



How to Design an Employee Engagement Survey

WITH BEST PRACTICES AND SAMPLE CONTENT

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What will this guide tell me?

If you're looking to run an engagement survey for your organization but don't know where to start, you've come to the right place. Maybe your boss has asked you to pull together some questions on engagement, or you'd like to make the case for running a survey to someone on your team. Whether you're an expert on engagement or just starting out, this short ebook will give you all the tools you need to get started creating your first engagement survey.

This guide offers a more traditional, comprehensive approach, suitable for one-off, annual or bi-annual surveys. While there is not a one-size-fits-all solution to running an engagement survey, this guide outlines the foundation from which any engagement survey can be built.

This guide will cover:

- The meaning of employee engagement
- The structure of a traditional engagement survey
- Questions to ask on a traditional engagement survey



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What is Employee Engagement

To understand employee engagement we must first go back to the 1930s, when psychologists started earnestly studying employee attitudes and how they were affected by the employer/employee relationship.

It is in this time that initial “job satisfaction” surveys were administered, and became the norm for the next 50 years, evolving over time to become more complex and sophisticated.



By the early 1990s, however, HR professionals had realized that just being “satisfied” wasn’t enough for people to really unlock their potential value to an organization.

Employers needed a way to get to the heart of how people were feeling about their company and, how much effort they were prepared to put in as a result. This measure of connection and effort was named “employee engagement” and has since become the industry best-practice for employee surveys.

Employee engagement is something we can all relate to. We’ve all had jobs where we stayed after hours because we were invested in a project and were driven to see it through. Conversely, we’ve all experienced jobs where lunchtime couldn’t come fast enough and we counted the hours from the minute we sat down in the morning. Engagement is that feeling where we believe in the work we do and want to go above and beyond to be successful. It’s the feeling when work doesn’t really feel like work. Imagine a company full of employees who feel like that—with the right direction and guidance, a workforce full of engaged employees can be unstoppable. It’s no surprise, therefore, that this has become such a crucial measure for organizations.



Measuring Engagement

There are many ways to measure engagement, but best practices for a traditional approach will measure the following:

- **Pride** in the company
- **Intention to stay** with the company
- **Likelihood to recommend** the company to friends or family (fast becoming an “ENPS” or “Employee Net Promoter Score”)
- **Motivation** to go above and beyond for the company

Naturally, a robust measure of engagement will need to cover the above mentioned concepts. However, it's not enough to only measure engagement. Engagement, such as one's pride in the company, is an “outcome measure” that is influenced by a number of other factors. You might have heard the term “outcome measure” before, particularly if you've ever used an engagement survey provider. So what does it actually mean?



Every organization is responsible for creating an environment that impacts and improves engagement.

Think about it like this. If you were faced with a disengaged employee and you wanted to turn his or her level of engagement around, it wouldn't be enough to just say “be more proud to work here!” Rather, you'd have to recognize that while the employee does have some accountability for his or her own pride, outside factors also contribute. Therefore, these outside influences (benefits, management, resources, etc.) impact outcome measures like pride, and ultimately overall engagement levels. Every organization is responsible for creating an environment that influences or impacts engagement for the better.



Identifying Engagement Drivers

When you create your own engagement survey, you'll want to measure engagement itself (outcome measure), as well as the outside influences (engagement drivers) that may influence engagement in your organization.

Over the years there has been extensive research about what makes an environment engaging. Common themes that impact engagement include:

ENGAGEMENT DRIVERS

Autonomy / Empowerment	Are people able to act on their own authority and innovate on the job?
Career Progression	Are there opportunities for people to grow and develop in the company?
Collaboration	Are they able to easily work with other teams or colleagues without barriers, and to what extent are people from diverse backgrounds or with diverse opinions able to collaborate?
Communication	Are they getting enough info from the company about what's happening, and do they feel they're being listened to?
Company Leadership	Do they believe in and trust their senior leaders?
Pay and Benefits	Do people feel they're fairly compensated?
Quality of Product or Services	Do people believe in what they (and/or the organization) provide to their customers?
Recognition	Do people feel that they're recognized and appreciated?
Resources	Do they have the right tools (computers, systems, etc.) to do their job, and are there enough people on the team for them to achieve a work/life balance?
Strategy Alignment	Do they buy into where the company is going or do they even know?
Supportive Management	Are managers supporting their teams to be successful (this can also include good performance management)?
Training and Development	Do people feel they have the training they need to do their job?

