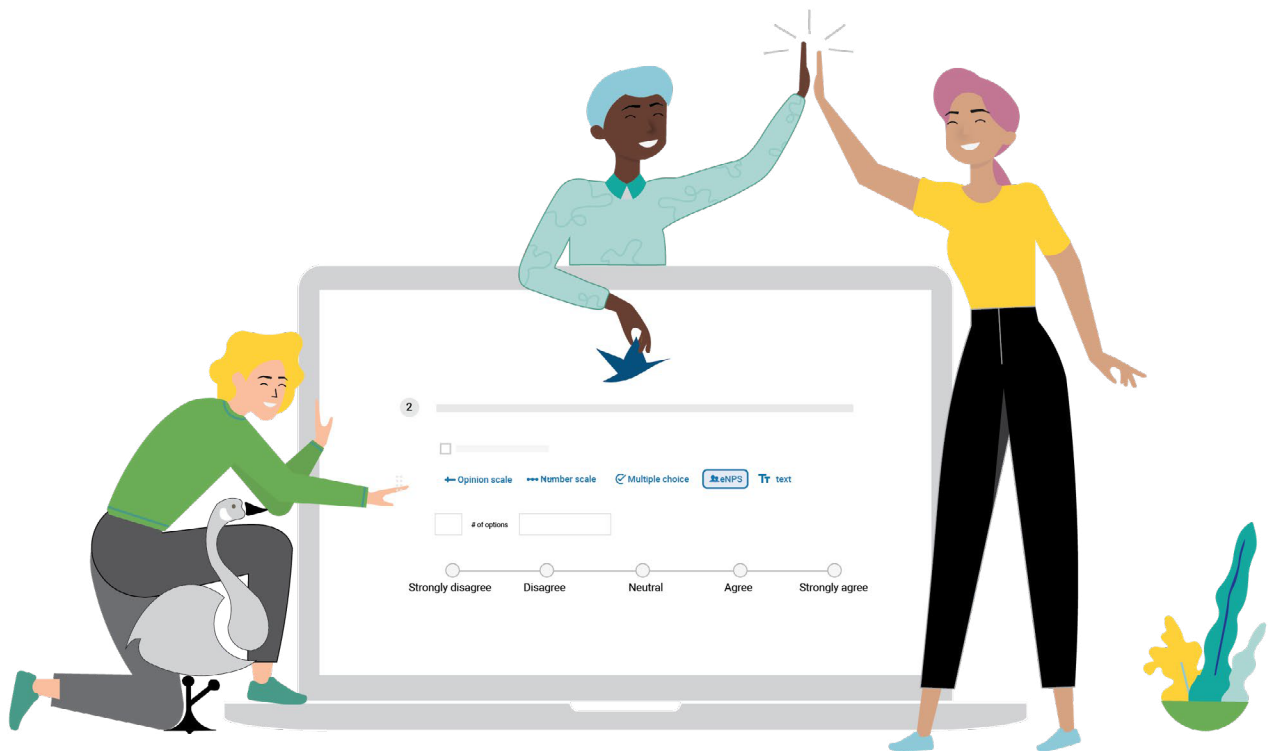




# Company Surveys

TAKING THE PULSE OF YOUR ORGANIZATION



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## INTRODUCTION

# Why Company Surveys?

Research shows there is a link between employee experience, engagement and company performance.<sup>1</sup>

Companies that report high positive employee experience in the top quartile have shown to have 25% higher profits when compared to organizations in the bottom quartile. They also report twice as much innovation and customer satisfaction (IBM: Smarter Workforce Institute).

As organizations collectively recognise that being more people-centric will translate to real results, they are recognising the need to have a stronger pulse on people's experiences in the workplace.

These "experiences" encompass just about any interaction they have in the workplace. It could be social interactions, their desk setup, the ability to access resources when they need them, their tech stack, their manager. Literally every interaction both positive and negative. These all drive the employee experience.

Having a regular rhythm and a mechanism of taking the pulse on how our people are experiencing can help us identify critical points to leverage engagement and higher performance, in time and see real results.

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<sup>1</sup> Although 'employee engagement', a term often used loosely, does not necessarily always mean better performance, high performing teams do result in higher engagement opportunities ([Reference](#)). Such as the case of the reported findings of the Temkin group of companies that excel in customer experience have 1.5x as many engaged employees, and Gallup finding that highly engaged workforces outperformed their peers by 147% -reflected in earnings per share ([Reference](#)).



## INTRODUCTION

# Why Now?

If this was important before, right now it has become crucial, as our companies pivot to adapt to new rapid and urgent changes in working culture globally.

