How to Turn Engagement Survey Results Into Action

HR's guide to analyzing survey results and implementing change.

Introduction

You spent months honing your <u>engagement survey questions</u> and prepping communications. Your company's CEO and managers rallied employees to participate in record numbers. And just like that, the results are in. Now what?

You asked for it — and employees were happy to oblige. Now the ball is in your court. It's time for your HR team to turn that feedback into change. Making that happen will require you to analyze the data, present your findings, and collaborate with managers to build an action plan.

In this ebook, we'll go through all of the above, citing real-world examples along the way. You'll learn how to uncover insights from your engagement data and set clear, actionable goals in response.

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Analyze the Results

You've just received your employee engagement survey results. While the software you used might provide an overall score or average, you need to go a bit further. There's a lot of nuance to employee sentiment, and on-the-ground realities can vary widely from team to team. What's more, visualizing the data can reveal trends in ways that static spreadsheets can't.

You don't need to be a data scientist to pull insights from survey data. Here's how to get an accurate read on the state of your workplace.

1. Look at cross-sections and performance.

After looking at your overall, company-wide results, break responses down by departments and demographics. For this to be possible, it's important that your survey data includes all of the right fields. If you use an engagement survey platform like Lattice, make sure you account for all the different dimensions you want to consider before launching the survey.

Do your older workers report feeling excluded from the company's culture? Does engagement vary by job level or pay grade? You can't identify these trends without having these fields in place. To that end, this analysis gives you a great opportunity to note what fields you'd like to add to your dataset for future surveys.

Here are some dimensions you should consider when looking at your engagement survey results:

- Age
- Department or business unit
- Ethnicity
- Gender
- Job category (full-time, part-time, contractor)
- Job level
- Months since last title change
- Office location
- Salary band
- Tenure

Comparing results across each of these will help you prioritize your next steps and get ahead of voluntary turnover. Factoring in employee performance can

also put the survey results in a different light. Are your star performers the least content? That could be reason enough to sound the alarm with department leadership. In cases like these, HR technology can help your team identify flight risks. Lattice makes it easy to cross-reference engagement and performance data in one dashboard.

2. Read the comments.

Scores might be telling on their own, but what better way to gauge sentiment than to read what employees have to say? While you can make comments optional, they should never be absent from your survey altogether. They provide you with the most direct feedback, and subtleties like tone and word choice can convey more than any percentage or rating ever could.

If you're at a small business, skimming the comments might be a lunchtime activity. But for companies with hundreds or even thousands of employees, it can take teams days to read them. For immediate insights, consider importing your comments into a word cloud tool. These also make powerful visuals when it comes time to present your findings to leadership and the company at large.


HR technology can help you uncover even more. Artificial intelligence and machine learning makes it easier to not just identify recurring words, but also the emotions behind them. Sentiment analysis empowers HR teams to identify positive, neutral, and negative responses en masse. Software like Lattice even allows you to use sentiment analysis in performance reviews, too.

While it might be tempting (and only natural) to hone in on the negative comments, listen to your promoters as well. That positive feedback can serve as your north star and inform how you address weaknesses or challenges during action-planning.

3. Compare historical data.

More data, more insights. Tracking engagement survey data over time gives you a clear picture of whether things are improving or not. Sure, it might be disheartening to see that only 45% of employees consider your company a great place to work. But what if that statistic was just 20% last quarter? The changes you've made are working — build on that momentum. That comparative data is important to know when you start drafting an action plan.
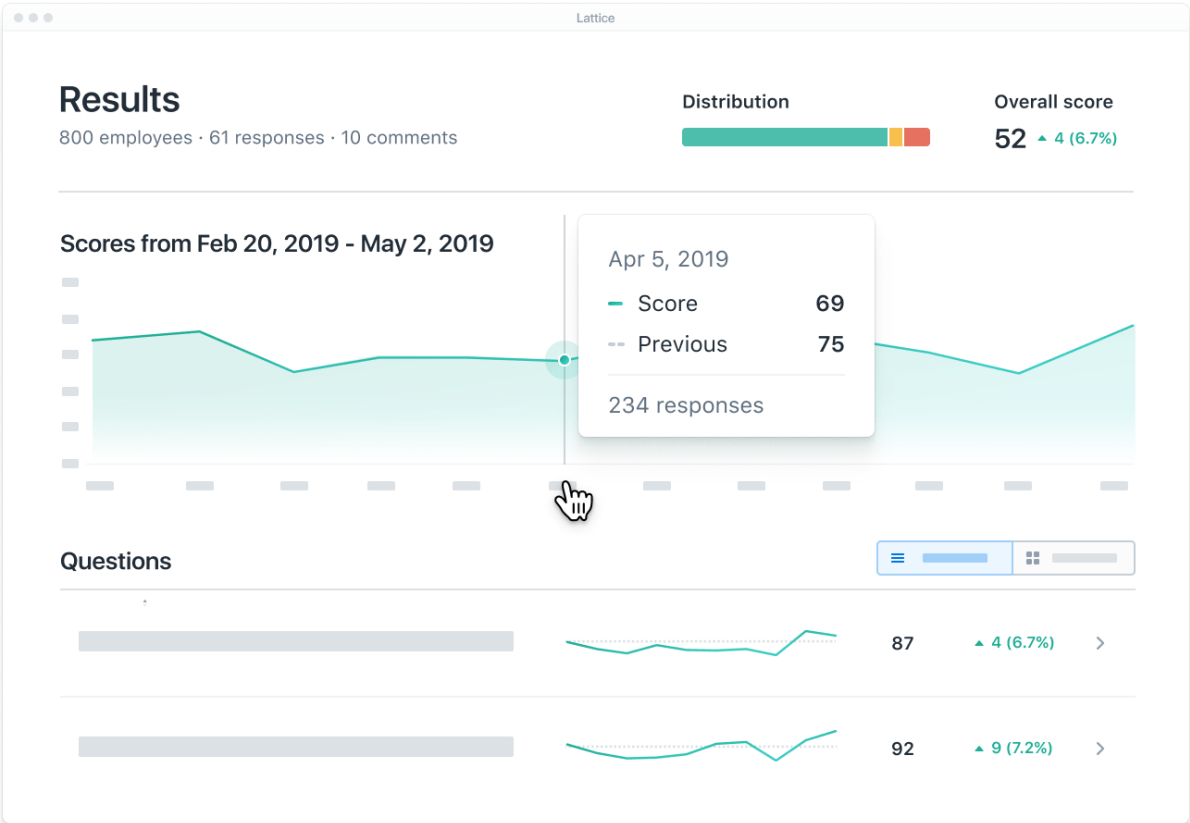
Looking at historical data can also reveal seasonal trends. Let's say your company's busiest season is year-end. If you run surveys on a quarterly basis, are your fourth-quarter results typically on the lower side? While you should never discredit employee feedback, it's important to know that sentiment ebbs and flows through the year. If your results mark a complete departure from past surveys in the same timeframe, that should stick out like a sore thumb.

