The retained analysis can be revisited without losing its interpretation context.

PRIOR REVIEWED SCREEN



Previously reviewed wellbeing reference and interpretation context.

REFERENCE / 1 OF 1

OPEN SOURCE

Survey workflow at a glance

Stage	Use	Check before moving on
Build	Pages and questions	Approved wording and complete response choices
Logic / Scoring / Languages	Rules, calculations and translations	Equivalent meaning and tested branches
Preview / Review & publish	Participant journey and controlled release	Purpose, privacy, consent and version
Collect	Participant link, QR and collection status	Correct cycle, dates and tested route
Analyse	Reportable patterns and exports	Response base, suppression and comparability
Actions / History	Follow-through and cycle record	Owner, due date and evidence of change

REFERENCE / 1 OF 1

OPEN SOURCE

Choose a participation mode

Mode	Operational implication
Survey: anonymous / confidential / identified	Confirm the selected profile and tell participants who can use the responses.
Live: open unidentified	The public page describes a session token.
Live: strict anonymous	The page describes removal of persistent respondent-answer links and withholding small groups.
Live: identified learning	Personal invitations and disclosed quiz reporting are used.

QUICK REFERENCE

Your final check

- [ ] **01** Purpose and action owner are agreed.
- [ ] **02** Question content and translations are approved.
- [ ] **03** Privacy mode and reporting thresholds are explained.
- [ ] **04** Participant route and closing date are checked.
- [ ] **05** Results are interpreted with their valid base and measure.
- [ ] **06** Every agreed improvement has an owner, date and review evidence.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Contact Lama when you need access, a missing resource or help applying the engagement & wellbeing workflow. Describe the task and the point where you stopped. Include an error message or a screenshot with personal records hidden so the team can route the request accurately.

OPEN LAMA'S RECEPTION

drphillip@hr.delivery

INCLUDE IN YOUR REQUEST

- Your organisation and authorised role
- Portal and task name
- Page URL and exact error message
- A screenshot without passwords or personal records

REFERENCE NOTES

OPEN SOURCE

Guide scope and screen references

- Protected Survey Studio and Live administration were not entered. Demonstration screenshots are explicitly identified.
- The 17-question-type total and six specialised listening workspaces remain inventory-supplied; detailed private controls were not verified.
- Eight listening starters and full sample reports were still awaiting approved content on the reviewed public pages.
- Prepared recipient imports do not prove email delivery; an outbound sender connection must be confirmed.
- No survey was published, no invitation sent and no live session created during review.

Screen key: Current live screen | Published demonstration | Prior reviewed screen