

# How Often Should Companies Survey Employees?

*Emerging Trends and Practical Considerations.*

# Contents

- Building your survey plan ..... 3**
- Understanding the organizational strategy: Interview guide ..... 5**
  - Understanding business priorities ..... 5
  - Understanding the role of people and engagement ..... 6
  - Summarize Strategic Priorities and Context.....7
- Example Strategic Challenges and Priorities ..... 8**

## How Often Should Companies Survey Employees?

Advances in technology have paved the way for a range of new survey frequency options: be it on demand, always listening or otherwise. Such options have provoked increased debate, and hope for a more effective methodology for measuring and responding to employee feedback. However, while the question “how often should I survey?” is common; we strongly recommend that this question is considered against the context, purpose and desired outcomes for embarking on a survey program in the first place. Attempting to respond to this question in the absence of understanding the organizations strategy, priorities and goals can result in misguided recommendations.

While Perceptyx is equipped with the technological power to support multiple administration methods, we pride ourselves in our ability to help you design the best approach. We partner with our clients to walk through important considerations that should be made prior to addressing the question: “How often should I survey?”. Our perspective on the frequency for measuring employee engagement, or any other related organizational effectiveness construct, is that it should first be linked to business strategy. Following this, we then consider the impact of each methodology for supplying insights and action at the relevant levels of the business.

### Building your survey plan

When constructing your own analytics plan as it relates to the employee survey, consider the following questions:

- What is the business context/need/strategy?
- What is the right content?
- Who is the right audience?
- How often should we collect data?
- Who are the primary stakeholders?
- What is the best method to share insights?

Importantly, you should consider the impact of your approach across all stakeholder groups. Specifically, you should consider how to optimize the survey, analytics and reporting experience to maximize impact for:

- Senior Leaders;
- Managers;
- Human Resource Consultants (HRBPs, OD consultants etc); and importantly,
- Employees.

If we choose to accept that by listening and responding to our employees, we are more likely to increase engagement, then we should be inclined to design the survey program to reach this end. The census survey that gets the insight of all employees is a proven way of reaching this end, as it enables reporting and action at all levels of the business.

If we contrast this approach to replacing the census with frequent pulse survey’s that use a superficial/stratified sample of the business, it can be difficult to provide managers and employees with feedback at the ground level. Indeed, we may be able to update a senior manager’s scorecard, but cynicism and disengagement is sure to follow if we are unable to close the loop with feedback and action at the ground level. Therefore, despite the interest in using an alternate approach to replace the

traditional method (e.g., always on; or on demand surveys), the census remains one of the most utilized methods given its reach and depth.

While the census remains prevalent, the use of alternate methods, such as pulse surveys or always listening surveys do have utility if combined as a broader effort. For example, a census program that is coupled with a well-considered pulse program that addresses deeper and pertinent issues can complement a census by delivering insights on progress and fine-tuning actions. Designed correctly, this can provide important information to managers on progress following a large census.

Importantly, the design of such an approach should be based on the business context, strategy, and prior findings from employee surveys, so that the methodology is fit for purpose. For example, in some instances, major and ongoing disruption in an organization may call for more frequent employee feedback (e.g., the always listening approach). In such an instance, we can leverage our technology to help funnel pertinent data to key stakeholders in real time during major organizational disruption.

In other instances, the “onboarding” or “exit” survey can form a suite of analytical tools, that when coupled with census data, provide you with ease of analyzing engagement at any point in the talent lifecycle. This option is particularly useful as it combines always listening, census, and even pulse surveys in a way that provides more meaningful insights to the business. A typical approach to combining methods is evident in the lifecycle survey approach, where our system allows you to surf between multiple datasets to understand the employee journey.

Taken together, it is important to select a method that gets you right insights, along with a sampling procedure to maximize impact. While we do acknowledge that there are some common approaches to structuring survey administration methods, it is not a “one size fits all approach”. Importantly, it is always recommended that you leverage from our professional services team to help draw out the strategic considerations, and recommend an approach that is right for you.

## Understanding the organizational strategy: Interview guide

It is reasonable to assume that many HR practitioners have a good business understanding. However, embarking on an organizational survey offers an opportunity to re-engage with leaders to specifically identify how these insights are useful for the business.

The interview guide presented below incorporated into your pre-launch conversation. This guide is broken down into two sections:

- Understanding business priorities
- Understanding the role of people and engagement

### Understanding business priorities

- What are the current goals?
- What is the biggest challenge you are currently facing?
  - What do you see as potential solutions to this challenge?
  - What barriers do you see getting in the way of that solution?
  - What has kept these barriers from getting removed?
- What are your strengths as an organization/department/division? (You hope it never changes)?
- What does the organization/department/division need to get better at fast (you hope it changes tomorrow)?
- What is your long-term vision for your organization/department/division?
  - Where are you at risk?
  - What is the distance between now and next?
  - What has to change for you to achieve your outcomes?

## Understanding the role of people and engagement

- How are people important for you to achieve your business priorities?
  - What are you most interested in understanding from the survey?
  - What key groups are important to explore?



## Summarize Strategic Priorities and Context

You can use the questions and the space below to summarize the major themes. The strategic priorities and challenges on the next page is useful to help you reflect on the types of priorities to align your survey program against.

- What is the business context/need/strategy?
- What is the right content?
- Who is the right audience?
- How often should we collect data?
- Who are the primary stakeholders?
- What is the best method to share insights?

## Example Strategic Challenges and Priorities

At any one point in time groups may be faced with a variety of challenges. Depending on what is happening internally, or externally, the business group may have different strategic needs.