4. Benchmark your results.

What's "good" look like, anyway? Companies seldom share their engagement data with the general public, so it can be hard to tell.

In the past, wrangling this information was easier said than done. It meant privately asking your professional network, reading industry studies, or even purchasing costly benchmark reports. Technology has risen to meet that call. Using a survey tool like Lattice empowers you to benchmark your results against the other companies'. Our platform allows you to do this for specific questions and your overall results.
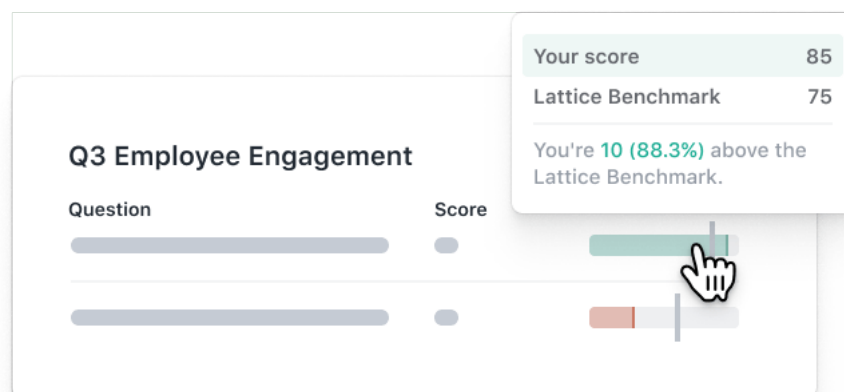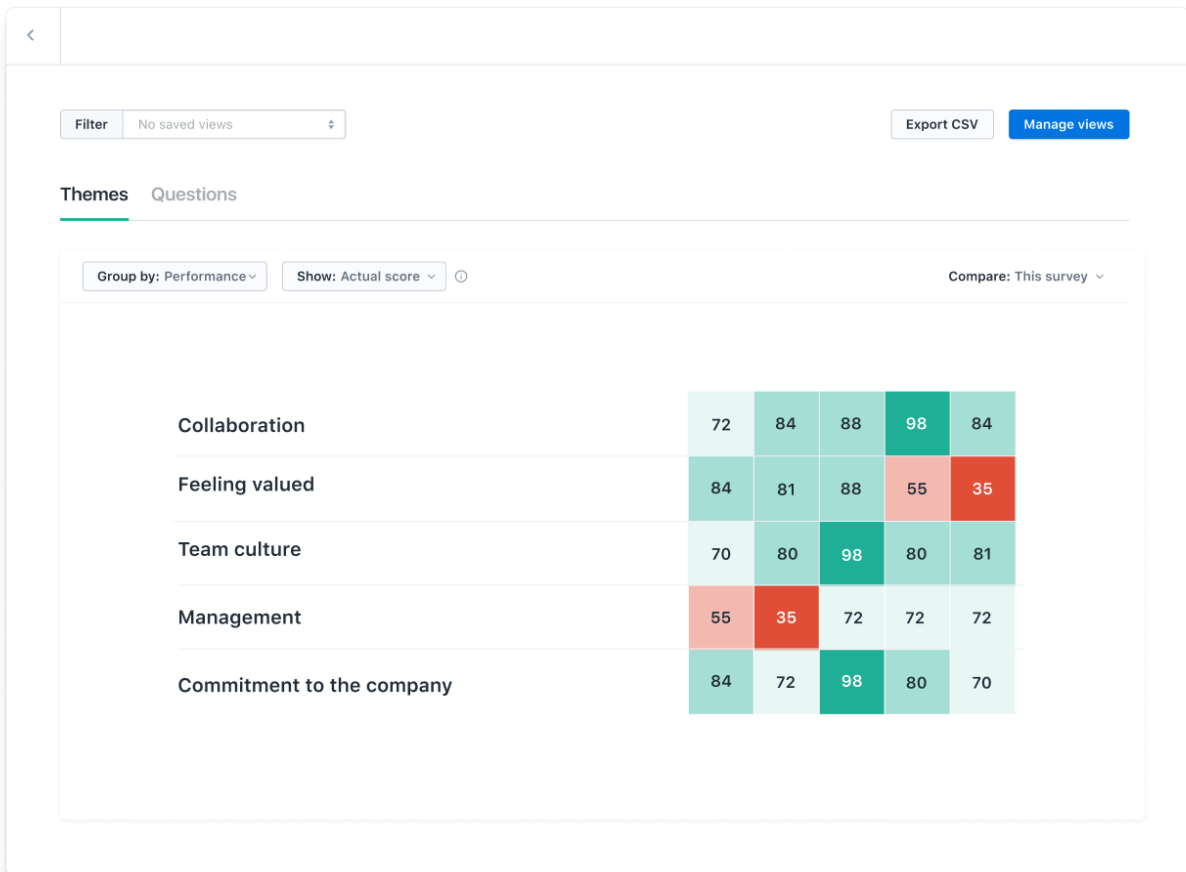

