

CONDUCTING AN EMPLOYEE ENGAGEMENT SURVEY



THE COMPLETE GUIDE

MEASURING EMPLOYEE ENGAGEMENT

You already know engaged employees are more productive, profitable, and likely to stay at your organization—what you might not know is how to effectively get and keep them engaged.

That's where conducting an employee engagement survey comes in.

Achieving and maintaining a culture of engagement begins with checking the pulse of your organization.

Understanding your employees' engagement level is critical to creating a culture of engagement and driving results. The first step is collecting employee feedback, through a combination of engagement, pulse, and lifecycle surveys.

This guide will walk you through the steps and best practices for conducting employee engagement surveys.



TYPES OF EMPLOYEE SURVEYS

Utilize three different survey types to effectively measure an organization's engagement: engagement, pulse, and lifecycle surveys.



Engagement

An organization-wide survey that includes all employees and is usually conducted annually. The engagement is the traditional "engagement survey," used to measure employee engagement across the organization. It is especially helpful in identifying overall trends and creating benchmarks.

Pulse

These fast, easy-to-implement surveys are designed to collect light-weight employee opinions. A pulse survey offers a quick way to follow-up on engagement items or receive real-time feedback on everyday workplace initiatives.

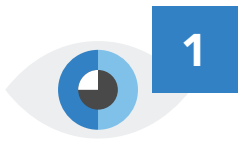
Lifecycle

These measure employee opinions at a specific point in their tenure (e.g. new hires or tenured employees). Lifecycle surveys provide a unique opportunity to better understand employee perceptions during key milestones.



Measuring employee opinions is only one piece of your overall engagement strategy. Without an organizational mindset dedicated to action, shared by leaders, managers, and employees, authentic engagement will not follow.

5 BENEFITS OF ENGAGEMENT SURVEYS



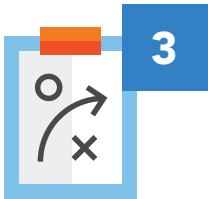
1 Get an Accurate, Holistic View of Employee Engagement

Surveying every employee gives you a more accurate and comprehensive view of your organization's engagement level. Gathering organization-wide feedback consistently allows you to assess the specific strengths, weaknesses, opportunities, and threats you face each year.



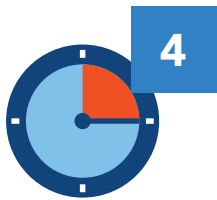
2 Compare & Contrast Among Different Employee Groups

Collecting comprehensive employee feedback on your engagement survey gives you the ability to compare and contrast specific metrics among different employee groups. Do remote employees feel connected to their teams? Do tenured employees feel recognized for their contributions? One employee survey with a set of core items will help you answer questions like these.



3 Determine Commitment Plans & Next Steps

By analyzing detailed reports and comparing them to the organization as a whole, you'll gain a better perspective on where to improve. This insight will help you create specific, targeted commitment plans.



4 Save Time & Resources

Don't overwhelm yourself, your HR team, or your managers with extra work by sending out sporadic surveys, dealing with a hoard of multiple survey set-ups, communication plans, and unorganized data. Avoid this by conducting one annual, comprehensive employee engagement survey.



5 Build Trust with Employees

Exclusion fosters distrust. Conducting one organization-wide engagement survey that collects feedback from every employee sets the precedent that every employee's opinion matters and squashes any concerns of the contrary—before they surface.



SURVEY SET UP



Demographics



Questions



Frequency



Accountability

DETERMINE DEMOGRAPHICS TO TRACK

Employee demographics help you sort your data and identify trends among different employee groups.

Professional Demographics	Personal Demographics
<p>LOCATION: Analyze feedback based on varying office locations.</p> <p>TENURE: Splice employee responses at different points in their career.</p> <p>POSITION LEVEL: Assess feedback trends by employee rank.</p> <p>DEPARTMENT: Examine employee engagement by department.</p> <p>EMPLOYMENT STATUS: Evaluate responses among full-time and part-time employees.</p> <p>PAY TYPE: Check the engagement gap between hourly and salaried employees.</p>	<p>GENDER: Look for engagement trends based on gender.</p> <p>AGE: Analyze workplace perceptions by age group.</p> <p>EDUCATION: Assess the impact education level has on employee engagement.</p> <p>RACE: Evaluate engagement levels for differing ethnicities.</p>



More demographics aren't always better. Avoid asking demographics that you don't plan to analyze. Too many demographics can lead to more work for managers, which can decrease likeliness of follow-up.

COLLECTING EMPLOYEE DEMOGRAPHICS

Now that you've determined which demographics you want to include in your engagement survey, it's time to decide how to gather that information.

Here are two options:

Self-Reporting

Organizations that administer internal surveys might request that employees self-report their own demographics. With this option, you risk:

- Inaccurate information, whether intentionally or inadvertently
- Loss of employee interest due to an increased number of items
- Decreased survey participation and completion rates

Pre-Loaded

We recommend employee demographics be pre-loaded by your survey provider. Pre-loaded demographics give you:

- Accurate information (no errors!)
- Less time spent physically taking the survey, resulting in increased employee interest for the items you care about
- An overall increase in participation and completion rates
- Assured anonymity

INCLUDE A CORE SET OF ENGAGEMENT QUESTIONS

Each engagement survey should contain a targeted measure of engagement. Based on extensive research, we recommend asking questions that focus on three factors—each containing three engagement outcomes that address employee perceptions of a topic.

