

Pulse surveys: How, why, and when to use them

Executive summary

Many companies measure customer data continuously, have real-time metrics reporting for some of their most critical operational issues, and monitor their key financials with something bordering on obsession. Furthermore, they know exactly why they need these data and what to do with them. However, what about critical employee attitudes?

Based on TalentMap research, more than 90% of organizations conduct an engagement survey regularly, and most are planning to maintain or increase their investments in these initiatives over the next year. Business leaders are often frustrated with the lack of return from the employee survey and how they drive business outcomes. They are frustrated with the resources that the surveys require but simultaneously wish that they had fresher data about employee attitudes.

Creating a comprehensive employee attitude data collection strategy solves both issues: it ensures an effective survey and provides leaders with more timely data to guide decisions and shape or evaluate strategy.



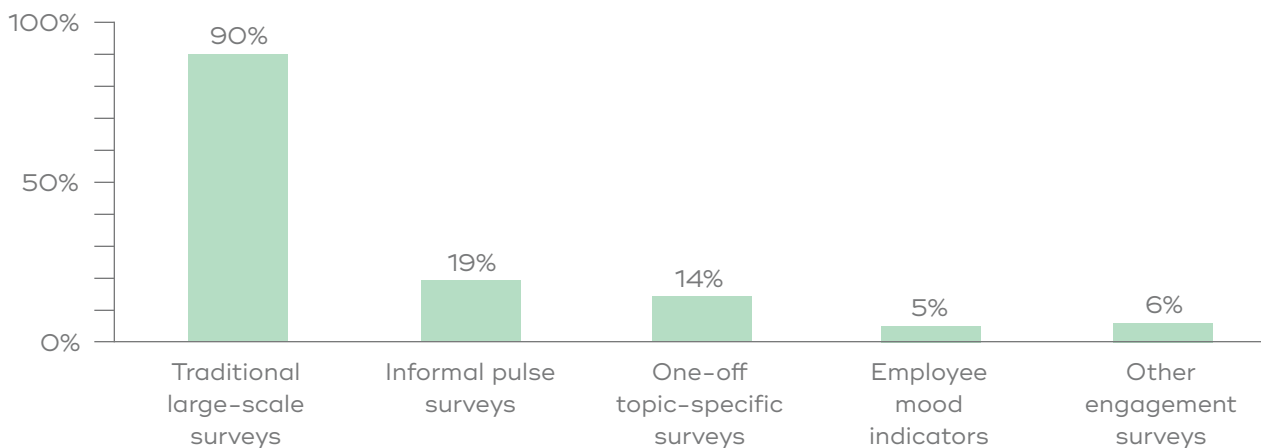


The annual survey: The foundation for your survey strategy

Our research shows that more and more companies are interested in administering pulse surveys; however, the annual enterprise census survey continues to be an overwhelmingly important centerpiece of an effective employee survey program, with over 90% of organizations deploying traditional large-scale employee surveys.

DIFFERENT ENGAGEMENT SURVEY METHODS USED

Percentage of organizations using each method



This approach reflects the important benefits that come with annual enterprise surveys:

- Using an annual schedule for the survey elevates the importance of the survey process as part of the overall firm strategy and aligns it with other key business processes that get completed annually (e.g. business planning, budgeting, talent reviews, goal setting).
- It allows for survey results to be tracked annually like other key business metrics.
- Managers at all levels have an opportunity to receive results, identify challenges, and take meaningful action, if they receive the minimum number of completed surveys required to develop a report. In contrast, most pulse surveys that involve surveying are not administered to the full employee base but rather only to a sample of employees. As a result, only leaders at higher levels in the organization can receive results in most pulse surveys. This type of report rollout does not support action at the manager level or allow for action plans to be tailored to the specific context of each group.
- It allows for greater trust in results and deeper analysis of group and demographic differences. This is because all employees have an opportunity to participate and because census surveys typically result in higher response rates. For these reasons, the enterprise survey should remain a critical part of an effective survey program.



So why change the status quo?

