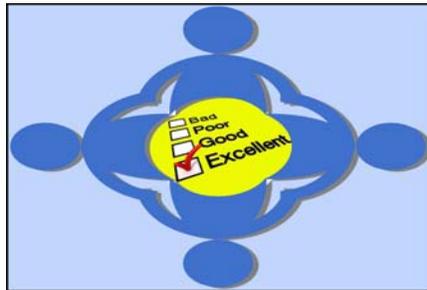


Use Participative Surveys To Build An Organization-Wide Team

By Arnie Dahlke¹



At the heart of any company's profitability is the individual employee. When every employee is focused on being productive, conscientious about expenses, and responsive to customer needs, the company delivers customer-valued products and services. This attracts even more customers and increases company profitability.

- ◆ When too many employees lack this focus, the company suffers.
- ◆ It is thus very important to periodically track employee attitudes, opinions, and concerns.
- ◆ Employees will tell you what is getting in their way. Employees will give you helpful ideas.
- ◆ Employees will tell you what needs to be done to make things work better.
- ◆ When employees feel that management is listening and responding to them, they are more likely to deliver customer-valued products and services.

The end result will be higher company profitability.

Most people think of an employee survey as a measuring instrument—a technique for benchmarking and then periodically assessing attitudes and opinions of survey respondents.

I view a survey differently.

Yes, it is a measure. But, more importantly, it is an opportunity to bring people together throughout an organization to solve problems and improve processes. It can be a very useful *participative* measuring process.



To begin with, I recommend bringing in an external consultant to conduct the survey. He or she should have a problem-solving mindset and be a “people-person.”

Using such an outside person will be more credible and will increase the likelihood of more enthusiastic participation.

And—this is very important—he or she *should not* use a “canned” survey. The survey must be tailored to your organization. How this can be done is outlined in the following 14 steps:

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INTERVIEW MANAGERS INDIVIDUALLY

1. It begins with the consultant meeting with the top management team to establish rapport, describe the steps involved, and to gain their support.

This first step in the survey process is very important, because it sets the stage and tone of the survey. The aim is to make this meeting informative, enjoyable, and motivating.

Lasting about two hours, the purposes of this session are to:

- Introduce the consultant to managers and establish his or her credibility with them.
- Describe the philosophy underlying the approach, showing them how they can use the results to make everyone's jobs more successful and enjoyable.
- Describe all of the steps involved in the survey.
- Enlist the commitment of all managers to support the survey, stimulating their enthusiasm for the process through an informative and highly motivational presentation.
- identify concerns and/or issues that should be included in the survey.



The end objective of this meeting is to have managers leave this meeting as “owners” of the survey, fully informed about it, enthusiastic about its value and usefulness, and poised to convey those feelings and their support of the survey to employees.

SEND MEMO TO ALL EMPLOYEES INTRODUCING CONSULTANT AND SURVEY

2. Next, a memo is distributed to all employees introducing the consultant with a reassurance that their voices will be heard and their anonymity protected. A sample of some memo content is presented below:

The memo emphasizes several things;

I believe each of you plays a critical role in satisfying our customers. I know that each of you will do a better job at keeping our customers satisfied and loyal when you feel good about your job, your fellow-workers, and your working environment. My job is to make sure that this is the case.

I therefore have asked (Name of Consultant) to put together a survey to give you a chance to let me know how you feel. He has conducted such surveys in many companies for many years. I believe you will find him to be personable and sensitive to your concerns.

During the next two weeks, he will be interviewing some of you as the first step in assembling the survey. He will not be able to talk individually to every employee, but will select a cross-section of you. He will do this in order to determine the kinds of questions that need to be included in the survey to give you the best opportunity to express your opinions and feelings. Based on those interviews, and on his experience compiling other such surveys, he will then construct a survey specifically tailored to your needs and concerns and then distribute it to all of you.

I encourage you to answer questions freely and openly. As part of his agreement with me, he will not reveal the identity of any person's opinion. He will only use your input from the interviews to shape questions for the survey. I assure you that both your discussions with him and your responses to the survey that follows will be totally anonymous. It is very important to me that you free to respond honestly and fully to all of the items on the survey.

INTERVIEW MANAGERS INDIVIDUALLY

3. This is followed by a series of confidential one-on-one interviews with each manager and the consultant to gather individual perceptions of what should be addressed in the survey.

In some organizations, I have found managers to be reluctant to openly discussion what they see as issues that need to be addressed in the organization. I therefore interview them individually.

