

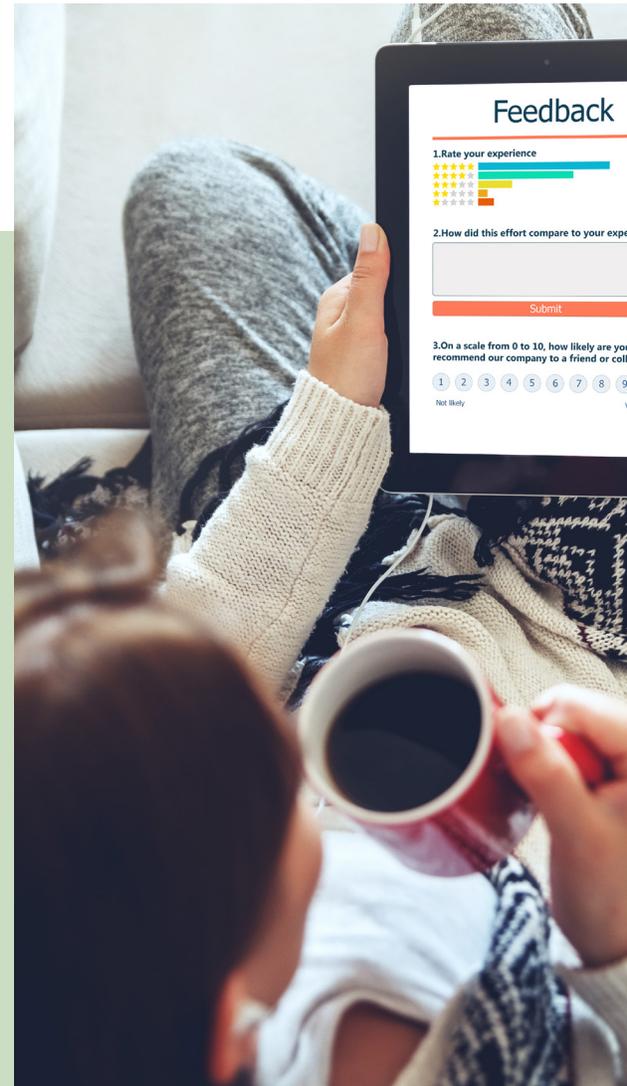
Guidebook to Pre-Survey Success

How to ensure an effective survey experience from the start



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About this eBook

As you start on your journey to gather employee feedback, there are certain steps you can take to set yourself up for success, all before you send a single invitation. Whether you want a survey strategy or full employee experience strategy, you need to consider buy-in, intentionality, survey design, and communication. With a little guidance and support you will find that it can be quicker and easier than you might expect. This guide will walk you through the steps to take to ensure that you can gather specific, actionable feedback and leverage that into better decision-making. This resource assumes that you already have a software solution at your fingertips. If you don't yet have software to help you run an effective employee survey, [let's talk](#).

1

Leadership Buy-In



Leadership Buy-In

Having executive buy-in and support before you launch is critical to the success of your survey or your employee experience strategy. To achieve this, you need the support of an executive sponsor and to communicate the survey's purpose to leadership. [Research from Prosci](#), a leading change management solution, shows projects that have an extremely effective leadership sponsor are likely to meet or exceed objectives more than twice as often as a project with an ineffective sponsor.

In fact, sponsorship has been at the top of the list of key contributors to project success in all of Prosci's benchmark reports since 1998.

How to Excel as a Sponsor

What does it mean to be an effective sponsor? It doesn't have to be a major commitment, and there are three easy ways for a leader to be an effective sponsor, according to Prosci:



We have found it most successful when you identify an executive sponsor before any other actions are taken. The sponsor is given templates to communicate their support for the employee survey process before invitations are sent. Communication templates may also be pushed throughout the survey process when needed (i.e., low participation, employee questions/concerns).

