Measuring Engagement via Employee Surveys:
How to Keep Line Managers Interested and Involved

Employee surveys have the potential to help companies understand the relationship between human capital and the bottom line. Yet, if not managed carefully, surveys may fail to realize their potential as strategic organizational tools. Why? Because many organizations are successful in designing reasonable questionnaires, generating high participation rates and gathering a lot of good information. But where survey processes most commonly break down is in the "hand off" between a survey team, perhaps working with the assistance of an outside consultant, and line managers throughout the organization.

In the early stages of a survey process – including survey design, survey administration and the processing and analysis of survey data – line managers, while involved, typically play a secondary role to internal survey coordinators or external consultants.

But once information is collected and the attention turns to communicating the results and using them to drive organizational improvements, external consultants (and even internal survey coordinators) rely on line managers to carry the survey forward into the organization. And that's where, in many organizations, problems occur and survey processes break down.

Here are seven recommendations for increasing the commitment of line managers throughout an organization to an employee survey process:

1. BROADEN YOUR FOCUS

Traditional engagement surveys focused on motivational outcomes generally will not measure aspects of the work environment critical to enabling contributions from motivated employees. The old saying, "What gets measured gets managed," may be true, but the corollary is equally true: "What is *not* measured will *not* be acted upon."

It is critical that organizations get people into job roles that draw on their distinctive abilities to contribute, as well as ensuring that they're able to carry out their job responsibilities as efficiently and effectively as possible. As a starting point, consider whether your survey can help you answer these questions:

- *Have "must-win battles" been adequately defined for employees?* Where employees have too much to do and too little time to do it, clarity regarding key priorities is critical to allow them to focus on essential, value-added tasks.
- *Are you avoiding the trap of routines?* Since efficient execution is only helpful if directed at the right targets, work processes need to be evaluated regularly to ensure they're aligned with changing work demands.

- *Are managers treating training as a process rather than an event?* Training should be revisited frequently in dynamic environments. Otherwise, skills and abilities that once made employees strong contributors can quickly become obsolete.
- *Do employees have "specific freedom to act?"* The scope of employees' authority should be clear, so that fear of overstepping boundaries doesn't become a disincentive to taking risks or making even simple decisions.

2. PUT LAST THINGS FIRST

At the time you are designing a survey process, it's important to think ahead to the strategic objectives on the table in your organization and the types of questions a survey could most usefully answer. As noted earlier, organizations are becoming much more strategic in their use of survey data. Many of our clients, for instance, are using surveys to monitor the success of change initiatives, to communicate and track progress toward new organizational cultures, to assist with integration following a merger or acquisition, to inform a new organizational leader, to identify the key drivers of business outcomes (e.g., customer satisfaction, employee retention), or to incorporate employee opinion into individual or organizational performance measures. It is essential to think at the beginning of the process about organizational objectives so you can ensure that useful and actionable data will be available at the end.

You may want to solicit input directly from line managers at the outset of the process to clarify strategic objectives, perhaps by conducting interviews or focus groups, by leveraging existing task forces, or by organizing steering committees comprised of key stakeholders. The goal of your outreach should be to share key information (to avoid a not-invented-here mentality on the part of managers), to get feedback on organizational issues and priorities (such that the survey isn't seen as an add-on activity), and to build buy-in to the process (such that managers don't see the survey as something being done to them, but rather something they own and have influence over).

3. MAKE SURE THERE'S TIME

Just as you need to think about what information you will want to deliver to managers, it is also important to think about when they are going to need that information. Typically, in designing surveys a lot of thought is given to the timing of survey administration, with the aim of generating a high participation rate. But organizations generally devote less attention to the optimal time to receive survey feedback.

From a strategic standpoint, if you can time the delivery of the survey results such that they feed naturally into business planning cycles or strategic planning activities, the survey is much more likely to generate impact. Given the amount of change going on in most organizations, there is seldom a perfect time to conduct a survey. But, at the same time, you don't want to be conducting a survey at a time when managers are going to be too busy to take full account of the information.

