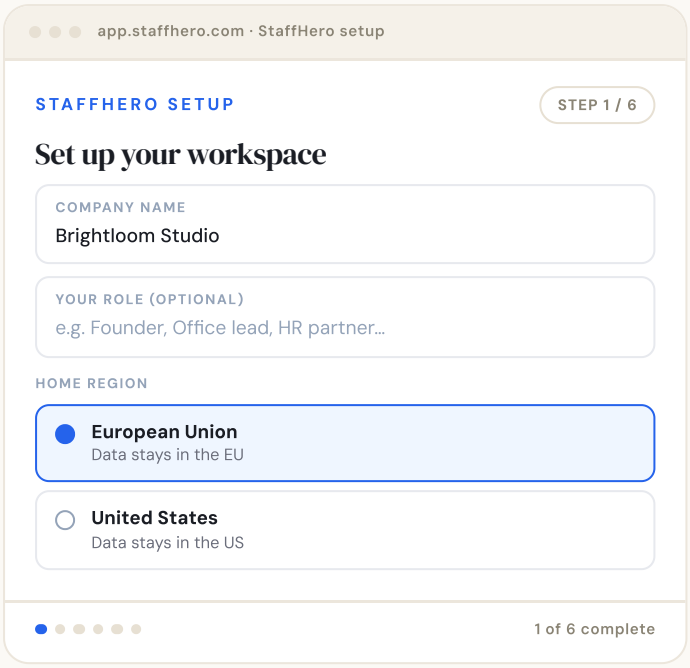
Launch your first pulse in less than *15 minutes.*

From a blank workspace to a live anonymous pulse — what you'll click, what your team receives, and when results appear. Every step in this guide uses the exact labels you'll see on screen.



THE SIX STEPS AHEAD

1. **Set up your workspace** ~2 MIN
   Name it, pick your Home region
2. **Create your teams** ~2 MIN
   The rows of your future heatmap
3. **Add your people** ~4 MIN
   Upload a CSV or add them by hand
4. **Review your privacy rules** ~1 MIN
   The defaults already match best practice
5. **Review your survey** ~1 MIN
   Your Monthly Pulse, ready to go
6. **Launch your first pulse** ~3 MIN
   Pick a plan, hit send, watch it go out

<15 min total, end to end

BEFORE YOU OPEN THE WIZARD, HAVE THESE HANDY

Your people's work emails
A CSV export from any HR or payroll tool — or just a list you can type in.

The teams you think in
They become the rows of your heatmap, so pick the cuts you'd actually act on.

Your region call, EU or US
The one setting you can't change later — it decides where your data lives.

Free to explore, pay to launch. Everything up to Step 6 is free — no card. You pick a plan the moment you send your first pulse, backed by a 60-day money-back guarantee.

No credit card to start · Employees never need accounts · Results locked below 5 responses · Data stays in your region — EU or US

WHERE THIS ENDS UP · ONE WEEK FROM NOW

A team-by-team heatmap

Engineering	+64	+51	−5	+34
Sales	+52	+4	+31	🔒
Operations	+34	+54	+2	+26

+42
your StaffHero Score, from the licensed eNPS℠ question

Your Leadership Brief

A plain-English read of what's at risk and what to do next — written by StaffHero minutes after the round closes.

Every cell obeys the privacy rules you'll review in Step 4 — locked cells stay locked for everyone, including you.

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STEPS 1–3 · ROUGHLY EIGHT OF YOUR FIFTEEN MINUTES

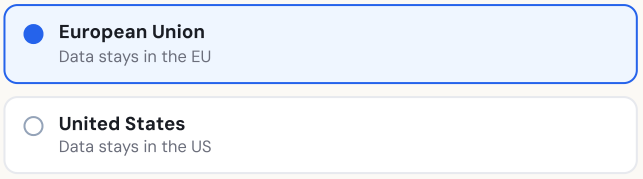
Getting your people in.

Three steps, three screens. By the end of this page your workspace knows who works where — which is everything the heatmap, the privacy rules, and the invitations hang off later.

