

Tip #7

HOW OFTEN SHOULD YOU SURVEY YOUR EMPLOYEES?

Not that long ago, all surveys were paper-based. The dissemination, collection, and processing of hundreds (if not thousands) of paper surveys, and the subsequent distribution of paper reports, was time-consuming and expensive, especially for large, geographically dispersed organizations. To ease the strain on their resources, most organizations opted for surveying their employees every other year.

Today the advent of technology has made administration of annual (or even more frequent) surveys a feasible option. Thus, organizations may field multiple surveys every year. Benefits surveys. Recognition surveys. Communication surveys. But these are side dishes; the main course for most organizations is still the full employee opinion survey. And this has given rise to the perennial question: “How often should I conduct an employee survey?”

Let Me Count the Ways

There are many types of survey schedules out there. **Annual surveys are becoming the norm**, and are recommended for the vast majority of organizations. There is a distinct advantage to acculturating the survey process into an organization by making it an annual occurrence. As with any yearly process like performance reviews or budgeting, putting in place a regular, predictable process can mean fewer problems overall. People know the

survey is coming (“*It’s fall again, time for the survey*”); they can plan and prepare.

Familiarity makes communication and follow-up easier because people know what to expect – they’ve been down this road before. And getting annual data updates provides more meaningful and relevant information, allowing organizations to more quickly adapt to changing circumstances.

A few of our clients use an **18-month cycle** – long enough for the organization to see meaningful change but short enough to keep the process relevant. This approach takes discipline, however. The shifting schedule can cause confusion among employees and management. It also becomes easier to postpone the survey if another organization-wide initiative or change interferes. It becomes easy for management to think “*OK, we know we have to survey this year, but it doesn’t have to be now.*” Then time passes and momentum for the survey is lost.

Some clients still adhere to the “**every two years**” schedule. These tend to be:

- » Those with globally-dispersed organizations, where coordination across time zones and languages can pose many challenges.
- » Those with employee populations whose jobs or locations do not support the use of technology, necessitating the use of paper processes that slow things down.
- » Those with very comprehensive (i.e., lengthy) surveys that require more time for dissemination and follow-up.

However, most of these organizations have also learned that the rapid pace of change today means that waiting two years to find

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out if you are on the right track can actually put you *behind*. They also know that it can be difficult to maintain passion for change over a 2-year period. So more and more of these companies are opting to conduct sample “pulse” surveys during their off-year to gauge progress and keep enthusiasm high.

How about **splitting administration over the course of a year or two**? One of our clients surveys each division within its vast, global organization separately on a rolling cycle over a period of two years. Another surveys domestic employees in the first half of the year and international in the second. While this approach may make life easier for the internal folks running the survey, its main drawback is that it compromises your ability to get an overall picture of the organization. After all, how often in this day and age do things in any organization remain static for more than a few months, let alone half a year? Surveys are a snapshot in time; rolling up data collected at different times from different areas will not provide a realistic image of the whole organization.

Since the technology is in place, how about surveying more frequently – maybe **every month**? This is a very common practice in the market and customer satisfaction arenas, and several of our clients have asked about it. Why doesn’t it work as well with employee surveys? Several reasons: the need for brevity, the need for speed, and the need for sampling. All of these limit the usefulness of your survey effort – and all are necessary because without them, your organization and your employees will develop “rater fatigue.”

Look at this example: one of our clients used to send a postcard with a phone number to a 10 percent sample of their workforce each month. Employees called the number and were asked to respond to five questions using

their touch-tone phones. Data were collected and tracked across time. Simple – yes. Affordable – fairly. Timely – most certainly. But meaningful? Not really.

- 1) The brevity of the survey (necessary because it was done so often) did not provide more than a quick pulse-taking of overall issues. There was no opportunity to delve below the surface.
- 2) The speed of the process meant minimal follow-up. Employees rarely saw results; action planning was nominal. The process had become a data-gathering exercise that provided no real benefit to the organization other than numbers.
- 3) No actions could be taken for key groups (e.g., locations, divisions, departments) because the sample was not large enough to provide meaningful results at those levels. Management had no opportunity to drill down and uncover local issues directly impacting the work environment – things that drive employee engagement, productivity and turnover. So a key benefit of conducting an employee survey was lost.

So How Do You Decide What’s Best for You?

While the annual survey is becoming standard, many factors play into the decision on how often to survey your employees. Here are some things you need to consider:

Follow-up capability. Follow-up – what you do with the survey results – is very important to your credibility and success. The follow-up process needs to get underway quickly. You do not want to be commencing action planning at the same time as you are preparing for the next survey. For one thing, your action planning efforts are more likely to

stall as resources are switched to new survey activities. Speeding through the process in order to finish quickly may make employees suspicious that you aren't serious about using the results; you are simply going through the motions. Since not enough time will pass for people to see meaningful change, your new survey results may remain static or even go down because employees' expectations have not been met.

Successful follow-up needs good planning, timely execution, active communication, and built-in accountability. If rushing the process is the only way in which you will be able to incorporate a yearly cycle, it's better to set a more realistic timetable.

Logistics. This can include the size of the organization, the length of your survey, and your technological readiness.

- » It's a fact that larger, more complex organizations often take longer to roll out and act on results, as well as to implement changes. This may require a longer timeframe than the 12-month cycle, because good follow-up is critical and should not be hurried simply to "get it done" before the next survey.
- » Shorter surveys can be administered more frequently because they take less time for people to complete. Longer surveys provide more detail, but may also require more time and effort in the follow-up process. That's why organizations use shorter surveys for interim pulse-taking and longer surveys to provide in-depth information that is useful for implementing change.
- » Paper processes take longer to administer and thus may require more time between administrations.

Your survey history. Is this your first survey or your tenth? The very first time through the survey process may take a bit longer, as the organization designs its procedures, develops content, maps its structure for reporting, and gets its follow-up process rolling. In this case, waiting an additional few months beyond the one-year recommendation may make sense. Once all of these pieces are in place, however, subsequent surveys generally take less time from beginning to end, as you only need to "tweak" what you have already done.

Resources. The planning and execution of an employee survey most often falls on the shoulders of an HR staff. The size of your HR department, how much time it can devote to the survey process, and its level of experience and expertise in survey administration can play a key role in determining how often you are able to survey. Similarly, the experience level and attitude of management toward the process – especially follow-up – will inform your scheduling decision.

Sponsorship from senior leadership.

How much does your senior leadership team support the survey process? The successful survey effort cannot be done half-heartedly. Surveys that are not fully supported by senior leadership often find themselves shorted on resources, or postponed or even cancelled when the going gets tough. One compelling reason to make your employee survey an accepted annual process is that incoming leadership is less likely to abandon the survey, because employees will demand their chance to be heard.

There is no "one size fits all" survey timetable. With careful planning, you can design a process that fits your organization's needs and survey objectives.