When comparing your results to industry benchmarks, remember to carefully consider your response rate and sample size. For example, if a specific question was filled out by a small subset of workers, don't be surprised if your results seem way off the mark. Similarly, if your survey is highly customized and includes questions that don't typically apply to other businesses, you'll have less data to compare.
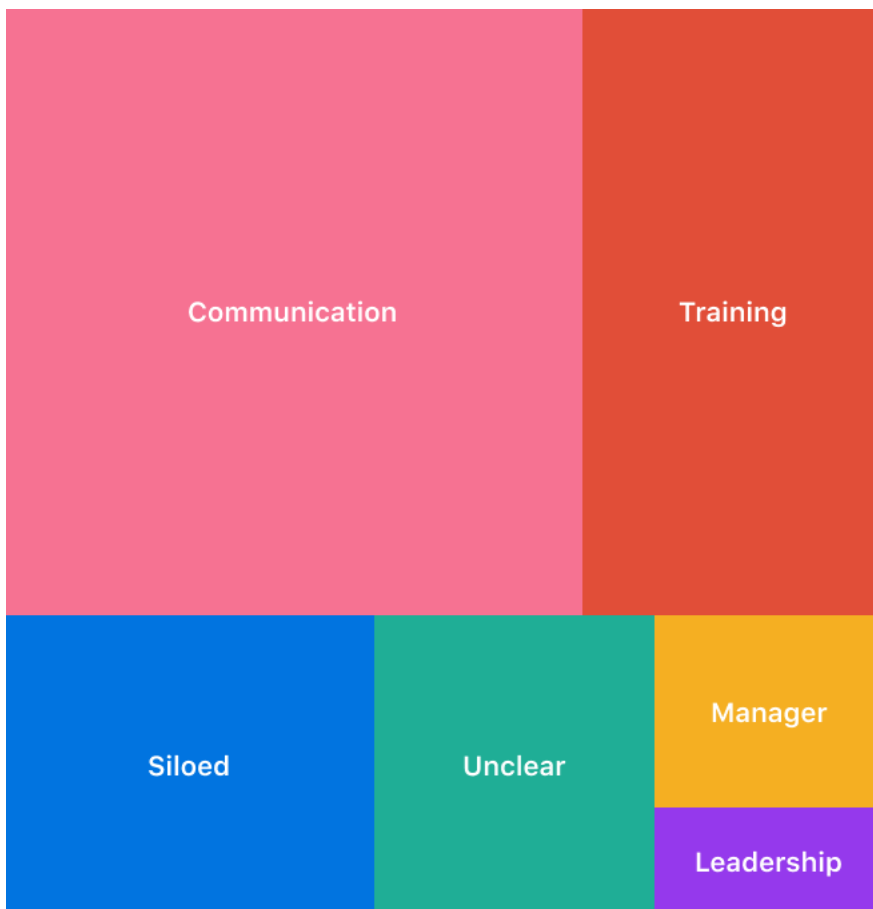
5. Use visuals to spot trends.

Static spreadsheets only reveal so much. Using visuals can help you focus in on problems and opportunities. They can also tell the story of your engagement survey in ways traditional metrics can't, making them powerful assets for your next boardroom presentation.