2X Projects with an effective executive sponsor are twice as successful than those without one

Employees will be more likely to participate in a survey when they hear about how important it will be to leadership and that their feedback will be taken seriously. Furthermore, when this communication from top leadership reaches managers, this will also help survey participation as those managers are more likely to promote participation and engage in the survey process as well.

Minimize Defensiveness

Another reason initial support from leadership is important is to avoid unnecessary ego and defensiveness. It does not become obvious until later in a project, but let this next story serve as a cautionary tale on the value of gathering buy-in incredibly early, before you collect feedback.

Imagine for a moment you are done collecting employee feedback on a survey event. You did not ask for an executive sponsor for the project, nor were any of the details communicated with the leadership team before the project started. They knew there was some sort of a survey happening, but none of them were included in discussions about the project or given a high-level overview of what was coming and why it would be beneficial to the organization. The leadership team is now gathered to attend a presentation of the feedback results and recommended next steps. Some of the data points indicate employee perceptions that leadership is not effective. People start questioning the reliability of the data, the survey questions asked (which we will refer to as “survey items” from here on out), the timing of the survey event, etc. They may feel blindsided by the feedback and act defensive, instead of taking the feedback objectively. As a result, the meeting becomes unproductive and it is difficult to agree on actionable next steps.

Now imagine the same scenario, but with early buy-in and support from leadership, including an executive sponsor who has been communicating the importance of the survey feedback and a leadership team who received insight on the project details. The feedback is the same, but the response to the feedback turns from defensive and upset to accepting and challenged to move towards action.

“...[they] act defensive, instead of taking the feedback objectively”

These are not make-believe scenarios; they are real situations we have observed and are a true testament to the power of buy-in. We have actually been in the room when leaders tell their teams things like “We knew this feedback was coming and we knew that it might feel painful to hear some of it. But we also know how important it is to listen and take action so we can improve.” Does this mean you have to have your leadership involved at every step of the process? No. But it means that taking the time and energy up front to communicate high-level information and get executive sponsorship will pay off in a big way.

2

Intentionality

Intentionality

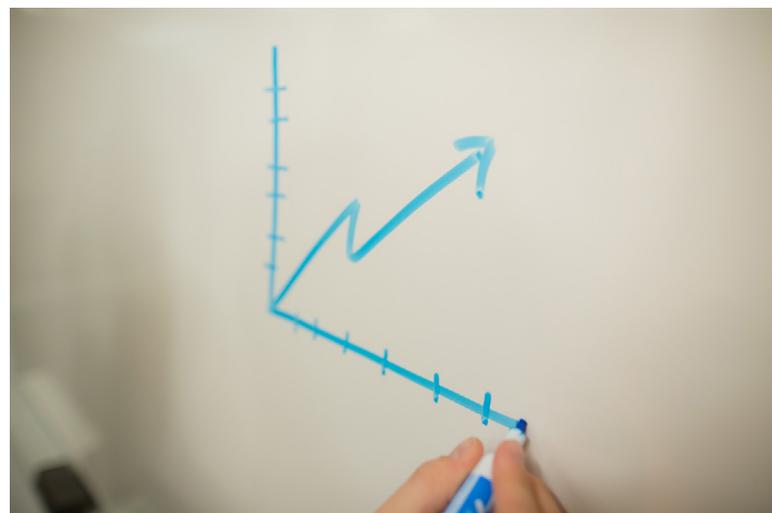
Gathering feedback from your employees is a powerful way to gain perspective and understand opportunities for improvement. Do not diminish the strength of this feedback by neglecting to look ahead and create an intentional strategy. Here are a few examples of the positive outcomes our clients achieve when they build an intentional survey strategy:

Knowing Your Limitations

One client met with us to create their employee experience strategy for the first year. We discussed their needs, their current reality, and their bandwidth. This client knew they needed answers, but also knew they didn't have the resources right now to launch several surveys. So, we helped them pick a starting point that felt doable, and they decided to focus on one survey with great feedback and plenty of time to generate and execute upon action plans. This client knew their current reality and created a strategy they can execute well, rather than trying to answer all the questions with all the surveys right now.

