The Ultimate Guide to Employee Engagement Surveys

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Introduction

This ebook will show you how to build a well-designed, repeatable employee engagement survey that effectively measures engagement and provides you with actionable information.

Like performance reviews, employee engagement surveys are sometimes given a bad rap—employees tend to distrust them because they worry their answers are going to be used against them, used to justify or prop up the decisions of leadership, or not even used at all.

But studies have shown that, like performance reviews, surveys are the best way to gauge employee engagement. **According to Harvard Business Review**, an engagement survey does three things that make it better than any other people analytics:

① **A survey is one of the few ways employees are directly asks employees how they feel about the company.** They might bring up thoughts and suggestions in a one-on-one, but a survey compiles the answers in a more readable form.

② **Turns out, their answers are the most accurate predictors of their behavior—even more so than any kind of machine learning analysis.** Even an employee not answering the survey is an accurate predictor of how engaged they are at a company (Spoiler: not very!).

③ **Holding an engagement survey influences employee engagement.** Simply asking these questions about their engagement can cause people to be more engaged—either because they want to stay consistently engaged over time, or because the question might be enough to reflect on their behavior.
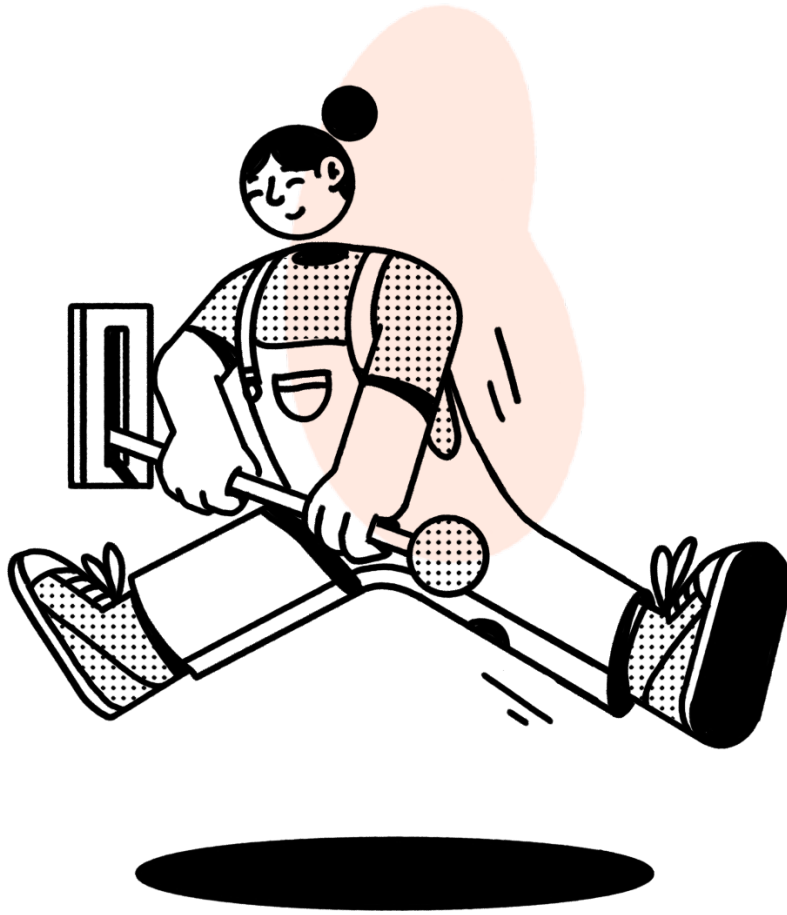
Even with those benefits, a badly run engagement survey can have deleterious effects on your employee's engagement. Running irregular or poor engagement surveys can also actually just be a red herring in terms of measuring employee satisfaction. You'll get data on how employees feel about their jobs, but not the company, which will make creating overall company strategy difficult. A thoughtful, carefully executed engagement survey can make all the difference in terms of employee perception and an output of meaningful, actionable insights.

For employees to feel heard, you actually have to listen. And the best way to do that with an employee engagement survey is to run **a really good one.**

First, let's break down what exactly we're running this survey for. Employees often have complicated relationships with their workplaces—they like one thing, but not another; disagree with some decisions, but understand them. Understanding that nuance sets you up to figure out how best to measure it.

Employees have two different feelings about their work:

☺ **Feelings about the company:** how enthusiastic/committed employees are about the company, and how much they feel their values/goals align with the company's values/goals

☺ **Feelings about their job:** how much employees feel connected with the actual work of their job, and how they can connect their daily work to the values/goals of the company

Both of these feelings need to be measured to gain a full picture of employee engagement at your company. The key is to use the best tools to measure these feelings.

