employee survey advantage

The "Rule of Twos" Helps Gain a Competitive Edge

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When a visionary, charismatic executive was appointed president at a $1 billion (USD) division of a large global company, one of the first actions he took was to implement a divisionwide employee survey. The initial employee response to the initiative ranged between a wink and a yawn. The employee mood was, "Well, I guess they're going to use a survey to cut our benefits."

After the survey, most employees felt the process was a breath of fresh air, producing bold new ideas and tangible business results, while enhancing benefits programs they valued. Employees indicated the process made them feel appreciated and increased their belief that action would be taken based on their input.

The president of this division, along with the head of human resources and other senior members of the leadership team, engineered a success story by focusing on a few key axioms for post-survey action. These came to be known as the "Rule of Twos." (See Figure 1 on page 58.)

'The Rule of Twos'

Why invest in a survey process? "We survey to listen and improve. It is as simple as that," said Phil Wendel, head of human resources at Yamaha Motor Corp. USA in Cypress, Calif. With retention and recruitment of key talent at the forefront of most corporate strategies and goals, understanding the needs and attitudes of employees has become increasingly critical. (See Figure 2 on page 58.)

The "Rule of Twos" is a simple guide for implementing improvement ideas generated from survey results.

Rule One: Use Two Sources of Actionable Data — Quantitative and Qualitative

Employee perceptions and opinions are typically surveyed via questionnaire, one-on-one interviews and/or small groups. The questionnaire format, excluding open-ended questions, yields quantitative data for analysis and action, while the interview format primarily yields qualitative data. Both tools can be valid and can produce — if they are designed properly — actionable data.

QUICK LOOK

- Conducting a survey allows HR professions to "listen and improve."
- The "Rule of Twos" can be used as an axiom for post-survey action.
- Lack of progress opens the door for the skeptics — or worse, the cynics.

Leading organizations understand that "just crunching the numbers" and doing regression analysis is not the only way to achieve actionable data. "As a leading scientific-based engineering firm with a strong value on analytics and numbers, we have found — after 10-plus years of surveying employees — that the qualitative comments and opinions give life and add additional meaning to the quantitative findings, and help our teams implement recommendations," said John Blowers, manager of professional development at the Jet Propulsion Laboratory in Pasadena, Calif.

Rule Two: Focus on Two Big Companywide Opportunities

Having focus is critical during the initial stages of action planning and implementation. "We used to come out of employee feedback meetings with dozens of opportunities, and there was just no way to adequately apply the right resources to each opportunity," said Ronn Werre, president of EMI Music Marketing in Hollywood, Calif. "We recognized the frustration level on our teams — and the lack of progress — so today, we focus on the few critical companywide issues raised from the survey and give wide latitude to our department heads and team leaders to identify solutions and implement actions important to them at a local level."

Items with a lower correlation to employee engagement and/or business impact should receive little if any attention. "We select and prioritize our issues based on: 1) what is most important to the employee population, and 2) what is most important to the lab," Blowers said.

One useful tool to identify the right priorities for action is the Impact Decision Matrix (IDM). The IDM is used with survey data to help target follow-up efforts that make optimal use of scarce resources such as time and money. (See Figure 3 on page 58.) This kind of analysis helps to quickly identify which projects merit further investigation and action.

Rule Three: Two Weeks to Communicate

Good communication after a survey means doing two things well in a short period of time: Clearly communicating results and presenting a compelling case for change. The "two weeks to communicate" rule provides a sense of urgency regarding these communication imperatives.

"We know that it's vital to communicate survey results in a timely and honest manner," Werre said. "Employees have taken the time to tell us what they think. We must accurately summarize that data and make it as actionable and accessible as possible so positive things can happen. And we want those positive things to happen fast; otherwise, why would anyone want to participate in the process in the future?"

Senior leaders should communicate key survey findings and clearly set the stage for action on the vital priorities. "We are fortunate here because our executives really 'get it,' and managers are eager to analyze the data and come up with practical solutions to improve things," said Nancy Pope, vice president of human resources at EMI Music Marketing.

