Perspectives

From survey event to listening strategy: capturing the value of employee opinion

Not that long ago, most companies relied exclusively on an annual survey as their sole means of gathering employee opinion on important workplace topics. Today, there are a seemingly limitless number of alternative options, fueled by the combination of advances in technology, a desire to mirror consumer-grade user experience, and a promise of big data/artificial intelligence power and insights. Quarterly, monthly and even daily polls are now possible, along with always-on tools, exit/ onboarding surveys and a broad range of qualitative/unstructured alternatives (e.g., online collaboration platforms, social media sites). While there has been much attention paid recently to what *can* be done, we believe attention needs to turn to what *should* be done. This paper answers that need. In it, we classify the broad set of solutions that exist today and how they can be most intelligently combined to form a comprehensive listening strategy that will provide the most value.

First principles

To truly start at the beginning it's important to understand why we ask employees for their opinions in the first place. Over the years, the traditional employee survey has been used to meet an increasing number of goals. Many of these goals are obvious but others are far less so, and some may have never been fully articulated or understood by company stakeholders. Indeed, in any given company different leaders may view the exact same survey as primarily intended to achieve very different goals. This has resulted in the traditional employee survey acting as a very blunt instrument. To understand how to best revise and supplement the employee survey, we must first identify the many specific goals it currently serves.

Based on in-depth conversations with clients and subject matter experts, we have identified 12 fundamental goals that companies seek to achieve by formally collecting employee opinion. While many more goals may exist, we believe these 12 provide a reasonably comprehensive set.

12 fundamental goals

1. Measure and improve company culture/climate.

2. Measure and increase employee engagement and its drivers.

3. Inform the design and rollout of companywide programs (e.g., rewards, career development).

4. Demonstrate that leaders care about employee experiences and opinions.

5. Monitor and address employee sentiment/well-being.

6. Monitor and enhance team effectiveness.

7. Gauge reactions to discrete organizational changes (e.g., restructuring).

8. Assess progress on a particular company goal or initiative (e.g., to improve innovation).

9. Improve employee onboarding (e.g., accelerating time to full productivity).

10. Better understand and reduce employee turnover.

11. Expose problems and concerns early on, before they escalate and become worse.

12. Surface novel suggestions on how to improve business performance.

As we look across these 12 goals, we see important differences along two dimensions:

- How often the issues being measured are likely to change

- The breadth of information required to fully understand each issue

Elaborating on these differences and their implications enables us to see clearly the ideal approach organizations should take with their listening strategy.

The foundational census survey event

Some of the goals on our list focus on issues that change relatively infrequently and require a broad amount of information to truly understand and address. For example, company culture, which changes quite slowly in most cases (despite our best efforts), requires substantial information to be truly understood in all its forms across the company and to enable predictive modeling against business outcomes (e.g., financial performance, customer satisfaction). The same can be said of sustainable engagement, defined as committed effort to achieve work goals in environments that support productivity and maintain personal well-being.

Therefore, to assess issues such as company culture and sustainable engagement, a broad census survey administered on a periodic (annual or biennial) basis is the most logical solution. The same solution would also make the most sense when gathering input on companywide programs.

Opinions of such programs may vary substantially for different segments of the company and thus a broad survey is important. Further, most companywide programs are not going to be substantially changed more often than annually, and thus collecting data on a quarterly or monthly basis provides no value. Finally, demonstrating that leadership cares about employees almost by definition requires a broad census survey because of its fully inclusive nature. Enabling senior leaders with enough time to respond to survey results in a meaningful way, and to be seen to do so, also likely lends itself more naturally to an annual event survey.

Strategic pulse surveys

Other goals on our list involve issues that may change more frequently over time and are generally narrower in focus. These include team effectiveness, employee mood/sentiment, reactions to recent initiatives or progress against a particular area of focus. At Willis Towers Watson, we label these Team Check, Sentiment Check, Initiative Check and Progress Check, respectively. Note that each of these goals could be well achieved by surveying only a segment of the population, for example, one's immediate team when measuring employee sentiment or team effectiveness, or a random sample of affected employees when gauging reactions to change or progress against a goal. Therefore, to complement the large-scale census survey an effective listening strategy should involve focused pulse surveys that provide less comprehensive but more frequent information on these types of issues. Importantly, these pulse surveys are deployed to only the segments of the population for whom these issues apply.

