

5 or 20 Steps in the Survey Process

Medical practitioners have long argued the need for annual checkups for all individuals. Usually this entails having ourselves looked at by others since we tend to deceive ourselves about ourselves, we have to hear from others how well we are doing and what we might do to improve. We need to “take stock” of ourselves.

Both organizations and individuals have the same need. The survey/polling process is the best known way to accomplish this.

Concisely, there are 5 steps in the survey process.

1. Diagnosis and Planning
2. Survey Development and Testing
3. Survey Administration
4. Survey Feedback and Action Planning
5. Monitoring Action Plans and Assuring Plans are Implemented

And, conduct all of the above steps with frequent communication and an abundance of recognition.

Below is a more systematic breakout of the process steps.

Survey Process Steps (Organization Survey)(Adaptable to other surveys)

1. Identify needs or area(s) of concern
2. Select a survey team for development, administration, feedback, action planning/rollup and follow-up
3. Establish survey objectives and a project plan
4. Obtain senior management buy-in and support, keep senior management informed and involved
5. Determine data collection strategy: online, paper, IVR, focus group, interviews, telephone, etc.
6. Define questions and test them with a sample of the potential respondents (or use importance questionnaire)
7. Conduct multi-level/functional focus groups to assure the breadth of issues are addressed
8. Finalize questionnaire and test using approach to administer the finished survey
9. Brief employees about the survey/feedback/action planning process. Communicate participation goals/incentives
10. Administer survey and monitor/communicate participation achievements
11. Train leadership and/or team leaders on facilitating feedback discussions and action planning
12. Analyze the data and prepare reports (pdf, paper, online, etc.)
13. Provide feedback to leadership and/or team leaders
14. Senior management responds promptly to several key issues indicating further action after reviewing action plan rollups are received and reviewed
15. Leaders and/or team leaders conduct feedback meetings and develop action plans
16. Action plans rolled up separated by local actions and actions required at higher levels
17. Rolled up action plans/summary presented to senior management
18. Leaders monitor and report progress and results to senior management
19. Follow-up by senior leadership to ensure progress and accountability
20. Communicate successes and problem areas, recognize achievements

If you are conducting another type of survey, spend the time necessary to outline your process similar to the one above.

With organizations increasingly aware of the link between employee engagement, retention, satisfaction and a whole host of other employee issues, customer preferences and service (internal and external) and business success, the need to gauge how the workforce sees their company - its culture, business effectiveness, working environment, management, products, services, reward packages, employment practices and development programs - is paramount. Research continues to show that survey feedback/intervention as the most efficient and effective tool available. With the advent of online data collection the process is considerably, faster, easier and more cost-effective.

Remember the most common faults of organizations, according to our experience, are clearly these: 1. Inadequate internal communications, 2. lack of commitment to common goals, and 3. unclear goals. Each of these can be improved by going through the survey feedback process. This is particularly true if the communication is “cleaned up” during the survey process. The intervention stresses two-way expression and listening in identifying and overcoming goal barriers. People need to feel safe in talking about the organization, and managers need to know accurately what people are thinking and feeling.