

Foundation Guides

People Analytics Strategy

Surveys are a great way to listen to your people. Done well, they offer a straightforward and structured way to receive meaningful feedback. By surveying everyone in your organization you democratize feedback, avoiding only listening to a small vocal group. Surveys must be backed up by strategic elements to provide genuine value to an organization.

Be consistent and strategic from the start. Careful planning and thoughtful implementation will provide valuable insights. Kicking off a survey/feedback strategy is like beginning a conversation and if you lose interest from your audience with your opening lines it can be hard to win them back.

If you're going to devote time and effort to collecting feedback, you want to be confident that the results will be accurate and actionable.

There are three primary employee spheres around which your feedback loops should revolve—it's integral to understand your employees in terms of their:

Engagement – their levels of commitment, recommendation and motivation

Experience – how they perceive working at your organization

Effectiveness – how they and the people around them gets things done together

To ensure your initial strategy covers all three of these domains, hit these five beats:

1. Establish a baseline
2. Sync survey strategy to the employee experience
3. Track progress

4. Develop employee effectiveness
5. Deep dive on an issue

Before you start

Choosing the right platform

The platform you use to conduct your employee surveys can have a huge impact on how useful the data you collect will be.

Good platforms are much more than sets of questions—they are integrated systems that simplify each stage of the process.

The best platforms come with appropriate methodological settings and constraints.

Priorities differ between organizations and over time, but there are certain features that all platforms should have. Similarly, there are a common set of concerns against which all platforms may be objectively evaluated. When selecting a platform for your purposes, be sure to consider:

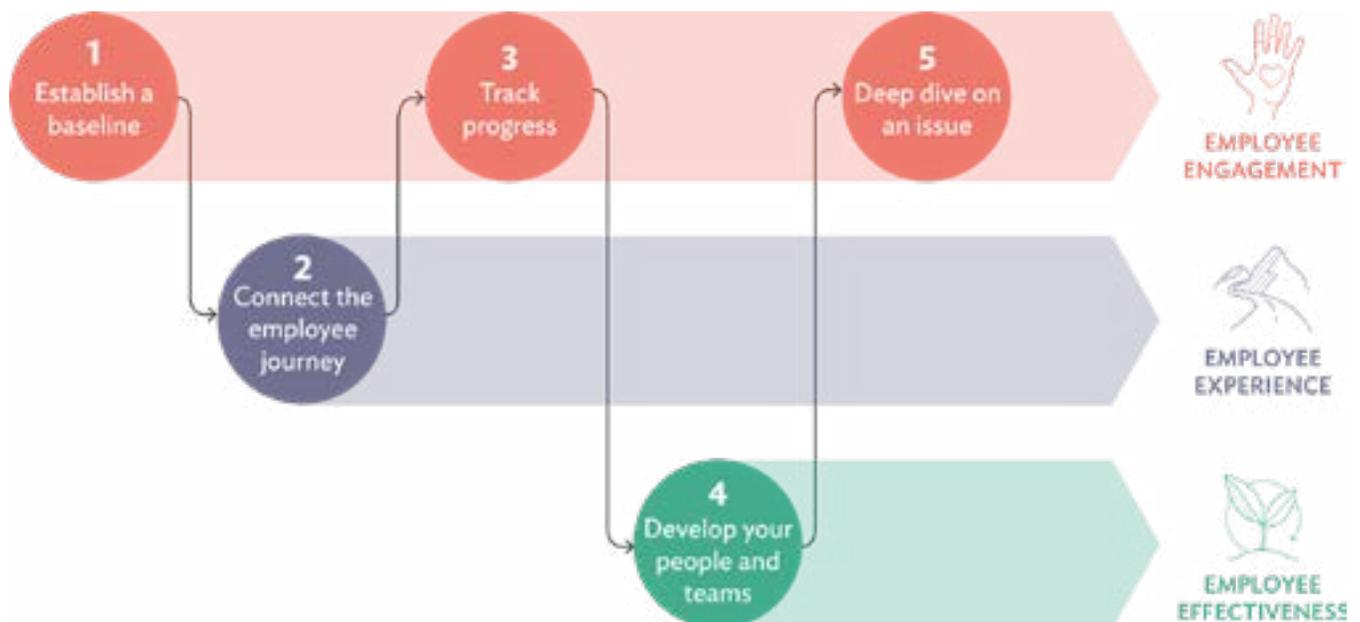
1. **Access:** Will all people be able to participate? Do surveys function on all necessary devices? Is there a kiosk mode for people who lack an assigned computer or device within your organization?
2. **Security:** Can surveys be anonymous or allow you to use appropriate levels of confidentiality? Is the data secure?
3. **User experience:** Is it easy to use?
4. **Shareability:** Is it easy to share survey results? Can you create different permissions for different users?
5. **Data reliance:** What is the science behind the platform's approach?

