

worktango

Internal Employee

# **ENGAGEMENT SURVEY GUIDE**



# Management considerations

## You've been tasked with organizing an internal Employee Engagement survey.

Your organization has great expectations. You do too. But as you start looking into what's involved you realize there's more to it than imagined.

What are the usual considerations for a successful outcome? Is there a typical approach that organizations follow when they manage survey initiatives internally (rather than outsource project management)? Is there something that would make your task easier?

There's lots of online guidance when it comes to surveys. But what works for academic research surveys or customer surveys or public opinion polls doesn't necessarily fit with Employee Engagement surveys.

### What is an internal Employee Engagement survey?

Firstly, let's define Employee Engagement. In brief, it's the sentiment we have as employees for our jobs, organization, people leaders and co-workers. Whether we're full-time, part-time, contracted, consulting or freelancing we all form sentiments around the internal culture of the workplaces and people we liaise with. It's what drives us to strive to do our best work and ensure the organization succeeds.

**Employee surveys are the keys that unlock that sentiment** and reveal opportunities for improvement. An organization-wide Employee Engagement survey establishes a baseline, a starting point that offers comparisons over time. You can see internal trends. Track where things are getting better or falling behind.

Reference to an internal Employee Engagement survey implies that an organization has decided to purchase a survey tool and manage the process "internally" with little or no third-party assistance.

There are lots of options that fit this bill.

But employee survey research is complicated and involves a lot of careful strategic thinking. Here are 18 steps to see you through an internal Employee Engagement survey project.

# Have a plan

**The first step behind a successful survey is to have a plan. What is it you want to know?**

- Why are you running a survey?
- What are your goals?
- What topics do you want to cover?
- What do you aim to learn?
- What kind of statistics do you want to come out of this exercise?
- How will you want to segment the data (department, location, etc.)?
- What sort of analysis do you need to inform business decisions?
- Who should be able to see survey results and for what purpose?

A clear intent guides the design of your survey. Once understood, the right kinds of questions can be built into your survey to get the best information for your purposes.



# Identify your target audience

A full-blown engagement survey is typically issued to the entire employee population. The people who make up your workforce come from all sorts of different backgrounds.

## Are there any language or education-level considerations?

The questions and phrasing that resonates with a hospital's surgeons, for instance, probably doesn't apply to a hospital's cafeteria or cleaning staff. In fact, this is one of the reasons why response rates can be so challenging in hospital environments. The same applies to a head office versus a manufacturing facility versus workers in the field.

There will likely be times when you want to deploy a survey to a certain demographic audience. For instance, Employee Engagement survey results could point to areas of concern by occupation or location or manager or any myriad of demographic factors. And you want to dig deeper.

## What do these people have in common?

- Do they all have access to email?
- What questions need to be asked to better understand their employee experience?

The early design of a successful survey takes shape by having a picture of your intended respondents.



# Look into the best question for your employee survey

To restate, some questions (and answer choices) might not make sense for every employee.

