

Pulse Survey Tool

Evaluation Questions

A vendor assessment framework for HR teams
shortlisting platforms in 2026

40 Questions
across all dimensions

8 Sections
of evaluation

Scoring Worksheet
included

How to use this document

Take these questions into every vendor demo and discovery call. Score each vendor 1 to 3 on every question. A vendor that cannot answer precisely scores a 1. Use the comparison worksheet at the end to stack your shortlist side by side before making a final decision.

Score	Meaning
3	Answered precisely with specifics
2	Answered but with vague or partial detail
1	Could not answer or deflected

SECTION 1

Anonymity and trust architecture

1. What is the minimum number of responses required before results are visible to a manager or HR admin?
2. Is that threshold configurable by our team, or is it fixed by the platform?
3. What happens to responses submitted below the threshold -- are they held, aggregated upward, or discarded?
4. Can managers see open-text responses from their direct reports at any point?
5. Does the platform log which employees have or have not responded, and who has access to that log?

Watch for: Vague answers about anonymity being "guaranteed" without specifics on threshold configuration are a red flag. Anonymity is an architecture decision, not a policy statement.

SECTION 2

Implementation and onboarding

6. What is the typical implementation timeline for an organization our size and complexity?
7. What is required from our team during implementation -- dedicated hours, technical resources, project lead?
8. What are the most common reasons implementations run longer than projected?
9. Is HRIS integration included in the base implementation, or scoped separately?
10. Do you provide a sandbox or test environment before we go live with employees?

Watch for: Any vendor that cannot give you a range for implementation time based on your headcount and HRIS has not done this enough times to give you a reliable answer.

SECTION 3

HRIS integration depth

11. Which HRIS platforms do you integrate with natively versus through a third-party connector?
12. Is the employee data sync real-time or scheduled, and how often does it refresh?
13. Does the sync automatically handle new hires, transfers, and terminations, or does our team trigger updates manually?
14. What happens to historical survey data tied to an employee record when that employee leaves?
15. Can you pull org hierarchy, department, and custom attributes from our HRIS for segmentation?

Watch for: "We integrate with most major HRIS platforms" is not an answer. Ask for the specific connector, the sync frequency, and whether offboarding is automated.

SECTION 4

Distribution and reach

16. Beyond email, which channels do you support for survey distribution?
17. Do you support WhatsApp, QR codes, text messages, or kiosk mode for frontline or non-desk workers?
18. How is multilingual survey delivery handled -- at the template level or does each language require a separate build?
19. What is the average mobile response rate across your customer base?
20. Can survey links be distributed without requiring employees to create an account or log in?

Watch for: If the vendor only supports email distribution, you are buying a tool for desk-based employees. Any frontline or distributed workforce will have participation rates that reflect that limitation.

SECTION 5

Analytics and driver analysis

21. Does your analytics layer show engagement driver analysis, or only score trends over time?
22. Can we see which specific drivers are improving or declining between survey cycles?
23. How does the platform help HR teams prioritize which drivers to act on first?
24. Can results be segmented by department, tenure, location, and custom demographics simultaneously?
25. Does the platform benchmark our results against industry data, and how current is that benchmark dataset?

Watch for: Dashboards full of scores without a clear action hierarchy put all interpretation burden on your HR team. Ask to see a live analytics view during the demo, not a screenshot.

SECTION 6

Action planning and follow-through

- 26. How does the platform support managers in moving from a score to a specific action?
- 27. Can action items be assigned to specific managers and tracked to completion inside the platform?
- 28. Does the platform resurface relevant questions in the next survey cycle to measure whether an action made a difference?
- 29. Is there a way to communicate survey results and planned actions back to employees through the platform?
- 30. How does the platform flag when a manager has not taken any action after a survey closes?

Watch for: *The gap between data and action is where most survey programs fail. If the vendor's answer to follow-through is "export a report and share it," the accountability loop does not close inside the tool.*

SECTION 7

Trial, pricing, and contract terms

- 31. Is a free trial available without a credit card or contract commitment?
- 32. What is included in a trial -- full feature access, HRIS integration, and analytics, or a limited environment?
- 33. Is pricing per active respondent or per employee in the system?
- 34. Are there additional costs for implementation, HRIS integration, or multilingual support?
- 35. What is the minimum contract term, and what are the exit terms if we need to switch platforms?

Watch for: *Pricing structured around total headcount rather than active respondents can significantly inflate cost for organizations with seasonal or part-time workforces.*

SECTION 8

Data residency and compliance

- 36. In which country or region is our survey response data stored?
- 37. Do you offer regional data isolation for GDPR, data localization, or other compliance requirements?
- 38. Who within your organization has access to our raw response data?
- 39. What is your process for data deletion upon contract termination?
- 40. Do you have SOC 2 Type II certification, and can you share the most recent audit report?

Watch for: *Data residency questions are non-negotiable for organizations operating in the EU, Middle East, or any region with active data localization requirements. Get answers in writing before signing.*

Vendor comparison worksheet

Score each vendor 1 to 3 per section. Total out of 24. The vendor with the highest score across all 8 dimensions is your strongest fit.

Section	Max	Vendor 1	Vendor 2	Vendor 3
Anonymity and trust	3			
Implementation	3			
HRIS integration	3			
Distribution and reach	3			
Analytics and drivers	3			
Action planning	3			
Trial and pricing	3			
Data and compliance	3			
Total	24			

Write vendor names in the column headers. Use this sheet in your final review meeting before shortlist decisions.

Built using CultureMonkey benchmark data: 10M+ anonymized employee survey responses across 15 industries. For the full benchmark report, visit culturemonkey.io/employee-engagement/employee-engagement-driver-benchmarks-2026/