Is the survey reputable? Are the surveys designed by data scientists and organizational psychologists? Many platforms have different philosophies, choose one that aligns with yours.

- 6. Benchmarking:** Inbuilt benchmarking lets you understanding how your organization compares with similar workplaces. What benchmark data is available? Which would best suit your company? Can you compare with your own data from last year, competitors, other people in your region? Consider the companies that you compete with for staff rather than those you compete with for customers.
- 7. Analytics:** You'll also want reliable analytics so you can uncover the key drivers of engagement for people at your organization.

Five beat strategy

Used effectively, a five-beat strategy touches upon all three of the primary employee spheres of engagement, experience and effectiveness.



Step 1: Establish a baseline—initiate engagement inquiries

Before you can move forward, you need to know where you stand.

A good engagement survey is a bit like a general health assessment for the people side of your business. It sets effective baseline understandings and—when comparing results to industry benchmarks—can quickly identify anomalies, issues and potential points of action. A well-designed survey platform will be able to process engagement survey results to indicate areas that need the most attention and to hint at possible courses of action.

That said, engagement surveys aren't always the first priority. In some cases, it makes sense to begin with a different type of diagnostic. For example, if your organization has recently had a hiring bump, then start by looking at your onboarding. If you've recently promoted several first-time managers, then start with manager effectiveness inquiries. If you've recently restructured, maybe you should investigate your change management.

Wherever you start, the first time is largely about identifying issues and establishing an organizational baseline. To do so effectively, it is essential that your survey and feedback systems have proven efficacy. Unless your survey team includes data scientists and organizational psychologists, you should consider using a dedicated employee feedback and analytics platform as discussed in the preceding section.

Step 2: Sync survey strategy to the employee experience

People's work experiences change over time. Levels of engagement can vary as people settle into niches or take on new challenges.

An insightful survey strategy must be capable of detecting these variations, connecting the entire employee journey. To do this, it is

necessary to sync the strategy to each stage of the employee experience - candidates, onboarding, training, exiting, alumni etc.

Employee experience surveys will help you:

- understand how candidates perceive your recruitment approach
- identify gaps in your onboarding process
- detect trends in the perceptions of people leaving your organization
- gain an overall view of the experience of employees throughout their time at your organization

Use employee experience surveys at select intervals across the employment lifecycle. Ideally, you'll want to cover each major stage, from candidate interviews all the way to retirement. This will develop an informed picture of how employees' perceptions evolve.

Step 3: Track progress

Effective completion of steps one and two will grant you insights that will lead to actionable recommendations. However, your strategy should extend beyond this, including provision to track your progress after you've taken action. This is necessary to see how your efforts measure up.

Once you've moved to improve on something, gather feedback to evaluate the success of the action.

- understanding of the impact of your actions
- measurable results to report
- intelligence to inform subsequent actions and areas of focus

Progressive feedback gathering may be discrete or broad-based. Discrete

progress measurement can be derived from pulse surveys which take a quick and efficient measure of a single field of interest. Broad-based progress measures may entail the re-launch of the same sort of survey that initially sparked the action.

The scale and frequency of your surveys—sometimes referred to as your ‘survey cadence’—will depend on your organization’s resources and how quickly you’re able to act on insights.

It’s important that the results of progress tracking are communicated to employees. Seeing how their contributions lead to real action will encourage them to willingly share feedback on a continuous basis.