As you explore various engagement drivers, you may decide that all of them are relevant to your organizational needs. On the other hand, you may only identify a handful of factors that speak to your specific needs. Whichever it is, thinking through the broad factors that shape engagement scores is a critical exercise.



You Can Do It!

Designing your own engagement survey can be daunting, but if you work within the previously outlined categories, the process is not as complex as it might seem. These categories will maintain a balanced and robust measurement of engagement, but the final design is up to you and your organizational needs.

Your goal is for as many employees as possible to understand and act on the results of your engagement survey. Employees will need to understand how to answer the questions and your managers will need to understand how to read the report. Be sure to keep your survey structure simple and intuitive.

The added bonus of designing your own survey is that you don't have to ask a question in a certain way to fit into a particular model or match other particular questions—every question can be designed to be 100% relevant to your organization, which can help make your survey shorter and easier to digest.

STEPS TO DESIGNING AN ENGAGEMENT SURVEY

- Step 1 Determine who will review and approve content. While several people and teams should review content, avoid having more than two leaders approve content. This will help you eliminate lengthy sign-off processes once you have a final question set.
- Step 2 Involve key leaders when prioritizing issues. Solicit opinions and ideas from stakeholders to better understand organizational needs. What do the heads of your business really need from their people in order to be successful?
- Step 3 Review and customize the 12 engagement driver categories previously listed. Remove any you don't think are relevant to your organization, and add any new ones you would like to include.
- Step 4 Review the questions within each of the categories you have left. Similar to Step 3, adjust the questions to fit your needs. Maintain at least three questions in each category.
- Step 5 Include necessary definitions on your survey. For example, many companies include a definition of “Your Manager”, “Your Team”, “Senior Leadership” and “This Organization” to ensure people use the same frame of reference when responding. These can be shown at the beginning of a survey or, depending on your survey software, as individuals hover over questions.
- Step 6 Send your questionnaire for review and approval. Typically you should expect around two to three rounds of iteration which can take at least two weeks.



A Traditional Engagement Survey Template

We've pulled together a question set that we think covers the basics of a typical traditional engagement survey. You can use this question set as-is, or for adding or removing questions from your existing survey.

SURVEY GUIDELINES

The following are guidelines for a traditional approach:

- Ask a robust engagement measure (as explained above)
- Cluster your other topic areas into themes (e.g., performance management, or senior leadership)
 - For each theme you will want to include at least three questions to give you a broad spread of responses in that theme.
 - The questions should attempt to measure different aspects of that theme (e.g., the company, the manager, the team, the individual), so that you get a new piece of information from each.
- Wherever possible, organize your responses to be on a five-point scale. The majority of the time, you should be able to word a question to be answered on a “Strongly Agree - Strongly Disagree” scale, or a “Very Good - Very Poor” scale. This will allow you to directly compare different question scores—an essential requirement on any employee survey. The questions in this set should mostly be answered on an Agree-Disagree five-point scale

You'll see the survey template is 42 questions, which should take most employees around 10-15 minutes to complete. There is no 'ideal length' for an employee survey—it is dependent on the individual needs of your organization. The key is to find a balance between asking enough questions to be robust, and not asking so many questions that your survey becomes too long, with data too complicated to digest in reports. As a general rule, we'd advise limiting your survey to 65-70 questions. A good way to potentially “cull” questions in the survey is to take a critical eye to it and ask the following:

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

Common Survey Definitions:

This company - refers to the overall global organization.

My manager - refers to the person you report to; most likely the person who conducts your performance reviews.

My team - refers to the group of people you work with directly, and share a manager with.

