

How you can seek staff opinion for less than \$6,000*

By David Parmenter

It goes without saying that the people in an organisation, **are the organisation**. Since Kaplan and Norton introduced the concept of a balanced scorecard (BSC) it has become increasingly more important for companies to track staff satisfaction and act upon those major areas of concern. Kaplan and Norton dedicated a section of the BSC to "learning and growth". Some organisations who have introduced the BSC have gone one step further by adding another section called employee perspective.

It is necessary to find a way to cost effectively and efficiently gain feedback on a quarterly or four monthly basis if you have a BSC or are serious about measuring employee satisfaction.

The purpose of this article is to help the reader implement a cost effective staff opinion survey which can be run 3 to 4 times a year.

Before I race ahead it is worthwhile to focus back on the benefits of a staff opinion survey, which include:

1. providing a channel for receiving suggestions, ideas and other forms of feedback from staff;
2. probing for sources of discontent within an organisation, and thus having the opportunity to address them;
3. canvassing opinions on new policies, and procedures; and
4. highlighting those areas of the culture that are working well.

Increasingly today staff opinion surveys are being delayed or deferred. I believe some of the problems which influence the senior management team (SMT) into delaying staff opinion surveys lie with:

- an over stretched HR function
- a lack of in-house survey experience
- poor implementation from the last staff opinion "so why bother?"
- lack of funding
- limited buy-in from the SMT

With the downsizing of HR functions due to the disenfranchising of HR, the HR functions are over stretched. Thus initiatives such as a staff opinion survey is put on the back burner.

Many organisations have experienced problems with their staff opinion survey. They have become "albatrosses" around the neck of HR because of the huge cost, the time spent trying to design the perfect questionnaire by committee, and the inability to handle the huge volume of information.

Poor implementation from the last staff opinion survey is a common problem, the staff opinion report becomes the end product, rather than a building block for HR initiatives. The HR function having expended all available energy has little left to carry out the new initiatives required.

Organisations of around 300-400 staff can be quoted \$30,000 for a staff opinion survey covering all staff. This often is not within the budget of an under funded HR function. Carrying out a rolling sample survey is considerably cheaper with costs ranging from \$9,000 for the first run and \$6,000 for subsequent runs.

Lack of buy-in from the SMT is a common problem as few have experienced a successful staff opinion survey and many clearly do not understand what value HR can offer. The recent Watson Wyatt's survey, published in The National Business Review on 18/1/02 indicated that few of the 75 major New Zealand organisations covered in the survey thought that HR functions were important or effective. A truly worrying situation. In addition some of the SMT may even wish to delay any such initiative as they fear it may be a vehicle for negativity.-

All the above issues can be solved if one is prepared to accept the following points.

Ways to make a staff opinion survey work

- A quick staff opinion survey is a good one
- Get management buy-in by having the CEO launch recommendations with a walkabout by the SMT (they might get to like it).
- Qualitative feedback creates at least half the value of an opinion survey
- Keep the questionnaire focused on issues that you can do something about
- A KISS questionnaire is a good questionnaire
- Use a rolling sample approach

A quick staff opinion survey is a good one. From planning to feedback to staff a 6 (or on the outside, 8 week) time frame is possible.

As one client said to me:

“I believe often these surveys fail because the Executive do not wish to hear or tackle the negative/critical comments and prefer to bury their heads in the sand. I believe the responsibility for developing change initiatives as a result of such a survey lies with the Executive, as should ownership of the information that is provided by the survey. I would argue HR's role as owner of the process is to make it all happen in an efficient and easy manner.”

I would add if the senior management team aren't prepared to present the findings in an open environment then don't bother doing a staff opinion survey.

Qualitative feedback creates at least half the value of an opinion survey, ensure that you get balance. We suggest you ask for comments on three things the organisation excels at and the three main areas in which the organisation should improve upon will be a substantial information source.

Keep the questionnaire focused on issues that you can do something about, why build up expectations.

A KISS questionnaire is a good questionnaire. It should be able to be completed in 10 minutes and thus anything over 30 questions will not allow enough time for commentary.

Use a rolling sample is the answer. All you need to do is analyse the total staff into three samples. Each sample having coverage of staff / managers / SMT, departments,

demographics, etc. You now have samples ready for not only the first survey but the subsequent two. Thus everybody will have the opportunity to give feedback over say an 18 month period. New staff being allocated an appropriate survey time when their details are entered on to the database.

One service sector organisation with over 2,000 staff on the one site have now developed a rolling staff survey. Every 3 months up to 200 staff are picked at random and asked to complete a survey. To ensure it is done, they organise a set time where the selected staff go to a room to complete the questionnaires. The survey company is present so that they can answer any questions and seek clarification on the comments staff make "there and then". This approach gives valuable quarterly trend analysis and avoids the time consuming delays of waiting for returns to come in.

A suggested steps:

1. Select a sample of staff covering each division/branch/team ensuring good vertical and horizontal slices.
2. Use either a clever word document (formatted for cut and paste into a database) or use SharePoint Team Services.
3. Make the questionnaire easy to complete, data entry fields should be highlighted.
4. Issue brief instructions asking that the respondents save the questionnaire before emailing it back.
5. give a short time frame (8 working days to complete) and follow-up, by phone, on all those who haven't responded by day 5, 3 days before the deadline.
6. Categorise all comments so that themes emerge, we use an access database and then transfer to word for final tailoring.
7. Prepare an informative report with practical suggestions, ensuring that feedback comments are handled carefully to maintain confidentiality.
8. Deliver enough PowerPoint presentations so all staff and managers can attend. All staff should have the opportunity to attend a feedback session as many who have not commented will still want to ensure their big issues have been covered.

