

At first glance it might appear to be a straightforward task to measure the level of employee engagement in an organisation. In the past, you may have heard people say, "It's just a case of putting together a few questions, asking employees to complete them, and then looking at the results, right?" But there's a lot more to it than that.

Employee engagement surveys require a detailed project plan just like any other business initiative. Many of the most successful approaches to employee engagement surveys are tailored to that organisation, and there is no one size fits all version. While each survey will require a different plan, this article aims to highlight some of the key aspects for consideration in the setting up of an effective employee engagement survey process, and how to use that data in a way that benefits your organisation and your people. Your organisation's culture, employee profile, leadership approach and even geographical location will dictate the format and content.

## Why conduct engagement surveys?

Employee engagement surveys help organisations identify and build on the strengths and talents of their workforce to gain a competitive edge. Many HR professionals and senior managers will agree that when people are engaged, they are more productive, perform better and deliver more in terms of results for the organisation. Routine engagement surveys not only give you an idea of the pulse of your staff, they also allow you to measure fluctuations in engagement as you implement various initiatives, or as your organisation undergoes change.



## Planning

### Measuring the starting point

Before undertaking the first survey, your organisation should objectively consider the state of the current culture by encouraging the sharing of open and honest feedback from your people. If this is new to your employees (and of course people will have worked elsewhere and therefore have likely been exposed to these things previously), they might be a little wary. This is an opportunity to use the engagement process to tackle possible concerns head-on and throughout the survey process, and in particular through communications. This potentially significant obstacle can be overcome and minimised using the engagement approach as it is designed to do: to change culture. Throughout the survey process, and well into the analysis and communication of results, employees will have questions and it can lead to great discussions. This means your line managers will often be the spokespeople for the engagement initiative, and you should support and enable them to clearly understand and communicate the reasoning, process and objectives of the survey.

### Including senior leadership

The senior leadership team must commit to improving engagement, and help make the survey process a success by sharing their enthusiasm and commitment to the rest of the organisation. So it is critical to meet with the leadership team in the planning phase to set the scene and to identify the objectives together. Note that simply running a survey and generating results should not be on this list. The objective has to be for leaders at all levels in an organisation to commit to take action based on the results that are designed to drive up the level of engagement. And, they must be role models to support the whole process.

Here are a few questions to start the discussion with senior leadership:

- What are the objectives of the engagement survey?
- How often will we repeat the survey process to measure change in engagement?
- What is the timeline?
- What should the role of senior leadership be in the survey and engagement process?
- What support can we offer line managers to communicate the survey process?
- How should the survey process be communicated to the employees?
- Will the results be shared with all employees?
- What changes can/will we realistically make in response to the survey results? Is this within our budget/timescales?
- What does success look like?

One of the benefits of using the approach described in this article is that it gives you an outline with which to start a discussion with the senior leadership team about the objectives and rationale for measuring the level of employee engagement. This is because it lets you skip the tactical discussions about **how** it will be done and puts the focus on **why** it should be done.

### Setting objectives

Every person included in the planning process will have slightly (or wildly) different objectives for the survey and improving engagement. Make sure that every person in the team involved has their voice heard, but then narrow down the objectives – which in some cases means making discriminating choices. You can't measure everything and you can't

fix everything at one time. So identifying the high priority objectives is crucial and should be the focus of the survey. For example, these could be the areas where productivity is falling, initiatives are already in place or areas that competitors are focusing on. If the organisation is going through a period of transformation then the employees' engagement, or lack of, with the change can be explored through survey items focused on communication and involvement.

Shaping the survey to focus on what is important to the leadership team in this way will help to overcome any resistance that might be encountered. But don't be tempted to include survey items relating to everything discussed. Think of what the employee would be faced with if everything was included, short and sweet really does work best.



### Communication

Start communicating the what, why, when, how of the survey process to employees as early in the process as possible. Think about it from their point of view – would you answer a survey openly and thoroughly if you didn't know why you were being asked to complete it, how the results would be used, and if your answers could be used against you personally?

Communicating the survey plans and objectives helps ensure that all employees know what to expect, which is particularly helpful if you intend to repeat surveys on a regular basis. Subsequent communications can focus on roles and

responsibilities and any manager/employee training that might be required. Senior leaders have a key role to play in positioning and supporting the survey and emphasising that action will take place to address whatever the results show.

## Survey design

Keep it simple. The participation rate can be very adversely affected if employees are daunted by the time it will take to complete the survey or if they feel the questions are irrelevant to them. Most people in your organisation are very busy so a short, focused survey that takes approximately 15 minutes or less to complete will be most well received. Make it a blend of open-ended and closed-ended questions so you have both quantitative and qualitative data. You may also find in the data that you want to go back and do sample interviews to get even more qualitative data if the results surprise you.