We found that just about every organization has experienced a significant change in the past three years. Nearly three quarters of organizations say they expect to see an even greater number of changes over the next three years, and only 13% expect fewer change initiatives. More worryingly, these changes are becoming more complex. Sixty-two percent of organizations surveyed say that the changes are unfamiliar—in other words, that they are facing more situations that are new to them than they did three years ago.

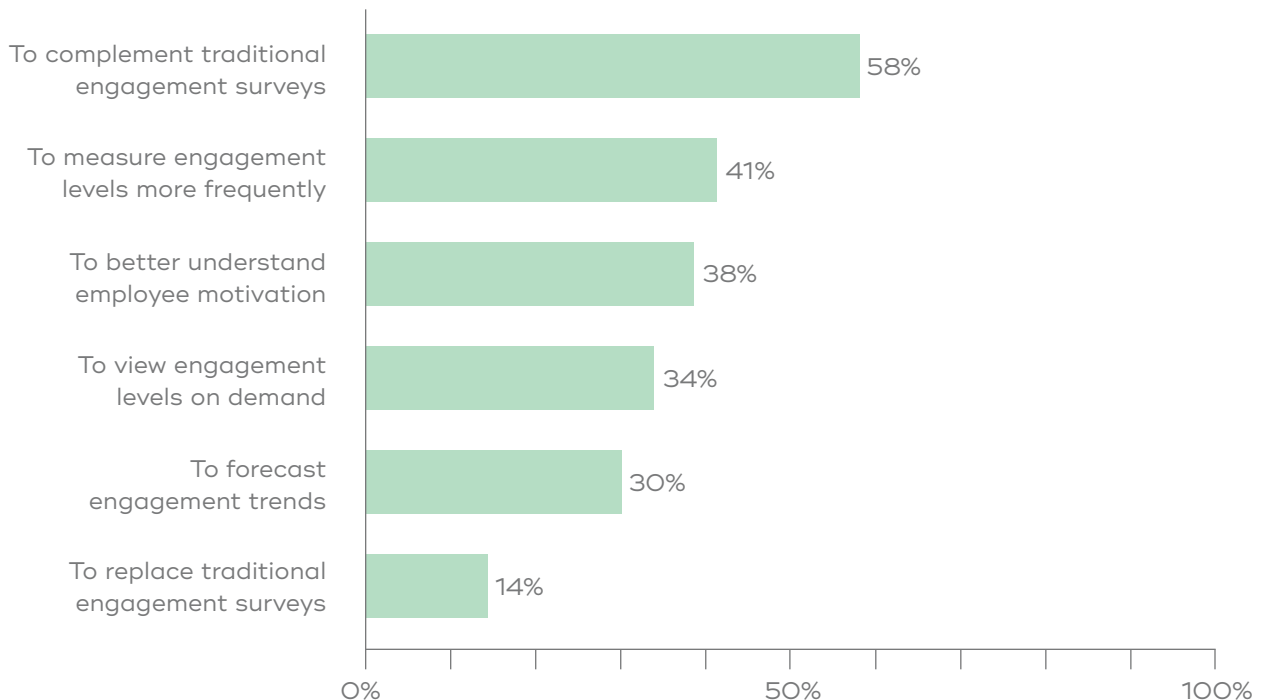
Given this increasing pace of change and complexity organizations face today, leaders are demanding more frequent data to help them understand how employee opinions are changing. This is where pulse surveys can complement your annual survey initiatives by helping leaders:

- Generate additional insights
- Identify and respond more quickly to problems
- More Easily evaluate the effectiveness of improvement actions

For this reason, pulse surveys play a key role in maximizing the value of survey programs, providing organizations with more robust and timely information.

REASONS FOR USING PULSE SURVEYS TO MEASURE EMPLOYEE ENGAGEMENT

Percentage of heads of engagement





Types of pulse surveys

As technology makes pulse surveys faster and easier to deploy, organizations need to consider their pulse strategy carefully. Decisions about the best approach for a pulse survey must be determined based on the organization's strategic needs and long-term goals, not just current trends or whatever the latest technology can provide.