Engagement Outcomes

Organizational	Team	Work
<p>How connected am I to the organization as a whole?</p> <ul style="list-style-type: none">• Advocacy• Pride• Intent to stay	<p>How connected am I to my immediate coworkers?</p> <ul style="list-style-type: none">• Discretionary effort• Commitment• Acceptance	<p>How connected am I to my work?</p> <ul style="list-style-type: none">• Inspiration• Immersion• Motivation

ADD CUSTOM QUESTIONS

To accurately measure engagement, you should include foundational survey items that address work, team, and organizational engagement. However, your survey should also include items that reflect the uniqueness of your organization. To customize your survey:

- **Add items unique to your organization**

Utilize additional survey items that mirror your organization's unique needs. Did you change your core values? Have you had a change in leadership? Custom items allow you to gather feedback that fits the need of your culture.

- **Add items unique to employee groups**

Many organizations have a handful of specific questions that only pertain to unique groups (i.e. a multi-location organization that has questions for one office location that doesn't concern another). Be sure to include necessary questions like these.

ASK ABOUT SURVEY FOLLOW-UP

"Is this working?" is a common thought that nearly every administrator thinks after implementing a survey. The best way to find out? Ask your employees! After you've initiated your first engagement survey, we recommend adding two or three questions to your reoccurring surveys to gather employee opinions on effectiveness of follow-up.

Some example survey follow-up questions include:

- Senior leadership is committed to responding to the results of this survey.
- My manager shared the results of the last survey with our team.
- Our team developed action plans to address issues raised by the last survey's results.
- I noticed positive change as a result of the last survey.

DETERMINE SURVEY FREQUENCY

Employee opinions change, which is why it's important to ask for feedback regularly. Utilizing an engagement survey, in combination with pulses and lifecycles, will help you keep a pulse on your organization, but first you need to determine the frequency of your organization-wide engagement survey.

Why You Should Conduct an Engagement Survey Annually

Our research proves that organizations surveying annually experience greater year-over-year increases in engagement than those surveying less frequently. On average, organizations that consistently surveyed annually saw favorability increases 2.5X greater than the increases seen among organizations that administered surveys on a less frequent timeline.

Organizations that survey annually see

2.5X greater increases
in engagement

WHY YOU SHOULD INVEST IN ENGAGEMENT SURVEY TECHNOLOGY

Engagement can be measured by one of two processes: using your own internal survey or investing in outside survey technology. Here's why you should leave collecting employee feedback to the experts:

Your analysis is biased.

As much as you try, your organization won't be able to get an accurate read on its own data. Rely on outside technology to keep the survey analysis focused and accurate.

Your employees won't trust you.

In order to provide actionable results that increase organizational engagement, it is critical that your survey is based on accurate data. That might not occur when your employees know that the people with the power to promote (or fire) them are sorting through the results.

You're not an expert.

Outsourcing technology brings a level of experience and insight to your organization's survey that you would otherwise be lacking. Do you have a team of industrial and organizational psychologists helping you write and analyze survey items? Most likely not if you're surveying in-house.

Your reporting capabilities are clumsy.

Can you pull a report at a moment's notice? Can you build in an organizational hierarchy? Can you show correlation? Can you track employees as they move through the company? Can you integrate historical data points? Even if you answer yes to all these questions, your reporting software is simply no match for technology dedicated to reporting on your engagement levels.

Your time is valuable.

Whether you're in HR or management, measuring employee engagement is not – and should not be in your job description. Improving employee engagement is what you should be focusing on. You don't have to be an engagement expert to know that the opportunity cost of spending more time on survey administration is less time available for actually increasing your organization's engagement.

WHICH TECH IS RIGHT FOR YOU?

Great employee engagement vendors can improve efficiencies, make your job easier, and provide you with great engagement insights—but they're not all created equal.

Put the tech to the test, if it doesn't have the capabilities of the checklist below, move on and find one that does.

- ✔ **Survey Customization**
The technology you choose should have the capability to mix and match survey elements so that it fits your culture.
- ✔ **Quick Survey Launch**
Make sure outsourced technology minimizes the timeline of your survey project.
- ✔ **Smart Technology to Crunch the Data**
If the technology doesn't have the capability to effectively analyze your organization's data, and make it easy for managers to sort through and take action, then what's it good for?
- ✔ **Flexible Survey Ability**
An effective engagement initiative incorporates more than a engagement survey. Technology that supplements the engagement survey with pulse and lifecycle surveys is crucial.
- ✔ **Online Reporting System**
Find technology that is up-to-date and streamlined. Archaic and inefficient reporting will hold your organization back from disseminating your data quickly, gaining leadership and manager buy-in, and acting swiftly on results.
- ✔ **Limitless Analysis**
Don't settle for technology that doesn't give the full benefit of unlimited analysis. You've provided the employee feedback, now it's on the technology to provide strong analysis that can result in transformational action.
- ✔ **Manager-Focused Reports**
The technology should empower managers to take an active role in their teams' engagement. This means reports that are customizable to a manager's team and fits seamlessly into the manager's processes.
- ✔ **Helpful Ideas In-Tool**
Not all managers are born coaches. Find technology that gives them in-tool guidance and resources to target high-impact opportunities and evolve them into the people-focused team leaders your organization needs.
- ✔ **Commitment Plans & Tracking**
An employee engagement survey is only as good as the action that follows. Find technology that offers effective next steps to act on the analytics they provide, and ways to track the changes being made.

CONGRATS!

Whew! You made it! You now all about engagement surveys, including why they're important, how to set them up, which questions to ask, and what to look for in the technology that will make it seamless.



MODERN TOOLS FOR EMPLOYEE SUCCESS

Haven't found the technology that fits all the recommendations we've outlined? See if our tools measures up.

[LEARN MORE](#)