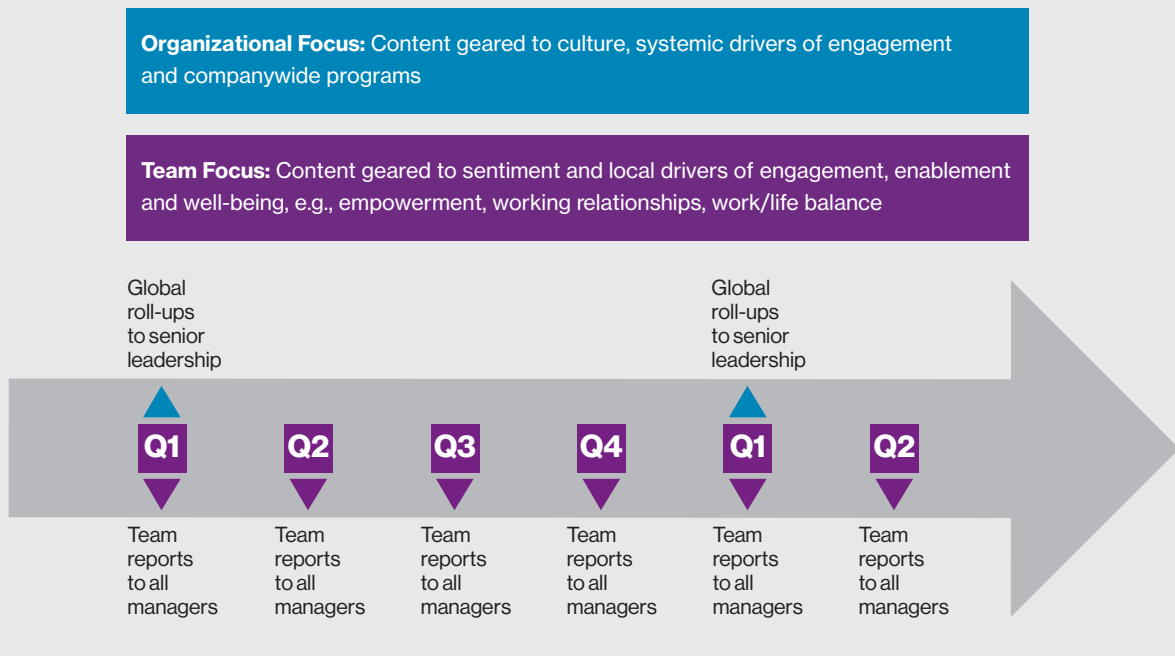## Combining census and pulse surveys

By articulating our specific goals and identifying the right tool for each we can see more clearly the limitations of relying solely on a traditional annual survey to meet disparate objectives. An annual assessment is too infrequent for narrower issues that change often, but increasing frequency would be counterproductive for the monitoring of broader, more stable issues. Further, the comprehensive data required to measure culture is unnecessary to assess team effectiveness, but a short survey of a small sample would be insufficient to gauge company culture. Only through a combination of both a broad annual survey and more frequent, focused pulse surveys are we able to gain the insights we need in the most efficient manner.

There are several models for how to design, deploy and manage pulse surveys. One approach is simply to enable local leaders and managers to conduct pulse surveys on an as-needed basis. This has the advantage of maximum flexibility but allows for little in the way of quality control or coordination across separate efforts. A second approach is to create a center of excellence that provides guidance, coordination and the tools enabling leaders to deploy pulse surveys as their needs emerge. A third and perhaps most efficient approach is to design a pulse survey program in advance, such as deploying a short pulse survey for all managers across the company once a quarter. This has the advantage of enabling roll-ups on a common set of questions.

