

Tip #8

TO SURVEY OR NOT TO SURVEY (IS THAT YOUR QUESTION?)

An organization announced to its employee population that it would be closing one facility the following year, and making substantial cuts at two others, affecting almost 15% of its workforce. A few months after the announcement, senior leadership decided to do an employee engagement survey, despite some resistance from management who felt that the negative impact of the upcoming plant closing and downsizing would result in lower scores. Was this the right decision?

An organization's senior leadership was in turmoil, plagued by scandal and negative publicity. A new CEO was brought in to help put the organization back on track. A month later, a decision was made to cancel the annual employee survey, reasoning that the new CEO would be blamed for past problems because not enough time had passed for employees to see change. Was this the right decision?

A large business was planning a major reorganization, and one of its largest divisions was being sold. Nonetheless, when time came for the annual survey, the division was included since it was still technically part of the business. However, the data from this division was excluded from the overall rollout of organizational results. Was this the right decision?

The times, they are a changin'

We live in a changing world, and the organizations in which we work are not exempt. Mergers. Acquisitions. Downsizing. Turnover and transition, reorganization and right-sizing. So the question often arises: Should an organization proceed with an employee survey in the midst of significant events that may significantly affect the work environment?

Many feel that during a period of dramatic change, you should not be putting more pressure on an organization by expending time and resources on a survey. After all, major organizational changes can be highly emotional and stressful for employees. How accurate will their perceptions be when they are tinged with anger, regret, or sadness? Of course, not all changes are negative – it's also possible that employees may be experiencing unusual jubilation or relief. Either way, won't these emotions skew any rational response to the survey, making it more difficult to determine employees' true beliefs?

Others believe organizations should consider most significant organizational events as unique opportunities to use their survey as a tool for change. The strength of those emotional responses to the survey can help management gauge employees' understanding of and readiness for the change, and provide an opportunity to let employees voice their concerns. Findings can be used to track the progress of the change and make necessary corrections.

So, which approach works best?

The final decision should ideally be driven by your objectives for doing the survey.

Questions with no easy answers

There are several things to consider when deciding whether or not to survey your employees in the face of change.

- » **The nature of that change.** How disruptive is it to the workplace? How many people are affected? How do you expect employees to be feeling and reacting to the news? If you anticipate negative reactions on the survey, you must be willing to deal with them honestly, or your survey process will lose credibility. If there are legitimate reasons why information cannot be disseminated (e.g., legal restrictions), you might want to wait until you have more freedom to be open with employees.
- » **Expertise and experience.** How adept is your organization at managing change, or at least the change you are currently facing? If you have experienced this type of change before, you may already have processes in place to deal with communication and trust issues that arise. But with everything else going on, do you have the resources and experience to keep the survey process running smoothly? Surveys demand attention; if you choose to go ahead, you must be sure that your HR and management staffs have the time and energy to handle what will be expected of them.
- » **Timing.** Where are you in the change process? Do you have the ability to use the survey as a vehicle for gauging employee reactions before implementation, and then apply that information to address concerns and issues that might derail the change? Can

you use the survey to measure reactions to the change after the fact, and use that information to address fallout?

- » **Survey culture.** Is your survey process a regularly scheduled, annual affair or a once-in-a-while occurrence? And was the change announced before or after the survey was announced? These questions together can affect your decision. Say your organization had a highly successful year and all employees received large bonuses. Then you announce a survey not previously on the schedule. Will employees feel that you are trying to manipulate them into providing more positive results? On the other hand, if your stock just plummeted and you then cancel your *already scheduled* annual survey, will employees think you are trying to prevent them from voicing their concerns?

These are questions with no easy answers.

Objectives and Outcomes

The final decision should ideally be driven by your objectives for doing the survey. If you are trying to set a benchmark for the future or measure progress from the past, you may not want to survey during times of organizational upheaval because your emotionally skewed results might make historical comparisons difficult to interpret. In this case, waiting until the “dust settles” before embarking on a survey process may be the prudent choice.

On the other hand, **you should not let fear of what employees *might* say dictate your decision.** Moving forward (especially if the survey process is part of your culture) is an act of courage and openness that employees often appreciate.

If you wait for the perfect time to survey, you'll never survey. There will always be change, turnover, competing initiatives – life in any organization isn't static.

Let's revisit our three original scenarios and see if the decision made was a good one.

In the first example, an organization facing a plant closure and heavy downsizing went ahead with their survey despite management concerns about employees' negative reactions. It turned out that decision was a good one. Employees were able to provide input that helped the organization successfully manage the change process. Several things worked in the organization's favor:

- » The plant closing and downsizing had been communicated well before the survey was announced, so there was no suspicion that management was trying to manipulate employees into feeling better about the situation.
- » The organization had prepared extensively. Employees had been given a one-year notice. Transition teams in all affected locations had been working with displaced employees, helping with job placement and re-training efforts. Local management provided regular information on the status of the shutdown/layoffs.
- » Management had been given the opportunity to add supplemental items asking employees how the change was being handled. Employees were very honest in their responses; the organization used those responses to make improvements in their efforts on behalf of those employees.

Now let's look at the second scenario. In this one, the organization canceled their survey because of the arrival of a new CEO. This turned out to be a mistake. The survey was in its third year and had become an important vehicle for employee input. Senior

management had canceled the survey out of fear that employees would take out their frustrations on the new CEO. But in canceling the survey, management lost credibility. The action fed into employees' fears that perhaps things were not really changing, and they laid the blame on the new CEO – the very outcome management had been trying to avoid. This made the goal of turning the organization around more difficult.

In the final scenario, an organization included a division it was selling in the survey, but excluded that division's data from the overall organizational rollup. This tactic worked in their favor. Since the organization was used to surveying on a regular basis, management felt that telling employees of the affected division that they would be left out this year would lead them to feel even more anxious about their future. Keeping that division's data separate was also a good idea. The rest of the organization wasn't distracted by the perception that this division's scores were impacting overall results (they couldn't use it as an excuse for negative findings!). And the division being sold was still able to use its own data to identify priorities and plan actions, keeping a semblance of normalcy that employees appreciated.

So is there a “wrong” time to survey?

Of course, you must use common sense. You want to avoid your organization's busy times. One of our clients in the fitness industry doesn't survey in the first quarter of the year (all those New Year's resolutions keep the gyms humming!). Retailers don't try to squeeze in a survey in the fourth quarter. Our European clients don't administer surveys in August when many people take time off. We advise clients with unionized

workforces to exercise caution about surveying during periods of labor unrest or immediately before negotiations on a labor contract.

But organizational change is not, by itself, reason to avoid doing a survey. **If you wait for the perfect time to survey, you'll never survey.** There will always be change, turnover, competing initiatives – life in any organization isn't static. If postponing your employee survey process for a few months

eases tensions or frees up resources, then by all means, do so. But communicate the rationale for your decision, emphasize that this is a postponement, not a cancellation – then keep your word.

Surveys raise expectations on the part of employees. As long as you believe you can meet those expectations, there is no absolutely "wrong" time to survey.