Senior leadership - refers to the executive team in the organization (i.e., our CEO and his 5 direct reports).



Employee Survey Scales

AGREEMENT SCALE

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree

RATING SCALE

- Very Good
- Good
- Average
- Poor
- Very Poor

SURVEY QUESTIONS

Engagement Questions

- 1 I feel proud to tell people where I work
- 2 This company motivates me to go above and beyond in my role
- 3 I would recommend this company to family or friends as a great place to work
- 4 I see myself working at this company in two years time

OTHER THEME QUESTIONS

Autonomy / Empowerment

- 5 Decisions are made at the appropriate level in this company
- 6 My manager listens to or acts on my ideas
- 7 I am encouraged to come up with new ways of doing things in my role
- 8 I am given the opportunity to be involved in decisions that affect me

Career Progression

- 9 There are good opportunities for career progression at this company
- 10 My manager gives me the opportunity to try new things in my role which align with my career goals
- 11 I have an understanding of my career path at this company
- 12 I find my day-to-day work challenging and interesting

**Collaboration**

- 13 Diverse types of people (i.e. people with different backgrounds, ages, or opinions) are able to work well together at this company
- 14 It is easy to collaborate with other functions or teams within this company
- 15 The workload is evenly distributed across my team

Communication

- 16 There is open and honest two-way communication in this company
- 17 I receive regular communication from my manager about what is happening at this company
- 18 I feel I am able to communicate freely up the line, even when I am communicating bad news

Company Leadership

- 19 I have confidence in this company's senior leadership team
- 20 I hear enough communication from the senior leadership team about what is happening at the company
- 21 The senior leadership team has communicated a vision for the future that motivates me

Pay and Benefits

- 22 I am paid fairly for the work I do
- 23 I feel my pay is fair compared to people in similar roles in other organizations
- 24 My pay is linked to my performance

Quality of Product / Service

- 25 How would you rate the quality of the product or service this company provides to its customers? (asked on a Very Good - Very Poor scale)
- 26 When there is a problem with a product/service on my team, we work hard until it is resolved
- 27 People are recognized when they go above and beyond for customers on my team

Recognition

- 28 At this organization, we recognize and promote people based on performance
- 29 My team takes time to celebrate our successes
- 30 I receive positive feedback from my manager when I do a good job



Resources

- 31 This company is good at directing resources (human, financial or other) to the right places when necessary
- 32 There are enough people to do the work on my team
- 33 I have the tools / equipment / technology I need to do my job

Strategy Alignment

- 34 I have a good understanding of this company's strategy and goals
- 35 I agree with the strategy and goals of this company
- 36 I understand how my role contributes to the company's strategy and goals

Supportive Management

- 37 My manager's actions are consistent with their words—they practice what they preach
- 38 Poor performance on my team is addressed
- 39 My manager helps me understand my strengths and areas for development

Training and Development

- 40 We are good at training up new starters in this company
- 41 We are able to take advantage of further development opportunities on my team (learning new skills or training)
- 42 I have the training I need to be successful in my role



About Qualtrics

Qualtrics is a rapidly growing software-as-a-service company and the provider of the world's leading insight platform.

More than 7,000 enterprises worldwide, including half of the Fortune 100, rely on Qualtrics' enterprise survey technology. Our solutions make it fast and easy to capture customer, employee, and market insights all from one centralized location. These insights help clients make informed, data-driven decisions. Global enterprises, academic institutions, and government agencies use Qualtrics to collect, analyze, and act on voice of the customer, customer satisfaction, employee engagement, 360-degree reviews, brand, market, product concept, and employee feedback.

Learn more at qualtrics.com

About Qualtrics Employee Engagement

The Qualtrics Employee Engagement platform helps organizations large and small improve engagement by providing a real-time, holistic view of employee sentiment at every level of the organization. By combining organizational hierarchy management, role-based dashboards, driver analysis and action planning with Qualtrics' intuitive survey engine, organizations can now control the engagement process from start to finish.

Visit qualtrics.com/ee for more info.