As we said, employee engagement surveys are so useful partly because they're one of the few instances that the company is asking employees what they think and feel about the company and their job directly. In fact, there are three main ways your company can ask employees directly about their feelings: informal conversations, formal conversations, and engagement surveys. All of these are necessary for you to comprehensively evaluate how engaged employees are.

Informal conversations

Informal conversations encompass the majority of workplace interactions. These can be anything from a 1:1 check-in to a feedback session on a recent project. They offer a chance for managers to connect with more individual and team-oriented problems. The key to making informal conversations a useful tool for engagement is to document them. Adding feedback for 1:1s, notes, or praise in a performance management tool can help you understand changes in your employees' engagement more objectively over time.

Formal conversations

Formal conversations are the sit-down meetings that you and your employees have to prep for. A great example of a formal conversation is a performance review, which probably happens at least every quarter. Formal conversations can also happen at big wrap-ups, before or after promotions, or at other major shifts in an employee's or the company's trajectory.

Where informal check-ins are a good gauge how an employee is engaged in the day-to-day, formal conversations allow you to ask questions about where employees see themselves, what their goals are, and how they feel about their larger role with the company. With a strong performance management tool, you can review notes from informal conversations to enlighten the formal conversations.

And finally: **Engagement surveys**

An employee engagement survey allows you to check in on how every employee feels about the company and their job, all at once. Surveys are a useful tool because they give you a good understanding of what the company's biggest strengths and biggest weaknesses are. They provide a means for you to ask more questions and suggest policy changes because they provide contextual data.
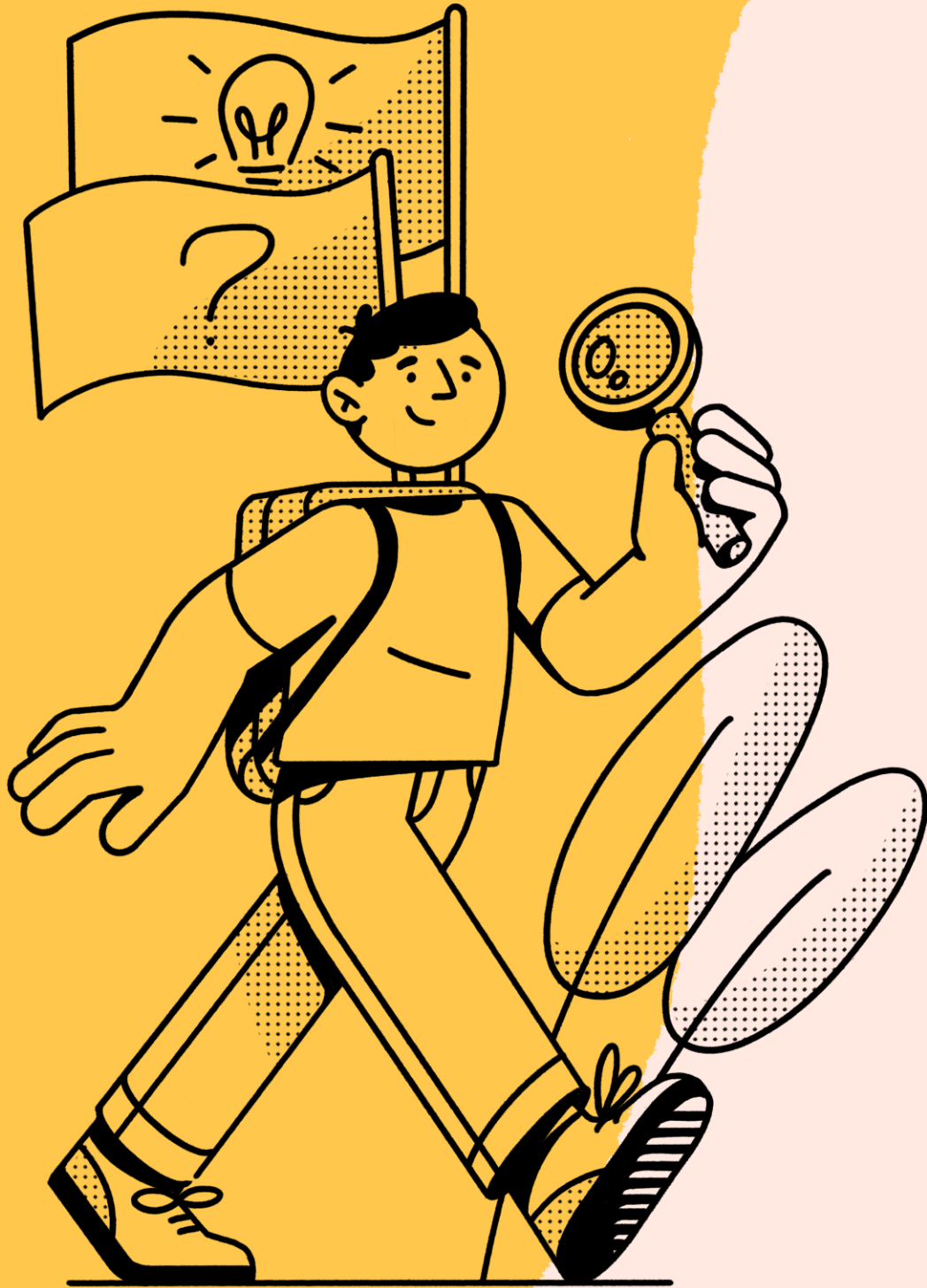
Building the Survey

