



Leading for Loyalty

Seven Steps to Conducting Employee Surveys

By taking a well-planned approach, you can gain many insights from conducting employee surveys. The benefits are multiple: more knowledge for leaders, employees who feel their voices are heard, and increased strategy and focus when implementing improvements within the work environment. Unfortunately, many employee surveys are not well planned, executed, or acted upon, and lack of communication can result in lower morale and increased frustration for leaders and employees.

Follow our Seven Steps to Conducting Employee Surveys to ensure the process reaps valuable benefits for your organization and everyone involved:

1. Identify the survey's purpose

For a survey to be successful, it is important that it serves a specific purpose. Surveys designed without a clear direction will only return static responses and poor results.

Identify the reason you are conducting the employee survey: What do you want to know? What has prompted the need for a survey? What areas of the organization need improvement or change? What information would help you to make better decisions?

By identifying what you want to know, it will be easier to determine the design, content, and tone of your employee survey. Design your survey to fit this information need:

- Do you want to improve the experience of new employees? An onboarding satisfaction survey could help determine which aspects of the program to focus on.
- Is your organization experiencing low morale? Design your questions to center on relationships, environment, and leadership to determine what may be impacting morale.
- Is productivity falling below expectations? Determine what tools employees need to do their jobs efficiently and effectively or what leadership supports need to be put in place.
- Is communication problematic? Questions could focus on the effectiveness of your organization's communication channels and processes.

2. Determine who will conduct the survey

Who will manage the survey? Who will determine content? Do you have the in-house expertise to conduct the survey or will the survey process involve the services of an external expert?

There are some advantages to conducting employee surveys independently. In-house surveys are less formal, more economical, and can be better suited to certain situations. For example, leaders may want to know how employees in a specific department will feel about a proposed change. A small scale in-house survey can yield results quickly and economically.

For broader scale and more sensitive issues, you may hire an external firm to guide you through designing and conducting your employee survey. These firms can also be very helpful in designing the questions, summarizing responses, and segmenting the survey results based on the location or type of respondents. The main advantage of having employee surveys conducted by a third-party is the ability to ensure employees that responses are confidential and interpreted without internal bias. If assured of confidentiality, employees will often be more likely to participate and be more candid in their responses.

3. Survey Design

Design of your survey and the questions you ask can make all the difference in the quality of the responses you gather. Consider these factors when designing the survey:

Question Types – You may include forced choice, scale ratings, or open-ended questions that allow employees to comment. Most surveys will include a combination of various question types.

Survey Language – Don't use acronyms or terminology that all respondents may not be familiar with. Avoid leading language that might sway survey responses in a particular direction and be sure to have someone else review your questions to ensure they are understandable.

Demographic Information – You may choose to gather demographic data such as years with the company, functional area, or job classification. This can be helpful when assessing the survey responses.

Mode of survey – Surveys can be paper-based, interviews (in-person or by telephone), or electronic either by email or online.

Participation – You will want to determine whether you require full participation or if you will be able to gather sufficient information from a random sample. Other considerations include whether you will require employees to complete a mandatory survey or if the survey will be voluntary.

Timing – Will employees complete the survey during work hours or on their own time? Be aware that this might influence participation rates.

Once you have completed the survey design, consider running a pre-test with a small control group of employees. Ask for their feedback on the question clarity, the survey length, and any other issues that might arise.

4. Communicate the Process

Communication is a common concern that arises when conducting employee surveys. Often employers conduct surveys without adequately explaining the purpose of the survey, what will happen with the results and what actions the company might take based on the information gathered.

You can boost participation and increase the quality of the survey responses by being clear about why you are asking the questions. We recommend that clients send an invitation to employees outlining the reasons and goals for the survey along with instructions and timelines for completion. Be sure to include information about the confidentiality of results and how the information will be shared.

5. Conduct the Survey

Consider the time that the survey will be conducted relative to your organizational needs. Avoid conducting the survey during peak business periods and allow adequate time for all participants to respond.

6. Compile Survey Results

Tabulate the responses for rated and forced choice questions and calculate response percentages.

Open-ended and comment questions can often provide valuable information. Look for recurring themes and highlight any specific responses that reflect an important idea.

If you have included demographic questions or have set up response collectors by groups, you will also be able to compile responses by these factors.

7. Present the Results and Follow Through

An important step in the survey process is presenting the results to the survey participants and other stakeholders. Decide how you will present the results: Will you provide information on specific question results or will you present the responses in aggregate? You will also have to decide how to present the results (presentation or written report).

Now that you have the results of your survey, the work doesn't stop here. You will likely have identified an opportunity, a need for change, or an organizational gap. You conducted the survey and received answers to your questions. Now it's time to take action.

If you develop plans or initiatives based on the information gathered, provide employees with progress updates, linking these projects to the survey results. This is vital to the success of future surveys. Your employees will feel their input was valued, strengthening their trust and commitment to the organization, and will be more willing to participate in the future.

Follow these Seven Steps to Conducting Employee Surveys and you will be sure to gather the information you need and lead your organization to higher levels of success.

Content Editors or Webmasters: You may reprint this article providing you include the following “About the Author” information in its entirety. (Including a hyperlink to www.LeadingforLoyalty.com):

Wendy Phaneuf is a professional speaker and author and a global expert in employee motivation and retention. Wendy is also the Founder of The Training Source and www.LeadingforLoyalty.com — a one-stop information source that helps leaders and their organizations enhance employee motivation and retention.

The Training Source

Unit 25 – 308 Westwood Drive Winnipeg, Manitoba, Canada R3K 1G7

Phone: (204) 831-5078 **Email:** wphaneuf@thetrainingsource.ca