

# Quick Reference Guide

## Launching a POPin

**Step #1:** Click "Launch & Manage" at the top right-hand corner.

**Step #2:** Choose one of the four options under "Ways to use POPin".

**Step #3:** Choose settings for your POPin.

- For Meetings, the meeting info you input will inform the default settings
- For Improvement, Surveys, and Custom, keep your question singular, constructive, and focused

**Step #4:** Click "Next" to finish creating your POPin.

**Step #5:** Share your POPin!

- If you chose "Anyone with the link" or "Anyone with the link in my organization", share the POPin link to invite people. Click "Share" to copy link to your clipboard, then paste it into your communication.
- If you chose "Only people I invite", add email addresses of participants and customize your invitation, and the system will send invites.

## During a POPin

### Edit POPin Settings

Prior to receiving participation in your POPin, you can update all settings. After one user participates, you cannot change question type nor can you change it from anonymous to named.

### Drive Participation

As the leader/hero, actively engage in your session. Take these steps to further maximize participation:

1. Send an email introducing POPin, setting expectations and encouraging multiple POPin visits
2. Send personalized invitations
3. Add 1-2 responses to the session to get the conversation going
4. Respond to Questions/Comments in the POPin – either named or anonymous
5. Send reminders that include the top 1-3 answers to get attention and encourage voting

## After a POPin

For long-term success, it is critical that you respond to your team after your POPin ends. Demonstrating that you're listening and incorporating their ideas and feedback into action plans builds trust and drives even more participation in future POPin questions. Here's how to close the loop:

- Read through the results of the session
- Categorize results into the following categories:
  - **Quick Wins** – Fast, easy to deploy
  - **No's** – Not possible. Why?
  - **Dig Deeper** - Requires additional discussion / problem solving
  - **Strategic actions** – Big opportunities requiring time and effort
- Communicate results and next steps with the team within one week of POPin close