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Two Questions:

(?) Why are you doing this survey?

(?) How do you hope to use the info you get from it?

Make sure you have a clear answer to these questions before you start to craft your survey, because the answers will help provide direction as you build out your survey. This will help you clarify your goal for it, as well as figure out the scope of your survey, and what precisely you're asking employees about.

Start with a brainstorming session: make a list of the company's perceived strengths and weaknesses or blind spots. Any good scientist comes up with a hypothesis and this is the first step to testing it.

You'll also want to do the following:

- **Consult company leadership.** Ideally, leaders have a finger on the pulse of the company, understanding the organizational culture and strategic objectives. Ask for their opinions when determining employee engagement problems and prioritizing issues. Include managers and leaders from different departments, particularly HR.

- **Review past surveys.** Has your company executed employee engagement surveys in the past? What problems were identified? Did you address or improve employee engagement problems, or are they still an issue? Problems can vary from survey to survey, so make sure that you identify current issues and action areas.

- **Use exit surveys.** While exit surveys are not an unbiased look at a company, they can provide some relatively honest feedback from former employees. If you have had employees leave recently, it can be worth seeing whether there are any common problems they identify in their exit surveys.

After doing the above, you can start building and choosing survey questions.

If you are planning an engagement survey, what you ask and how you ask it is of utmost importance. How you design your questions, what you ask, and how you phrase questions can have a statistically significant effect on results.

With that in mind, make sure your questions:

☐   Are pointed and unambiguous.

☐   Only ask one thing at a time.

☐   Are worded neutrally.

☐   Ask about something you can actually change or improve.

We also have our own questions you can use.

Lattice's employee engagement surveys include suggested questions developed from psychological and management research, with the help of UC Berkeley professor and behavioral economist Elizabeth Linos, to get you started.

All questions are rated on a Likert scale (strongly disagree, disagree, neutral, agree, and strong agree) unless otherwise noted. This type of response helps gauge how vehemently an employee feels about a topic, either negatively or positively. It is widely used in surveys — in fact, you've probably taken dozens of surveys with this type of response.

One of the benefits of using the Likert scale is that you avoid asking the same question twice. A positively worded Likert Scale question would be "I am happy to come to work everyday." It's important not to include "I am unhappy coming to work everyday," because the "strongly disagree" option already covers that.

Also, by using the questions in Lattice's question bank, you'll eventually have access to our Benchmark data which will allow you to compare your data to companies of similar size or industry.

Finally, make the survey easy to complete and not that long. This will encourage more employees to fill it out, and give you better data to check engagement overall.

We have several sections in our engagement survey question bank: Commitment to the Company, Diversity Climate, Engagement, Fairness, Feeling Valued, Fit and Belonging, Job satisfaction, Management, Psychological Safety, Self-Efficacy, Team culture, Team learning, and Work relationships. We've included a few here for your convenience.

Commitment to the company

I talk up this company to my friends as a great company to work for.

I am proud to tell others that I am part of this company.

I really care about the fate of this company.

I trust the decisions of the senior leadership in the company.

Feeling valued

Working with members of this team, my unique skills and talents are valued and utilized.

In the last 7 days, I've received recognition or praise for my work.

At work, my opinions seem to count.

People notice when I go the extra mile at work.

Engagement

🎯 When I get up in the morning, I look forward to going to work.

🎯 I am enthusiastic about my job.

🎯 Time flies when I'm working.

🎯 After work, I have energy for my leisure activities, friends and family.

🎯 At work, I feel very energetic.