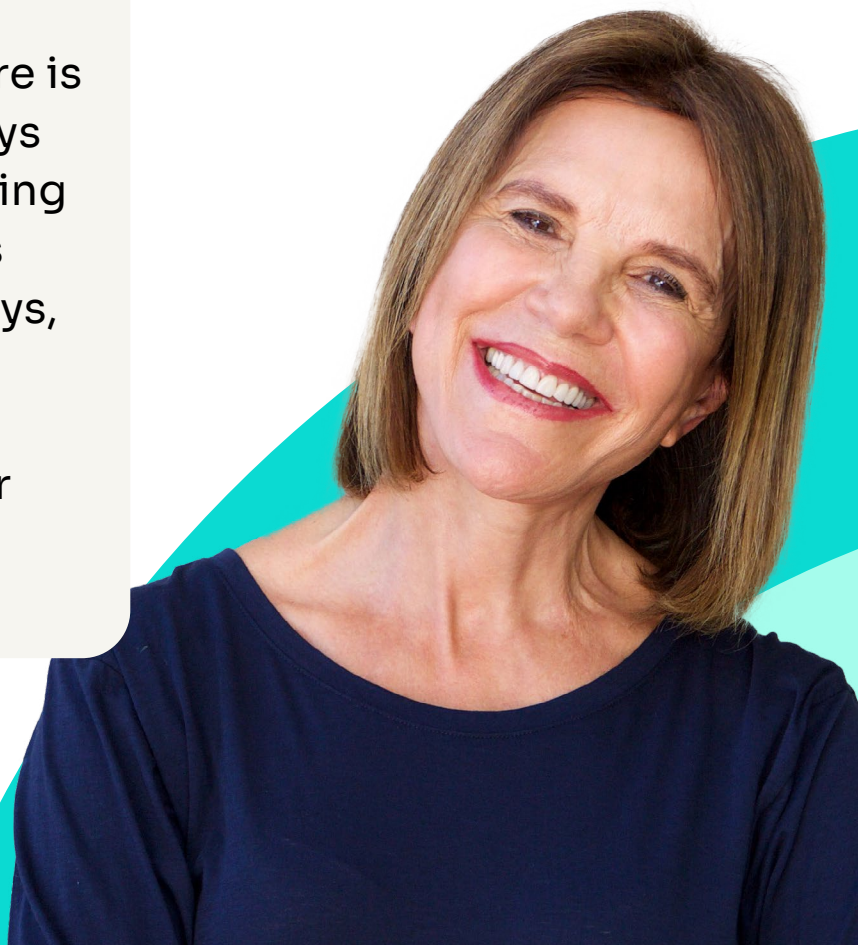
What's more, poorly designed questions can lead to bad data and even worse decisions. "Bad data is worse than no data," asserts marketing research and public opinion polling firm Versta. "With no data, at least you have intuition and experience to rely on. Bad data, on the other hand, will result in 'findings' that are likely to spoil important decisions."

## For example:

As advocated by data scientists generally and the Pew Research Center, the most important part of your survey process is the creation of questions that accurately measure opinions, experiences and behaviors.



"Designing your questionnaire is complicated because surveys can ask about topics in varying degrees of detail, questions can be asked in different ways, and questions asked earlier in a survey may influence how people respond to later questions."



# Understand the role of behaviors and attitudes

Engagement surveys certainly use many questions to capture all aspects of the concept. When you think about it, “engagement” and “job satisfaction” as examples, are abstract and multi-faceted. Resultantly, it’s rare to measure them with one single question. Questions that explore these themes on several fronts, help to produce deeper insight. **Behaviors are the way in which one acts or conducts oneself.**

**Attitudes are the underlying sensation, beliefs and values that can impact behaviors and decision-making.**

Here are four employee engagement survey statements in a multiple-statement approach that ensure accuracy (and give you a clearer sense of a correlated methodology):

I WOULD RECOMMEND THIS ORGANIZATION AS A GREAT PLACE TO WORK  
focuses on an action-oriented behavior of whether employees are satisfied with their work experience and willing to promote it.

MY ORGANIZATION INSPIRES ME TO GIVE MY VERY BEST AT WORK  
explores employee behaviors focused on a positive direction to support the organization.

I AM PROUD TO WORK FOR OUR ORGANIZATION  
measures an employee’s attitude towards their satisfaction and connection to an organization.

I INTEND TO BE WORKING AT THIS ORGANIZATION A YEAR FROM NOW  
focuses on the attitude around a desire to be part of the organization moving forward.

# Consider qualitative and quantitative questions

Another consideration that can affect how employees answer questions is whether the question is qualitative, where people answer in their own words, or quantitative, where they're asked to choose from a list of answer choices.

**Fortunately, the research techniques of a survey methodologist help you to avoid a chaotic questionnaire design.**

And while it was once difficult to make any credible sense out of open-ended answers, technology changes all that. Natural language processing tools sift through comments, generate word-clouds and pinpoint common themes.