- These interviews helps the consultant determine which issues are important enough to be included in the survey.
- They also give the consultant an opportunity to develop a rapport with each of the managers.
- Building on that rapport, the consultant is able to strengthen the support of managers in stressing the importance of the survey to their employees.



INTERVIEW A RANDOM SAMPLE OF EMPLOYEES

4. This is followed by a series of confidential one-on-one interviews with a random sample of employees representing the various sections and/or departments of the organization.

Interviewing a sample of individual employees throughout the organization accomplishes several things for the consultant:

- It insures that the final survey items will be relevant to the issues and concerns of employees.
- It establishes the consultant's "third party" credibility.
- It creates a "buzz" among employees that leads them to anticipate their responding to the survey.

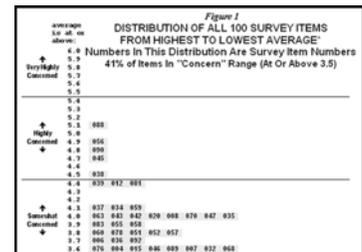


REVIEW ANY PAST SURVEY DATA AND CUSTOMER DATA

5. Review the results of any past employee surveys, customer feedback surveys or focus groups, and any other internal or external organizational assessments.

Organizations do change and reshape themselves over time. Nevertheless, certain issues often remain unsolved from survey to survey. It is important to review past data in order to:

- Determine which issues should be re-assessed.
- Identify any problems and/or concerns that were not raised during the manager and employee interviews that should be included in the survey.
- Suggest any changes in the format of the survey to make it easier to respond to.



CONSTRUCT THE SURVEY

6. Construct the survey, based on the manager and employee interviews, and any insights offered by looking at past surveys, customer feedback information, and any other assessments.

The consultant assembles a survey covering the issues and concerns covered, which is:

- Designed to ask clear, unambiguous questions that target issues and concerns uncovered during the previous steps.
- Presented in an easy-to-use format with clear instructions and a simple scales for responding.
- Includes open-ended questions to provide qualitative data and give respondents the opportunity to offer constructive suggestions .

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NEVER	NEVER	SOMETIMES	SOMETIMES	SOMETIMES	SOMETIMES	ALWAYS
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1. My shop manager is generally available to me wherever I want.
2. All employees working here believe that everybody in this shop is equally important to the success of the team.
3. This shop cares about the people who work here.
4. Managers here "pull rank" rather than work out a problem.
5. Employees in this shop greet customers and deal with them courteously and efficiently as soon as they come in the door.
6. I would like to see more meetings among secretaries at the corporate level.
7. My shop manager keeps me well informed of new developments.
8. Employees in this shop are constantly aware that the customer is the most important asset we have.
9. When interacting with customers, employees in this shop establish a "relationship" instead of conducting a "transaction" for the money.
10. Managers are so suspicious here that they even go through trash to see what we have done.

FINALIZE SURVEY WITH MANAGERS AND SCHEDULE SURVEY SESSIONS

7. The consultant meets again with managers to review the survey, ensure that questions are appropriate for the organizational, and schedule employee group sessions to administer the survey.

The consultant meets with managers to make sure that the survey reflects the concerns and issues are covered. In addition:

- Managers review the survey to ensure that the format and choice of words used in it is clear and meaningful to employees.
- Managers schedule survey sessions for employees and commit to urging them to participate, assuring them that their responses will be anonymous.



ADMINISTER THE SURVEY

8. The final survey is then compiled and *administered by the consultant* (to guarantee the anonymity of their responses) in a series of scheduled groups of employees.

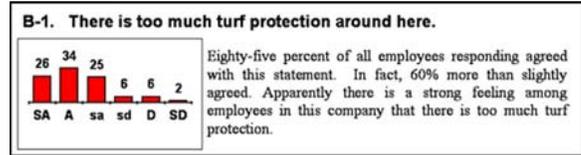
- The consultant administers the survey in each scheduled session without any manager being present.
- The consultant tells employees that their responses will be anonymous, that only graphs and percentages will be reported in the report.
- The consultant tells them not to put their names on their completed surveys and to put them in a slot in a sealed box at the front of the room so that even the consultant will not know their individual identity.
- The consultant promises them that the results will be presented to all employees in scheduled meetings, once the surveys have been analyzed and a report completed.



ANALYZE RESULTS AND PREPARE REPORT

9. The consultant analyzes the responses to the survey and prepares a report of the survey results, including a set of recommendations to managers based on the findings.

- In preparing the report, the consultant presents the survey results item by item, with clear, graphic descriptions of each survey item.