1 Set up your workspace ~2 MIN

Three things, and only one of them is hard to undo: your **company / workspace name**, **your role** (optional — it just helps StaffHero write to you in the right voice), and your **Home region**.

The one decision to get right. Home region routes where all your people records and survey responses live. It **cannot be changed later** — everything else in this guide can.



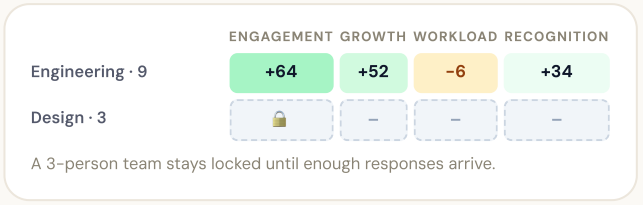
Both regions run the same product — the choice only routes where your people records and responses are stored.

2 Create your teams ~2 MIN

"Teams are the rows of your heatmap — the cuts you'll read sentiment by." Quick-add the groups you actually think in — Engineering, Sales, Operations. **Departments** are an optional broader grouping on top; perfectly fine to skip on day one.

Engineering · Sales · Operations · Customer Success

+ Add team



A 3-person team stays locked until enough responses arrive.

Tip: teams under 5 people will show locked cells until enough responses arrive — prefer groupings of 5+.

3 Add your people ~4 MIN

Two ways in — pick whichever matches where your roster lives today, or mix both. Either way, this is the longest step of the six, and it's still about four minutes.

OPTION A · UPLOAD CSV

Upload → Map columns → Preview → Done

Export from any HR tool or payroll sheet — or download the **starter template** right there in the step and fill it in.

Required

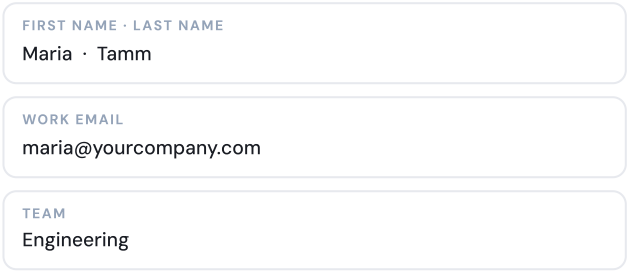
Email · Name

Optional

Team · Department · Preferred language · Gender · Birth date · Start date

OPTION B · ADD MANUALLY

Faster than it sounds for a 25-person company — four fields per person:



Worth saying out loud: people never log in to StaffHero — they only receive anonymous survey invitations by email. No accounts, no passwords, nothing to roll out.

MILESTONE CHECK

You're about eight minutes in.

- ✓ Workspace named, region set
- ✓ Teams drawn as heatmap rows
- ✓ Roster in, nobody needs an account

The pulse itself is already built and waiting — the next page is guardrails, a quick read of the survey, and the send button.

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STEPS 4–6 · THE LAST FIVE MINUTES

Privacy, survey, launch.

The back half of the wizard is mostly reading. StaffHero has already set the guardrails and built the survey — you check both, then press the one button that matters.

4 Review your privacy rules ~1 MIN

The defaults already match industry practice, which is why this step takes a minute. The **quantitative reporting floor** is 5 responses — a hard floor you can raise but never lower. Written comments need **7**. Below a threshold, StaffHero hides the score, the trend, the comments *and the counts* — the lock icon is the only visible state, so a small team's silence never becomes a signal.

Want stricter? Raise either floor — 7, 10, higher. The settings only move up, never below the defaults you see here.

5+	7+
SCORES APPEAR	COMMENTS APPEAR
🔒	–
🔒	–

Below threshold: no score, no trend, no count — ever.

5 Review your survey ~1 MIN

Your default **Monthly Pulse** asks the eNPS℠ question plus 5 rotating driver questions, and ends with an optional comment box — 6 quick questions, under 3 minutes for a teammate. Drivers rotate from **35 research-backed questions across 19 engagement drivers**, so the pulse stays fresh month after month.

Each round stays open **7 days**, with one automatic reminder 2 days before close. Cadence is monthly — you can fine-tune all of this later under **Surveys**.

