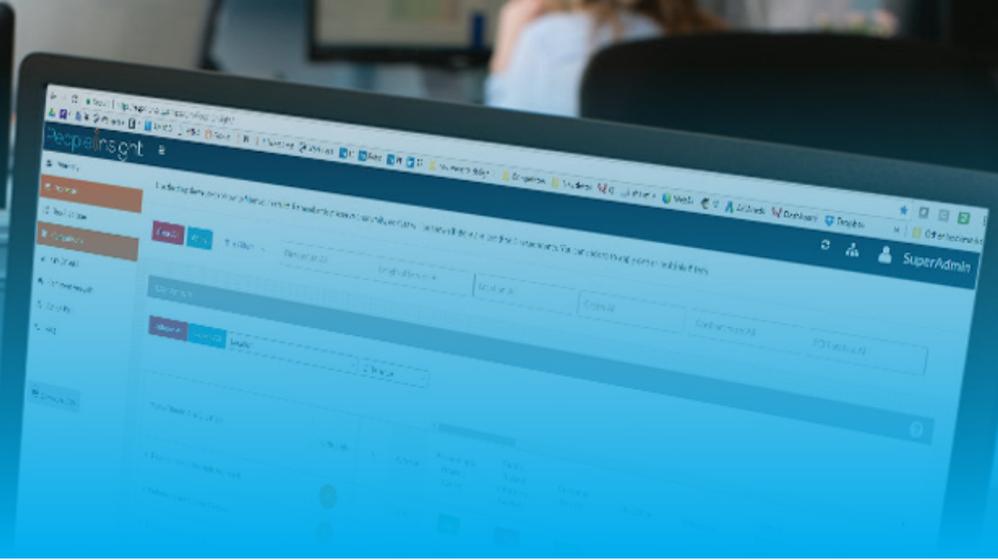




# How to create great pulse surveys

# Introduction



## Everyone is talking about pulse surveys

Annual engagement surveys provide a fantastic opportunity to connect with your people in a meaningful way that drives significant change. The data is broad and deep, providing an unparalleled ability for internal and external benchmarking, rich analysis of sentiment, and identification of the drivers of engagement.

However, a lot happens in a year, and many organisations want to keep in touch with engagement and other key issues on a more regular basis – which is where pulse surveys come in. We thought it was time to define pulse surveys clearly, and examine pulse survey best practice.

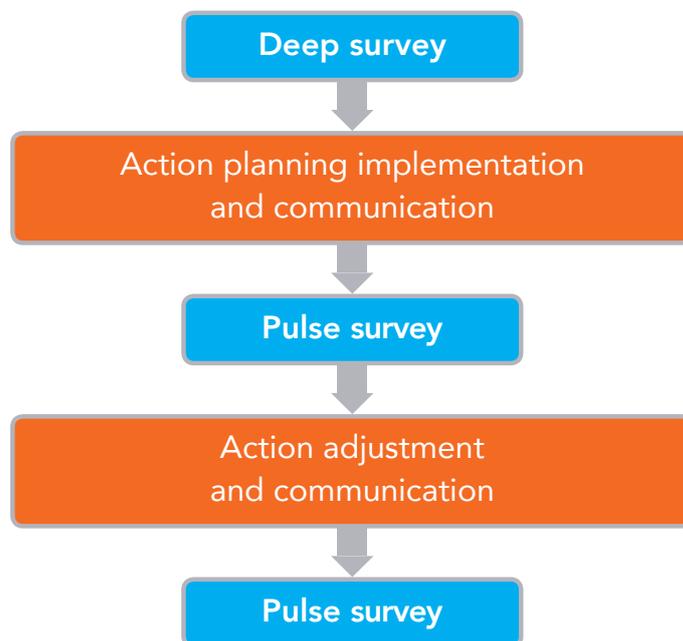
# Best practice pulse surveys

Put simply, a pulse survey is a short 'check in' in between deeper less frequent surveys.

At People Insight we believe the way to balance the principles of depth, frequency and action is a combination of deep, infrequent surveys (often annually) and more regular pulses.

The deep survey will give you feedback for strategic long term plans, and the pulses provide evidence of progress against these plans, and give you the opportunity to raise topical burning issues, or try new questions.

The cycle might look something like this:



This cycle takes place at a frequency that suits the organisation's pace of change, with one or two pulses commonly happening between the annual surveys.

# What's involved in a deep, annual survey?

The annual survey forms the initial measurement, and looks at in depth issues, but doesn't have to be long or dull.

People Insight advocate 35 concise questions in our PEARL™ model:

- An engagement index, to measure overall engagement
- The full range of specific engagement drivers – People Insight's model covers 5 global factors: Purpose, Enablement, Autonomy, Recognition and Leadership (for more details see PEARL™)
- The question: 'what changes have you seen since the last survey?' to check progress
- Free text comments for context

Employees complete the survey via their smart phone or any other device, and the data is usually reported within 2 weeks:

- Cloud based dashboard with logins available for board / HR / line managers to see data specific to their area.
- Offline reports (if preferred by the organisation)
- Feedback and interpretation presentations (with advice from business psychologists based on best practice gleaned from similar situations)

Alongside pinpointing quick wins (more recycling bins, more frequent 'thank yous') in depth analysis can reveal insights such as:

- Which issues have the greatest impact on engagement? i.e. what should you prioritise for action?
- Which issues have the greatest impact on factors like intention to stay?
- What difference have your programme(s) made, e.g. coaching, leadership training, reward schemes?