# Determine what level of customization is needed

## Most employee engagement survey vendors offer a library of questions.

But not every internal Employee Engagement survey question is applicable to every workplace. Although there are BEST practices, focus on the RIGHT practices for you.

## How do you refer to managers in your organization, for instance?

Are they people leaders or supervisors, team leads or something else? You want to be able to use language that reflects your culture.

## Look for a flexible survey solution that lets you tailor branding and communication.

The pillars of customization involve determining what can be eliminated, added, or tailored to suit your organization and the themes you wish to explore—without forfeiting valuable internal information that measures your progress over time.





# Pay close attention to phrasing

If your organization has issued employee engagement surveys in the past and you've decided to work with a new survey partner, or a tool new to you, you'll need to customize questions to be able to trend results from those previous surveys.

Be aware that word and phrase choices convey meaning and intent. Even small wording differences can influence whether people interpret and respond to a question in the same way.

In a January 2003 survey, when Pew asked people whether they would **"favor or oppose taking military action in Iraq to end Saddam Hussein's rule,"** more than two-thirds said they favored military action.

But when asked whether they would **"favor or oppose taking military action in Iraq to end Saddam Hussein's rule even if it meant that U.S. forces might suffer thousands of casualties,"**

**Only 43% said they favored military action, while 48% said they opposed it. That's where survey validity expertise is key.**

# Look into the science behind internal employee engagement survey questions

Survey validity is a fundamental must in matters of employee feedback if you want solid, reliable data from which to make decisions.

## What is survey validity?

Survey validity is a complex scientific approach to make sure the questions you ask measure what's intended to be measured.

Research-backed and statistically validated questions involve a team of psychologists, organizational design experts and data scientists.

You want to be certain the questions you have access to are scientifically vetted. And that you have access to a survey methodologist who can help you design questions specific to your organization.

## Some of the factors behind survey validity and data reliability include:

- The wording, order, flow of questions, how long it takes to complete and the number of points on a rating scale (Likert's 5-point scale is typical)
- Establishing Face validity
- Running a pilot test
- Cleaning collected pilot data
- Conducting a principal component analysis
- Completing a factor analysis
- Modifying the survey based on outcomes
- Repeating the validation process as needed

What really matters when it comes down to internal Employee Engagement surveys, is that all the hurdles outside of the typical HR purview have been dealt with; that the vendors and platforms you align with and the surveys you use genuinely measure what's intended to be measured—so that you CAN be certain about the knowledge discerned.

# Determine employee engagement survey frequency

Most organizations run a long survey every year or two as a starting point and baseline measurement for Employee Engagement over time.

**Shorter surveys tend to be conducted more frequently. In doing so they become part of a continuous Active Listening model.**

- By issuing pulse surveys frequently you get insights in real-time.
- You can dig deeper into weak or unclear areas.
- Understand the impact actions have had on improving Employee Engagement.

Gather more data around the entire employee life cycle experience (from recruitment and onboarding through career progress to the last day on the job). And better understand your people and culture on an ongoing basis.

**An excellent case in point was the forced shift to remote work in 2020.** Organizations found frequent pulse surveys were an essential communication tool. The practice has since become a mainstay.

**Many organizations use pulse surveys quarterly, monthly or even weekly** to focus on issues in the here and now. To become more proactive. To bolster agility. And combined with Active Listening (regardless of the cadence) there's flexibility in the number and type of questions you can ask.

# Make sure everyone who is meant to respond can do so

An internal engagement survey should be a frictionless experience inclusive of every employee. It should span the broad requirements of your entire employee population.

**Some data collection methods can lead to the exclusion of people with low education or comprehension levels, people who are technologically illiterate, or have disabilities, or language limitations.**

An essential part of your planning and preparation is to think about wording, format, context, and translation.