Questions we need to be asking ourselves as People Leaders are:

- How can we ensure people feel supported, to be their best and most productive?
- How can we foster inclusive workplaces and further fluidity in communication?
- How can we listen better to how our people are reacting and coping with complex social and economic realities around them?
- How are people coping with remote working conditions, or to recent changes in structure?
- How do their feelings and perceptions of energy and workload, safety and wellbeing, belonging and engagement change over time?



## INTRODUCTION

# Gathering Insights through Your Surveys is Just Half of The Battle.

Insights without action will backfire. Research tells us time and time again that companies who do not “close the feedback loop” from surveys by driving key actions risk disengaging their workforce by 4 times (Qualtrics).

In 7Geese Company Surveys is part of a much larger ecosystem of human performance. We know that Performance Management - when done right - is a key driver of a positive Employee Experience.

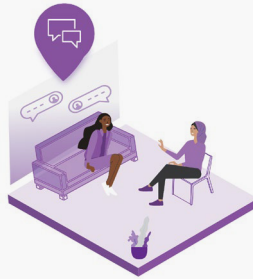
The insights you gain through surveys should inform your performance management ecosystem and how you action your insights.

Likewise, the data you gain from the full suite of 7Geese features, inform the questions you want to ask in your next company survey.



### 1-ON-1s

Provide growth-orientated coaching for employees.



### FEEDBACK

Help managers and employees grow with lightweight continuous and structured 360 feedback.



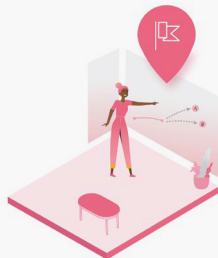
### REVIEWS

Conduct time efficient reviews based on historical performance data to reduce bias.



### CAREER MANAGEMENT

Reduce turnover and help people succeed with clear role expectations and growth plans.



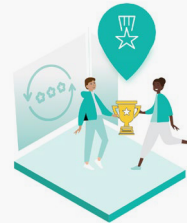
### OBJECTIVES

Everyone works toward the same goals with transparent and aligned Objectives and Key Results (OKRs).



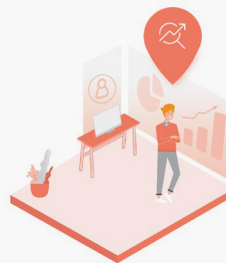
### RECOGNITION

Positively reinforce your organization's core values and increase employee happiness.



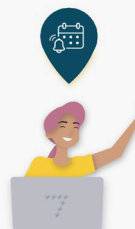
### PEOPLE ANALYTICS

Retain top talent by making strategic people decisions based on accurate talent data.



### PROGRAMS

Plan and automate all your performance management programs in one place.



# Getting Started!

What are some best practice tips for launching a company survey?

## GETTING STARTED: CONSIDERATIONS

# Questions to Ask Yourself...

What is the intention behind this survey? Consider the intent behind the questions you are asking and what you can realistically action, based on the data gathered. Is the company willing to listen to what their people have to say? “Just curious about anything and everything!” is a dangerous path to follow. Are you really able to action plan your insights about anything and everything? It is often smarter to focus on just a couple of key areas that you’re prepared to take action on.

What is your focus area/s or “theme/s”? Consider other forms of data that you have access to in order to contrast or give more context to what you are trying to learn about (e.g., in Paycor Talent Development through the Reporting tab, Manager Insights tab and feature specific data reports and export options).

Ask yourself: “Is this topic area timely?” Is this the right time to ask those questions? Will the theme be fresh in the responder’s minds? (e.g., after a specific event, change or critical time during the life cycle of a process, etc.).

How will we close the feedback loop? This includes the creating awareness and expectation communication before the survey, troubleshooting or handling general questions communications during the survey and planning on how the feedback will be acted upon and communicated afterwards.





## GETTING STARTED: CONSIDERATIONS

### Questions to Ask Yourself...(cont)

How much time and effort will this take? Is the required time in the capacity of most responders? Avoid high seasons or periods of time where people are generally busy with competing priorities.

Is this survey too long and are these questions straightforward? Remember to be considerate of people's time. Having short and simple questions and mostly of rating/multiple choice (closed questions) can help in this regard (few tips coming up in the sections ahead).

Is this a well designed survey overall? There is an art and a science to it. Make it as effortless as you can for responders. Use more 'closed' question types or of quick selection, and open text for responders to expand if they want (a few tips in the sections ahead).