Management

An employee's relationship with their manager is one of the most important working relationships, and asking about management can tell you two main things. One is whether your managers are doing what they are supposed to be doing, in accordance with your policies. The other is whether your management policies are working.

(These aren't all the questions in the Management section—we have a lot more!)

🎯 Someone at work encourages my development.

🎯 In the last six months, someone at work has spoken to me about my progress.

🎯 If I could choose, I would continue working with my manager.

🎯 My manager communicates clear goals for our team.

🎯 My manager gives me actionable feedback on a regular basis.

Fit and belonging

🎯 I can be myself at work.

🎯 I find that my values and the company's values are similar.

🎯 The mission/purpose of my company makes me feel my job is important.

🎯 My work style matches the work style of the company.

🎯 I feel like I belong in this company.

Job satisfaction

🎯 All in all, I'm very satisfied with my job.

🎯 All in all, I'm very satisfied with my coworkers.

🎯 All in all, I'm very satisfied with the supervision I receive.

🎯 All in all, I'm very satisfied with the work that I do.

During the Survey

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Congrats! You've

① Identified your focus

② Crafted questions, and

③ Built a great survey!

Now what? 🙂

Prepare your employees

This may seem basic, but you have to **prepare** your staff for the survey. Don't just craft it and immediately send it out -- instead, publicize that the survey is happening, and communicate deadlines so everyone understands how and when to do their part.

Timing of the Survey

When it comes to surveys, we recommend two things:

Don't have them at the same time as performance reviews. Asking your employees to write reviews and fill out the survey will be a lot of pressure and a lot of work at once. Even if you have them around the same time, we recommend putting at least six weeks between the two events. The data you gather for both will be more focused and more useful because of it.

Like performance reviews, have engagement surveys on a schedule. By having regular engagement surveys, you'll be able to compare data on engagement and keep track of whether your engagement strategies are working. Like we said, though, make sure your performance reviews and engagement surveys aren't on the same schedule! Even if you do both on a quarterly schedule, still keep at least 6 weeks in between them.

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Ensuring Participation

Now that you're ready to hold the survey, getting employee buy-in can seem daunting. How do you convince everyone to fill it out, so that you get an accurate picture of employee satisfaction?

☐ Ensure that answers are anonymous -- the last thing you want is for people to fear they'll be penalized in some way for giving negative feedback.

☐ Make sure they know that the company will use the information gathered to make improvements, and that you'll share the results in some shape or form.

☐ Empower them! Participating in the survey will give them a say in changes, so let employees know that the survey is the best way to make their voices heard.

☐ Send out creative reminders before the deadline -- a joke or two over Slack or email can be helpful.

☐ Give them an idea of how long it'll take, whether it's 10-15 minutes versus 30 minutes versus 5 minutes.

☐ Get managers to remind employees, and/or set aside time for it. Encourage people to put time on their calendars specifically for the survey.

☐ Finally, don't offer a reward for filling out the survey or make the survey mandatory. You can certainly encourage, remind, and suggest employees do the survey. But pushing or cajoling your employees into taking the survey can skew the results, and give you data that won't be very useful in the long run.

After the Survey

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Your survey is complete!

Take a brief moment to pat yourself on the back for completing the first couple steps in this journey.

Then, take a breath: the work isn't over yet!
You finished your survey, and have been looking at your raw data. This should inform your strategy going forward -- but you must analyze your results.

There are three parts to survey analysis:

① Looking at cross-sections

② Contextualization

③ Brainstorming reasons for problems and basic solutions

Cross-Sections:

You find valuable insights that you can get by looking at a particular cross-section of responses. Say, for example, your survey results say that 80% of employees agree or strongly agree that company morale is good. That's awesome! But what happens when you dig into a cross section:

Split by department and you may find that 70% of engineers disagree.

Split by gender and you may find that 60% of women disagree.

While your overall results are good, if you don't dig into your data, you aren't going to see that there are some departments or groups that aren't receiving the same support as others.

This can be especially important to do in large companies. If your company is 50 people, and your engineering department of 15 people are unhappy, they have a much bigger statistical influence on overall results. In contrast, if you have a company of 500 and an engineering department of 60, their unhappiness is less likely to move the needle on overall results.

Making Sense of the Data

Once you have examined your cross-sections, it's time to contextualize the answers to your survey. This has several components, including digging further into the numbers, and looking at the broader view of what is happening in your company.

If you have historical data on your company's employee engagement survey results, compare them to inform how your current results stack up. For example:

%   Your current survey says that 35% of employees enjoy working at the company.

%   Your last survey said 20% of employees enjoyed working at the company.

%   Therefore, your current survey shows a 15 percentage point increase in employee satisfaction.