The employee survey can help provide data useful for a variety of challenges. You can use the following list of challenges to help summarize the key themes.

### Alignment, Collaboration and Team Development

- **Senior Team Alignment:** Senior team alignment that drives greater clarity in values, short and long term goals and includes resource commitments and performance metrics required to execute the business strategy.
- **Organizational/Division Alignment:** Engagement of the workforce around values, short and long-term goals, and performance expectations.
- **Collaboration:** Sharing of resources and knowledge across your organization to deliver your desired business outcomes.
- **Knowledge Transfer:** Capturing and sharing of information and knowledge for the purpose of accelerating organizational capability, innovation and performance.
- **Team Development:** Development of high performing teams that can collaborate across geographical and functional boundaries to accelerate the execution of the business strategy.

### Strategic Workforce Planning

- **Workforce Capability:** Identifying the skills and abilities required to execute your business strategy. This includes performing a gap analysis on current capabilities against future capabilities and developing a detailed plan to close the gap.
- **Workforce Strategy and Resourcing:** Ensuring that the right resources and capabilities are in the right place at the right time to execute the business strategy.
- **Workforce Optimization:** Analyzing the organization's ability to accurately project the skill capabilities and work practices needed now, and in the future, that generate the highest possible return on workforce investment.
- **Contingent Workforce Development:** Utilization of a flexible workforce to manage shifting supply and demand while generating the best possible return on investment.
- **Recruitment:** Selection of uniquely qualified talent through the understanding of the skills and capabilities required to be successful in the organization and continuously knowing where to find and engage talent. This process can be managed internally or through a service provider that is able to optimize the selection process, improve time to hire, decrease cost per hire, and improve consistency.



## Career Development and Talent Optimization

- Career Path Planning: Development and implementation of a comprehensive plan that includes a set of prioritized developmental activities and opportunities that, when implemented, help ensure that an employee fulfills his or her potential in an organization.
- Individual Development: Developing and improving an individual's capacity and capability to execute their responsibilities now and in the future through skill development, formal and informal coaching programs, new learning opportunities and ongoing education.
- High Potential Talent Engagement: Engagement of high potential employees and individual contributors by understanding what motivates them. Developing and implementing a personalized individual career path plan that ensures their success and drives commitment to the organization.
- Cross Border Mobility: Leveraging talent from other countries to augment the existing workforce and assimilating them to the culture and environment so that they are immediately productive.
- Workforce Diversity: Developing and implementing a workforce diversity plan that recognizes the importance of attracting, developing and engaging a diverse workforce to meet your business needs.
- Talent Fit Assessment: Matching talent with the skills and capabilities needed in the organization by executing a fair, structured and consistent process comprised of interviews, skill and competency based assessments that are validated and proven to be successful in qualifying candidates who are capable of performing well in the specific position.

## Customer Focus, Brand and Innovation

- Customer Service: Engagement of the organization around a strategic approach to serving customers.
- Labor Environment Contingencies: Strategy to anticipate and protect the organization from legislation or labor activity that adversely impacts the efficient delivery of the business strategy.
- Employment Brand: Creating and articulating your employment brand to ensure you attract, retain and engage the talent you need to win.
- Innovation and Continuous Improvement: Identification and implementation of new ideas, activities and work processes that develop and expand the organization's capability to execute its business strategy.

## Employee Engagement and Performance

- Employee Engagement: Engagement of employees through a structured, measurable program that results in a workforce that has a strong emotional connection and commitment to the organization.
- Employee Recognition: Developing a culture that recognizes and rewards exceptional employee performance that is above and beyond the assigned responsibilities and contributes to the accelerated success of the organization.
- Employee Wellness Management: Development and deployment of programs that create an environment where employees are highly engaged and productive as a result of prioritizing their health and well-being.

- Compensation and Benefits: Developing and institutionalizing an integrated set of programs that align performance to required business results & attracts, engages and differentiates the talent needed to win.
- Productivity Optimization: Analyzing, and where necessary, changing workforce practices and processes for the purpose of increasing the organization's productivity.
- Business Performance Management: Development of management methodologies, metrics and technology to drive alignment of business activities to the strategic objectives of an organization.
- Performance Management: Aligning individual performance to business strategy and outcomes.

## Leadership Development

- Leadership Development: Developing and improving leaders' capacity and capability to execute their responsibilities now and in the future through skill development, formal and informal coaching programs, new learning opportunities and ongoing education.
- Leader Mentoring: Sharing one's wisdom, knowledge and insights with others with the goal of helping them become successful leaders in the organization.
- Leadership Coaching: Developing and implementing formal and informal programs to provide leaders with supportive feedback and coaching to enable them to grow and be more effective in current and future roles. Coaching is provided through external experienced coaches and/or internal coaches
- Succession Management: Developing a process and mechanisms to identify, engage, and grow talent that is capable of seamlessly replacing outgoing talent that the organization needs to meet its business objectives.

## Organizational Change

- Change Management: Clearly articulating the current state and future state as well as the actions that need to be taken to transition the organization, teams or individuals in an effective and engaged manner.
- Workforce Transition Strategy: Rightsizing the workforce in response to changing business conditions in a manner that protects the reputation and brand of the organization.
- Employee Integration: Assimilation of new employees to their culture, work practices and team to drive alignment and clarity around values, goals and performance expectations to increase productivity and commitment.
- Workforce Team Design: Creation of collaborative and effective business teams to support and deliver on key organizational objectives.
- Cultural Assessment: Defining the culture required to deliver your desired customer experience and developing a plan to institutionalize the desired culture in the organization.