

Build a connected evidence workflow

A fillable planning workbook for five connected lessons and one practical pilot.

Use the fictional course example first. Then adapt the five-part plan to your own collection, analysis and reporting workflow. Record the sources, definitions, review decisions and access needed to make it useful.

Download and open this PDF in a PDF reader that supports forms. Type in the shaded boxes and save a copy. You can also print it and write by hand. Some browser viewers handle saving differently: reopen your saved copy to check your answers.

Use fictional or de-identified material for practice. This workbook does not send or store your answers on a website. Completion is a planning exercise, not certification of an implemented system.

Your workflow and decision question and one workflow to test

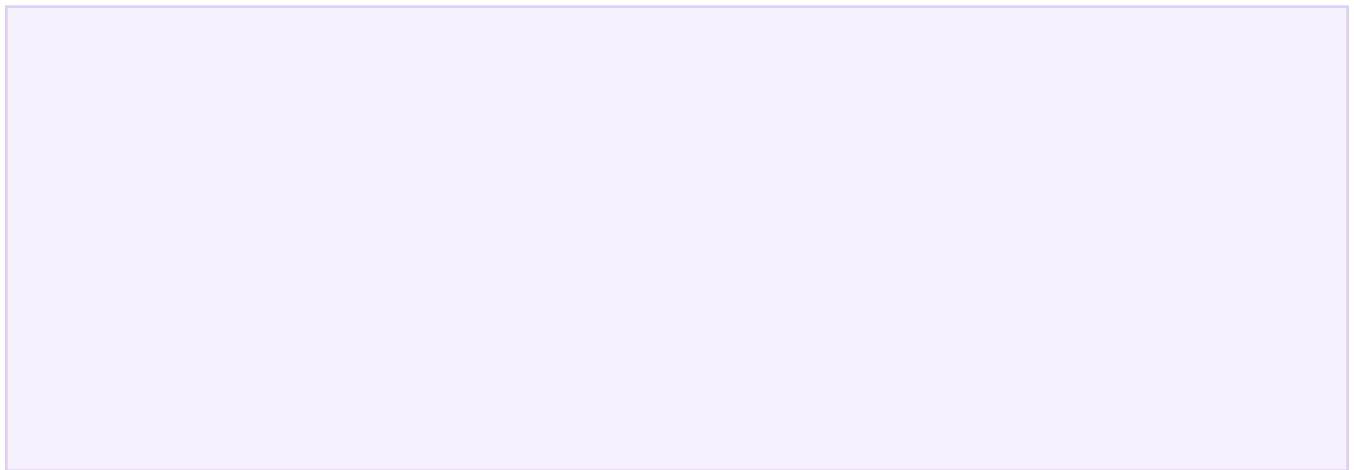
Who will help you test the plan? Record the owner and a review date.

1. Plan the listening

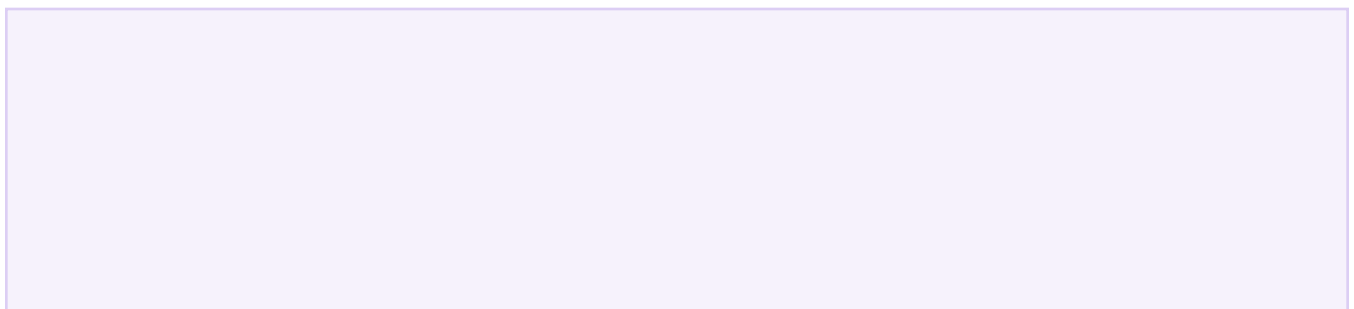
A listening plan that separates anonymous group feedback from identified follow-up.

Practice context: Anonymous pulse - Understand appropriately protected group patterns - No hidden individual matching; Identified follow-up - Respond to a person's request - Defined access and purpose

On workbook page 2, define one listening question, its identity model, audience and promised return. Add a separate named follow-up channel if needed. Identify the few shared fields, the local fields and which profile details should be reused or updated.



Name shared and local fields. Which profile details can be reused, and when do they change?



Self-check: Would an employee understand how their response will be used?

2. Review the themes

A theme-review record with source context, disclosure checks and a responsible action owner.

Practice context: Theme - Priorities change without clear explanation - Applies to supplied comments;
Interpretation - The communication process may need attention - Not a finding about individual intent

On workbook page 3, write a theme note from fictional comments. Include a disclosure check and a next question.



Record your decision, unresolved question, owner and next review date.



Self-check: Can a reader understand the finding without learning an unnecessary identity?

3. Connect the learning

A wave-comparison plan that preserves anonymity, question history and organizational context.

Practice context: Question - Wording and scale version - Assuming changed wording is identical;

Population - Group definition and participation - Assuming the same people answered

On workbook page 4, compare two fictional pulses with a team change and a revised question. State which findings remain comparable.

Record your decision, unresolved question, owner and next review date.

Self-check: Can you explain the trend without identifying individual respondents?

4. Define the boundaries

A comparison dictionary with audience, group, scale and disclosure rules.

Practice context: Measure - Question, scale and period - What does the result mean?; Base - Eligible and responding population - Who is represented?

On workbook page 5, define one pulse measure and the reporting rules for two audiences. Include a quote and small-group review. Map one local field to a common definition. Give one example that must remain separate.

Map one local field to a shared definition. What cannot be combined, and why?

Self-check: Can the audience use the finding while the listening promise remains credible?

5. Return and improve

A communication and follow-up plan linking findings to owned actions and later review.

Practice context: What was heard - Priorities feel unclear among respondents - Review team; What will change - Weekly priority review - Team lead

On workbook pages 6 and 7, draft the employee return and test its access. Add the action owner, review date and later listening question.



Record your decision, unresolved question, owner and next review date.



Self-check: Would an employee know what happened because the organization listened?

Test the complete workflow

Use fictional records first, then agree a small authorized pilot with the responsible people.

- ☐ A contributor can submit the intended information.
- ☐ An unrelated reader cannot access restricted evidence.
- ☐ A correction preserves the original and its reason.
- ☐ A reviewer can trace a finding to its source and definition.
- ☐ The intended reader receives useful, approved findings.

Expected vs actual behavior: record gaps and the person responsible.

What will change before the next cycle? Include the next review point.