Have we mapped out a clear course of action to "close the feedback loop"? Foster trust in the process with each cycle moving forward by following through with tangible, meaningful and timely actions.

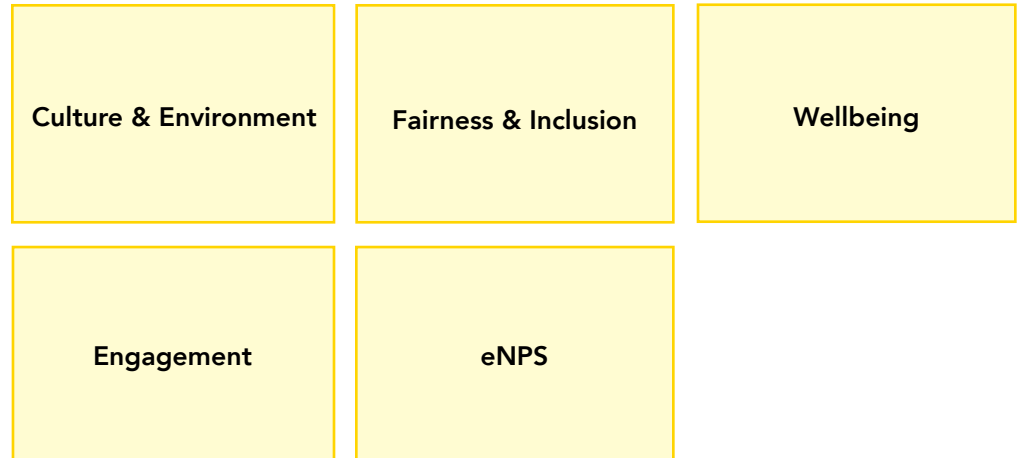


## GETTING STARTED: THE THEME

# Choose a Theme:

What insights do you want to gain?

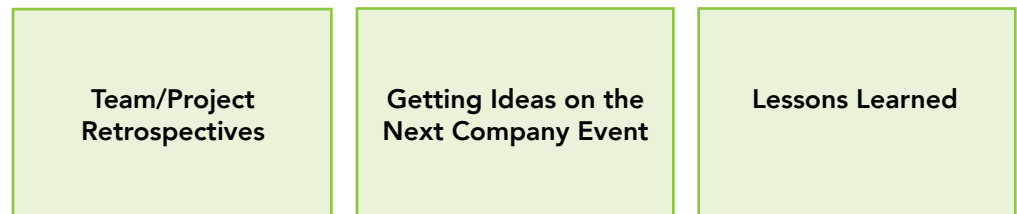
Company Surveys often include themes that fall under what is currently known as employee experience:



Other themes that often overlap with those mentioned before include:



They can also be used to inform any reflective and collaborative decision-making processes like:

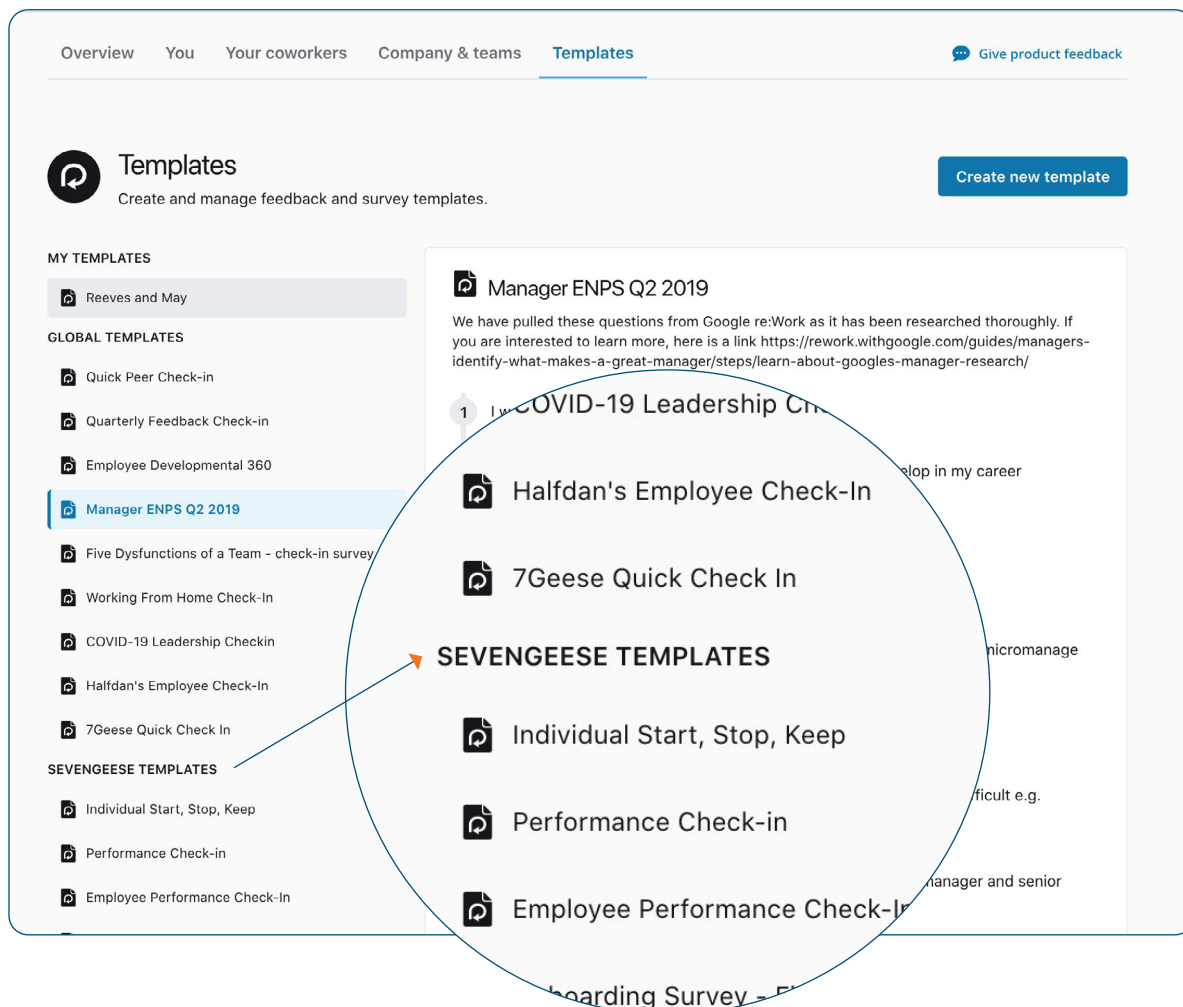


## GETTING STARTED: THE THEME

# Check Out Our Curated List of Templates!

No need to reinvent the wheel! Maybe what you have in mind is already there. Paycor Talent Development has a few curated templates to get you started.

There is an art and a science to writing surveys, and our very own in-house team of Work Psychologists and HR Professionals has curated a few from open source resources and their own professional experience.



## GETTING STARTED: CUSTOMIZE

# Adapting and Creating Your Own

If you want to customize or create your own set of questions, best practice suggests you keep the following ideas in mind:

### 1. Use a healthy combination of open and closed questions.

④ Do you have all the equipment / resources you need in order to do your work from home?

☐ Yes

☐ No

⑤ If you answered no to the above, what equipment / resources could we provide to help you work from home better?

Type your response

→ **Closed choice questions** (e.g., multiple choice or scales) are not only quicker to answer for responders, but are also easier to analyze as the system will aggregate them. The caution in using closed choice questions is they tend to narrow perspective to what is being asked. Sometimes, though, the real challenge is that we are not asking the right question.

→ **Open text questions** are great for exploring themes and to go deeper if needed. They also provide a space for explanations and for voicing something we might miss in our questions. BUT, keep in mind they take effort to answer, so use them with care. Consider also how you are going to analyse them—like separating them into categories.

Also, if not clearly phrased, they can lead to misinterpretation.



## Adapting and Creating Your Own (Cont)

### 2. Watch out for these common mistakes in quiz design.

Double-barrelled questions. Avoid asking two questions at once. For example: “How satisfied are you with your pay and job conditions?”, instead divide them into two individual questions.

Leading questions or statements. Avoid using questions or agreement statements. For example: “It’s clear you are happy in this company, right?” or “You love your amazing support team.” Instead use: “How likely are you to recommend working here?” or “How would you rate the response time of your support team”

Loaded questions or statements. Avoid questions that contain an assumption or that can be perceived as ‘tricky’ or with hidden intentions (e.g., “Have you stopped looking for other jobs?” Yes/No assumes the person is looking for employment elsewhere). Avoid questions overcharged with negative or positive emotions (e.g., “Why do you agree with the mistaken decision of reducing quarterly bonuses?”; “What are you most excited about ...”; “What do hate about...”)