A comprehensive survey program will likely include one or more of the following types of pulse surveys that:

1. Track key metrics between enterprise surveys and gain feedback on emerging topics
2. Measure the degree of improvement resulting from action responses to the enterprise survey
3. Diagnose the reasons for success or failure of action responses to the enterprise survey
4. Deploy "one-off" surveys to gain employee feedback on recent events or hot topics in the organization or to assess the results of change initiatives
5. Measure ongoing opinions as part of a continuous listening campaign

Although these surveys address different ways to complement the enterprise survey, they do not address the issue of understanding changing attitudes across the employment life cycle. For example, strong survey programs often include onboarding and exit surveys and even job applicant surveys. However, the focus of this whitepaper is restricted to the use of pulse surveys to complement the enterprise survey by allowing for an increased frequency of tracking employee attitudes.





1. TRACK KEY METRICS THROUGHOUT THE YEAR

The most common reason that companies express interest in pulse surveys is the desire to increase the frequency with which they can obtain data on important metrics such as employee engagement and more specific metrics that support their strategy. This type of pulse survey often involves administering a shorter survey including key metrics from the enterprise survey. A shorter survey is often administered regularly (e.g. quarterly, monthly) with a consistent set of questions. Typically, the pulse survey is administered to a random sample of employees to allow for a sufficient degree of statistical precision for both company-wide results and the results for the major divisions or business units within the company.

Reasons for increasing interest in this type of pulse survey include:

- Companies seek to be more agile in all aspects of their operations
- The increasing use of dashboard reporting tools that display customer and financial metrics has drawn more attention to the absence of quarterly employee survey scores
- With advances in technology that allow for these surveys to be more quickly and inexpensively deployed and the proliferation of mobile devices that make it relatively easy for most employees to participate, the barriers to more frequent measurement have greatly diminished

Although some companies that administer their enterprise survey every two years have frequently used pulse surveys in the “off year,” the interest in pulse surveys is greater than ever. The company that limits data collection to every 12 to 24 months runs the risk of delayed discovery of a problem with employee engagement or its organizational culture and sends a message to its workforce that employee opinions are not as important as customer opinions or financial metrics that are tracked more rigorously.

2. MEASURE THE IMPROVEMENTS RESULTING FROM ACTION RESPONSES TO THE ENTERPRISE SURVEY

After the results of an organization’s enterprise survey are reported, leadership typically picks a limited set of focus areas, creates action plans to address these priority areas, and then executes these action plans. Most often, it is important to leadership to know if these actions have had an impact.

A pulse survey can be an efficient and cost-effective means to assess impact, as well as communicate to employees that their input has been received, considered, and is resulting in substantive improvement efforts. The main difference between this type of survey and the interim survey described in the previous section is that this pulse survey covers the same topics that were the focus of corporate action planning efforts after the previous enterprise survey.

This means that if there is an annual enterprise survey, the topics on the pulse survey are likely to vary from year to year. Some organizations may choose to combine this and the prior type of pulse survey into one.



3. DIAGNOSE THE REASONS FOR SUCCESS OR FAILURE OF ACTION RESPONSES TO THE ENTERPRISE SURVEY

Rather than simply answering the question of whether post-survey actions have resulted in a meaningful change in the survey metrics, a pulse survey can also assess why the changes are or are not having the intended impact.

Using this Approach Organizations Can Gauge:

- The degree to which employees understand the reasons for a change
- Employee commitment to helping the changes be successful
- Whether the changes have the desired impact

For example, employees can be asked what type of additional support they need to ensure success, such as additional information regarding the purpose of the change, greater clarity about their role in implementing the change, and better prioritization of their new and continuing responsibilities.

