

# How to Do a Work-Life Balance Survey

Joe Robinson

Optimal Performance Strategies

310-570-6987

<http://www.worktolive.info>



# Introduction

- A comprehensive work-life balance survey can surface issues critical to employee engagement, satisfaction, and retention. People who feel they have good work-life balance are 21% more productive, studies show.
- The survey should be done anonymously to insure candid responses and can be used in conjunction with a work-life balance training and a follow-up survey to measure progress, something we provide at Optimal Performance Strategies.
- This e-book contains 20 survey selections. The statements flesh out, not just the state of work-life balance, but also its supporting issues, from poor time management to information overload and support issues.
- For each survey statement, respondees can answer: Not True at All, Rarely True, Somewhat True, Occasionally True, True, Often True, and Very True. Assign points for answers on a 7-point scale: 1 for Not True at All, 2 for Rarely True, 3 for Somewhat True, 4 for Occasionally True, 5 for True, 6 for Often True, 7 for Strongly True. Tally up average point totals per statement to find the hot-button issues.

# NUMBER 1:

I feel I have good work-life balance.



The right answer to this statement can translate into a big return for the organization. People who report good work-life balance are 21% more productive than their colleagues (Corporate Executive Board).

Satisfied employees bring more energy, focus, and attention to the task at hand.

# NUMBER 2:

I have more work than I can do well.



Workload that is beyond the capacity to handle it is a lose-lose for talent and organization. It drives stress, burnout, cynicism, and retention problems.

Since few employees will volunteer this information, this statement is crucial to identify the extent of the issue.

# NUMBER 3:

I feel valued by the organization.



This is one of the most important survey items, because it's one of the best indicators of the state of employee engagement.

Feeling valued builds trust and commitment and a desire to return the favor with discretionary effort.

## NUMBER 4:

I have concerns that my personal and home responsibilities are being neglected.



This statement gets to the underlying desire with work-life balance, the need to feel that all responsibilities are being handled as best they can be.

Low scores here can drive burnout, resentment, absenteeism, and retention issues.



# NUMBER 5:

My supervisor understands the importance of balancing work and home life.



Some 87% of engaged employees know their managers very well (Blessing White). Employees will take their cues on work-life balance from their supervisors.

It's important that managers set a good example on work-life balance or employees get the message it's not really supported.

# NUMBER 6:

I have trouble managing the volume of email and messages.



Unbounded messaging drives overwhelm and stress and a belief that work and life are out of control. Interruptions make whatever task you are doing seem more difficult and drive mistakes.

Creating agreed-upon norms and rules to manage messaging can keep devices from running amok.



# NUMBER 7:

I am able to get most of my work done each day.



The more people feel they can stay on top of workload, the more there is a sense of control and satisfaction, as well as progress.

They are more likely to feel positive and engaged when progress is being made.

## NUMBER 8:

I take the time to exercise and take care of my health.



Health and wellness usually come last on the list for people without good work-life balance. It should come first. It creates the physical vitality and mental focus necessary to do the job well.

The chief productivity tool is attention. A fatigued brain will vastly underperform an energized one.

# NUMBER 9:

I feel I have control over my schedule and how I do my work.



This statement measures how much flexibility and autonomy employees feel. Studies show that people who have perceived control in how they do their work and organize their schedules are happier and more productive.

Schedule flexibility is highly correlated to work-life balance.

# NUMBER 10:

I feel guilty about not being able to do all that I need to at work and home.



Guilt is a stressor that drives a cycle of resentment and futility. It undermines attention and competence and drives distraction, burnout and overwhelm.

Engagement is not possible when minds are ruminating about the unfinished and untended.

# NUMBER 11:

I am good at setting boundaries.



Boundaries are one of the most basic self-management tools. In a world of 24/7 technology, though, many don't know what a boundary is.

Managers can help show staff that being overly optimistic about workload and turnaround times can sabotage deadlines, performance, and health.



## NUMBER 12:

I sometimes feel overwhelmed with all that is on my plate.



This survey item is a tipoff that workload isn't seen as manageable. That can trigger stress, burnout, and poor performance.

Having tools to manage demands, devices, and projects is essential. Work-life balance and time management training can restore control.



# NUMBER 13:

I take the time to prioritize and have good time management.



Bad scores here indicate that employees are caught in the speed trap of rushing and are not determining what's urgent and what's not.

They have to learn how to prioritize, plan next actions, and manage the reflex of multitasking.

# NUMBER 14:

I feel stress often during the workday.



When demands outstrip ability to control them, it sets off stress, which undermines intellect, and results in rash and emotional decisions, conflict, absenteeism and increased medical bills.

Stress management training has been shown to increase revenues 23% and reduce absenteeism 24%. We offer that as well as work-life balance training.

# NUMBER 15:

I often bring work home with me.



Bad scores here are an early-warning signal that employees are doing more than they can do well and are on the road to burnout and resentment, which fuel the opposite of engagement.

The solutions lie with better time management, project management, and information management.

# NUMBER 16:

I feel I have good job satisfaction.



High scores here are very good news. Employees are satisfied with their work. However, dissatisfaction can lead to poor performance, presenteeism, cynicism, and negative contagion.

Satisfied employees make a big difference in performance and commitment, and they influence colleagues in a positive way, which is infectious.

# NUMBER 17:

The time pressure and deadlines are reasonable.



If scores are low here, it points to the potential for errors and safety issues, high levels of stress, crisis mentality, and conflict with team members.

The answers here can lead to a review of project processes and a system where everyone has reliable turnaround estimates for each task on the job.

# NUMBER 18:

I have effective strategies to manage demands.



This identifies the self-management skills of employees. Those who don't know how to manage demands have reduced performance and increased absenteeism. Medical bills for high-stress employees are 46% higher.

Work-life balance and stress management programs can provide the strategies needed.



## NUMBER 19:

There is good communication between my supervisor and me.



This crucial survey item measures one of the most important factors in work-life balance, a supportive manager.

Good communication enables clarity in job goals and facilitates work-life discussion and strategies.

# NUMBER 20:

I have the support to do my job and grow.



If staff don't have enough support, it will come through clearly here. Lack of support is a key lever of disengagement, overwhelm, and bad retention.

Having support and opportunities to grow through development programs are critical levers in employee engagement, research shows (Gallup).