Some of the most impactful visuals involve looking at cross-sections of your workforce. For example, try looking at your survey responses by manager, as shown below. In this example, one manager's team appears to score significantly lower across all categories, especially "feeling valued" and "commitment to the company." It may be worth revisiting this team's written comments for context.

| Filter | No saved views | | | | Export CSV | Manage views |

Themes Questions

Group by: Performance ∨   Show: Actual score ∨   ⓘ   Compare: This survey ∨

Collaboration	72	84	88	98	84
Feeling valued	84	81	88	55	35
Team culture	70	80	98	80	81
Management	55	35	72	72	72
Commitment to the company	84	72	98	80	70

Don't shy away from experimenting with less conventional charts. Import your results and comments into data visualization tools for even more insights. On the next page, radar and treemap charts are used to look at survey ratings and recurring words, respectively. Apply the same creativity to other HR data points, like performance ratings and attrition, and you might make even more surprising discoveries.
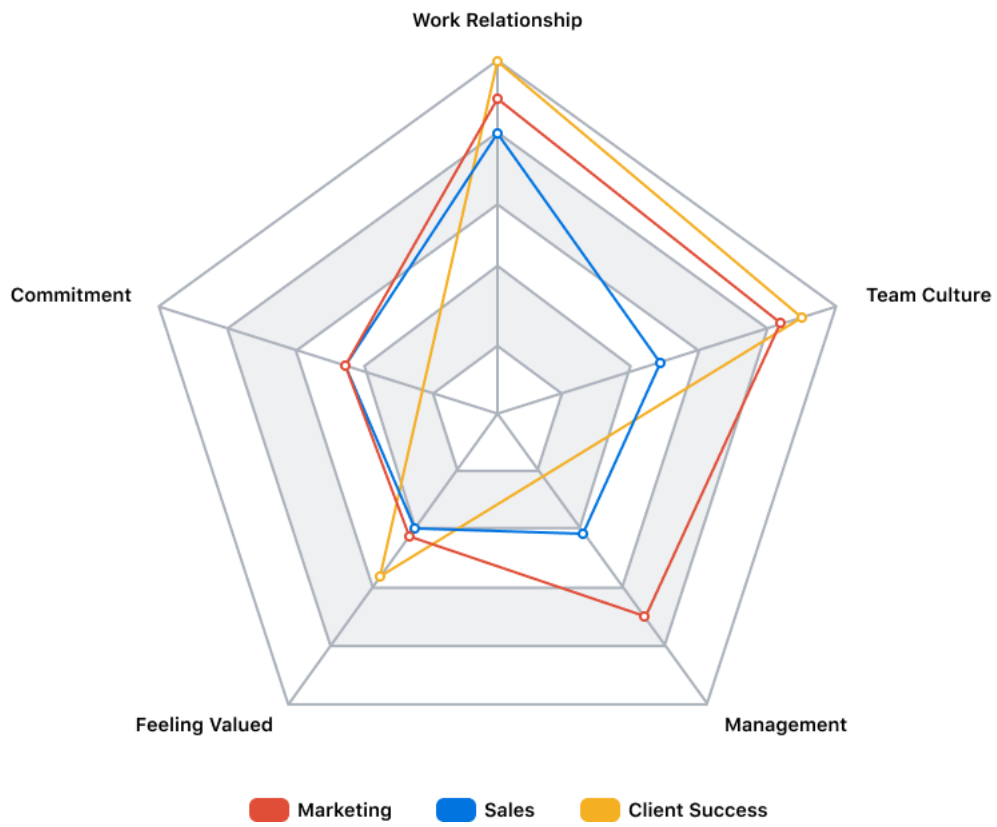
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Work Relationship

Commitment

Team Culture

Feeling Valued

Management

● Marketing   ● Sales   ● Client Success

Communication

Training

Siloed

Unclear

Manager

Leadership

Lattice

Building an
Action Plan

Building an Action Plan

You've had time to digest the results. Now it's time to share what you've learned with the leadership team and managers. At the end of this exercise, you'll have a clear sense of what needs to be prioritized and a list of goals to act on. For a presentation template based on these guidelines, click here.

1. Share the results with leadership.

Whether you're running open enrollment or launching a company policy, communication is a critical skill set in HR. That's especially true when it comes to sharing something as sensitive as survey results and employee comments.

