

# A practical guide to agile pulse surveys

It's a fast moving world out there. Shifts in the political, economic and social landscape together with changes in the nature of work are reverberating throughout organizations, and employees are feeling the effects.

More than ever, employers need to be on the pulse of their employees, continuously checking the heartbeat of their organization, in order to deliver a better employee experience.

There are many techniques for assessing an organization's employee experience, perhaps the most powerful and effective, certainly the most frequently used, is the employee survey. The trend is clearly moving from a single classic annual employee survey to more frequent listening. But how should organizations who have been conducting classic annual surveys transition to more real time tracking of the employee experience? What is the best balance between the need for speed and agility and the need for the depth of a classic survey? And what other approaches are emerging?

This article presents eight steps to conducting effective, agile pulse surveys.

## 1. Set a clear objective.

Currently, the objectives we see most commonly are:

The need for frequent tracking of the employee experience at a company level overall, combined with the ability to give leaders and managers at all levels occasional detailed insight.

Tracking employee experience on a regular basis for the company overall, as well as empowering local business units to track issues of local concern.

Understanding the effectiveness of the employee experience in depth, in all its dimensions, using a combination of survey, social media, entry/exit, qualitative and HR analytics to create a truly rich story. This is then tracked on an ad hoc basis to monitor the effectiveness of various work streams over time.

### *A. Blending frequent tracking with a classic deep dive survey*

"We've been conducting a classic annual survey, but we also need something far more frequent and lighter touch. Having said that, we love the comprehensiveness of the annual survey, and the ability to drive change throughout the whole organization. How can we get the best of both?"

The key objective in this scenario is to provide frequent insight on the overall employee experience to senior leaders, so they can course correct as necessary, whilst also getting the whole organization to rally around a deep dive event once a year. The frequent tracking is conducted via a pulse survey, and the deep dive is conducted via a redesigned, compact, classic survey, with a quick turnaround.

## Financial services case study

One international financial services organization had been running an annual employee opinion survey successfully for a number of years. Business leaders as well as employees recognized the value of the survey. Leadership drew on survey insights to track the success of strategy execution, making changes as necessary while managers, teams and employees used the survey to drive local actions and change.

Together, we designed a process to provide monthly insight to the board, via a simple pulse survey. This contains 10 items, made up of indices for Engagement, Leadership and Culture. In addition, up to five items can be added any month to gain insights on specific employee experience touchpoints, such as Rewards at year end, strategy after a big announcement, and so on. The time to complete the survey is two minutes.

The client uses the Willis Towers Watson Pulse Software to launch the pulse surveys as they wish and track trends over time. A sampling strategy ensures all data has a minimal margin of error, and nobody completes more than three surveys a year.

Once a year, an all-employee survey is completed, which allows all leaders and managers to get local level insight reports enabling them to drive business, function and local level change. In addition to the three indices, the survey asks questions around a number of strategic and local work experience topics. The survey is 'pre-coded' via a feed from the client's HRIS, removing the need for coding questions, and time to complete is five minutes. Results are available the day after the survey closes. Approximately six months after the annual survey, a 'Pulse Plus' is run to track progress deep into the business and functions.

## Pulse listening strategy

|                  | Pulse   | Pulse | Pulse | Pulse plus                     | Pulse                | Pulse | Pulse | Pulse | All employee survey            | Pulse                | Pulse | Pulse |
|------------------|---|-------|-------|--------------------------------|----------------------|-------|-------|-------|--------------------------------|----------------------|-------|-------|
|                  | Jan.  | Feb.  | Mar.  | Apr.                           | May                  | Jun.  | Jul.  | Aug.  | Sep.                           | Oct.                 | Nov.  | Dec.  |
| <b>Purpose</b>   | Continuous trend and board-level course correction                          |       |       |                                |                      |       |       |       |                                |                      |       |       |
|                  |   |       |       | Plus business/function actions |                      |       |       |       | Groupwide actions              |                      |       |       |
| <b>Sample</b>    | 10% sample per pulse  |       |       | 30% sample                     | 10% sample per pulse |       |       |       | 100% census                    | 10% sample per pulse |       |       |
| <b>Reporting</b> | Business and function leader reports  |       |       |                                |                      |       |       |       |                                |                      |       |       |
|                  |   |       |       | Plus one level down            |                      |       |       |       | Plus all levels                |                      |       |       |
| <b>Content</b>   | 10 questions – engagement, leadership, culture indices                      |       |       |                                |                      |       |       |       |                                |                      |       |       |
|                  | Up to five questions depending on topical issue, e.g., reward, new strategy |       |       |                                |                      |       |       |       |                                |                      |       |       |
|                  |   |       |       | 10 strategy-relevant questions |                      |       |       |       | 15 strategy-relevant questions |                      |       |       |
|                  |   |       |       |                                |                      |       |       |       | 15 local work questions        |                      |       |       |

### B. Frequent tracking of the employee experience, and empowerment of local businesses to track local issues

“We are a smaller organization, and less interested in classic engagement surveys. For us, agility is key. We want regular feedback to the board, but also want local level managers to be able to take the pulse of their business whenever they need to.”

In this scenario, the key objective is frequent insight, with minimal effort placed on the organization. Efficient, yet robust, question design is critical. It may be necessary to design and launch a survey in minutes, and yet the organization also needs the ability to combine the data from all surveys in order to track trends and aggregate data. Software is used which allows centers of excellence to launch company-wide pulse surveys on an ad hoc basis, as well as local leaders and managers to track local issues. The same platform can compare across all surveys, if necessary. Fast Moving Consumer Goods (FMCG) would be a typical sector requiring such an approach. Speed, a light touch and user experience are key. Surveys need to be designed mobile first and should be fast to complete – in under a minute. Scenarios where clients may prefer to be fully self-sufficient call for a software solution, perhaps with some light touch advisory support.