Figure 1. **Creating an employee listening strategy: the right tool at the right time**

Listening tool	Best for issues that...	Where you need...	Examples...
Large-scale "event"	Change more slowly	Broad data	▪ Improve culture ▪ Increase engagement ▪ Tailor company programs ▪ Show we care
Pulse survey	Change more quickly	Narrow/Focused data	▪ Drive team effectiveness ▪ Support specific change ▪ Measure progress on issue ▪ Monitor sentiment/well-being
Onboarding/Exit	Change with employee milestones	Event-focused data	▪ Reduce turnover ▪ Improve on-boarding
Always on/Social media	May change quickly, thus requires regular monitoring	Unstructured data	▪ Uncover problems early ▪ Surface improvement ideas

Figure 2. **A quarterly census with variable content and reporting**

Organizational Focus: Content geared to culture, systemic drivers of engagement and companywide programs

Team Focus: Content geared to sentiment and local drivers of engagement, enablement and well-being, e.g., empowerment, working relationships, work/life balance

Global roll-ups to senior leadership

| Q1 | Q2 | Q3 | Q4 | Q1 | Q2 |

Global roll-ups to senior leadership

Team reports to all managers — Team reports to all managers — Team reports to all managers — Team reports to all managers — Team reports to all managers — Team reports to all managers

An effective listening strategy will also include a mechanism to capture the opinions of employees as they join and leave the company throughout the year to improve onboarding and address any retention issues.

A quarterly census with variable content and reporting

Extending this logic further, we can imagine a survey program that involves a quarterly survey of all employees with variable content and reporting. Specifically, one quarter every year a survey could focus on broader issues that change less frequently. However, surveys in all four quarters would include more focused content covering issues that change more often. In a corresponding manner, senior leaders would receive reports of high-level issues annually because the broader issues (i.e., culture, systemic drivers of engagement) are often best addressed by these leaders. In contrast, team leaders would receive reports of local-level issues every quarter (see graphic below) because narrower, faster-changing issues are often best addressed by leaders of teams (at all levels).

Onboarding and exit surveys

Back to our original list of goals, we can see that improving onboarding and reducing turnover, are unique in that they have an even faster pace of change than those mentioned previously. However, in this case what's changing is not necessarily the issues being measured, but rather the survey respondents themselves. Because a focus on these issues requires collecting information from employees at a particular point in their individual life cycle (i.e., when they join or leave), employees become eligible on a continual basis.

Therefore, an effective listening strategy will also include a mechanism to capture the opinions of employees as they join and leave the company throughout the year to improve onboarding and address any retention issues. Ideally, these surveys can be set up to deploy automatically based on updates to an HRIS system, with aggregation of results provided on a quarterly basis.

"Always on"

The final two goals on our list, exposing problems early on and surfacing novel ideas, involve assessing change that is *continual* because an important suggestion or provocative warning can be raised at any time. In addition, the information gathered should by definition be as broad as possible. Rather than looking for feedback on a known set of issues, we're asking employees to comment on whatever they like. These goals naturally lend themselves to the online equivalent of the classic "suggestion box." This is because in these cases we're not interested in gathering information on a defined and consistent set of questions from a statistically representative sample or full population. Rather, we merely want to provide an opportunity for employees to raise issues – as many as they like, as often as they like, on whatever topics they choose.