Start the presentation by reminding leadership of why you conducted the survey in the first place. Cite the statistical data correlating engagement to business results and the importance of your employer brand on attracting talent. According to Gallup, some of those more tangible impacts include:
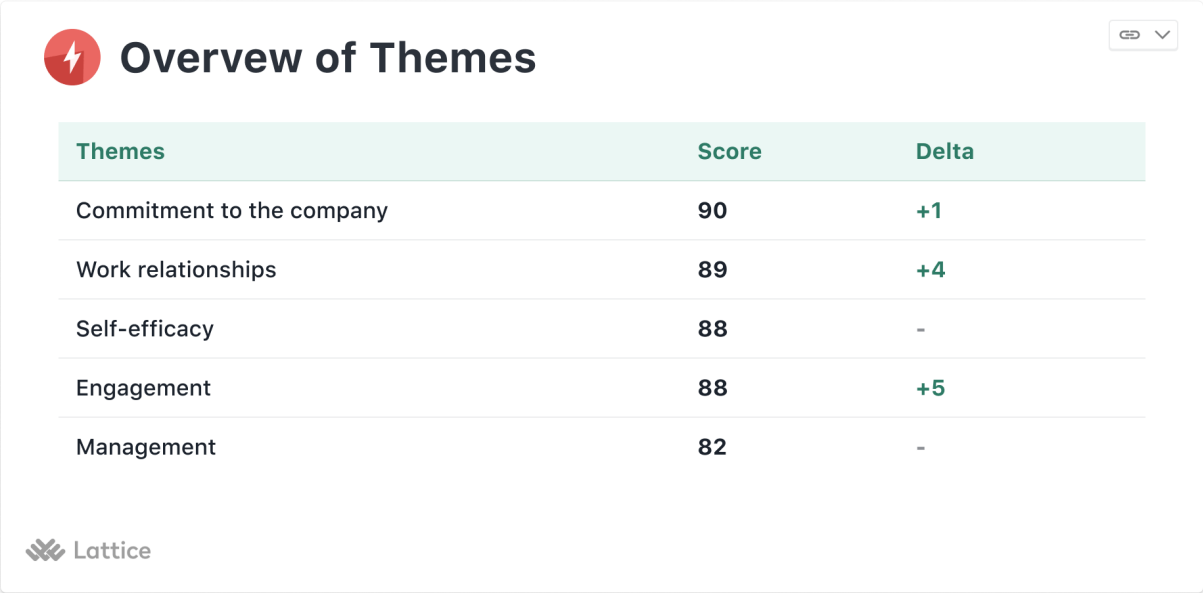
- 21% higher profitability
- 20% higher sales
- 17% higher productivity
- 10% higher customer metrics
- 24% lower turnover in high-turnover organizations
- 59% lower turnover in low-turnover organizations
- 40% fewer defects
- 41% less absenteeism
- 58% fewer patient safety incidents
- 70% fewer employee safety incidents

If you surveyed for topics like belonging and employee Net Promoter Score, mention why each of those matters to the business. While you'd be hard-pressed to find leaders that don't buy into the value of these, it's still worth providing the context.

Next, talk about *who* took the survey. What did participation look like by department? Remind your audience that response rate can be a misleading indicator of success. Achieving a high participation rate is important, but if it's too high it can suggest employees were coerced into completing the survey. According to Lattice benchmarking data, the average response rate is 74%. Aim higher, but don't be disappointed if you fall short of 100%.

Now it's time to get into the meat of your presentation: the results. Run through the themes of your latest survey. How did you fair for criteria like "commitment to the company?" Did results vary significantly by department? For additional context, note whether these numbers changed since the prior survey. If you have access to industry benchmarks, include them to give your audience a sense of how typical or atypical your results are.

You can give leaders and managers additional insight by following up with how employees responded to specific questions within each category. For example, were employees more favorable about certain aspects of management? Your leaders might be giving employees actionable feedback, but not giving enough direction in the form of clear goals. This data starts to get to the "why" of your results.

⚡ Overvew of Themes

Themes	Score	Delta
Commitment to the company	90	+1
Work relationships	89	+4
Self-efficacy	88	-
Engagement	88	+5
Management	82	-

Lattice

⚡ Theme Breakdown: Management

Manager: Steven Fisher, Camille Franco, OR Sara Livingstein ✕

Themes	Distribution	Score	Δ Delta
Management 5 questions		50	
In the last six months, someone at work has spoken to me about my progress. Management - 20 of 20 responses		65	
My manager communicates clear goals for our team. Management - 20 of 20 responses		40	
My manager gives me actionable feedback on a reglyar basis. Management - 20 of 20 responses		50	

Lattice

Now that you've gone through high-level details, it's time to share your "aha" observations or hypotheses. This is where your earlier analysis comes into play. If you noticed anything compelling with regards to employee demographics, tenure, or other dimensions, highlight those observations. Content permitting, you should include employee comments that help color the findings and give your audience greater context. Their qualitative nature also grounds the results in reality. If you use an engagement survey software like Lattice, you can paste visuals from the platform into the presentation for additional emphasis. The below slide features a key insight, verbatim comments, and a heatmap of scores by department. Copy this approach for each of your deep dives.

2. Identify your priorities.

You've gone through key findings and hypotheses with leadership — now it's time to identify the next steps and tackle opportunities for improvement.

No company is perfect, and even glowing reviews from employees leave room for improvement. Whatever your reality, don't bite off more than you can chew. First, determine which opportunities need to be prioritized. Using a matrix, identify your important weaknesses and strengths. You may opt to make this a collaborative exercise with leadership and managers in the room. Doing so has the added effect of getting buy-in from the same individuals who, in many cases, will be responsible for the success or failure of the resulting action plan.