## Adapting and Creating Your Own (Cont)

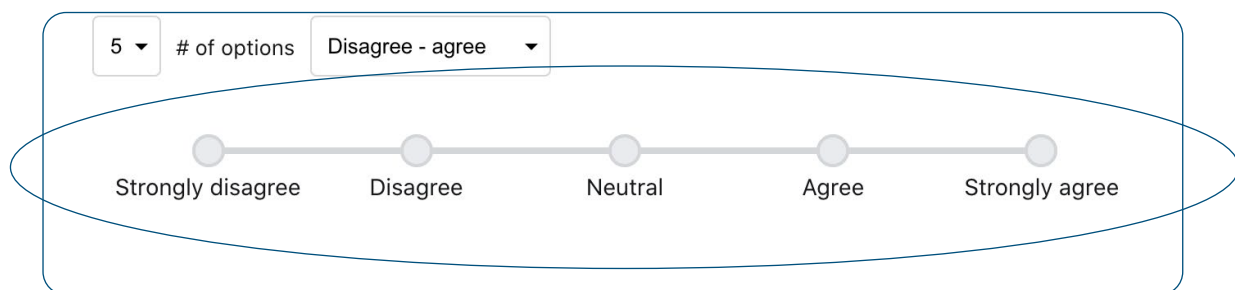
### 3. A special mention to Likert scales.

They are great for measuring attitudes toward a topic and allow for a rating in a continuum (i.e., from 3-7 in Paycor Talent Development).

The most popular are Agreement scales. Make sure you phrase them as statements.

- For an Agreement scale, avoid using negative statements (eg. "I don't think that..." ) or double negatives (eg. "I don't think that not having....")
- For other types such as Frequency, Importance, Quality and Likelihood, phrase them as questions that match the options; like: "How often...", "How important ...", "How would you rate the quality of....", "How likely", etc.

Use a consistent number of options. If you need to change the options, keep them in a different section.



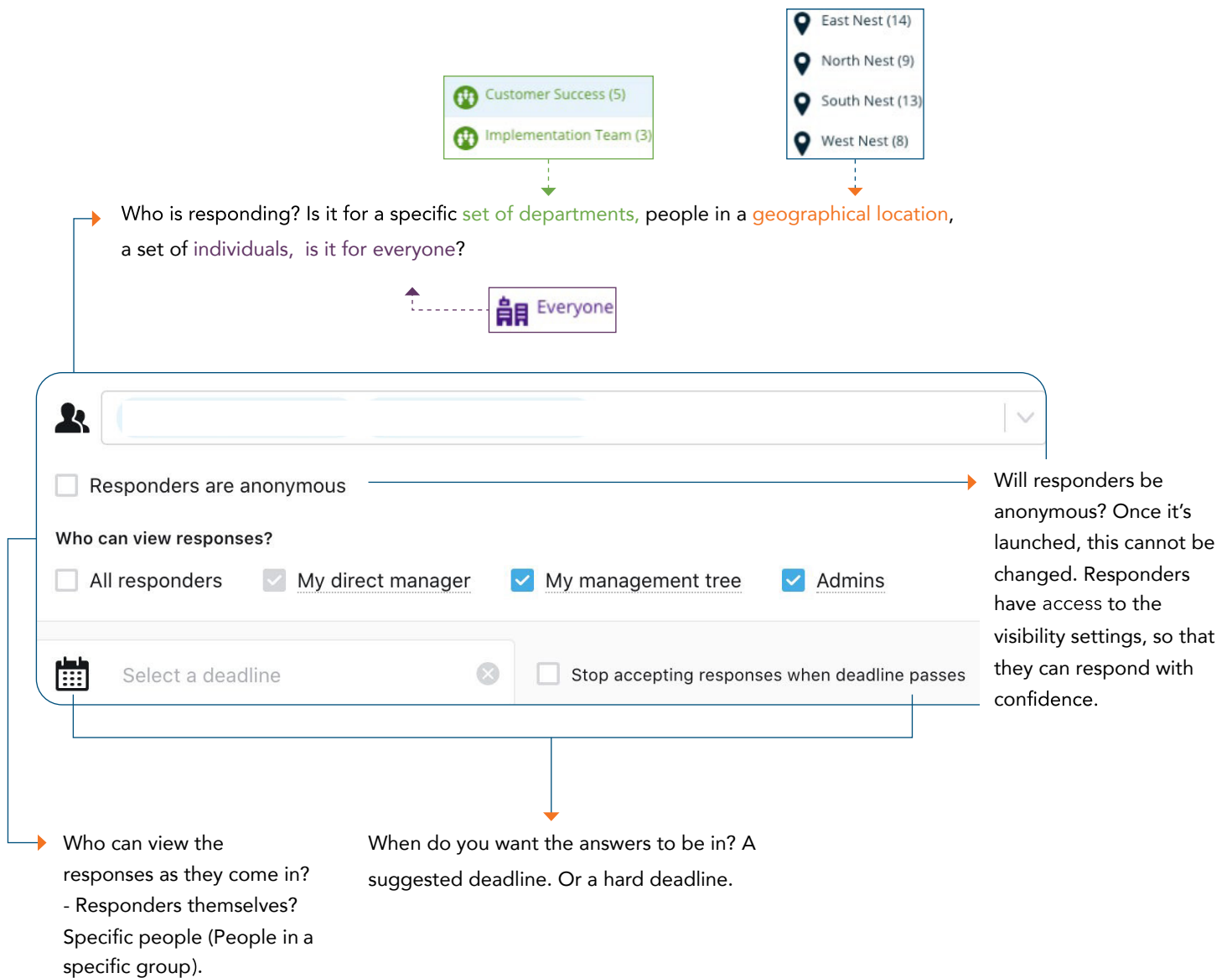
The image shows a user interface for configuring a Likert scale. At the top, there are two dropdown menus: the first is set to '5' with a label '# of options', and the second is set to 'Disagree - agree'. Below these, a horizontal line with five circular markers represents the scale. The markers are labeled from left to right: 'Strongly disagree', 'Disagree', 'Neutral', 'Agree', and 'Strongly agree'. A large blue oval is drawn around the entire scale visualization, including the labels and the line with markers.