4. KEEP IT SIMPLE

In terms of engaging line managers, especially time-pressured managers, it is important to make it as easy as possible for them to get through the information and on to a set of focused action priorities.

When sharing results with managers, focus on the goals and objectives that drove the survey process at the outset. If, for instance, your survey was designed to provide an understanding of how well your organization is doing in living its core values, then feed results

back to managers through the lens of your values framework, so that the connections between the responses of employees and the objectives of the survey are crystal clear.

In a first-time survey particularly, it is also important to make sure that managers are effectively resourced in interpreting the survey data. Such support might be provided through in-person training sessions with managers, written guidelines or toolkits, or train-the-trainer sessions with HR staff or others who will be tasked with playing the role of internal consultants to assist managers throughout the survey process.

Finally, in delivering information, be sure that it is as accessible and action-oriented as possible. More and more, surveys are making use of interactive results tools to make survey feedback easier for managers to digest. Part of the results rollout process involves knowing your audience and the level of detail they expect.

5. PREVENT 'ANALYSIS PARALYSIS'

Analytical tools can also be used to help managers avoid information overload and more readily isolate the key findings coming out of a survey. One of the most critical analytical tools is "normative" benchmarks that help an organization understand how it stacks up against key competitors or other organizations operating in similar locations.

But there is an equally important function of norms that is less often recognized, and that's putting survey results in an appropriate context. We know that what you ask in a survey determines to a large extent what you can expect to get back. If you ask employees in most organizations how they feel about their compensation, they're not likely to tell you they're paid too well. If, on the other hand, you're asking about relationships with co-workers or immediate supervisors, you're likely to get much more favorable responses.

The implication? It is hard for managers to determine whether they should be pleased with or concerned about survey results without some context for interpretation. Not only do typical survey scores vary by topic, but also by industry, with organizational performance levels, over time, and cross-nationally.

6. TAKE ACTION

Don't let a process focus at the action stage of a survey become a barrier to effectively using survey information. Once again, you don't want the survey to be seen as an add-on activity. You are not seeking to improve survey scores for their own sake. You are trying to understand factors in the work environment that impact important organizational goals and objectives. Accordingly, from an action planning standpoint, you want as much as possible to integrate the survey feedback with ongoing organizational activities.

In addition to working through the survey data and taking note of issues that "bubble up," it is equally important to focus on the strategic objectives associated with the survey and work back to the survey to understand what the data tells you about how well you are positioned in relation to those objectives. If, for example, you are looking to increase customer focus or innovativeness, you can work back to the survey (which was hopefully designed with those goals in mind) and call out for managers findings that relate to critical success factors in those areas.

7. FOLLOW THE FLOW

Organizations are often advised not to conduct follow-up surveys until they have succeeded in acting on all survey issues. It is certainly possible to survey too frequently. But a "survey-act-survey-act" mindset ignores the fact that there is an ongoing stream of activity and improvement efforts going on in the organization.

Well-timed surveys can help gauge the progress of these efforts and provide guidance on future directions – even if there is some "unfinished business" from one survey to the next. Once

more, a survey is not an end in itself. When used strategically, surveys are seen as providing periodic metrics that can be used to shape ongoing organizational activities.

MAXIMIZE SUCCESS

Surveys have tremendous potential as strategic organizational tools. But realizing that potential requires organizations engage managers throughout the survey process to gain their active support and participation. You can maximize the likelihood of success in your next employee survey by:

- focusing on engaging as well as enabling employees
- making your strategic objectives the foundation of your survey process
- optimizing the timing, not only of survey administration but also of the delivery of survey results
- giving results to managers in flexible and easy-to-use formats
- using norms and statistical analyses to focus managers on the most significant findings
- integrating survey findings with ongoing business planning and organizational improvement activities
- conducting surveys at regular intervals to ensure effective management of human capital on an ongoing basis.

This white paper is excerpted from the Hay Group report, 'Seven Steps to Measure and Build Engagement – the Right Way,' copyright 2012 by Hay Group Insight. View the full report >