Important Weakness	Important Strength
Unimportant Weakness	Unimportant Strength
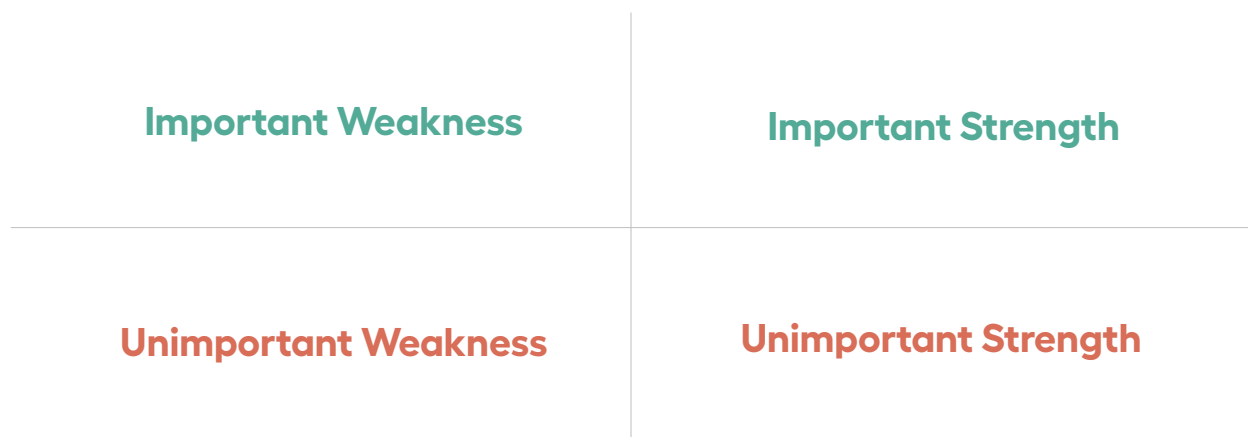
The matrix is intuitive enough: Items listed in the bottom quadrants should be shelved, and strengths and weaknesses in the top half prioritized. Your important strengths serve as your guiding light — a reminder of what your company excels at. Consider why these are your strengths and whether there are any practices or lessons that can be applied to your weaknesses.

Next, pick three to five weaknesses to focus on. Any more and you risk spreading management's focus too thin. Under each weakness, propose potential solutions. You may come to the meeting with your own ideas, but once again it's important to give managers a role in crafting solutions on their own.

Here are three example insights and their potential, high-level solutions. **Keep in mind that these aren't goals** — we'll get to those shortly. If you subscribe to the OKR approach to goal setting, consider these akin to objectives, not key results.

Example Insights

GTM employees feel disconnected from the product team.
This tends to happen at high-growth companies. Encourage managers from these two teams to improve communication. Asking them to share updates with the broader organization or co-own certain goals could boost collaboration.

Managers in the Seattle office report lower team engagement.
It can be difficult keeping satellite offices engaged and feeling like part of the company. Roll out a cross-office public praise initiative to recognize remote or distributed employees.

High-performers on the client service team report lower engagement. This could be a future retention issue. Have managers speak with these employees to gather more context, and encourage frequent and detailed one- on-one meetings and praise from their manager.

3. Set actionable goals.

Identifying problems and high-level solutions is an important step, but it's just a preliminary one. Using these as a starting point, you'll need to formalize goals so owners have something to work from. Setting goals will also give employees, who want to see their feedback result in change, something to track progress with.

"Improve communication between departments" is a worthy aspiration, but it's also a vague one. You need to divide aims like these into more actionable, measurable goals. There are a few different methodologies you can use, including the "SMART" model. This acronym stands for specific, measurable, actionable, relevant, and time-bound. As you divide your high-level responses into smaller goals or key results, consider whether each fulfills these criteria:

- **Specific:** Does the goal have specific means and ends?

- **Measurable:** Can the goal be measured? How?

- **Actionable/Achievable:** What are the specific actions that will lead to the goal? What do you need to do to accomplish it?

- **Relevant/Realistic:** Is this goal relevant to your team and company? Is it based on factors that are under your control?

- **Time-bound:** What is the time period? Does it depend on a deadline or target date, or is it on a regular schedule?

If employees feel like they're in the dark about what other teams are working on, consider a goal like, "Launch and send at least five cross-departmental email newsletters this quarter." Because the goal is specific, it lends itself to being assigned to an owner and acted on immediately. The clearer the goal, the easier it is to get it assigned and rolling without superfluous kickoff meetings or brainstorms. To help get you started, here are some example scenarios and their respective goals.

Example Goals

Opportunity: Only half of respondents think managers are invested in their growth.
- Introduce a learning stipend of $500 per year by the end of the Q1.
- Reach 60% utilization for the learning stipend across all departments by end of Q4.

Opportunity: Employees feel like they aren't being recognized for their hard work.
- Evaluate and implement employee recognition software by Q3.
- Roll out a spot bonus program for exceptional service before the busy season.
- Put up a "praise wall" in every office location by Q3.