## GETTING STARTED: SETUP

# Setting It Up

Make sure your survey settings match its purpose.



# From Insights Into Action



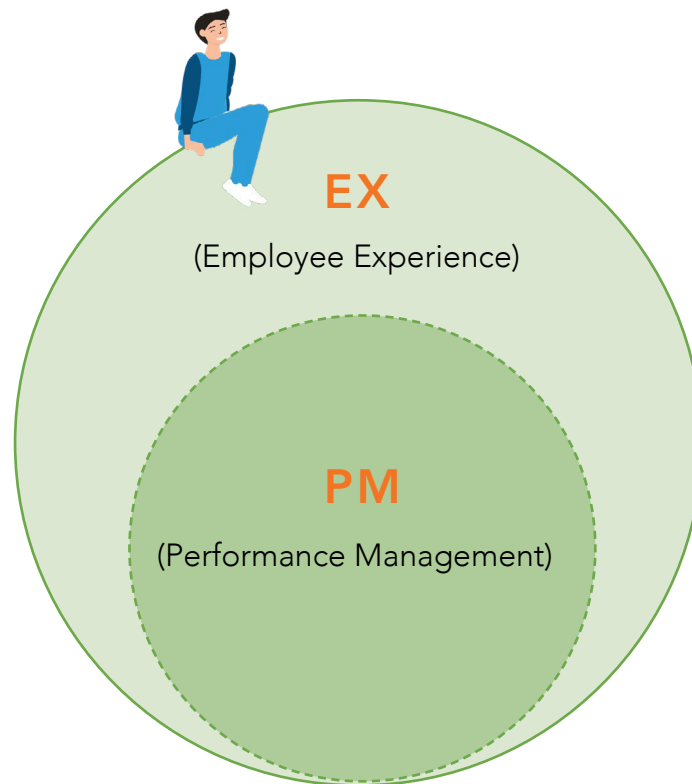
## FROM INSIGHT INTO ACTION

# Now the Most Important Work Starts!

We know that simply measuring and understanding these experiences is not enough. The challenge is to turn them into tangible, meaningful and timely actions.

You want to show they've been listened to and committed to follow through with actions and commitments. Feeling heard is critical. Acting on the feedback says they've been acknowledged and listened.

"About 60% of U.S. employees said their employer gave them a way to provide feedback about their own employee experience, but only 30% said their feedback was acted upon" (Qualtrics).



## FROM INSIGHT INTO ACTION

# Now the Most Important Work Starts! (cont)

Leverage Paycor Talent Development to follow through your insights.

### 1-ON-1S



Rehash your 1-on-1s with critical themes that emerged.

### CAREER MANAGEMENT



Helping shape and track growth plans for teams.

### OBJECTIVES



Following and tracking concrete goals and actions.

### REVIEWS



Leverage annual review conversations to help team member release their potential.

### RECOGNITION



Highlight people's contributions as they connect to our values.

### FEEDBACK



Foster opportunities for 360 or upward feedback, or smaller subsection targeted surveys.

### PEOPLE ANALYTICS



Contrast survey results to manager's insights into indicators of opportunities and career plans.

