the engagement survey process

Best Practices

By Richard Greenberg, President, The BreakThru Alliance with Perceptyx, Inc.

The BreakThru Alliance methodology, powered by Perceptyx technology, provides the ability for any organization to get higher value from surveys than ever before. It is critical in these challenging economic times to take the pulse of your employees and tap into their ideas for improvement. We help organizations to ask, listen, respond, involve, and solve the issues that are getting in the way of improved performance.

CRITICAL SUCCESS FACTORS

1.Establish Clear Goals and Objectives. Early in the planning stage, articulate the overall goals and objectives of the survey and define the anticipated return on investment.

These objectives should be developed with management input and clearly communicated to employees to demonstrate the importance of the process. Without long-term objectives that are clearly linked to company performance, the survey may fail to elicit the management support and secure the resources required for success.

2. Develop a Communication Plan. Prepare a comprehensive communication plan to support each stage of the survey. The plan should include a schedule of communication "events" as well as a budget and formally assigned responsibilities. In the absence of a communication plan, employees may not recognize the importance of the process or see the connection between survey findings and subsequent follow-up actions.

3. Brand the Survey Process. The survey should be "branded" with a theme and identifiable graphic logo. Without branding, the survey may be seen by employees as an unconnected initiative that will have limited consequences for the organization.

4. Allocate Sufficient Resources. By leveraging appropriate technology, we increase the ability for you to accomplish more with less resources. Otherwise, without adequate resources or technology, the survey follow-up stage will lack the support required to be effective and will often meet with resistance from line management.

5. Define roles and responsibilities. Support your survey by creating a network of internal survey champions with responsibility for identifying the requirements for their part of the business. Survey champions must be sold on the value of the survey and given a clear description of their role requirements so that they can budget their time accordingly.

We train managers who will receive results for their areas of operation so they will have clear instructions regarding their responsibilities for survey follow-up. Training can occur prior to, or during the survey so that they will be prepared to execute their specific responsibilities.

6. Demonstrate Management Commitment. The survey process will have greater credibility if employees believe that it is endorsed and supported by senior management. Even when management committment is provided, if it is not widely visible, employees may view the survey as a public relations exercise designed to project a "caring" management style rather than a process for identifying and acting on employee concerns.

7. Ask the Rght Question the Rght Way. The survey should be designed to measure areas that are of concern to management and employees. Even when the questionnaire includes standardized items, the wording should be modified to reflect the culture of the company. An "off the shelf" instrument that fails to address issues of concern or that falls to reflect the language and terminology of the organization will be seen as lacking in relevance and will fail to engage employees.

8. Collect Data the Right Way at the Right Time. Consider the data-collection methodology that is best suited to your workforce. Traditionally, surveys have been administered using printed questionnaires. Technology is now readily available for conducting online surveys that make data collection easier, more efficient, and less costly. Ease and convenience translate into higher response rates. Equally important, survey administration must include the results reporting plan so that the findings are available immediately and in time to be included in business planning.

9. Take Clear Follow-Up Action. The most effective way to build confidence in the survey process, and thereby improve participation rates for future surveys, is for the organization to take clear and visible action based on survey results. A realistic number of areas should be targeted for follow-up action to allow the organization to concentrate and focus resources on issues that will have the greatest impact on performance. Failure to take action will create apathy toward the survey, and targeting too many issues will diffuse the effectiveness of follow-up actions.

10. Review the Process. A formal audit process should be planned to monitor the effectiveness of follow-up actions and to measure progress against objectives. Actions that meet with success should be widely communicated and celebrated. It sends out the signal that the survey isn't simply a nice thing to do -- it's good for business.

Enhancing employee motivation and engagement has become a business imperative and is essential to compete effectively in today's market. The employee survey can be used to develop a strategy for creating highly-motivated work environment for improving business performance.

Leveraging the critical success factors outlined above will engage both management and employees in the survey process, and can serve as a catalyst for positive organizational alignment and improvement.

The BreakThru Alliance and Perceptyx have a unique and effective approach for providing high value solutions for each of the critical success factors. Let us share our extensive experience in providing end-to-end employee survey and engagement solutions that will provide higher levels of value for your organization. Let us show you how to do more than just an employee survey.

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