

Vital 33 Report Creation



Setting Up Survey Monkey

Get a Survey Monkey account. The free account is not adequate as it limits the number of questions in a survey to 10.

Here's how the questions are to be set up:

The screenshot shows the SurveyMonkey question editor interface. At the top, there are tabs: EDIT (highlighted), OPTIONS, LOGIC, MOVE, and COPY. Below the tabs, there's a dropdown menu set to "Matrix / Rating Scale" and a checkbox for "Show Suggested Questions". A text editor toolbar is visible. The question text is "Q1 Our work culture is one where we openly invite feedback from each other about how we are performing." Below the question text, there's a checkbox for "Make this a single-row rating scale (remove row choices)." which is checked. Underneath, there's a table with two columns: "Columns" and "Weight". The "Columns" column lists five options: "Almost Never", "Rarely", "Sometimes", "Usually", and "Almost Always". The "Weight" column lists corresponding weights: 1, 2, 3, 4, and 5. Each weight has plus and minus buttons. Below the table, there's a checkbox for "Use weights." which is checked, and a checkbox for "Add a N/A column." which is unchecked. At the bottom, there's a checkbox for "Add an 'Other' Answer Option for Comments" which is unchecked. At the very bottom, there are three buttons: "NEXT QUESTION" (green), "CANCEL", and "SAVE" (green).

This is what the survey looks like when being set up in Survey Monkey:

The screenshot shows the SurveyMonkey survey preview for "ACME Corporation". The survey title is "ACME Staff Survey". Below the title, there's a message: "Please answer the following 33 questions. Thank you." The survey contains three questions, each with a 5-point rating scale. The first question is "1. Our work culture is one where we openly invite feedback from each other about how we are performing." and has a rating scale with options: "Almost Never", "Rarely", "Sometimes", "Usually", and "Almost Always". The second question is "2. We are all very clear about our objectives and priorities." and has a rating scale with options: "Almost Never", "Rarely", "Sometimes", "Usually", and "Almost Always". The third question is "3. We leave meetings feeling secure that all members are dedicated to the decisions that were agreed upon." and has a rating scale with options: "Almost Never", "Rarely", "Sometimes", "Usually", and "Almost Always". Each question has a set of buttons: "EDIT", "OPTIONS", "LOGIC", "MOVE", "COPY", and "DELETE".

This is what the survey looks like for people completing the survey:



ACME Staff Survey

Please answer the following 33 questions. Thank you.

* 1. Our work culture is one where we openly invite feedback from each other about how we are performing.

Almost Never

Rarely

Sometimes

Usually

Almost Always

☐

☐

☐

☐

☐

* 2. We are all very clear about our objectives and priorities.

Almost Never

Rarely

Sometimes

Usually

Almost Always

☐

☐

☐

☐

☐

* 3. We leave meetings feeling secure that all members are dedicated to the decisions that were agreed upon.

Almost Never

Rarely

Sometimes

Usually

Almost Always

☐

☐

☐

☐

☐

* 4. We value organisation success more than individual achievement.