### PROGRAMS



Reinforce positive goal setting, 1-on-1 and Feedback habits with smart notifications.



# Practical Examples

## PRACTICAL EXAMPLES

# 1-on-1s Actions to Develop Performance



Add a regular question in your 1-on-1 that can help you gauge an area identified as critical through Company Surveys. E.g., If you identified Wellbeing in your Company Survey as an area of focus, include the question “How are you feeling today?” as the starter agenda item to get a “temperature check” on your team member before launching into tactical agenda items.

Create a template specific to the areas of action your Company Survey was able to identify, at different alternating cadence (e.g., monthly).

Review, from time to time, the progress of the conversations in your 1-on-1s to identify progress.

Get a sense of possible areas of discovery that can inform your next Company Survey.

Agenda Items [Expand all previous notes](#)

☒ Your notes are visible to Hank Honker [Edit default](#)

1 What are the three most important things that you did this week? 🔒 [×](#)

Jason Geese Hank Honker

Add your notes No notes

[View previous notes](#)

2 What are the three most important things that you are going to do next week? 🔒

Jason Geese Hank Honker

Add your notes No notes





# Developing Teams through Themed 1-on-1s

## 1-on-1s Program: Conversation Themes

<b>January</b> Fitness and Physical Health	<b>February</b> Self-Motivation	<b>March</b> Explore Your Roots	<b>April</b> Spring Forward
<b>May</b> Wellbeing	<b>June</b> Mind Your Head	<b>July</b> Mid-Year Reflection	<b>August</b> Summer Lovin'
<b>September</b> Back to School	<b>October</b> Turning Over a New Leaf	<b>November</b> Remembrance	<b>December</b> Budgets and Financial Health

## How

- At the end of the previous month, edit your 1-on-1s growth template to include a question linked to the monthly theme.

“How are you navigating the holiday blues? What has helped you?”

- Share with the team some details about that month’s theme and the impact it could have on them.
- Review the answers shared by your team members and create a quick resource guide for that topic to share with the team.
- You’ll be getting to know a different side of your employees and providing them with support they didn’t know to ask for.

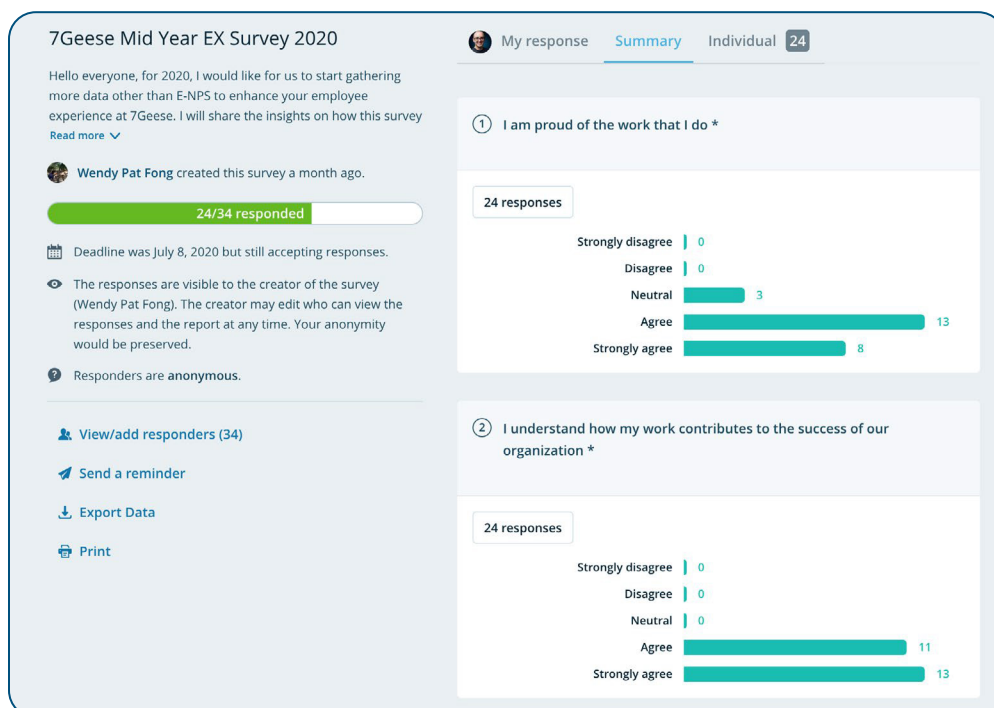




# Use Multi-rater Feedback to Identify Strengths and Areas of Development

## What areas of the Company Survey called to you?

- Personal & Leadership Development - Get specific and structured feedback from multiple raters (peers, direct reports, cross-functional teams) on how you can improve when working with them.
- Team Development - Launch team retrospectives surveys on a monthly or bi-weekly cadence to maintain team morale and assess team capability at regular intervals, tracking progress.
- Organizational Development - Launch a feedback survey on project completion to collate lessons learned and formalize post implementation reviews.





