



### General Principles

Since survey-feedback technology is widely available, it is important to capitalize on what has been found to be an effective implementation strategy. We recommend the following principles:

1. Think about where the organization is and where it is going (vision, mission, values, goals, outcomes and performance) and relate those to the purpose, process and outcomes of the intervention.
2. Make sure you have top-management buy-in. They are the real change agents.
3. Involve representatives of several levels in planning and carrying out the intervention, under the direction and involvement of top management.
4. Create and utilize a task force throughout the process.
5. Carefully evaluate whether an “off-the-shelf” survey versus a custom survey best satisfies your needs (validity is often overstated for “off-the-shelf” surveys, that is, relative to your organization).
6. If a custom survey is required, conduct sensing sessions or focus groups to obtain input for survey.
7. Write, test and modify questions (often requires several iterations).
8. Pilot the survey with 3% to 5% of the population on every step of the planned process except feedback.
9. Plan to include as many people as possible in the survey.
10. Publicize the importance of participation, measure it and recognize departments that do well.
11. Train feedback facilitators.
12. Feedback the overall results of the survey to everyone.
13. Hold individual supervisors and managers accountable for holding survey-feedback meetings with direct reports. Obtain their “bottom-up” feedback/action plans as to what they can do to improve. Rollup this information to assess magnitude of issues and improvement needs and to help define “top-down” action plans.
14. Work with senior leaders to communicate “top-down” action plans to everyone.
15. Make sure that feedback and action planning are conducted in a timely manner.
16. Consider using task forces or employee-involvement groups to work on organization-wide situations that need attention.
17. Provide “outside” consultative assistance to leaders and their work groups, where helpful, to use the survey results effectively.
18. Publicize action plans and implementation outcomes that are generated by work groups at all levels.
19. Do not raise expectations unduly by including items on organizational “givens” or promising what cannot possibly be achieved (sometimes because of uncontrollable reasons).
20. Try to act on several important, highly visible, broadly applicable action items quickly.
21. Carefully evaluate the intervention through a follow-up study.
22. Reward people who use the intervention to make lasting organizational improvements.
23. Celebrate achievements.
24. Establish and publicize a plan to repeat the survey to measure improvement.
25. Benchmarking improvement within your organization is far more important than comparison to benchmarks for other organizations.