Growing & Adapting Your Strategy

One client found that employees were leaving due to the immediate supervisor relationship, specifically due to issues with managerial soft skills in areas like trust, communication, empathy, and feedback. So, the client decided to act on this feedback by having all managers attend a series of soft-skills trainings. By continuing to collect exit feedback as the trainings took place, the client noticed an improvement where "immediate supervisor" went from being the top reason for leaving to being the 10th highest reason for leaving. In addition, favorable perceptions from current employees increased significantly. They effectively impacted turnover and were able to quantifiably measure that impact due to their willingness to adapt the strategy as they acted on their feedback.



Below are a few questions that you should answer to best set yourself up for success:



Timing

Are there any major events, projects, or upcoming changes that may impact your ability to gather employee feedback?

Examples may include benefits open-enrollment, a large compensation change, heavy vacation/time off periods, and heavy production times. You can't anticipate everything, but it's best to schedule an employee feedback event after considering other timing factors



Population

Are you asking the right questions of the right population?

Figure out what questions you want answers to, then decide which population is right to help answer those questions. A few examples can include:

- Why are employees leaving?
- Do all employees feel like they are included and they belong?
- Are the changes we made to our compensation plan for <insert job title here> having the right impact?
- What are people's first impressions of our company when they're hired?



Survey Cadence

Do you have enough bandwidth to act on the amount of feedback you want to collect?

It is not realistic to survey your employees once per month if you don't have the ability to act on the feedback monthly. Determine what feels realistic and set your cadence accordingly.



Participation

What are your best options for sending out survey invitations? How will you ensure everyone has a chance to provide feedback?

Common survey invitation options include email, SMS text, phone calls, and kiosks.

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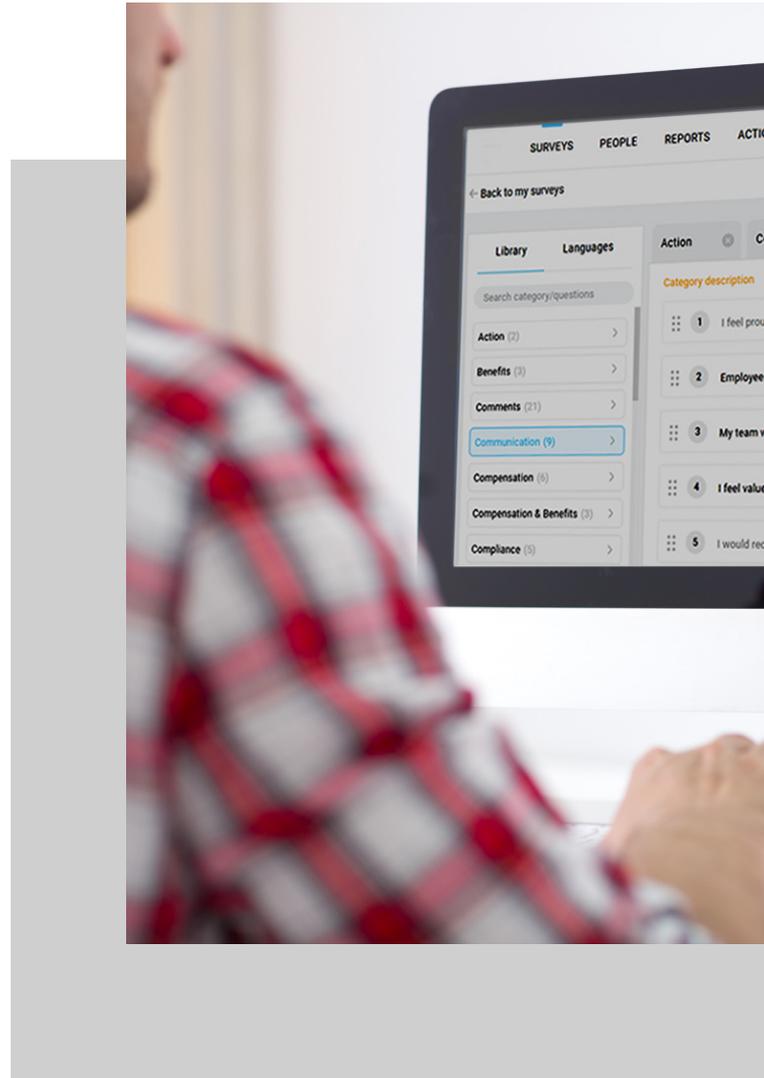
Survey Design