By administering this type of survey at multiple points along the implementation timeline, organizations can obtain critical data to help them make timely course corrections. Of course, this type of survey can also include the enterprise survey questions on the topic that led to the change in the first place, so that the survey can serve the dual purpose of measuring the success of:

1. The change
2. The factors that are contributing to or inhibiting progress

4. DEPLOY “ONE-OFF” SURVEYS TO GAIN EMPLOYEE FEEDBACK ON RECENT EVENTS OR CHANGE INITIATIVES

Pulse surveys are useful tools to measure employee feelings on emerging or hot topics, providing leadership with information that addresses their immediate needs or interests. For example, organizations may conduct “one-off” surveys to learn about employees’ reactions to changes in the benefits plan, to assess the success of cultural integration as part of a merger or acquisition, and so on.

In some cases, these surveys are described as “polls” and can even involve a single question or a few questions, perhaps posted in a consistent location on the company’s intranet and made available to all employees. In other cases, the content may be a bit more extensive and the audience more specific (e.g., a function or business unit). With different groups throughout the organization having varied interests, the number of these surveys can quickly become unwieldy for organizations regarding managing the volumes of resulting data and the cumulative impact on the productivity of employees who are asked to complete these surveys.

By limiting the complexity of these surveys, organizations can quickly get feedback.



5. MEASURING ONGOING OPINIONS AS PART OF AN ALWAYS-ON, CONTINUOUS LISTENING CAMPAIGN

Increasingly, organizations are looking for real-time knowledge of employee sentiment with always-on surveys—for example, a “suggestion box” type of survey in which open-ended, qualitative feedback is sought on an ongoing basis. This process can be facilitated using automated text analysis in that it can quickly and consistently assess the positivity or negativity of employee sentiment. Alternatively, the always-on survey can take a more structured approach with close ended questions on a set of topics. In either case, the idea is that the employees can decide to provide their feedback whenever an event triggers the desire to do so.

The intuitive appeal of an active listening campaign is evident. In an increasingly dynamic business environment, an active listening campaign provides leaders with timely information on what employees are thinking. This type of approach also provides an opportunity for greater employee involvement. Although this type of survey will quickly provide a read of the organization on specific issues asked, it does not allow for issues to be viewed together in context for deeper insight.

Consequently, this type of strategy does not lend itself to robust and targeted action planning efforts that foster the accountability and best practice sharing that ultimately facilitate change throughout the organization.





How to use pulse surveys effectively

Regardless of the type of pulse survey used, several important considerations can significantly impact the efficiency and value of pulse surveys. Failure to address these considerations carefully and at the right time can greatly limit the value of the data and waste organizational resources.

CONTENT

Begin by ensuring that all key stakeholders understand the survey's goals. As described above, companies may engage in pulse surveys for various reasons, but regardless of the specific purpose, a thoughtful and targeted approach to designing the survey content will yield greater benefit and increased ROI.

The purpose of the pulse survey will drive its content. To illustrate, let's review content differences for interim pulse surveys tracking engagement metrics and a pulse survey focused on measuring the success of action:

Tracking Engagement Metrics

For organizations on a typical annual survey cycle, an interim pulse survey will usually include a short, targeted subset of questions that primarily focus on key metrics important to organizational success. The content is therefore driven more by what is important to the business than by what topics or items had favorable or unfavorable results of the last enterprise survey. Less commonly, a company may wish to administer the entire content of the enterprise survey to a sample of employees. This may be more appealing to a company that surveys only every other year.

Tracking Corporate Actions

In contrast, a pulse survey to measure the success of action responses typically will include a small subset of items that have been the focus of action planning efforts after the last enterprise survey.

This allows leadership to determine if the actions taken have had the desired impact. We recommend that some items from the enterprise survey on a topic such as engagement also be included to facilitate results interpretation. These results can be used to assess whether change seen on items targeted for improvement reflects more general changes in employee attitudes or change specific to the actions taken to improve on a topic or issue.



TARGET AUDIENCE

Choosing the target audience for the survey is another important component of your overall survey strategy and should be determined primarily by the purpose of the survey and the issues you intend to address.

For example, if the organization is implementing a one-off survey focused on a few key initiatives being implemented company-wide, then the entire workforce would be an appropriate target audience. Alternatively, if the pulse survey focuses on gathering feedback on initiatives or concerns specific to business units, geographies, or employee segments (such as a business acquisition, geographic market restructures, or change in executive compensation), then participation should be limited to these impacted segments.

