



Checklist for Successful Surveys

① Plan for action from the beginning

One of the most common survey pitfalls is too much focus on survey administration, reporting and analysis and not enough on action planning. This can be due to the event-based nature of survey administration (there's a start, middle and end) and the deliverable-focused nature of reporting. Action planning is more abstract and variable in shape and form. So it is important to set a plan from the beginning for action planning. Make sure to allocate resources and hold people accountable for action planning.

② Involve management from start to finish

Make sure to involve your management team from the beginning by getting their input on the survey objectives, having them review the survey and engaging them in the survey reporting and action planning process. Make sure the survey complements and not competes with what they are trying to achieve in their business.

③ Know your survey objectives

Make sure you articulate a clear objective and purpose for the survey. This will help you position the survey with employees, draft your questions, and guide your reporting, analysis and action planning. Be sure to answer these questions:

- Why are you conducting this survey?
- What is the end result that you expect?
- How will you use the survey results?
- What questions will the survey help answer?



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④ Connect the survey to the business

Make sure to connect the survey content and process to what you are trying to achieve as a business. For example, if you are launching a new product or service, you can gather feedback from employees on potential obstacles to a successful roll-out. If you are looking to attract and retain employees, consider asking questions about what motivated them to join the company and what keeps them there.

⑤ Less is more

Make sure to keep your survey short and focused. Remember, the longer the survey, the more time it will take employees to complete and the more time it will take you and your managers to make sense of the data. A long survey or too much data can lead to inaction.

⑥ Communicate, communicate and communicate

Communication before, during and after the survey is critical for survey success. Make sure to inform employees about the goals of the survey, remind them to participate and provide updates on any actions that are taken based on their feedback.

⑦ Don't be tempted to over-report the results

We often try to report results at the lowest level in the organization, however, this may overwhelm first line managers who may not have time to address issues or may not have the skills or resources to do so. However, it is important to report results at a level deep enough for meaningful change and action. Refer to the objectives of your survey when deciding on reporting results. Many companies can avoid unneeded reports and analysis by only reporting results for the levels they need to (e.g., business units instead of departments).



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⑧ Don't forget to monitor progress

Once you've prioritized your results and developed and implemented action plans, don't forget to monitor progress on those actions. By doing so you will ensure the survey results in organizational change and improvement.

⑨ Go through a process check

At the end of the project, review the process to see what aspects went well and what could be improved upon for the next administration of the survey. Surveys are an ongoing process and questions that may have been useful in the first administration may no longer be relevant. Likewise, new reporting needs or process enhancements may be necessary as your survey effort evolves.

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