Opportunity: Remote offices feel excluded.
- Hire office managers for the company's remote locations by Q2.
- Starting next quarter, implement company-sponsored monthly happy hours for remote offices.
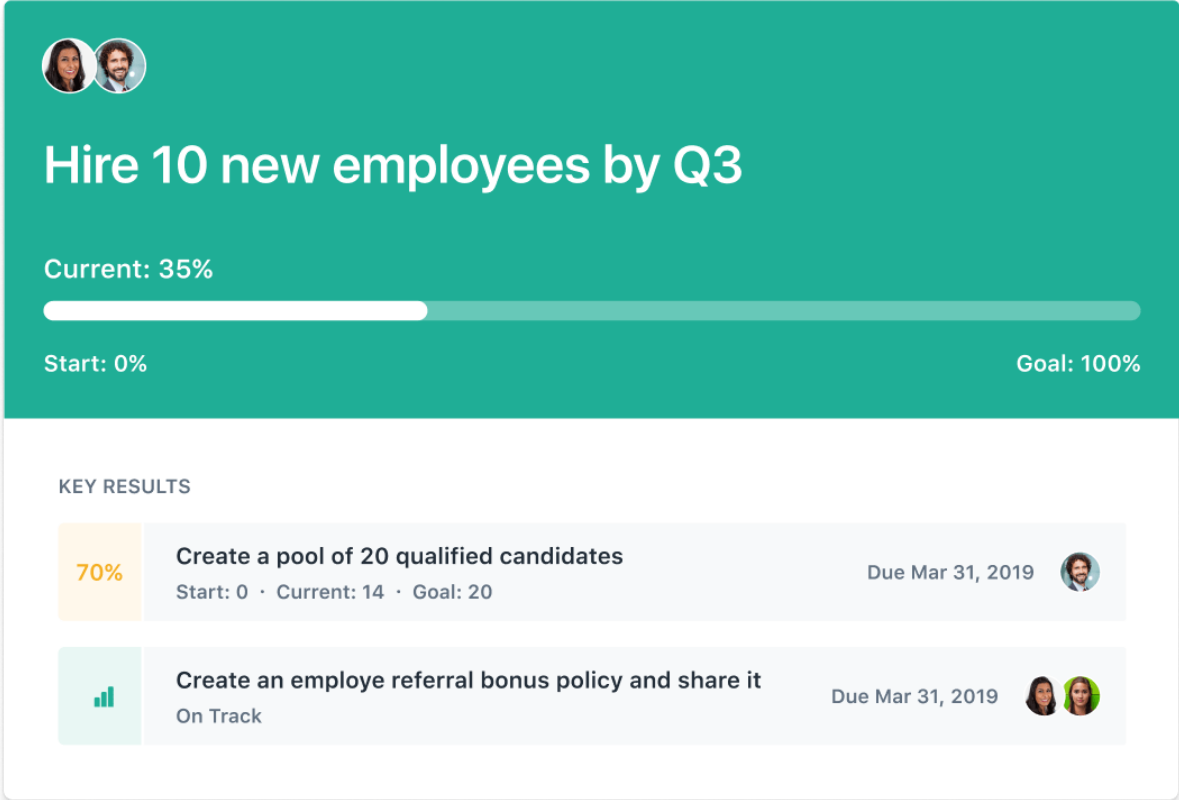- Bring the company together for a fully-paid holiday offsite event.

Opportunity: Only half of employees would recommend their manager.
- Enroll 50% of managers in a leadership training pilot program in Q2.
- Build and distribute post-training surveys asking managers for their feedback. Secure an NPS of at least 60 for the program.
- Require 100% of managers to take the training program by Q1.

While HR can help move the needle on things like stipends and manager training, some goals will be specific to certain departments and teams. For example, your survey might reveal hostility between divisions in your sales team. In cases like these, play the role of advisor and partner with managers to draft SMART goals that get to the heart of the issue.

4. Share your plan.

Once you've formalized goals with your leadership team and management, share your survey results and action plan with employees at large. Pairing the two will show you intend to act on their feedback in specific, measurable ways. Doing so will have the added effect of giving managers and goal owners an extra nudge to take their next steps seriously.

Hire 10 new employees by Q3

Current: 35%

Start: 0%   Goal: 100%

KEY RESULTS

70%	Create a pool of 20 qualified candidates Start: 0 · Current: 14 · Goal: 20	Due Mar 31, 2019
	Create an employe referral bonus policy and share it On Track	Due Mar 31, 2019

Once you've shared your goals, add them to your people management platform. Lattice allows managers and goal owners to easily provide updates and gives employees a place to periodically check in on progress. What's more, if you need to provide the C- suite with a quick update on your employee survey response, you can just take a snapshot from the platform.

Tracking Progress

Tracking Progress

Sticking to goals is just as important as setting them. Once you've built your action plan and targets, goal co-owners will need to track progress and adjust as needed. That way you can provide leaders, managers, and employees with a steady stream of updates along the way.

1. Use pulse surveys.

Knowing whether an action plan is working shouldn't mean waiting for your next big survey. While semiannual or quarterly employee surveys provide valuable insights, companies need a way to act on engagement data in real-time. Enter pulse surveys.