Survey Design

A well-designed survey means the data you get will be helpful, understandable, and actionable. Whether you're designing from scratch or customizing a reliable survey template, your survey will perform best when you design with a focus on survey length, survey item types and answer choices, and survey item construction.

Survey Length

We have found that surveys are most effective with about 40 items. This allows for specificity – for example, seeing data for multiple supervisor survey items such as “my immediate supervisor provides recognition for my accomplishments” and “my immediate supervisor holds people accountable” feels much clearer and more actionable than seeing data for one supervisor item such as “my immediate supervisor is effective.” This is also short enough to minimize the risk of rater fatigue and low participation. That said, the length of your survey also depends on the type of information you want to receive. If you want to gather quick feedback on one single topic, a survey with five items may be best. If you have multiple topics to cover, don't be afraid to increase your length in order to ask enough of the right kinds of items.



Survey Item Types & Answer Choices

Most employee feedback surveys include both quantitative (numbers-based) and qualitative (word-based) answer options, and you should feel free to use these multiple item types and answer choices. But, how do you choose? Here are some points to consider:

Keep your quantitative answer scale consistent. People Element recommends using a 1-5 Likert scale for single-select survey items. A Likert scale is a bipolar scale that measures the extent to which a respondent agrees or disagrees with

a statement. If you choose a 1-5 Likert scale, keep the same scale throughout the survey. Don't switch from a 1-5 agreement scale to a 1-10 likelihood scale, then to a 1-5 frequency scale. Make sure you have the right answer set for your survey item type. Are you asking a yes or no question? Use a yes/no answer set. Do you want people to choose one answer from a set list of options? Choose a drop-down answer set.

Whenever possible, group the same answer choices together. Avoid skipping from a 1-5 Likert scale item to a yes/no question, then to an open-ended question and back to another Likert scale item. This helps speed up the feedback process for the participant and minimizes the risk of them mis-reading an answer set and responding in a way they don't intend.



Survey Item Construction

The Harvard University Program on Survey Research's questionnaire design tip sheet says *The ideal question accomplished three goals:*

It measures the underlying concept it is intended to tap

It doesn't measure other concepts

It means the same thing to all respondents

This very well covers a lot of the mistakes we see in survey item construction. Here are some tips for great item construction that will fix common mistakes:

Do not use double-barreled items.

Mistake: My supervisor is respectful and trustworthy.

Fix #1: Either – My supervisor is respectful OR My supervisor is trustworthy

Fix #2: Two separate statements – Q1: My supervisor is respectful; Q2: My supervisor is trustworthy

Use clear, simple language that all participants are likely to understand.

Mistake: The SLT's strategic implementation of a new SaaS solution was effective.

Fix: The company's move to a new benefits software program was successful.

Avoid using vague measurements.

Mistake: My supervisor checks in with me often.

Fix: In the past month my supervisor has checked in with me at least one time.

Do not ask leading questions

Mistake: If you struggle with the current time tracking system, how can we make it better?

Fix: Do you have any feedback regarding the company's current time tracking system?

While this may seem like a lot to keep track of, survey design is a crucial step and will determine the data output you receive, so it's good to get it right. For this reason, People Element offers its clients a professional survey design review upon request, which includes constructive feedback and recommended edits based on all these survey design points.

4

Communication Plan

Communication Plan

Communication can make or break your survey, and this is no exaggeration. If employees know that an invitation to provide feedback is coming and who it is coming from, they're likely to trust the invitation. If employees don't know to expect an invitation for feedback, they are likely to think the invite is not real and ignore it. Or, they will do exactly as you've told them to do in your data security trainings and report unexpected emails with survey links as spam or phishing.