### C. Comprehensive understanding of the employee experience, blended with social media and hr analytics, followed by ad-hoc tracking of work stream effectiveness

“We really want to understand our employees to the same extent we understand our customers. We need insight from all the key employee experience touch points, and we need to be able to track the impact on the employee experience of the changes we make”

In this situation, the objective is less about checking the pulse at a regular frequency, but more about gathering rich insights on the employee experience, so that programmatic changes can be made and tracked. Retail is a sector that increasingly requires this approach.

## 2. Choose your software well.

Make sure you choose software that allows you to be super-fast and super-agile. Here are a few must haves:

- Choose software that allows you to respond rapidly. You should be able to set up and launch a survey within minutes.
- Choose software that can house all your pulse surveys as well as your annual or deep dive surveys. No longer should you have one provider for your annual survey, another for your pulse surveys, an app for tracking team sentiment, and pockets of activity all over the place using various software solutions or spreadsheets for local surveys. Bring it all under one roof, so you can connect it all together.

## Retail case study

In the case study below, a retail client wanted to ensure it fully understood the effectiveness of its Employee Value Proposition (EVP). Initial insight gathering paired classic survey data with a social media crawl to see how attractive the brand was. This was then matched against employee turnover data, in order to create an 'Employee Success Index'. This pointed to key benchmarked strengths, and areas for attention. The client put in place a series of work streams with frequent pulse surveys to track their effectiveness. When the client launched major new initiatives, it also conducted an ad hoc pulse survey to track the effectiveness of these efforts.



- If you prefer self-service, the most flexible way to go is an annual license model whereby you can run as many surveys as you want, whenever you want (perhaps up to a certain data limit). That will give you true agility.
- Choose software that provides a great user experience. Employees expect a consumer-grade experience. It should be fast, slick, and mobile-enabled. The actual number of questions isn't an issue as such, it's how quick the experience is. Pulse surveys should take about a minute to complete, a deep dive or annual survey, not too much longer.

### 3. Decide whether you want to go self-service, get the support of a trusted partner, or both.

If you're a self-starter, with a limited budget, self-service software is a good option. If you feel you need a little support, make sure you choose a partner who offers experienced project management teams to provide trusted guidance at every step of the process. Ideally find a partner who offers both self-service software as a cost effective way of delivering pulse surveys while also providing support for the larger activities.

#### 4. Determine your reporting objectives.

The case studies above illustrate different reporting needs. There isn't one model. But there are a few rules of thumb.

If you are providing insights and reports to all leaders and managers across the whole company, perhaps do this only once a year. This gives everyone sufficient time to understand the insights and enable change. Insights here should cover a range of dimensions of the employee experience.

If you're expecting leadership teams to make changes based on strategic-level insights, perhaps bi-annual reporting is sufficient. Insights here should be limited to key strategy-related dimensions that leaders have control over.

For an executive team to track trends, but not necessarily implement detailed actions, monthly reporting works well. Insights here should be focused on a small number of critical KPIs.

For tracking of local mood and sentiment, reporting typically occurs on a monthly or on an as-needed basis.

#### 5. Get your questions right.

As tempting as it may be for your CEO to dream up a bunch of survey questions over a glass of wine on a Sunday afternoon, this may not be a wise course of action – the questions are unlikely to be good predictors of business performance. Good questions should be designed thoughtfully, tested, and have a proven link to performance. Make sure you choose a provider who can advise you well, or software that has a robust library of tested items and credible benchmarks, so you can find out whether your scores are actually good, or just the same as everyone else's. As a general rule, design a blend of questions to give you insights into your culture, your strategy (for senior leaders to take on), and the local level work experience (that local leaders, managers and teams can influence.)

#### 6. Set the frequency, and avoid survey fatigue.

The frequency of pulse surveys is an important factor to get right. If surveys are not conducted frequently enough, your insights become dated. On the other hand, surveys administered too frequently, produce survey fatigue and can cause the quality of your insights to diminish. It might be tempting to survey everyone monthly, but employees may soon tire of this practice, or find it intrusive. In the financial services example above, by sampling 10% of the population for ten months, 30% in April, and 100% in September, the organization was able to provide all business leaders with monthly progress reports, but each employee only received two or three surveys per year. A good number.

#### 7. Get your sampling right.

Choose a partner who understands sampling statistics. A sample of 10% might sound like a good number. Indeed, if your total population is 10,000, and you get 1,000, your margin of error will be +/- 3%. This is an acceptable margin. However, if your total population is 1,000, and you survey 100, your margin of error is +/- 9%, which is not acceptable. If your population is 100, and you survey 10, your margin of error is +/- 30%, which is a waste of time and money.

#### 8. Link to performance.

Once you've established the basic cadence of your surveys, and are feeling a little more ambitious, the real goal is to overlay the trends in employee experience with trends in performance (sales, efficiency, turnover, etc.) and identify the key predictors of performance. At a basic level you can simply eyeball the various trends and look for linkages. Ideally, your software will have an analytics capability, allowing you to structure the data by your HRIS data base, and use statistical or predictive modeling to link the survey data to your performance metrics. Increasingly at this stage, you might broaden your search to integrate social media or other forms of data, to build a truly rich picture of the experience of your employees and how it drives your business.

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