- Can everyone access the survey and offer feedback regardless of their mother tongue or preferred language of communication? Regardless of educational or literacy levels?
- What modes of data collection are required: text and email formats viewable on computers, notepad or mobile phone?
- Do you need computer kiosks for those who don't have work access to a computer? Paper surveys desk-dropped or mailed? Audio call-in?
- Make participation easy for everybody.
- Anticipate and break down all barriers.
- Fears about confidentiality and a reluctance to respond or answer truthfully are also barriers that need tearing down.



# Promote Confidentiality

**Consequences are scary. Employees are reluctant to answer surveys if there's even a hint of potential reprisal.**

But when employees know and understand how their identities are protected, issues of confidentiality tend to disappear.

As the Provost and Senior Vice President of Tufts University Office of Institutional Research explains: when survey results are kept confidential, a respondent's name or ID will never be associated with their survey response in any kind of reporting. Survey results are always reported in aggregate – that is, individual survey results are combined and presented as a group.

Results for groups of fewer than a set standard minimum (typically five) are never reported to prevent any risk of breach of confidentiality.

Moreover, people are reassured if they can see that the survey is being handled by a reputable third-party provider.

At every opportunity, stress how your organization's arms-length relationship with survey data ensures respondent confidentiality. Honest feedback and higher participation rates will follow.



# Tools required for an internal employee engagement survey

Most organizations run a long survey every year or two as a starting point and baseline measurement for Employee Engagement over time.

## Technology's growing impact on surveys

By extension, technology is a robust enabler of internal Employee Engagement surveys and feedback actioning.

Modern AI, Machine Learning, and Natural Language Understanding technology offer advanced capabilities. In combination with an inclusive, accessible, easy-to-use survey experience available on any device, powerful technology helps you see the forest from the trees.

Plus enterprise-grade security and scalability support any organizational structure or language so you can integrate your HRIS data, enable single sign-on, and ensure data privacy. **WorkTango is one such technology that ticks all of these boxes.**



“When the world went remote, we became 100% reliant on technology — technology as a medium of interaction and engagement; technology as a tool to perform one’s job effectively in this new environment, and technology as a vehicle to make the job better and more digital.”

**SUGI VENKATESH**

ADP division Vice President HR, for  
Global Product and Technology

# Understand data mapping, migration and integration

When measuring change over time, as Pew Research Center suggests,

**“It’s important to use the same question wording and to be sensitive to where the question is asked in the questionnaire to maintain a similar context as to when the question was asked previously.”**

For trending purposes, importing two or three previous survey periods and either maintaining questions or mapping them to your selected methodology is recommended.

Data mapping is the process of matching fields from one database to another. It’s the first step to facilitate data migration, data integration, and other data management tasks.

Migrating previous survey data helps to build continuity and provides the data tracking insights you need to gauge the effectiveness of actions—and pivot focus, fast.

A specialized survey solution that uses authenticated survey design and research techniques ensures the most critically revealing Employee Engagement questions relevant to your organization are being asked. And lets you perform trending on overall engagement, response rates, individual factors, as well as individual questions.



# Use “skip” or branching logic

If you want to continue a line of questioning for a subset of respondents (for instance those who had to remain working onsite) use branching or “skip” logic to address follow-up questions to that specific subset before returning to the full group questionnaire.

As mentioned earlier, some questions won’t be relevant for everyone. “Skip logic” involves asking a qualifying question and then presenting a dynamic set of follow-up questions based on the answer to that qualifying question.

## Here’s an example from a market research site for students and professionals

You first ask **“Do you buy bottled beer at least once a year?”** If the respondent answers **“yes,”** you present two additional questions about the types of bottled beer they care about. If the answer is **“no,”** the respondent skips to a new page, never seeing those additional bottled beer questions.

**Good skip logic works in the background so that the respondent never knows it’s in play.**





# Take advantage of employee engagement survey communication templates

You have to start with a solid strategic communications approach to achieve statistically representative and reliable response rates.

