Timing, Frequency, and Pulse Surveys

Finding a healthy rhythm for measuring your organization
Cycle:

Periodic, repetitive fluctuation from a constant average or trend line in a time series data observed over an extended period

www.businessdictionary.com
Survey frequency: Developing a healthy habit

While some of our clients conduct employee engagement surveys biannually and others semiannually, it is Hay Group’s recommendation for most organizations to conduct a full census survey on an annual basis.

Surveying employees annually makes logistical sense, given that many other business metrics are measured annually and most business planning happens on an annual cycle as well. There is no doubt that organizations benefit from having annual survey results in hand during key business planning periods. Survey results can help bring the employee voice to the table as decisions are made about company priorities and goals. They can also guide leaders in developing business plan implementation strategies that are most likely to be successful.

An annual survey cycle not only benefits the business, it is also good for the survey itself: keeping the survey cycle harmonized with the business cycle can help enhance the survey’s visibility in the organization, facilitate action planning, and integrate the survey into the standard annual planning process. A year is also roughly the right duration in between surveys. It gives time for short-term action plans to be completed and long-term action plans to be initiated, but does not wait so long that trend results are considered invalid.

An annual survey can also drive accountability for managers to take action by appropriately tying it into the manager’s performance management and development planning discussions.

The survey is more than a mechanism to collect feedback; it is also a powerful communication tool for an organization. When organizations run annual surveys, employees become accustomed to regular outreach, and come to believe that their opinions are of great value to their company. Employees also feel that they have a constant outlet to express their feelings, giving them a sense of empowerment. Thus, even if an organization does not choose an annual administration, the most important thing is to make the survey an expected, predictable event.
Choosing an administration window: Timing is everything

The timing around an employee survey can be a critical factor in the success of the overall effort. The most important aspect of survey timing is that you make the survey a regular part of the employee experience. Surveying at roughly the same time each year has the advantage of demonstrating to employees the organization’s commitment to regular feedback. However, when it comes to choosing a time of year to survey, Hay Group recommends that you consider the following:

1. Will employees be available to take the survey?

There are some obvious examples: year-end closing and tax filing season are not ideal times to survey an accountancy, and December may be problematic for a retail environment. However, even if you manage to find an administration window that works for most of your employees, inevitably, there will be still be scheduling challenges for some—country-specific holidays, department-specific deadlines and unexpected crises can throw a wrench into otherwise sound plans. By identifying ahead of time where it will likely be hardest to ensure high response rates, you can direct aggressive marketing and support where it is needed the most.

2. Will managers be available to action plan following the survey?

Remember the old adage of survey professionals—“once the survey is over, the real work begins.” Not only do employees need to have the time to take the survey, but managers need to have enough capacity after administration ends to think about action planning. It is not enough, then, to simply keep the administration window outside of seasonal crunches; organizations should also ensure not to ask managers to respond to their results—an activity that may seem daunting enough already—when they are already overwhelmed.

3. Will HR be available to support managers in their action planning efforts?

Human Resources should expect to play an especially important role throughout the survey lifecycle, but no more than during the action planning phase. While HR is rarely tasked with doing action planning on behalf of managers, the supporting role they play can be extremely time intensive. For that reason, just as it is important to plan the survey timeline with managers’ schedules in mind, ensure that HR is not going to be immersed in another effort (such as performance reviews, compensation planning, etc) as action planning is taking place. That way, managers will have the support and guidance they need.

4. Will other datasets of interest be available on a similar timeframe?

Frequently employee survey data are combined with other datasets containing hard business metrics, like sales, customer satisfaction, turnover, or profitability. However, merging a fresh dataset with a stale dataset can compromise an analysis, leading to results that can be inconclusive or misleading. If it is known that certain datasets will be key elements of future analyses, it may be worthwhile to try to collect the employee survey data at roughly the same time.
5. **Will action planning dovetail with other aspects of business planning?**

Leaders typically want to be able to incorporate survey results and action plans into their larger business reporting and communication cycles. For example, if certain action plans are going to require resources or personnel, it is crucial to incorporate these requirements into annual budgeting and workforce planning. Moreover, organizational leaders who hope to share the survey results in annual shareholder reports or board meetings should be sure to plan the survey so that the results are available in time.

6. **Have there been any significant disruptions to business as usual that might skew the results?**

Trying to conduct an employee survey amidst a major organizational crisis or overhaul is ill-advised. Not only does it put extra strain on a system already burdened with change, but it is often impossible to know if the survey results should be attributed to real, lasting components of the workplace environment, or whether they are simply noise generated by employees’ experiences during a time of turmoil. Faced with this uncertainty, it is challenging to know on what issues managers should action plan. Moreover, there is a risk that poor survey results will cause undue alarm in people who attribute the results to fundamental flaws in the organization or its departments and managers.