Is it good that 35% of your company enjoys working at the company? No, but it is a huge step in the right direction compared to 20%. This tells you that the changes you made after your last survey are working. Conversely, if there's a dip, that is a red flag to probe further. It might be that outside factors have changed the results, even if your company didn't change any official policies. So take stock of what major company changes have happened recently. If you've hired a ton in the last quarter, you might get more agnostic results as new people might not feel strongly about issues yet. If you opened a new office, your communication scores might be low.

Even better is when you're using an engagement tool that provides benchmarking, as Lattice does. It helps you see how your company is answering questions compared to other companies your size.

Brainstorming solutions

Before you talk to your team about survey results, brainstorm problems and potential solutions to those problems. This is key for several reasons:

You can't expect your employees to do all the work for you—and they don't have all the data you have.

Employees are going to ask questions about what you're planning and what your next steps are. Giving them assurance that you are working through solutions keeps their confidence that you are taking the survey seriously.

Brainstorming can tell you if there's a mismatch between employee perceptions of problems and management's perceptions of problems. If you don't brainstorm beforehand, you won't get that clarity.

Finally, **discuss results with management** so you can lay out pressing concerns and brainstorm ideas as a team.

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When sharing results with employees:

💡 **Thank them for their contributions.** This should be your opening, especially if your survey was voluntary. Employees are taking time out of their schedules to be honest about their experiences, and this can be difficult and time consuming.

💡 **Let employees know you've identified areas of concern.** This will show that you have truly paid attention to employee feedback and are actively thinking about the problems that the survey brought up.

💡 **Outline your basic plans and next steps.** This makes it clear that you aren't just listening to concerns, you are actually addressing them. It is a critical step to reassure employees that your engagement survey will make a difference.

💡 **Open the floor to comments.** Now, it's time to step back and see what your employees have to say. They may be able to give you critical insights that can better your plans. This is also a gut check to see if the areas that you have identified as problematic resonate with employees.

💡 **Continue to seek employee input** through post-survey meetings so they can share new or continuing concerns. Also let them take the lead with generating ideas so as to further empower them to give input and problem-solve.

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Post-survey Engagement

Your post-survey employee engagement strategy is like any other strategy you craft for your business: You have to create a plan, begin to implement it, and adjust it according to what happens after. Your strategy should be:

⚡ Tailored to your business

⚡ Solving for actual problems

⚡ Constantly reevaluated

Advice on planning:

💬 If you have to make a sweeping change, you might focus on one specific area of improvement at a time. This means anything that is going to significantly change the workflow, tools or structure. These changes can be unsettling and take time to get used to and will be hard enough to roll out without trying to tackle more than one thing at a time.

💬 If you are making smaller changes, you can implement a few at a time. Humans are creatures of habit and trying to switch up too many things at once is bound to fail. Employees need some time to form new habits, even at work.

Make a commitment to your employees to make changes after an engagement survey. Empty promises will hurt engagement and will cause employees to distrust the efficacy of future surveys and future feedback.

Instead:

🙂 **Share your reasoning** as to why you have decided to tackle these particular problems and why you are adopting the solutions you are. This doesn't necessarily mean you have to prove that what you've decided to tackle is the number one problem — again, you might not have a standout — but it should show that you understand the underlying cause of the problem.

🙂 **Give your employees key dates** for the rollout when you discuss implementing changes. Even if you can't start the change right away, this will show you are serious and can be held accountable for the changes. It will also force team members to prepare themselves for any habits that might be disrupted.

🙂 Make it clear that **you will be open to further feedback** on the processes, tools, etc., that you are now putting in place. You've just opened a line of communication with your employees, and they need to know that you are going to keep it open, especially when shaking up processes.

Keep track of your employees' engagement over the course of the year. Even outside employee engagement surveys, you can keep track of employee engagement. One of the best ways to do this is through performance management, like the informal and formal conversations we already talked about. That's because **performance and engagement are linked**. Engaged workers can be defined as people who are enthusiastic about their work and their company. This enthusiasm translates into employees who are high performing, productive workers who are eager to stay at the company.

So, to sum it up, ways to measure employee engagement outside of a survey include:

- [ ] 1:1s
- [ ] Status updates
- [ ] Pulse Surveys
- [ ] Performance Reviews
- [ ] Feedback conversations
- [ ] Praise

By holding performance reviews, gathering and giving feedback and praise, setting up 1:1s and status updates, and finally, building and launching engagement surveys, you get a much fuller picture of how your company's doing and how to make it even better.

The good news?

You can actually do all those things at once in Lattice.

Set up a demo today.