## Linking Recognitions to Incentives and Rewards

- Often seen as one of the “greatest missed opportunities for leaders and managers” (Gallup), recognitions can be huge for Team Morale and Work Climate Survey dimensions.
- In Paycor Talent Development recognitions are encouraged to be tied to your core organizational values, showing how small but meaningful actions (from your coworkers, colleagues and direct reports) add to the culture and mission-day in, day out.
- Take this further by having formalized shout outs to individuals in Company Meetings and those who got the most Recognitions for specific core values.
- Prepare a small token such as a gift card or a “trophy” item (like a stuffed toy) to inject fun into your Recognitions program.



## PRACTICAL EXAMPLES

# Track Employee Contributions and Have Data-driven Performance Conversations with Reviews

- Traditionally, one off, non-documented conversations.
- You can pull in information based on all the activities you undertake over time and curate “evidence” of the contributions you are making.
- You can also reflect on the impact you are making—recognitions, feedback and check-ins all provide really meaningful input.

The screenshot shows a performance review interface for Bruce Goose, VP of Product, managed by Wendy Gosling. The review period is April 1 - June 30, 2018. The current step is '1-on-1 discussion' and the next step is 'Finalized'. A 1-on-1 meeting is scheduled for Tuesday, January 15, 2019 at 3:30pm. The review content includes 'Objectives & accomplishments' with a table of objectives and a section for recent achievements.

**Objectives & accomplishments**

Your objectives for this period are displayed below to assist you in your responses, in being able to reflect on your most recent goals. Having a focus on strategic objectives allows us to improve our planning skills and helps us align our efforts to ensure that we are all driving towards the same outcomes

Objectives you own	Status	Progress
<input checked="" type="checkbox"/> Fly south for winter <span>02</span>	<span style="color: green;">●</span>	61.7%
		61%

Which of your recent achievements are you most proud of?

**Bruce Goose**  
I am super proud of my team getting to 80% of their quota. It was a hard quarter and they could have been so demotivated the start, but they really channelled their strength and we were able to make up almost 90% of what we missed.

**You**  
I 100% agree. I think you did really good rallying the team.

How valuable do you feel your contributions have been to the company during this time?

**Bruce Goose**

1 2 3 4 5  
Not at all valuable Highly valuable

**You**

1 2 3 4 5  
Not at all valuable Highly valuable



## PRACTICAL EXAMPLES

# Translate Insights into Objectives and Stretch Yourself and Your Team



- Create Team OKRs that address specific areas of growth through the insights gained in the Company Surveys and engage with others as you take the steps to work towards those Objectives.
- Identify what your specific department can do in alignment to the Company's Employee Experience goals.



## PRACTICAL EXAMPLES

# Build a Common Understanding of What 'Good' Performance Looks Like Using Role & Growth Profiles

If the Company Survey identified Fairness & Inclusion as a key area of focus, you can start addressing this by defining a standard or what 'good' performance looks like across each role in your Company.

Using Paycor Talent Development role templates and competencies, you can define success profiles for each role in your Company outlining the expected behaviours and results, setting clear performance expectations for everyone and aligning measures of performance on a 'level field.'

### Creativity

The ability to come up with original and innovative ideas and solutions, to adopt points of view outside the usual parameters.

Choose a level

**General**

- thinks independently
- has the courage to come up with unusual solutions
- believes in his/her abilities

**Operational**

- sees connections between seemingly unconnected aspects
- looks beyond obvious solutions
- offers suggestions for original products, methods, approaches
- experiments with new methods and opportunities
- looks for better alternatives

**Tactical**

- recognizes other people's ideas for what they are worth
- is able to abandon existing structures and methods
- restructures data and ideas in order to achieve innovative or alternative approaches
- talks in terms of possibilities instead of problems
- is flexible in his/her thinking and has many ideas

**Strategic**

- comes up with (yet) impossible
- is sometimes h of his/her swift associations
- is able to connect views from different
- comes up with
- comes up with solutions and i

Current assessment level from Hank Honker

**Assessment comments**

I can see Hank that you are actually moving towards Tactical Creativity. Remember how during project MT1 you enabled great ideation sessions with the rapid prototyping participants

