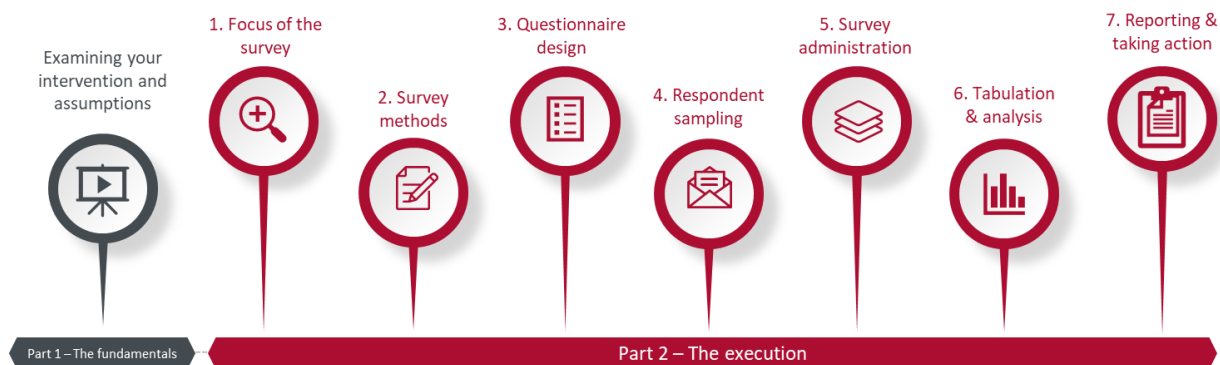


MODULE 7. REPORT AND TAKE ACTION



Congratulations, you reached the last step of your “Leading with Data” journey! In *Module 6*, you crunched the data, now is time to turn the numbers into actionable insights.

First, you need to tease out the key takeaways from the analysis. Go through your initial assumptions once again: were they confirmed by the survey results? If not, why not? What are the implications of these findings? Did the analysis uncover other key findings that were not reflected in your original assumptions? Do not be surprised or disappointed if survey results challenge some of your assumptions: the whole purpose of this effort was to allow you to take better decisions and improve your organization. The most powerful results are often those that expose blind spots. And even if all your assumptions are validated, you should still be able to extract valuable insights to further strengthen your model. It is also possible that some results are difficult to interpret. In this case, try to problem-solve with some of your colleagues who might have further insights from the field. In some cases, re-running part of your survey at a later point might be necessary.

Once you identify the most valuable 5-10 findings, think about their implications and possible next steps. Ask yourself: “So what? What can we do better/differently based on this finding?”. At this point, it is crucial to involve your leadership and colleagues to interpret the results, brainstorm resolutions and plan of action. When presenting the results, choose a few effective visualizations to deliver the main messages, without overwhelming them with too many charts or a long report. Go back to *Module 6* for guidance on data visualization if needed! Make sure to present the results as a decision-making tool, and not merely as inputs for an interesting discussion.

In the process, engage all stakeholders affected by potential changes. For example, if your survey results suggest the need to improve the sales process, make sure your sales team sees these results, understands them and is involved in the redesign. Remember that humans are naturally averse to change. Generally, the status quo is simply more comfortable and disrupting it can be a painful process. People will look for excuses and alternative explanations. There might also be an ego dimension to this: if the analysis challenges your manager’s legendary intuition, it might be painful for him or her to get over what could be considered a failure.

But you cannot let beliefs guide your organization – that is what leading with data is all about! Try to anticipate some of the objections and resistance your findings or proposed solutions might face, and find ways to address it. There is no universal recipe on how to manage communication and change. Nevertheless, these steps might guide you:

1. Reflect and discuss what you want/must to change, based on the analysis – in a very collegial manner
2. Agree and plan the changes you want to induce and how to do it
3. Communicate very clearly about the necessity to change to every stakeholder group, and involve them in the change process
4. Implement the change process

5. Track progress.

The last step is particularly important to continue leading with data. Improving and changing an organization is rarely a linear, one-time process. For it to be successful, you will have to assess whether the implemented changes actually result in the desired effect, i.e. if your improvement strategy is effective and successfully implemented. Define some metrics and targets in the planning stage and keep track of your progress against them. That might mean more surveys, which now you are fully equipped to perform!

Special focus: automating the survey process

To take your “Leading with Data” journey one step further, you may want to embed surveys as part of your day-to-day operations and processes. That way, you will be able to collect data on an ongoing basis. Once you have identified your most important questions to ask and metrics to monitor, you can leverage existing tools to automate large parts of the work.

One of the most versatile tools is [Zapier](#), a software that connects different web applications (e.g. email, CRM, survey tools) with one another, and allows you to create custom automated workflows (“zaps”) without having to hire a programmer. Zapier integrates thousands of apps (e.g. Gmail, Outlook, Google Drive, Dropbox, SurveyMonkey, Airtable, Typeform, etc.), whereby something that happens in one app will trigger an action in a different app. In relation to survey automation, an example of workflow you could for instance create is:

1. Create a SurveyMonkey form with all the right questions based on the metrics you want to measure
2. Create a blank Google Calendar and create events on dates on which recipients should receive an impact survey
3. Use Zapier to connect Google Calendar with Gmail via this “zap”: [Send Gmail emails for new Google Calendar event starts](#)
4. When the “event” starts on the calendar, recipients will receive an email in their mailbox with the SurveyMonkey link
5. Use Zapier to connect the SurveyMonkey form and Google Sheets via this “zap”: [Add new SurveyMonkey responses to new Google Sheets rows](#)
6. Results of the survey will automatically appear in a Google Sheet
7. Create a visual dashboard (with charts, KPIs etc.) on another tab in the same Google Sheet, which consolidates the survey results and automatically updates when new responses come in.

This is just one example of a relatively simple workflow, but depending on which apps you use, you can create many other automated processes. You can explore Zapier’s functionalities and integrations here: <https://zapier.com/explore>. Keep in mind, however, that Zapier only works with cloud-based apps, and cannot connect offline applications like Word or Excel. Also, Zapier has a free version that allows you to set up a limited number of “zaps”, and several tiers of paid subscriptions depending on your needs. Besides Zapier, other free and paid automation tools exist, so the possibilities are many!