Step 4: Develop employee effectiveness

Up to now we’ve largely been speaking about employees giving feedback to the organization. We should extend this feedback so that managers and even individual contributors are receiving feedback.

Gauge manager effectiveness with 180° feedback from the people who report to a manager. See how individuals perform by gathering 360° feedback from people who work with that individual. Seek feedback from team members to monitor how effectively they work together.

Employee effectiveness feedback will help you:

- understand how to support and develop your managers to be more effective
- guide individual employees to discover opportunities for improvement
- streamline your approach to learning and development so your activities have the greatest possible impact.

Step 5. Deep dive on an issue

The results of your first four steps will give you excellent insights into issues and actions. Pick out the area/s on which you plan to focus, then do a deep dive survey to better understand the approach you might take.

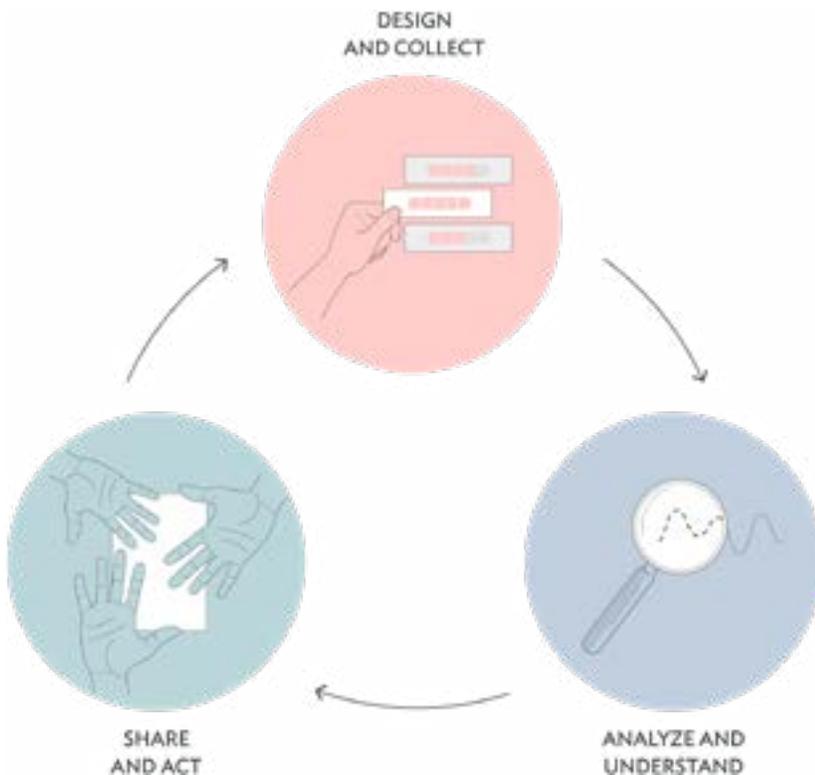
- Values and alignment
- Learning and development
- Compensation
- Work-life blend
- Management
- Collaboration
- Inclusion and equality

A deep dive survey into any such issue will help you:

- better understand the intricacies to facilitate policy formulation and action
- understand the types of employees affected
- gather input from your team about proposed actions.

The platform you use should provide resources assist you with this process. For example, survey templates developed by organizational psychologists and data scientists will simplify the path to gaining actionable insights into specific issues and ensure the process is easy for respondents and results are reliable.

Employee feedback loop



Once you've completed the Five Beat Strategy you'll have an understanding of how your organization is tracking on engagement, experience and effectiveness. You'll have had an opportunity to take action based on the insights you've uncovered. Now it's time to enter the Employee Feedback Loop. The cadence of this process is up to you, and will be guided by how quickly you can act on results, collect data, understand results and so on - it's an ongoing cycle of improvement.

A 2015 study by IBM[1] looked at the benefits of what they termed listening programs—initiatives that 'actively solicit, analyse and engage in ongoing conversations with past, present and even future employees' (p.1). They found that '83% of surveyed employees said they would participate in an employee listening program' (p.2).

The upshot is that your workforce wants to be listened to—they want to be engaged. So long as they see evidence that they've been heard and you're acting on results - they'll be happy to give you more feedback at a cadence dictated by your progress through the Employee Feedback Loop.