Some leaders worry that postponing an employee survey will lead to a further erosion of goodwill among employees, who have come to expect a regular survey administration. Note that it is not necessary to put off a survey indefinitely; sometimes as little as four to eight weeks is enough of a postponement to let the dust settle. With a strong communication plan that assures employees that the survey is on the way, there should be no loss in employee confidence.
Pulse surveys: Making a long story short

While surveys have become shorter and more focused, a survey method that is gaining traction at a variety of organizations is the “pulse” survey—a data collection effort that often involves a briefer, more targeted survey instrument, a smaller sample of the organization, or both. Now that employee surveys are conducted online and the herculean administrative efforts around paper surveys are largely in the past, conducting pulse checks is reasonably easy. While most Hay Group survey clients still choose to administer their regular full-content surveys once per year, we believe there are several compelling reasons to augment traditional annual surveys with pulses:

1. **Keeping data current**
   
   Many businesses operate in an intense, competitive environment characterized by rapid change, and for organizational leaders, being nimble is the first priority. In this type of business climate, waiting a year to receive new information on products and services is unthinkable—and waiting that same year for fresh feedback from employees is equally untenable. These organizations need to be able to change rapidly in order to stay competitive, and are typically inclined to administer shorter surveys focused on top priorities and outcome measures (e.g., employee engagement and enablement) as frequently as several times per year.

2. **Retaining top talent**
   
   Organizations with acute concerns around employee retention often use pulse surveys to keep a close watch on trend. These organizations are typically concerned that movement in the wrong direction will cause them to lose valuable employees, and look to their frequent surveys to provide early warning signals should they veer off course. Pulse surveys offer opportunities to course correct before small missteps become issues serious enough to drive valuable employees out of the company.

3. **Evaluating specific efforts**
   
   Often companies decide that a special emphasis on certain aspects of the workplace environment are warranted, based on the organization’s values, goals, or results from a traditional survey. At Hay Group, we often see companies create company-wide task forces dedicated to, for example, diversity, work-life balance, a new performance management process, or immediate manager skills. Pulse surveys are used to gather specific feedback on those efforts by administering a highly targeted survey—sometimes as few as five questions. Subsets of the population may be surveyed and contrasted, e.g., managers vs. general population, client-facing vs. support functions, etc. Rather than cascade results to the entire organization, the results are used specifically by senior leaders and the task force to assess progress on the special effort.

4. **Focusing on specific groups**
   
   At times a subset of the population—such as a particular business unit, function, or level—emerges as having opinions that differ materially from the larger organization. While the full survey may hint at the reasons behind the difference, a pulse survey of the subpopulation of interest can help clarify the nature of the specific issues faced by this group. A more nuanced understanding of an outlier group’s needs can lead to more targeted and effective action planning.

5. **Mitigating challenges with the survey culture**
   
   Some organizations struggle with their employee survey culture, and conducting rolling pulse surveys in place of traditional annual surveys can help mitigate problems such as overemphasis on perfect response rates or pressure to give favorable survey responses. In this case, a random sample of employees is selected to participate in the survey every month, quarter or half-year—whatever is deemed practical—and since managers are not privy to sampling results (and are therefore unaware of when a certain employee is invited to take the survey) undue pressure cannot be applied.
While there are several reasons, then, that pulse surveys can be valuable complements to traditional annual surveys, there are a few words of caution. Over-surveying in a company can lead to survey fatigue, which can affect both the quality of the results and the response rates. Not only are respondents affected—managers receiving the results can find themselves overloaded as well, and find themselves unable to act in the face of a surfeit of data. Careful planning can, however, prevent these potential pitfalls. Attention to and communication around action planning can help prevent survey fatigue, and manager training and support can keep managers from becoming overwhelmed.

Pulse surveys can help take a survey program to the next level. They are not, however, a substitute for regular full-content census surveys. A full survey can provide a rich dataset that allows for sophisticated statistical analysis, comprehensive reporting and action planning at every level of the organization. A pulse survey is a valuable tool, but should be seen as a complement to full-content surveys, along with other types of quantitative and qualitative research. Strategic use of all the tools at your disposal is the best way to understand your workforce, and to use that knowledge to improve your business results.

**Pulse surveys have saved Hay Group’s clients time and money—and enhanced employee effectiveness:**

A major Australian financial & insurance company used a pulse survey to temperature check whether progress had been made on areas for action identified by the census survey. The pulse survey results were mixed—some of the actions were clearly working but others required a change in strategy. Overall this allowed them to change the milestones and strategy early on, saving them from investing in a flawed plan.

A well-known U.S. food and beverage company ran a pulse survey to monitor progress on enterprise action items that sought to enhance employees’ voice in decision-making. The pulse survey showed that progress was lagging for employees in certain job roles. Action plans were modified to better address the extent to which people in those job roles felt that decisions were made fairly, all employees were given equal opportunities for advancement, and managers took proactive steps to ensure widespread inclusion.

A leading global provider of customer loyalty and marketing programs used a pulse survey to examine manager effectiveness, an ongoing focus area for the organization. The pulse survey revealed employee concerns regarding the frequency and quality of coaching and feedback they received from their immediate managers. The results led to a revamp of the existing coaching and feedback program to standardize processes and incorporate manager accountabilities. This ultimately helped to ensure standards for frequency and quality of coaching and feedback across the organization.

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Hay Group is a global management consulting firm that works with leaders to transform strategy into reality. We develop talent, organize people to be more effective and motivate them to perform at their best. Our focus is on making change happen and helping people and organizations realize their potential.

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