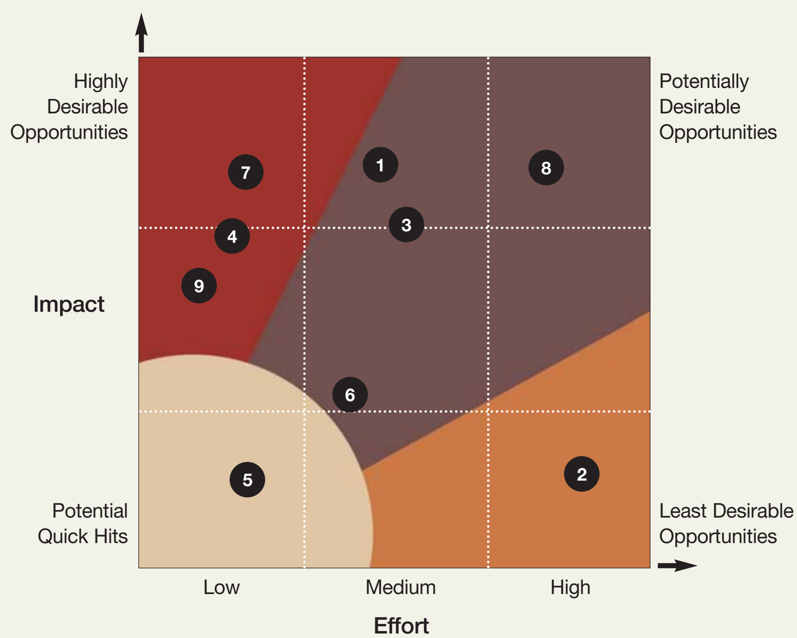
FIGURE 1: 'THE RULE OF TWOS'

- 2 sources of survey data: quantitative and qualitative
- 2 big opportunities
- 2 weeks to communicate (big-picture results, prioritize opportunities, identify owners)
- 2 action owners: leader and facilitator
- 2 seconds to access, 2 minutes to analyze and 2 hours to innovate
- 2 months to show momentum

FIGURE 2: INSIGHTS FROM EMPLOYEE SURVEYS

- What drives commitment levels in the organization?
- Are employees aware of the "total rewards" the organization offers?
- What are the biggest sources of employee frustration?
- What drives employee engagement?
- Are our managers effective?
- Is our performance-management process working?

FIGURE 3: IMPACT DECISION MATRIX



"I think part of the reason it works so well is that our leaders place the survey results in the context of our mission and values as a company. Employees know they are working on things that matter to the business and to them."

Rule Four: Identify Two Action Owners — Leader and Facilitator

A common mistake after improvement initiatives have been identified is to allow structure to take a back seat to goals. According to Anne St. John, assistant vice president of organization development and training at St. Joseph Health System in Orange, Calif., the post-survey process is rigorous. "Our senior leadership receives a thorough briefing about the survey results, local hospitals receive training on how to integrate survey communications into other training sessions, impact plans are created and each manager receives a scorecard for their workgroup," she said.

Merry Rogers, director of staffing and retention at St. Joseph Health System added, "We have also created a shared best practices video and Web site for effective survey follow-up and action. Issues are identified and worked at the local level while our system office designs the tools and process to support local team implementation."

Implementation teams vary in their success. Some go far beyond expectations while others never seem to get off the ground. One item often overlooked: Identifying a leader *and* a facilitator.

"The team leader's primary role is to drive the team to results and a successful conclusion. The team facilitator manages the process: Is the team staying focused on the issue or opportunity? Are they efficient? Are all team members adding value? We definitely differentiate the two roles, and I think this has helped our teams," Wendel said.

Rule Five: Two Seconds to Access, Two Minutes to Analyze and Two Hours to Innovate

"Analysis-paralysis" is a serious concern following a survey. Employee survey results should give managers data that promotes action — not simply more analysis. Survey data, especially when supplemented with other pieces of employee information (personnel records, performance ratings, etc.), can show managers' patterns of practices that produce, for example, higher employee engagement. Certain survey items can be correlated with turnover, and managers can quickly understand that focusing on the right issues has a measurable impact on performance, productivity and undesirable turnover.

"I want to continually improve the speed and availability of the survey reports for our managers," Pope said. "The last thing we need after our survey are problems accessing the data and quickly turning it into ideas for action."

Rule Six: Two Months to Show Momentum

After survey results have been communicated, there is a fairly short window of opportunity to show progress. According to Rogers, "Our motto is — 'one quarter to maintain, and one quarter to improve'."

Lack of progress opens the door for the skeptics — or worse, the cynics. The two-month window after the survey results have been communicated is critical to define what progress means and manage expectations. Employees have just shared their opinions. They want to know what it is that the organization is going to do about it. Communication efforts must shift from showing and explaining the survey results to trumpeting what the organization is doing.

Following the 'Rules'

The awareness of effective survey strategies and tools, and knowledge of potential pitfalls of the process, will serve to increase the likelihood of a positive outcome. Keeping the "Rule of Twos" in mind is an effective way for HR professionals to guide the survey process to a successful conclusion — for shareholders, customers and employees. WS

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