Whilst you wouldn't want to report on these issues in such detail frequently, such insights can be key inputs in to your long term strategic plans.



## What's involved in a pulse survey?

The pulse survey can be carried out at intervals of your choosing (once or twice a year is popular). It provides metrics to demonstrate progress on actions and the opportunity to 'check in' on any other burning issues, or test new questions.

It usually contains 10-15 questions:

- An engagement index, to track overall engagement
- Specific engagement driver questions related to your actions from the baseline survey
- Perhaps one or 2 topical burning issues that change over time
- Critically – the question: 'what changes have you seen since the last survey?'
- Open ended comments – for context around the above

A pulse survey is usually reported at a high level, with the data again provided as a cloud based dashboard or offline report. It shows you where you have made progress on actions, might need to change or intensify your approach and may need to consider some new issues.

Organisations then typically tweak actions, and spend the interim implementing and communicating, before repeating the pulse cycle again.

(continued)

---



People Insight's client, Fuller's, Smith and Turner, the annual + pulse approach has been adopted, with the initial in depth results providing key action areas for improvement.

A plan including personal development actions was implemented, and the ensuing pulse survey allowed them to check in and measure progress. Dawn Browne, Head of Operations, Fuller's says:

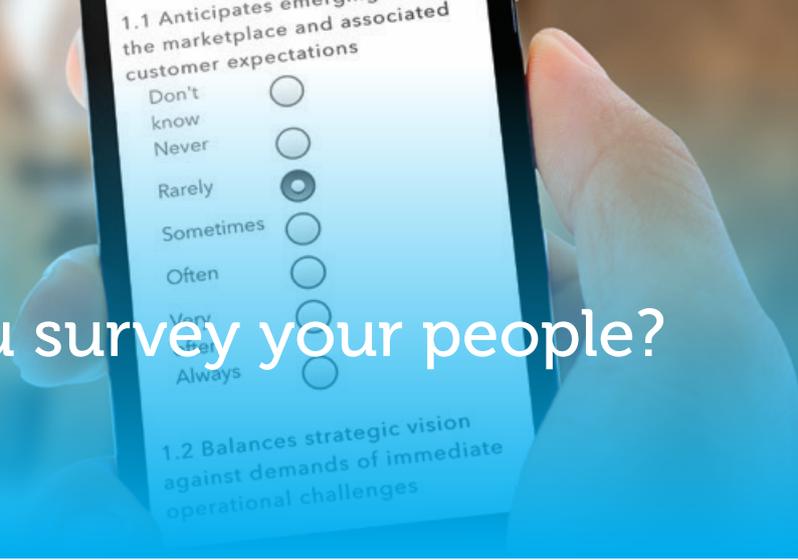


*"We decided to run a micro pulse survey to 'check in' on the progress of our actions, in Fuller's Inns, where the pace of change means it's appropriate. We wanted to emphasise to staff that their voices have been heard, and we are doing something promptly."*

*"Overall, the pulse survey already shows an increase in engagement scores of 5%. What's more, the things that we have prioritised; personal development and belief that each person's views have an impact on decisions made at Fuller's, have seen the greatest rise in scores."*

Dawn Browne, Head of Operations - Fuller's

# The big issue: How often should you survey your people?



Your key concern with any employee survey is to engage people in honest, constructive and timely feedback and get a good response rate that represents the broad population. We find the main consideration therefore is to:

## Act on the results

This should be your number one priority. People will quickly go off giving you feedback if you don't do anything about it, and you need to go through the cycle of listening, acting and communicating before you listen again. It is critical to be realistic about how frequently you can move through this cycle:



Effective surveying depends on this cycle

When deciding about frequency, think about an achievable pace of change in your organisation, and ask yourself:

- How much internal resource do we have to make changes as results of your surveys?
- How frequently can we mobilise this resource?
- How often do things change in our organisation? Are we early adopters or late to change?
- Is there the support, will and culture to make changes happen on an ongoing basis?
- Do we think we need to make fundamental changes or the occasional tweak?

# Myths about annual surveys



Annual surveys have come under some scrutiny with criticism for being slow and out of date. But you may be surprised to discover that when you apply an annual survey with more frequent pulses, the criticisms simply do not hold.



## The questionnaires are long and boring

People Insight's core employee engagement model PEARL™ is 35 questions long for the annual survey. It's lean, but not too lean, with the right balance between strategic depth and conciseness.



## The software is old fashioned

Annual + pulse surveys are carried out on online platforms with great user experience (UX) – they are easy for employees to complete on any device, and provide real time completion statistics. Results dashboards too are cloud based and intuitive.



## Response rates are poor

We see an average response rate of 80% online. Where surveys are easy to complete, have been communicated well, and employees aren't being asked too frequently, response rates are strong.