Like all other tips for survey launch success, your communication plan doesn't need to be overly complicated or take a long time to create and execute. Here are three points to consider in order to build an effective survey launch communication plan:

Identify Best Channels for Communication

What communication channels work the best for your organization? Make a list of effective communication channels and determine which ones are right for messages about your survey.

Do you have a difficult-to-reach population? How are you ensuring they receive timely communication about your upcoming survey?

Use Change Management Communication Principles

Prosci uses a tool with the acronym ADKAR for effective communication of change. All of these steps are important items to make sure you cover with your survey communications. When we see great communication that covers these points, we see higher survey participation.

Awareness:

Tell people why you want their feedback

Desire:

Tell people what's in it for them by giving their time and feedback

Knowledge:

Tell people when/how/where the survey invitations will come and how their feedback will be reported

Ability:

Tell people how they can provide feedback

Reinforcement:

Tell people the impact their feedback has had in the past and will have again with this survey

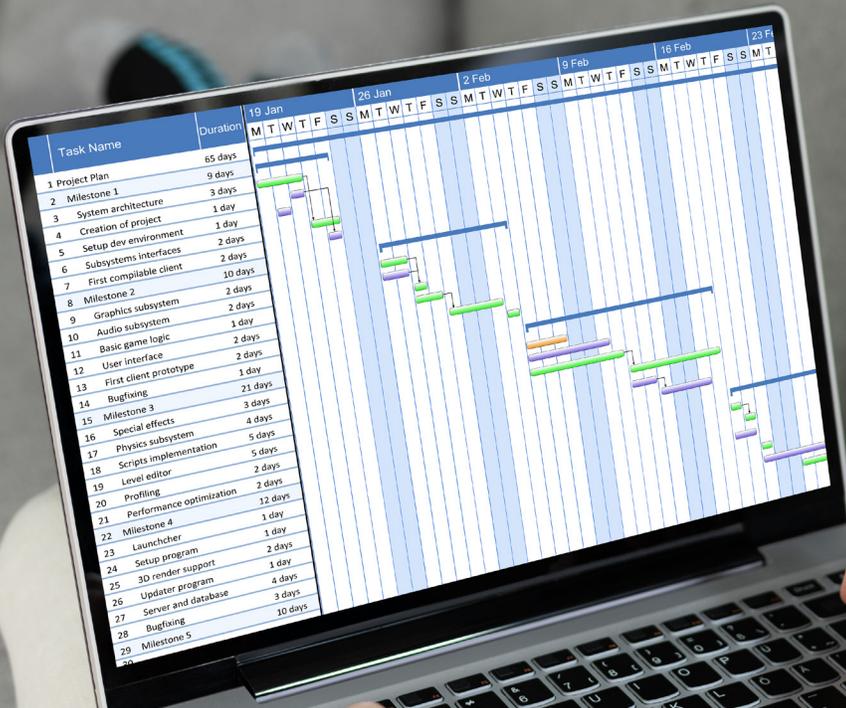
Start Communicating the Post-survey Information Early

To alleviate concerns and create comfort with the survey process, it is important that your participants understand what will happen with their feedback if they give it to you. Provide a brief explanation of how feedback will be reported and who will have access to the survey data.

If this is not your first time collecting employee feedback, remind people what actions were taken last time their feedback

was collected. This reminder serves as confirmation that a person's time and effort are worth it because they know their feedback and opinions were heard last time.

This may seem like a lot to communicate, but most of this is typically covered in a high-level email or one-page flyer. To save you time from having to build these from scratch, People Element has resources available for your communication plan.





Following these steps and best practices for your survey launch will go a long way toward getting great participation and clear, actionable data, which are two common measurements of the success of an employee feedback survey. Should you need additional support along the way, People Element is here to help at every step, because your success is our top priority.

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