



SAP SuccessFactors 

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DESIGN AN EMPLOYEE ENGAGEMENT SURVEY CHECKLIST

Your Top 10 Checklist

Engagement is that feeling when work doesn't really feel like work, when we believe in what we do and want to go above and beyond to be successful. Imagine a company where everyone feels like that – with the right direction and guidance, a workforce full of engaged employees can be unstoppable.

It's no surprise, therefore, that tracking employee engagement has become a corporate priority. We recommend an approach that measures:

Discretionary effort

- This company motivates me to contribute more than is normally required to complete my work

Organizational commitment

- I would recommend this company to people I know as a great place to work. (Advocacy)
- I am proud to work for this company. (Pride)

Intent to stay

- I rarely think about looking for a new job with another company

Work involvement

- My work gives me a feeling of personal accomplishment

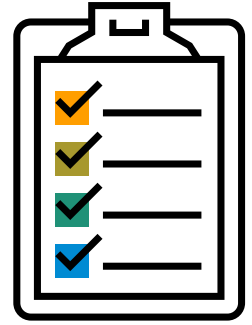
These should be part of a robust engagement survey. However, it's not enough to only measure engagement. These "outcome measures" are influenced by a number of other factors such as benefits, resources, management, and so on. These outside influences, or "engagement drivers," will impact outcome measures like pride and, ultimately, overall engagement levels. They are unique to every organization and should also form an integral part of any employee engagement survey.

So, how do you get started? Here are 10 questions to ask yourself when designing an effective employee engagement survey, along with some useful tips and advice to help you:

- Identify the engagement drivers relevant to your company
- Structure your survey and ask the right questions
- Interpret and act on the results
- Choose the right survey technology



Your Top 10 Checklist



1. WHO WILL REVIEW AND APPROVE YOUR SURVEY CONTENT?

Determine who will review and approve the survey content. While people and teams representing all parts of the business should review content, avoid having more than two leaders approving content. This will help eliminate lengthy sign-off processes once you have a final question set.

2. WHAT DOES THE BUSINESS NEED FROM YOUR PEOPLE TO SUCCEED?

Involve key leaders when prioritizing issues. Solicit opinions and ideas from stakeholders to better understand organizational needs, and what business heads really need from their people to be successful.

3. WHAT ARE THE ENGAGEMENT DRIVERS AT YOUR COMPANY?

Every company is unique, and we've listed 10 of the most common engagement-driver categories (see Figure 1) to get your thought process started. Review and customize the list by removing any you don't think are relevant to your company and adding any new ones you would like to include.

FIGURE 1: ENGAGEMENT DRIVERS

- 1. Collaboration:** Are employees able to easily work with other teams or colleagues without barriers?
- 2. Communication:** Are they getting enough information from the company about what's happening?
- 3. Customer focus:** Are employees encouraged to focus on the customer?
- 4. Growth and development:** Do people feel they have the training they need to do their job?
- 5. Inclusion:** Are people with diverse backgrounds and diverse opinions welcome?
- 6. Leadership:** Do they believe in and trust their senior leaders?
- 7. Performance and accountability:** Are managers supporting their teams to be successful (this can also include good performance management) and are people held accountable?
- 8. Strategic alignment:** Do they buy into where the company is going or do they even know?
- 9. Survey follow-up:** Do employees feel that their feedback is being listened to and acted upon?
- 10. Work process:** Do they have the right tools (computers systems and so on) to do their job and are there enough people on the team for them to achieve a work/life balance?

4. HOW SHOULD YOUR SURVEY BE STRUCTURED?

The aim is for as many employees as possible to understand the survey and act on its results. Employees will need to understand how to answer the questions and your managers will need to understand how to read the report. The survey structure should therefore be simple and intuitive, with topic areas clustered into themes (for example, performance management or senior leadership). You should include at least three questions per theme and measure different aspects to give you a broad spread of responses.

5. WHAT QUESTIONS DO YOU NEED TO ASK YOUR EMPLOYEES?

Now you've selected your engagement drivers, you need to review the questions in each category. An advantage of designing your own survey is that you can include questions that are 100% relevant to your company, which can make the survey shorter and easier to digest.

6. HOW LONG SHOULD YOUR SURVEY BE?

There is no "ideal" length for an employee survey – it depends on the individual needs of your company. The trick is to find a balance between asking enough questions to be informative, and not putting people off by asking too many questions. As a general rule, we would recommend limiting your survey to 65–70 questions.

7. HOW DO YOU DECIDE WHAT QUESTIONS TO INCLUDE?

A good way to potentially "cull" questions is to take a critical view of each and ask yourself:

- Are we really prepared to act on this question?
- Is this question repeating what is asked in another question in the survey?
- Does this question actually tell us something useful rather than just something interesting?
- Is this question relevant to all parts of the business?

8. WILL YOUR RESPONDENTS UNDERSTAND THE TERMINOLOGY?

You should avoid jargon (particularly if it's specific to a particular part of the business) and use common definitions. However, language that is used across the business – perhaps industry-specific terms that will be understood by everyone – can actually enhance the survey. To ensure that all employees have the same frame of reference when responding, many companies include a definition of terms like "Your Manager," "Your Team," "Senior Leadership," and "This Organization." This can be shown at the beginning of the survey or – depending on your survey software – as individuals hover over questions.

9. SHOULD YOU GET OUTSIDE HELP?

Designing your own employee engagement survey can be daunting, but simple software tools are available to help you create and execute your survey. However, the context is important. If your employee engagement survey is part of a wider employee experience (EX) strategy, then it makes sense to explore a single platform to manage every aspect of the program.

10. WHAT SHOULD YOU LOOK FOR IN AN EXTERNAL VENDOR?

Engagement is a part of the overall employee experience. To be truly representative, feedback needs to be captured at every step of the employee journey. Look for a vendor that offers solutions at every touch point – including onboarding, pulse, exit, 360s, and more – with the flexibility to scale and expand as your business changes. Employees want to know their voices are being heard, so your vendor should offer real-time reports and dashboards and predictive analytics so you can anticipate and prevent any potential issues before they happen.

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