Almost Never

Rarely

Sometimes

Usually

Almost Always

☐

☐

☐

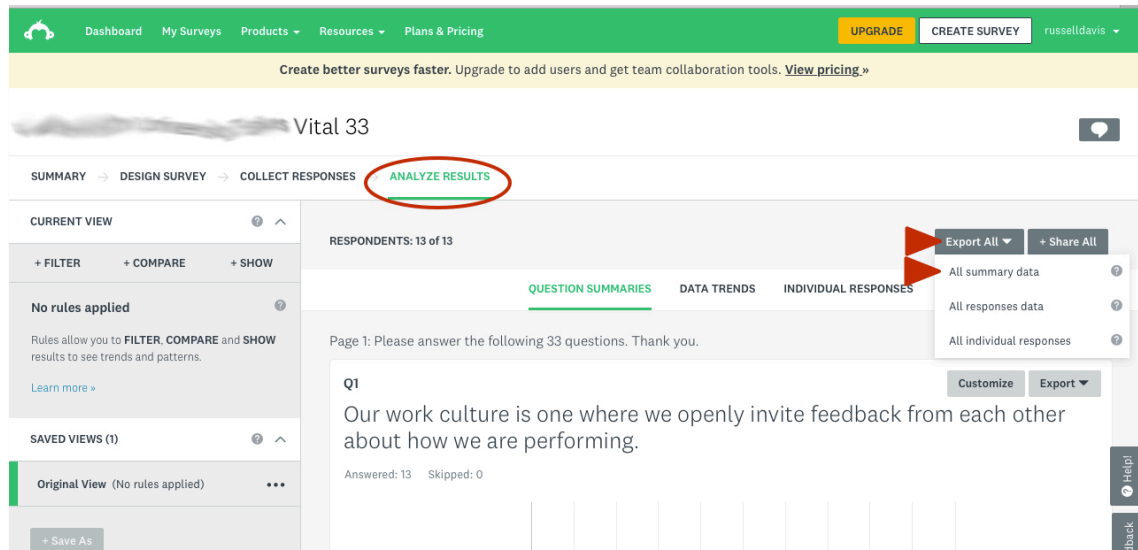
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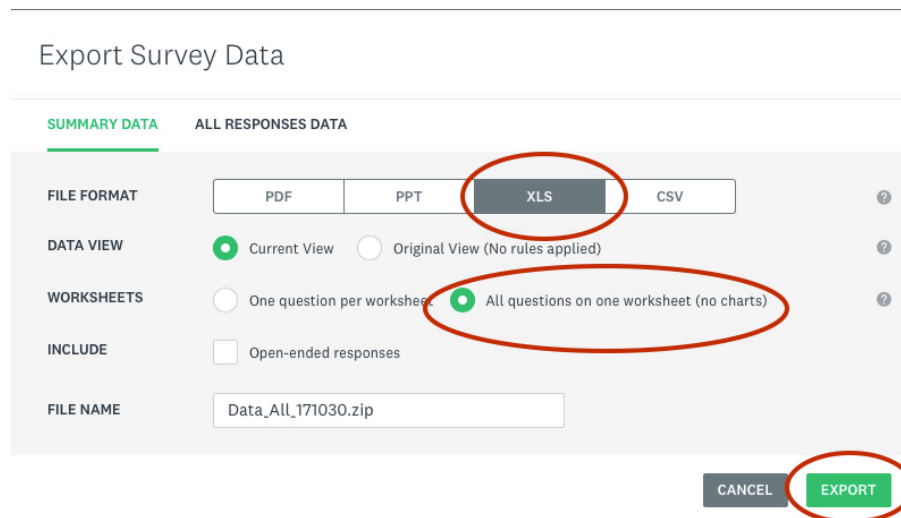
Downloading The Results

Once the survey has been completed you then download the results from the Survey Monkey website in to an Excel spreadsheet in order to create the report for the client.

Log in to Survey Monkey. Go to the completed survey and open it. Then select the last tab on the right. Analyze Results. Then select Export All. All Summary Data.



This will bring up a dialogue box as per below. Ensure you select 'XLS' for File Format and 'All questions on one worksheet (no charts)' for Worksheets. Then click Export. This will download a file on to your computer in to your downloads folder (or wherever your browser is set to save downloads).



The Vital 33 Master Spreadsheet

You will now have two spreadsheets. The downloaded file from Survey Monkey and the Vital 33 Master spreadsheet.

Here is an explanation of the Vital 33 Master spreadsheet sheets/tabs.

Paste SM Download Here

This is where you copy and paste your downloaded Survey Monkey results to.

Open the Survey Monkey sheet and select all (File, Edit, Select All or Ctrl/Cmd A on your keyboard), copy and then paste it on to the first sheet/tab of the Vital 33 Master spreadsheet. Over-write the example date that is already in that sheet/tab.

Summarised Results

This is a summary of all the results which can be formatted as you wish and included as a summary/introduction to the results for the client. I usually put this before the detailed results in the report to give the client an 'executive summary' of the results.

Results

This sheet/tab gives you the individual question results which are used in the report. You can copy and paste these answers in to a formatted table and/or graph in Word or present them as you wish.

You will see in the supplied Word document a table and graph for each question. The figures in the table are copied from this sheet and the weighed average is used in the graph. I chose to do it this way as I found Word has more formatting capabilities to make the report look as I wanted however you can use/present these figures as you wish.

Mapping

This sheet/tab gives the mapping between the Vital 33 and Essential 4, Critical 5 and Engagement 10. This mapping is somewhat subjective so you may/may not 100% agree with it. You can change the mapping here and it will update the Essential 4, Critical 5 and Engagement 10 sheets automatically as long as you use the same wording for the categories already used in the columns.

This sheet also gives an overall score (out of a maximum of 5) for each of the Essential 4, Critical 5 and Engagement 10.

Essential 4

This gives you a summary table and graph of how the organisation scored against the Essential 4 based on the Vital 33 results.

Critical 5

This gives you a summary table and graph of how the organisation scored against the Critical 5 based on the Vital 33 results.

Engagement 10

There is no separate sheet for this as there is not enough questions in the vital 33 to cover all the Engagement 10 so making a breakdown a little meaningless. However an overall score is provided in the Mapping sheet.