At every opportunity, it's best practice to emphasize confidentiality and convey what employees should hope to see because of the survey, as well as what the organization is aiming to accomplish.

## Craft your own communication or use available communication templates to:

- Explain who is conducting the survey
- Make it clear “why” the survey is being run and “why” participation is important
- Give details about how the data will be used, what the organization is aiming to accomplish
- Emphasize all responses are confidential
- Tell how long it will take to complete the survey
- Send reminder notices when the survey is in progress
- Express thanks to participants
- Share insights and next steps

# Tap into the platform implementation support

The life of administrators is simplified when user data management, integration tools such as data mapping, configuration, and any other technical requirements are supported by live chat, email or phone services.

When given the opportunity, it's highly recommended that you **demo a platform first** to get a sense of its usability, and the level of support you can expect.

Then, when you've selected your platform, arrange for admin and leader training, and take advantage of the expertise available to you from design technology advisors.



# Adopt tools with insight and analytics technology

The real art of data is showing relative trending insights; the kind of people analytics where senior leaders and people managers can see the impact of their actions.

**Advances in HR technology include self-serve snapshot analytics** that can be segmented by management level, manager results, question type, positive/negative/neutral responses, and the likes.

Whatever categories you have or want to create, it all comes full circle back to customization. The strategic customization you've built into your survey from the outset can mean being able to share different self-serve reporting formats (or not).

Intuitive dashboards with **powerful reporting and predictive analytic tools** make it easy to compare feedback by any segment of your organization.

Whether it's heat maps, averages, benchmarks, or word clouds, role-based permissions controlled by you, give executives and managers access to insights and analytics that guide their next steps.



# Add leadership support into the internal employee engagement survey equation

Most companies have **big databases of content or Learning Management Systems for their employees**, a learning library where people can look for courses. The problem is people must go there to choose (or are forced for compliance reasons). But learning preferences are changing.

**A variety of insights and recommendations should be a fundamental part of your survey methodology.**

Options should cover a variety of standard and customized presentation formats, including themes that have surfaced from open-ended comments and suggested post-survey actions. Layering in external benchmark data based on your organization's size, industry and geography can provide additional context and comparisons. But understand and make it clear to leaders across all levels that it's your internal benchmarks that measure progress best.





# Place emphasis on post-survey actions

**Ultimately, the outcome of your internal Employee Engagement survey is action. Adopting the right technology ensures success.**

Technology features such as automated learning (based on team feedback scores), built-in action planning tools for creating and assigning actions (as well as AI-driven suggested actions), customizable dashboards, and easy-export summary reports help leaders to up-skill, change behaviors and become more accountable for their actions.



# Simplify your internal employee engagement survey responsibilities

**At WorkTango, we talk to a lot of HR executives who are weighing the benefits of internally managing their own survey initiatives versus outsourcing the project management to an outside firm.** We've always had the benefit of straddling both the DIY market as well as the managed survey market, offering our platform as well as support service.

The benefit of a trusted survey partner like WorkTango is that we help guide you through all the layers of implementation. Throughout the entire process. From strategy and design, training, communication and technical implementation, all the way through to analytics, reporting, action planning and continuous active listening. **We can hold your hand every step of the way. Or step in only as needed. And we're always on standby ready to help — 24/7.**

Whether validating custom questions or offering recommendations for your vision, the scientific survey methodology and advanced technology solutions we from WorkTango focus on the RIGHT practices for your organization.

## **At WorkTango, we're revolutionizing how the world's most forward-thinking companies engage and inspire their people.**

We offer the only Employee Experience Platform that enables meaningful recognition and rewards, supports alignment through goal setting and feedback, and offers actionable insights through employee surveys.

WorkTango is built for the workplace we all want to be a part of – where priorities become clear, achievements are celebrated, and employees have a voice. So if you're ready to make work lives better, schedule a demo today.