

## Company Pulse Questionnaire Help and Guidance

### Introduction

This document provides help and guidance for Company Pulse's online questionnaires.

We aim to use questionnaires that are easy to follow and straightforward to answer but, in case you have any problems, the following sections provide guidance and tips on completing our questionnaires, including how to get further help and assistance.

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### Preparation

1. Our questionnaires comprise a series of screens containing questions covering various areas of your business health and are the first step in completing your Business Health Check.
2. Access to our Business Health Check questionnaires is restricted (other than our Free Trial Diagnostic). We authorise you by sending a personalised link to the online questionnaire. If you haven't received this email, please contact us – but please check your 'spam' folder first, in case our email has been diverted there.
3. The lengths of our questionnaires vary, but our Gold and Silver Business Health Check questionnaires (the longest) take about one to one-and-a-half hours to complete. Our clients usually find completing the questionnaire a tough but thought-provoking and rewarding task – we therefore recommend you avoid interruptions and have a nice cup of tea (or coffee) ready!
4. Please note that our questionnaires time out after 60 minutes of inactivity. If this happens and you have not used the 'Resume later' button (see *Saving and resuming*, below) to save your data, all the data you have input will be lost. We therefore recommend you avoid interruptions and use the 'Resume later' button periodically to save your data.
5. You will need to input some numerical information (for example the turnover, numbers of employees). You may find it helpful to have recent copies of your statutory and management accounts to hand.

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6. For most of our questionnaire, you need to send us information by email, including:
  - a. Your statutory accounts for the last 3 financial years
  - b. A set of current management accounts
  - c. The management accounts for your last financial year end
  - d. Details of any top-level targets or key performance indicators, and recent performance against them
  - e. Any additional background information that would be useful for our analysis (e.g. a current organisation chart)
  - f. A list of the key managers, their job titles, roles and responsibilities

Specific information requirements are set out towards the end of the questionnaire. The data should be in the form of PDF files or Microsoft Office (Word, Excel, PowerPoint) documents. See *Emailing required information*, below, for further guidance.

### Answering questions

1. The answers to this questionnaire will form the main inputs to our analysis, so we ask you to try to give full and accurate answers to all the questions.
2. Mandatory questions are indicated by a red '\*'. If there is no asterisk, the question is optional.
3. Some questions are dependent on previous answers, so you may see questions appear (or disappear) following your answer to an earlier question.
4. Help and guidance for a specific current question, (if available) is provided next to a question-mark icon below the relevant question.
5. In most cases you answer a question by selecting the most appropriate from a list of answers (sometimes in a 'dropdown list', where you click the down-arrow to reveal the list).
6. If more than one answer is appropriate, you will be asked to check all the boxes that apply.
7. If you select 'Other', you will usually be asked to provide further (text) details.
8. Where a text input box is used, please type in a full answer.
9. Some input boxes only allow numerical inputs.
10. For date answers, these can be input from a calendar or typed in direct.
11. A few questions require you to rank a list of options. This is done as follows:
  - a. Click on your top-ranked choice from the list on the left and this choice moves to the top of the list on the right
  - b. Continue clicking on your choices from the left list until the list on the right is full
  - c. If you want to remove an item from the ranked list, click on the scissors icon next to the last item on the right, which moves it back to the list on the left
  - d. If you want to reorder an item higher up the list, click the scissors icon successively
  - e. After removing item(s) from the list on the right, click on replacement choice(s) from the list on the left

### I can't answer a question!

1. Some questions have specific help and guidance (next to a question-mark icon) that covers missing information or answers of 'Not Applicable' – please follow this guidance.
2. Where requested, please select the most appropriate option (even if this isn't quite right) and provide further details later. (There is always a box for additional comments at the end of the questionnaire).
3. If you are still unable to answer, please contact us (see *Further help and assistance*, below).

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### Navigating between screens

1. When you have answered all the questions on a screen, use the 'Next' button (at the bottom of the screen) to move to the next screen.
2. If you have not completed all the required inputs (those with a red '\*'), you will not be allowed to use the 'Next' button. You must complete the missing inputs before proceeding – any of these will be highlighted.
3. You can use the 'Previous' button to go back and amend inputs on a page you've already completed.
4. If you select the 'Exit and clear survey' button, all the data you have input will be lost.

### Saving and resuming

1. You can save your inputs at any time, allowing you to exit and continue the questionnaire later, by using the 'Resume later' button.
2. You can also use the 'Resume later' button to save your data and continue working, ensuring that your inputs are not lost if you are interrupted.
3. When you select the 'Resume later' button you must enter a password to allow access on your return. If you also enter your email address (which is not mandatory), you will receive an email containing the password for reference.
4. The questionnaire will time out after 60 minutes of inactivity. If this happens and you have not used the 'Resume later' button to save your data, all the data you have input will be lost. We therefore recommend you use the 'Resume later' button periodically to save your data.

### Submitting your answers

1. On the last question screen, use the 'Submit' button when you are ready to submit your answers. Once submitted you cannot amend your inputs.
2. After submitting your answers, you can print or save your answers by clicking on the 'Print your answers' link. You can then use your browser's print function to print, or click on the 'PDF export' button to save your responses to a PDF file.

### Emailing information

1. When completing a Business Health Check questionnaire, you will be asked send us copies of your statutory accounts and other information (see *Preparation*, above).
2. To send the required information, click on the link in the questionnaire, which should create a new email addressed to us (you may need to click 'Allow' in a dialogue box).
3. If your email application does not automatically generate an email, please create a new email addressed to [healthcheck@companypulse.co.uk](mailto:healthcheck@companypulse.co.uk)
4. Please attach the required information files (PDFs or Microsoft Office documents) to this email before sending the email to us.
5. If you have any difficulties emailing the required information, please contact us (see *Further help and assistance*, below).

### What happens next?

1. For a Gold or Silver Business Health Check, we will contact you in 1 to 2 working days to arrange on-site meetings with you and to explain the next steps in the process.

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2. For a Bronze Business Health Check, we will contact you in 3 to 5 working days to arrange a follow-up discussion and to send you our report and analysis.
3. For a Free Trial Diagnostic, our analysis will be emailed to you in 3 to 5 working days.

### Terms and conditions

1. The general conditions for using our website are set out on our Legal Notice page.
2. The terms of use for our Free Trial Diagnostic are set out on our Free Trial Terms of Use page.
3. Our full terms of business for any Business Health Check are available to download from the Legal Notice page and will also be set out in any agreement we have with you.

### Cookies

1. Our questionnaires use cookies (a cookie is a small file put on your computer) which are necessary for the operation of the questionnaires. These cookies are set when you answer a question or otherwise interact with a questionnaire.
2. By continuing to use a questionnaire, you will be consenting to such cookies being stored on your computer.
3. If your browser is set not to accept cookies, a questionnaire will not operate correctly.

### Further help and assistance

1. If you need to talk to us, you can call us on **0844 809 4202** (calls cost 7p per minute, plus any additional access charge from your phone company).
2. You can also use our online support service by clicking on the “**Click for online support**” button at the bottom right of any of our website pages to (text) chat to us live. If the button reads “**Please leave a message**”, we are offline, but you can leave a message which we will answer as soon as possible.
3. Alternatively, you can send us an email, to [healthcheck@companypulse.co.uk](mailto:healthcheck@companypulse.co.uk)