Step 1: Design and collect

You'll have had some experience in launching surveys by now. So ensure that you're set up to get the insights you need to measure the success of your past actions and gather information to shape what your future actions might be. That might mean including many of the same questions you asked in your original surveys, so that you can benchmark against your original results. You can also include questions about what changes people have seen as a result of your actions or a fun question about something that has happened recently.

Communicate clearly with employees:

- the aims of the process
- how you'll share results once they're out
- if/how they'll be involved in ideation of actions.

Step 2: Analyze and understand

Once you have some responses you'll be able to start analyzing what the data you've collected is telling you. A good employee survey platform will do some analytics for you. For engagement it will analyze what the key drivers are, and surface any discrepancies in cohorts. You'll be able to see your results against a benchmark of organizations like yours or your own previous results with deltas clearly identified. For experience and effectiveness you'll be able to see areas that need attention and where you've improved - some

of these analytics will point clearly to actions, and for others you'll want more context or input from employees. You might do a deep dive during this period to gather this information, or consult with employees during the share and act step. The important thing is to focus on something important versus agonising on finding everything or the perfect thing. There is never a perfect thing to focus on.

Step 3: Share and act

Detailed research and reporting in the first two steps gives you the insights you need to make decisions that will work for your organization. Share your learnings with employees and invite them share their thoughts and experiences. Your preference may be to give managers different access to employees or for everyone to have visibility of results. Remember that the feedback is from your employees - so there probably won't be surprises in the results for them (even if there are for you).

Just as your workforce must be consulted in the design and collect step, so too must they participate in formulating the actions to be taken. Whether addressing a challenge or capitalising on an opportunity, let your staff guide the way. Ask your highest scoring groups or managers to share their tips or things they do.

Empower your employees to make meaningful decisions and to play an active role in the process. To do this, they'll need actionable data provided in a quick and responsive manner, so provide it for them. Make sure it is easily digestible and relevant to each recipient, without reinventing the wheel each time.

Ensure that the actions you take are welcomed by your staff, measurable and effective. Involve your employees in the process of finding and

implementing solutions. Make certain that all actions are supported by accepted conclusions from your internal research.

The 3 Beat Improvement Cycle is a proven program that gets results. Find the right way to learn what impacts your employee engagement, genuinely act on the findings, then re-evaluate to refine your approach. Through this sort of persistent process of inquiry and action, you can effectively improve your workforce engagement and boost your bottom-line.

Conclusion

Implementing people analytics strategy can seem overwhelming, but in fact building consultation and measurement into the work you're already doing will enable you to be more efficient.

Employee engagement is a common starting point for a reason. The findings of such investigations are often relevant across the organization. With the technology we have at our disposal these days, strategic surveys can identify some potential issues before they've manifested in other ways (for example churn or damage to culture).

Choosing the right platform will make the whole process smoother and more reliable. A good platform will help you gather, share, and report on the data that's most useful to you.

Using employee experience surveys can drive big picture organizational strategy that has an impact throughout the employment lifecycle.

When you implement actions based on your findings, be sure to track your progress. Both pulse surveys and comprehensive follow-ups are useful to measure your success against your baseline results. Use them to fine-tune your remedial actions and improve your strategy.

Employee effectiveness surveys will let you gauge how things measure up on the front line. You can use them to determine which methods of support and development will help you get the best out of managers, teams and individuals.

Deep-dive surveys help you get detailed intelligence on areas most in need of action or improvement. Use them to reveal intricacies, comprehend scope, gather suggestions and to facilitate effective policy formulation for complex issues.

A five-beat strategic approach implemented with a quality platform ensures that your effort is well-spent and that your results are effective. That's what you need to bring about genuine organizational improvement.

References

[1] IBM Institute for Business Value and IBM Smarter Workforce Institute, Amplifying Employee Voice: How Organizations Can Better Connect to the Pulse of the Workforce, IBM Corporation, 2015.



How can we help?

We built Culture Amp, the world's most powerful employee feedback and analytics platform, so that professionals like you have the insights they need to help employees succeed at their fingertips.

www.cultureamp.com