NUMBER OF EMPLOYEES

Determining the target audience is only the first step. Next, organizations must determine the number of people who will be invited to participate in the survey and how they will be selected.

Deciding on how many employees should participate is usually driven by the desired depth of reporting and level at which action planning will take place. Reporting results only at high levels of the organization (e.g., company overall, by major business unit) requires fewer participants.

Manager-level reporting and action planning deep into the organization require far more employees to participate. It is this trade-off of the depth of reporting for process simplicity where we have seen companies struggle the most. To have an effective and agile approach to pulse survey implementation, companies must be willing to restrict results reporting to very high levels in the company for most pulse surveys.

When a random sample needed to reliably report results at the desired organizational levels represents the vast majority of the target audience, including the entire target audience is usually the best strategy. This avoids the situation where the few employees who were not invited are offended because of their exclusion, and it avoids further complicating the process and communication of results associated with sampling.



FREQUENCY AND TIMING

Approximately 75% of our Fortune 500 clients use an annual enterprise survey schedule, providing key metrics as inputs to their annual strategic planning process. Some clients have longer survey windows (e.g. every 18 or 24 months), while a small number survey more frequently (e.g. quarterly or monthly) using a pulse sampling strategy only. Some even use an always-on survey approach with the pulse being administered on an ongoing basis and different employees being asked to participate in a daily/weekly/monthly/quarterly basis. In our view, organizations should use pulse surveys as a complement to, rather than a replacement for, their more comprehensive enterprise-wide survey.

Organizations commonly want to know how often to administer pulse surveys. It is always specific to the organization and depends on what the organization is trying to achieve with the survey and how urgently information is needed. Some organizations have an ongoing pulse program where surveys are administered on a fixed schedule (e.g. quarterly), while others survey on an as-needed basis around a particularly hot topic or event (e.g. following the roll-out of a new program or product release; after a significant internal announcement).

RECOMMENDED PULSE FREQUENCY FOR SPECIFIC TOPICS

Interim Pulse Surveys

We recommend that an interim pulse be conducted every six months between survey administrations (once a year if there is an annual enterprise survey, and three times in between enterprise surveys that take place every two years), with results reported no deeper than one level below the CEO. This schedule ensures that the survey can be administered to a relatively small percentage of the organization while still identifying important shifts in employee attitudes.

Change Tracking Surveys

When a significant change is implemented after the enterprise survey, we also recommend deploying a survey to identify the barriers to successful implementation of the change. These follow-up surveys can be combined into a single survey or administered separately. An alternative approach is to administer a pulse survey quarterly to facilitate a reporting cadence that matches that of other organizational metrics. When following this approach, it is important to ensure that reporting takes place only at the highest levels of the organization and to use a sampling strategy that avoids any single employee receiving the survey in consecutive administrations.

Targeting Hot Topics

We do not recommend a predetermined cadence for pulse surveys designed to target hot topics but rather that those surveys are administered as those important topics emerge.



COMMUNICATIONS

For any survey program, having a strong communications plan in place is important to ensure high response rates, more reliable data, and better use of results by leaders. Firms with successful survey programs tend to invest in branding their programs and in creating informative and compelling communications. This strategy reinforces what matters most to the company, highlights the reasons why employees should participate, clearly defines roles and responsibilities, and builds accountability for action.

Despite the value of a strong communication plan, pulse surveys often lack a well-developed communication plan, likely because smaller-scale surveys often receive less attention from corporate communications departments. Also, because the topics of pulse surveys often change from administration to administration, a consistent and integrated storyline for communications becomes more difficult to establish. This is reflected in the fact that we consistently see lower response rates for pulse surveys than enterprise-wide surveys.