## It takes too long to get reports

Two weeks is average. Hardly the 'months' you might have seen years ago.



## They are expensive

It depends on your provider. Prices vary widely in the market. It's good to shop around. Looking for providers who give you options, have standardised build and design where it makes sense, and are lean, focussed organisations might just help.



## What about 'always on' surveys?

Sometimes confused with pulse surveys, an 'always on' methodology has been promoted over the last year or so. Proponents say it helps to identify problems before they escalate.

Our view is that whilst 'always on' works well in the consumer space to track immediate customer response, it does not translate so well in the employee world.

For example, some organisations have found that the pace of organisational change isn't compatible with such frequent surveys:

*"...the problem with conducting such frequent surveys "was that [the firm's approximately 8,000] line managers weren't gaining any new insights and didn't have time to digest that much data and take action on what the latest employee polls told them. Polling employees less frequently and seeking more substantial input has paid off."*

David Littlechild, Head of culture and engagement - Lloyds Banking Group<sup>1</sup>

Others find that 'always on' leads to poor response rates and skewed data. Dr. Jason McPherson<sup>2</sup> explains that whilst 'always on' works for customers, organisations have a finite sample of employees, and asking them the same questions repeatedly is less effective.

*"Based on what we've seen, 90% of companies using always on surveys can't keep their response rates above 50% when the same people are being surveyed weekly or monthly."*

Perhaps more fundamentally, the clients that we work with are working hard to develop organisation culture, values and climate. This takes nurturing, and also takes time. 'Always on' measurements of employee opinion will at best tell you what the organisation "weather" is like today (assuming you can buck the trend and maintain a decent response rate) – but won't tell you much, if anything, about whether the organisation's climate is changing in the direction you are aiming for. Any short term fluctuations in results on a weekly or monthly basis will as likely be due to sampling error as to any meaningful movement in climate, providing a distraction rather than insight.

<sup>1</sup> HRE online, October 2016. Reassessing engagement surveys

<sup>2</sup> Chief Scientist, Culture Amp

# Final recommendations

When thinking about your pulse survey programme, it's always worth considering the following issues. In summary:



## Survey at the pace of change

Employee engagement is about the active change, not the passive listening. Understand the realistic pace of change in your organisation. If you ask staff for their opinions, they will expect change. If you can't deliver, you will have failed, and they'll tell you as much.



## Internal comms are critical

Ensure people know the survey is coming, are enthused about it, are involved in deciding actions, and critically, know what is being done as a consequence. Otherwise when you check on progress – you'll get sullen responses, if any.



## Stay disciplined

Be really disciplined and focussed on the aim of the pulse survey and select questions accordingly. What actions do you need to check the progress on? What assumptions do you have / rumours have you heard of other issues that you might want to investigate? Don't let your pulse send you off on a tangent, opening up new issues, without having satisfied yourself on progress since last time.



## Make sure your questions are robust

Employee engagement; it's not just how 'happy' your employees are, but for the organisation's benefit, how likely they are to go above and beyond, speak positively about the organisation, and stay.

Therefore your questions must be proven by current research to indicate, and drive engagement. Ask your provider to show you the evidence that you are using effective questions.

(continued)

---



### Make it part of your organisation culture

The branding, tone and question text are all critical to making your survey feel part of the culture rather than something being done to staff. These two question examples from two organisations show how different wording can be for the same question:

*"I am able to build and sustain enduring partnerships with my internal and external clients"*

*"I get on really well with my team and my customers"*

Similarly, engage people in the survey through branding and comms – whether you make it fun and entertaining, or it's more appropriate to show people you are serious about listening.



Examples of survey branding from Guinness World Records and Bostik



# About People Insight's approach

At People Insight we use a full range of survey technologies, frequencies and formats to fit each organisation's needs. We love helping our clients make people decisions to help their organisations thrive.

We work with clients to measure at the pace of change using advanced survey software, and present results in the People Insight Cloud (or offline reports for those who prefer). What's more, our technology is backed up by cutting edge employee engagement and organisation development research.

Our business psychologists help clients design best in practice survey programmes, analyse data to reveal robust insight and understand exactly what to do to improve engagement, all wrapped up in a whole lot of customer love.

We monitor the effectiveness of our annual + pulse survey programmes closely, and find that:

- Clients improve their engagement scores on average by 7% after working with us
- Employees report they have seen action increase by 20% after working with us

*"People Insight were brilliant in helping us design and launch a rolling monthly survey within a very tight timescale. The survey is very popular with our employees and managers, as it is simple to use, completely anonymous, and gives us the data we need to rapidly respond to feedback and drive engagement at our sites."*

Claire Balmforth, Group HR Director - The Priory Group

## Give our surveys a try

If you are interested in how our employee surveys could help your organisation, contact us at:

W: [peopleinsight.co.uk](https://peopleinsight.co.uk) | T: 0203 142 6511 | E: [enquiry@peopleinsight.co.uk](mailto:enquiry@peopleinsight.co.uk)

People Insight, 33 Foley Street, London, W1W 7TL

People*i*nsight