ANATOMY OF ONE PULSE

- 1 × eNPS℠ question
- 5 × rotating driver questions
- 1 × optional comment box

= 6 questions · under 3 minutes to answer · open 7 days

6 Launch your first pulse ~3 MIN

"This sends an anonymous survey invitation to everyone on your roster." If you haven't picked a plan yet, checkout happens right here — flat pricing, never per-seat, taxes handled automatically at checkout, and a 60-day money-back guarantee behind all of it. The pulse goes out the moment checkout completes.

STARTER	GROWTH	SCALE
$99/mo	$199/mo	$299/mo
up to 50 people	up to 100 people	up to 200 people

Prefer annual? $990 / $1,990 / $2,990 — two months free. Full details at staffhero.com/pricing.

Sending invitations… 23 of 37

You'll watch it go out live — then the waiting is your team's turn.

Before you hit launch

- ☐ Roster is within your plan's headcount cap
- ☐ Extra survey languages need complete translations — or keep English-only for now
- ☐ One pulse at a time per survey

SKIPPED THE WIZARD?

Same launch, from the dashboard:

Surveys → Monthly Pulse → "Activate Survey" → choose "Send now"

THAT'S THE WHOLE SETUP

When the counter reaches everyone, you're live.

Your part is done — the next page is what lands in your team's inboxes, and when the results come back to you.

7 days	1	5+
ROUND STAYS OPEN	AUTO REMINDER	RESPONSES UNLOCK RESULTS

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AFTER YOU LAUNCH

What happens next.

The week runs itself: invitations, one reminder, a hard close, then results within minutes. Here's each moment — starting with the only thing your team ever sees.

WHAT YOUR TEAM RECEIVES

FROM StaffHero
SUBJECT **Brightloom Studio · Your team pulse is ready**

Hi — your team is running a quick anonymous pulse. Six questions, under 3 minutes.

Take the pulse

staffhero.com/s/... · your private single-use link

Every survey page carries the anonymity notice: answers are anonymous to your employer — grouped results only, nothing shown for groups under 5 (7 for written comments). No IP logging, no tracking.

No login, no app, no account — the link works on any device. That's the whole ask of your team.

WHILE THE ROUND IS OPEN

Your dashboard shows **response rate only** — scores stay hidden until the round closes, so nobody is tempted to read a half-finished picture, and early answers can't be singled out. A reminder goes out automatically 2 days before close; you don't need to chase anyone.

Responses 23 of 37 invited so far

WHEN IT CLOSES · DAY 7

Within minutes, StaffHero freezes the round, computes the heatmap, and — once 5+ responses are in — writes your **Leadership Brief**: what's strong, what's slipping, and the one or two things worth doing about it. You get an email the moment it's ready.

The Brief plays by the same rules you reviewed in Step 4 — it only ever cites groups above the privacy floor.

THE WEEK AT A GLANCE

DAY 0
Launch
Invitations go out to everyone on your roster

DAY 5
Reminder
One automatic nudge, 2 days before close

DAY 7
Round closes
The round freezes — no more responses

MINUTES LATER
Results land
Heatmap + StaffHero Score + Leadership Brief, in your inbox and dashboard

PRO TIPS FOR A STRONG FIRST ROUND

Invite everyone, not a sample
You need 5+ responses for anything to show at all — and each team cell needs 5+ within that team. Small rosters can't afford sampling.

Want results sooner?
Shorten "Days the survey stays open" in the survey settings. Seven days is the default; a smaller, chattier team can close faster.

Preview the outputs first
Demo mode is a realistic workspace with months of data — poke at a heatmap and a real Leadership Brief before your own exists. Or skim staffhero.com/sample-brief.

Aim for 70%+ response
A CEO heads-up note the day before helps enormously. Partners: there's a ready-made announcement template in the partner kit.

YOUR MOVE

Fifteen minutes from now, your team is talking.

Free to explore, pay to launch — no card needed until Step 6. Questions? The StaffHero team replies fast.

Start free at staffhero.com →

No card needed · 60-day money-back guarantee

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