To avoid or minimize unmet expectations about pulse survey results, we recommend taking the following steps:

- Senior leaders should be involved in outlining the goals of the pulse survey, understand its limitations, and help set expectations company-wide.
- Ensure all managers understand key features of the program (e.g. its objectives, survey timing, how employees will be chosen for participation) and what is expected of them and their teams. This will ensure that they can personally inform each team member, respond to questions, and be prepared for next steps. Expect questions about confidentiality and/or how specific employees were selected for participation when giving a pulse survey to a subset of employees. Managers must be prepared to handle these more sensitive questions.





Common pitfalls and misconceptions

Pulse surveys, though smaller in scope than a company-wide enterprise survey, can be complex to design and execute in some cases. Pulse surveys are often believed to be a simple way of measuring employee opinions that avoid the time, expense, and effort of an enterprise survey. While this is possible, pulse surveys also can be more expensive due to the complexities of sample selection, the specific organization being surveyed, and/or the increased number of survey administrations. Careful planning and a well-defined and agreed-on strategy are critical to success.

Below are some common pitfalls to avoid:

Limited depth of reporting for small sample sizes

Limiting participation to a random sample of employees does not lend itself to the level of detail and reliability in reporting that a full enterprise survey can provide. A common reason for unmet expectations is the misunderstanding of the depth of reporting that is possible with a pulse survey administered to a sample of employees. Stakeholders must understand what level reporting is possible given the approach used. Balance should be achieved between the desire to provide information at all levels of the business where needed and keeping the content targeted and the costs down.

Focus on the Measurement More Than the Insight

Pulse surveys can fail to deliver on their potential if the focus is unduly on the measurement itself rather than on the insights and the resultant actions that can be taken to drive organizational improvement efforts. The mistake of substituting measurement for meaningful action undermines credibility in the survey process and devalues the real impact a survey can have on a business.

Inflated Focus on Engagement Score Rather Than Improvement

The goal of the survey in the eyes of managers, particularly in organizations where they tend to be competitive by nature, can devolve into an inappropriate focus on the score itself. Organizations should emphasize that the goal of the survey is not to beat the historical results but rather to collect information that will help define opportunities for continuous improvement. If the goal becomes simply to better the last score, this survey can be reduced to a meaningless exercise of data comparisons rather than an effort toward instigating and achieving successful organizational change.

Survey Fatigue

Without appropriate controls, a pulse-only or pulse-heavy survey strategy can devolve into an endless series of surveys and an overwhelming amount of data, none of which tells a compelling story that is useful to business leaders. Continual requests to participate in surveys also may be perceived as burdensome by employees and may impact response rates and the quality of data received—not to mention employees' productivity on the job. Using a sampling strategy to limit the number of times that any employee is asked to participate in a survey, and spacing out these requests over the course of the year, can help minimize the burden.

Because of these concerns, we strongly recommend that an organization's overall survey strategy include the development of a governance system for pulse surveys, which may involve the following controls:

- Limitations on how many surveys may be fielded in any given month or quarter and the maximum number of items that may be included
- "Black out" periods of surveys during peak business cycles or surrounding the administration of the enterprise survey or other system-wide events
- Consistent rules for how employee confidentiality will be protected so that these rules become institutionalized and all know what to expect
- Review and approval of survey content by a centralized group to ensure the content is appropriate and will provide the key insights needed to support the business
- Expectations for how the survey results will be shared with key stakeholders

Closing thoughts

As employee opinion surveys become a more strategic part of improving organizational performance by aligning talent management with business strategy, understanding how pulse surveys fit into the broader survey strategy is essential. We recommend that pulse surveys be used both to monitor change in employee attitudes over time and to help identify factors that influence the success of change implementation.

As with other types of employee opinion surveys, success is more likely when there is:

- A designed set of objectives
- A carefully managed scope that does nothing more than what's specified in the objectives
- A clear understanding of purpose and scope of results reporting
- A plan for making use of, and communicating, results and interpretations

About TalentMap

With over 17 years of conducting thousands of different surveys in every type of organization across North America, TalentMap offers you the insights, context, and experiences of those organizations alongside sophisticated post-survey services and support. TalentMap offers a large suite of full-service to Do-It-Yourself survey solutions that are flexible and configurable.

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