- The consultant also prepares a presentation of the report for managers and employees with whom it will be shared in survey feedback meetings.

REVIEW RESULTS WITH MANAGERS AND DETERMINE QUICK WINS

10. After completing a report of the survey results and its draft presentation, the consultant meets with managers to present and discuss the survey findings.

- Managers are given the opportunity to familiarize themselves with the results and help the consultant clarify any seemingly ambiguous findings.
- Managers develop “quick wins” (actions they can immediately take to address employee concerns) that will be shared in the survey feedback meetings.

DETERMINE QUICK WINS

Free coffee and doughnuts are a good idea for meeting customers, but only a “demon” people receive any. Do perhaps chocolate boxes or some high volume food item would work more useful.

IMPLEMENT NOT AT THIS TIME SET UP ACTION TEAM

Put a sign outside the door going to the TV room stating where the restrooms are. We are always being asked where the restrooms are!

IMPLEMENT NOT AT THIS TIME SET UP ACTION TEAM

Let's schedule Service Department Parts “How To” sessions for customers that will provide them with tips and instructions for maintaining their vehicles, as well as answer any questions they may have about the functioning of their vehicles.

IMPLEMENT NOT AT THIS TIME SET UP ACTION TEAM

Get a better computer system for better job quality and get rid of the servers because they mess up your eyes and less work for less stress on everybody.

IMPLEMENT NOT AT THIS TIME SET UP ACTION TEAM

Offer discounts once a month to all Service, Parts and Sales customers for gift certificates, like \$2.00 off on next Service visit or Parts Department purchase.

IMPLEMENT NOT AT THIS TIME SET UP ACTION TEAM

PRESENT RESULTS WITH MANAGERS TO EMPLOYEE GROUPS

11. The consultant and managers then meet with groups of employees drawn from different departments to present and discuss the survey results. In these meetings:

- The consultant facilitates the meeting, giving everyone a chance to participate.
- Employees clearly see that managers are listening to them, particularly when they are presented with the quick wins.
- They also see the “bigger picture” and the role that each of them plays in the delivery of customer-valued products and services.



FORM TEAMS AND DEVELOP ACTION PLANS

12. Facilitated by the consultant, managers and employee in the feedback meetings identify issues that need to be resolved and form action plans to address them. This step:

- Sets the stage for employees working with managers to implement action plans and follow them up.
- As a participative process, along with previous steps, this survey becomes an organizational teambuilding vehicle, instead of simply an assessment of employee opinions, by getting employees involved and developing an ownership of outcomes.

WHOLESUME MARKETS: ACTION PLAN TEMPLATE		
OBJECTIVE 1: XX		
<small>Specific, Measurable, Aligned, Realistic, Time-Based</small>		
SMART GOAL 1: • XX		
ACTIONS	TARGET DATE	WHO IS RESPONSIBLE?
1. XX	XX	XX
2. XX	XX	XX
3. XX	XX	XX

IMPLEMENT ACTION PLANS

13. The action plan groups, with the support of managers, are then responsible for taking the steps necessary for implementing the action plans.

- Each action plan is implemented, following the timeline and outcome guidelines established and described in the plan.
- Action plan group members are assigned the responsibility to track the progress of the various steps described in the plan.

WHOLESOME MARKETS: BAKERY ACTION PLAN		
OBJECTIVE 1: Hire an Operations Director for the Bakery to provide oversight and direction for the Wholesome Bakery Departments and coach Bakery Supervisors.		
Openly, Measurably, Aligned, Realistic, Time-bound		
SMART GOAL 1: • Develop and post a job description for an Operations Director for the Bakery. • Interview candidates, and • Select and hire an Operations Director for the Bakery by the end of the 1st quarter, 2007.		
ACTIONS	TARGET DATE	WHO IS RESPONSIBLE?
1. Determine job qualifications and write job description.	Completed	John
2. Post and advertise job description.	02/06/07	David, HR
3. Interview candidates.	03/06/07	John, David
4. Select candidate and make offer.	04/16/07	John, David
5. New Operations Director begins work.	05/01/07	John

MONITOR AND ADJUST ACTION PLANS TO ACHIEVE OBJECTIVES

14. Members of the action plan groups monitor the progress of the implementation of the action plans according to the timelines specified in the plans and adjust steps where necessary.

- When they see objectives not being achieved according to schedule, as members of each action plan group monitors the implementation of their plan, they meet and problem-solve to come up with changes or steps that will keep the plan on the right track.
- They then implement the changes.



These 14 steps transform an employee survey from a simple assessment to an organization-wide teambuilding tool!