## Keeping it confidential

Decide upfront what demographic information is to be gathered in the survey process. This is a balancing act between gathering sufficient information to enable the data to be cut in a variety of different ways to answer the 'what if' questions, with not compromising individual confidentiality and making it onerous to complete. For example, if you are a small organisation with only one female employee and you ask gender on the survey, then she is less likely to be honest and authentic because she knows her answers can be easily singled out and identified as hers. The same goes for asking what department an employee is in if there are only a small number of people per department in that organisation. While these are just two simple examples, keep in mind that your staff will be more likely to complete a survey if they feel their answers are anonymous and that results are measured as a collective. So make sure to only ask the questions that you feel are necessary to analyse the data effectively.

## Cultural differences

If the survey is to be taken by employees from other countries and cultures then it is best practice to have the survey items checked both for the accuracy of language translation and cultural fit. If possible, have a native speaker of each language translate so that the correct phraseology and wording is used to ensure consistency of meaning for each item. This is very important when there is a need to compare results from different countries.

Note that sample survey questions purposely are not included in this article because they will be different for every organisation. However, it's not the questions themselves that are the most important part of the process. It's more about how it opens the lines of communication across the organisation (particularly between employees and their line managers, and amongst peers) and the changes that are made as a result of the survey.

## Sharing results

Even leaders who are competent and experienced at providing feedback and holding performance discussions with their direct reports can feel daunted and unsure about sharing survey results with them. This is because no matter how much it is explained that the results are not personal, it is hard not to see them this way. So this combined with a need to explain how to read and interpret the results report are good reasons to provide training for leaders. At a minimum, the training should cover how to interpret the results report, how to facilitate the discussion and how to create an effective action plan. Note the word 'discussion' there. This isn't about creating a memo and sending it around with a set of numbers. Encourage line managers to have meetings with their direct reports, especially in group settings where the team can interact and communicate openly. It must be made clear to leaders that this is

not an opportunity for them to find out just who said what. This can only be counterproductive. Rather, it's a chance to really find out how employees are feeling about their jobs and what changes could help them do their job better.

### Taking action

There are as many different ways to survey employees as there are organisations in the world. The specific questions aren't the most important thing though; the critical components are the actions that follow. There is no reason to waste resources on a survey that does not lead to change within the organisation. Every company has areas of opportunity, especially when it comes to getting their employees more engaged.

At the conclusion of the survey, crunch the numbers and get an analytics report together. But then go straight back to your objectives and analyse how the results measure up against what you want to achieve in terms of engagement and business success. You may find that the areas you thought needed improvement actually don't, and likewise that there are areas where improvement is needed that come as a surprise to you. This is the time to include your line managers in the change and the communication of those changes because they are the ones most likely to influence engagement on a day to day basis.

The key is that real change needs to happen if the goal of the survey truly is to improve employee engagement. This also means repeating the entire process on a regular basis so you can measure the fluctuations in engagement following the changes you make as a result.



### One final thought...

Remember that employee engagement surveys should not be carried out as a tick box exercise. Don't send out your survey and then presume you've addressed your employee's engagement successfully. Be prepared for a meaningful follow-up. If you ask for an opinion and are then seen not to act upon it, your survey could actually end up being counterproductive. The results should lead to change in the organisation, if they show that change is needed. So, as with all things, the measure of success is not just in how high the scores are or how far they change in the right direction, but in whether the people 'feel' it and that it lives throughout the organisational hierarchy, be that flat or multi layered. To be a useful contributor, engagement has to impact at both an individual and organisational level. Success depends on how it is executed by each and every leader in the organisation and with each individual.

## About the authors

**Helen Studzinski**  
UK Client Relationship Manager



Helen is an experienced coach and learning professional with over twenty years' experience facilitating and developing senior leaders and their teams to enable them to meet the challenges they face in their personal and team relationships to deliver business results.

Since joining Insights in 1999, Helen has developed a number of long-term client relationships and enjoys working closely with businesses to develop organisational capability. As a member of the Association of Coaching (AC) and an MCIPD, Helen believes that enabling people to be their 'best self', both as individuals and leaders, impacts the discretionary effort or energy they bring and leads to greater collaboration, engagement and innovation.

**David Eccleston**  
Associates Ltd and Insights Licensed Practitioner



David has over twenty five years' experience in leadership development and talent management, during which time his passion for diversity and inclusion developed. Working for a global US corporation with a proud tradition of groundbreaking work in the D&I arena enabled him to create, customise and implement a wide range of talent management activities which reflected the diverse needs of its worldwide employees.

David now leads his own consulting firm which focuses on leadership and management development, coaching, enhancing employee engagement and succession management.