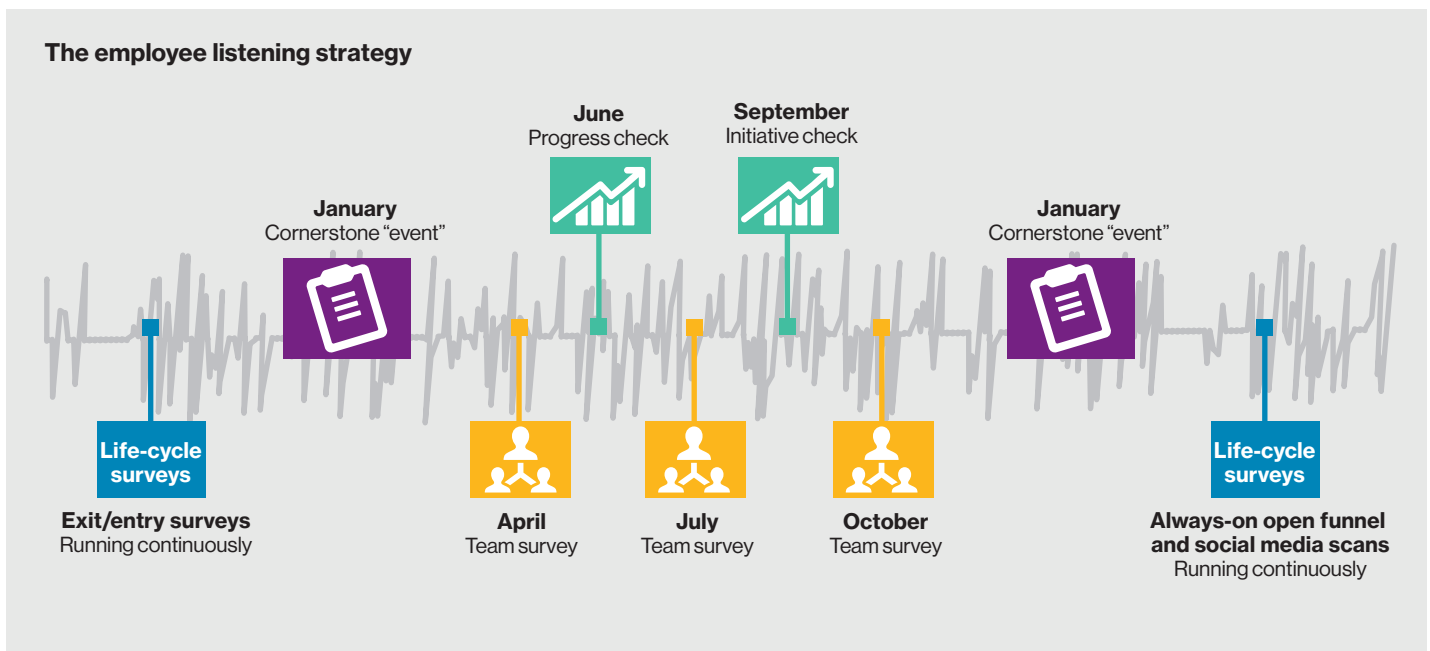To realize these goals, an always-on survey hosted on an internal portal, for example, and leveraging a generic prompt (i.e., "How can we improve?") may fit the bill. A supplemental or alternative solution here would be to mine internal (and possibly external) social media sites. Such sites have the advantage of allowing one to observe naturally occurring issues as they emerge organically. Although those who participate are a small (likely) biased sample and the issues discussed cannot be controlled, these limitations are irrelevant for the goal of surfacing problems and capturing suggestions. Of course, a challenge here will be monitoring and routing this information, a task often best performed by HR.

Putting it all together

Below we provide an example of how these various solutions come together to form a comprehensive listening strategy. Large-scale "events" serve as cornerstones at the beginning of each year, with results reported to senior leaders. On a quarterly basis, focused team surveys are deployed to measure local sentiment and effectiveness, with results reported directly to managers. Midway through the year, a pulse survey measures progress against a goal defined from the prior large-scale survey, and a few months later a second pulse survey measures employee reactions to a recent initiative. On a continuous basis exit/onboarding surveys are automatically deployed in the background and social media platforms are analyzed, with results from both surveys aggregated and reported to HR on a quarterly basis.

It's important to remember that gathering information from employees implies a commitment to take action. This requirement becomes even greater as we expand our listening activity. The strategy described here will produce a rich and comprehensive set of findings on an ongoing basis. Those organizations that are truly committed to responding to the insights gleaned through continuous feedback are certain to continuously improve.

The employee listening strategy

June Progress check

September Initiative check

January Cornerstone "event"

January Cornerstone "event"

Life-cycle surveys

Life-cycle surveys

Exit/entry surveys Running continuously

April Team survey

July Team survey

October Team survey

Always-on open funnel and social media scans Running continuously

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