Pulse surveys are short, 1-5 question surveys. These can be administered as often as needed, whether it's monthly, biweekly, or even weekly. They typically don't take more than 60 seconds to complete, making them a light lift for employees. Pulse surveys give HR teams a steady flow of feedback on how their initiatives are going.
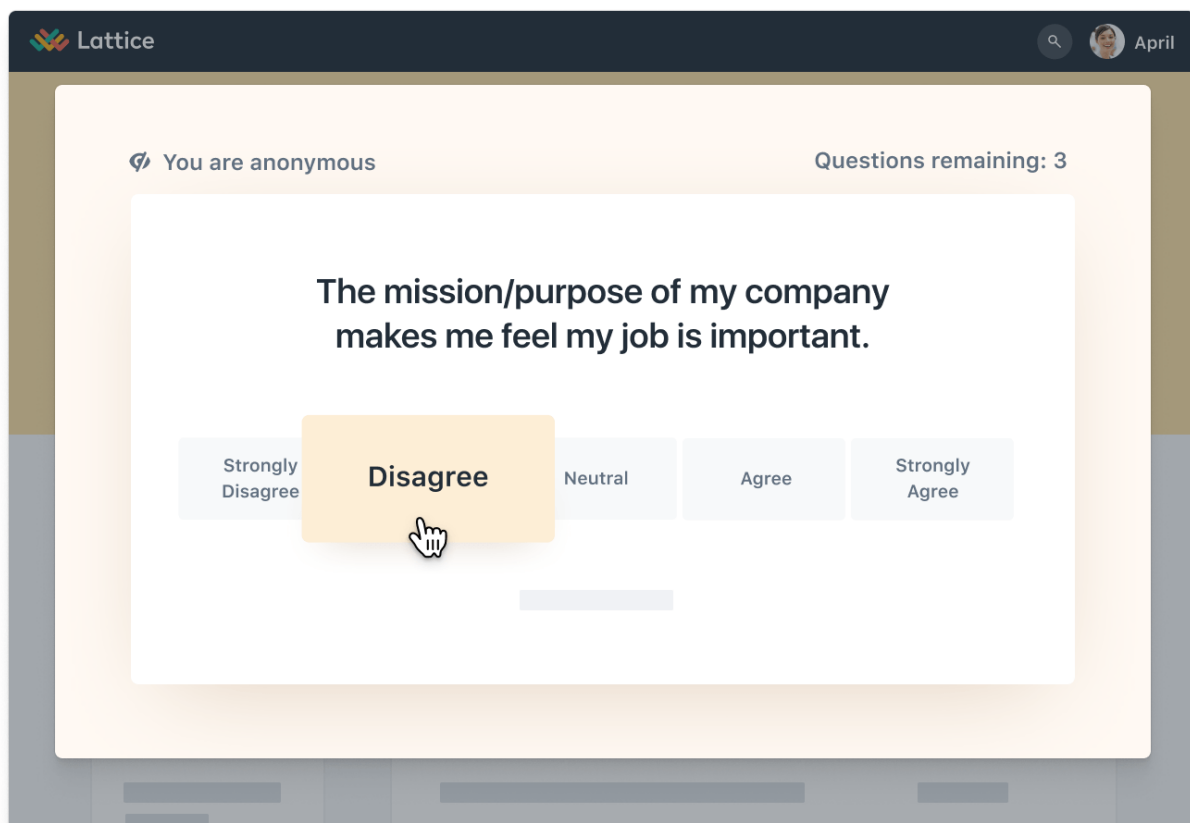
Let's say you wanted to check on the progress of your employee recognition push. If you rolled out Lattice's praise wall in response, ask employees whether

they feel recognized in subsequent pulse surveys. After a few weeks, you'll learn whether your adjustments are making an impact. You can also use these shorter surveys to track employee Net Promoter Score (eNPS), which simply asks individuals whether they'd recommend your company to a friend. No matter what you're measuring, your team can democratize this data by giving managers access to their own pulse dashboards so they can spot trends and act fast.

2. Check in with managers and employees.

You're in this together. Set recurring one-on-one meetings with managers to get a sense of how things are going with their teams. The frequency will depend on how big your team is — for example, if you have individual HR business partners dedicated to each department, a biweekly cadence might be best.

Use this time to see how managers are tracking on their post-survey goals. Has morale improved or remained in a holding pattern? These meetings provide you with an opportunity to walk managers through their team's pulse dashboards and any written comments that may have come through. This one-on-one can serve as a brainstorm for alternative solutions, too.

Pulse surveys are helpful, but sometimes you just need to hear straight from the source. Continue to seek employee input through post-survey focus groups or, for less sensitive matters, at company town hall meetings. Consider joining departments in their team meetings or lunches to take questions or share updates about ongoing HR initiatives. You'll be surprised how eager employees are to engage in those conversations.

3. Share your progress and celebrate wins.

When you survey employees, you enter a compact: They'll provide feedback as long as you act on it. To that end, you'll need to be transparent about the end result. How are you progressing on that new manager training initiative? Did your team's response to the last survey move the needle or fall flat?

In this line of work, over-communicating is seldom a bad thing. Your HR team and cross-departmental owners should regularly share updates through a variety of channels. Company-wide emails, Slack messages, and all hands presentations are all great places to start. For the latter, be sure your update isn't just tacked on at the end and rushed. If you're launching a new learning stipend, for example, take ample time to go through what qualifies and how to take advantage of the new benefit.

3. Use dashboards to track progress.

Beyond major surveying events (your quarterly engagement survey, for example) it's crucial to fill in the gaps with more regular insights. Pulse surveys help accomplish this, as do HR analytics dashboards.

Dashboards allow teams to track, analyze and report on HR key performance indicators (KPIs) in real time, making them an invaluable tool for People teams to get a read on the pulse of their workforce. Regular reporting through dashboards enables HR departments to recognize and act on emerging opportunities or problems before they have a significant business impact.
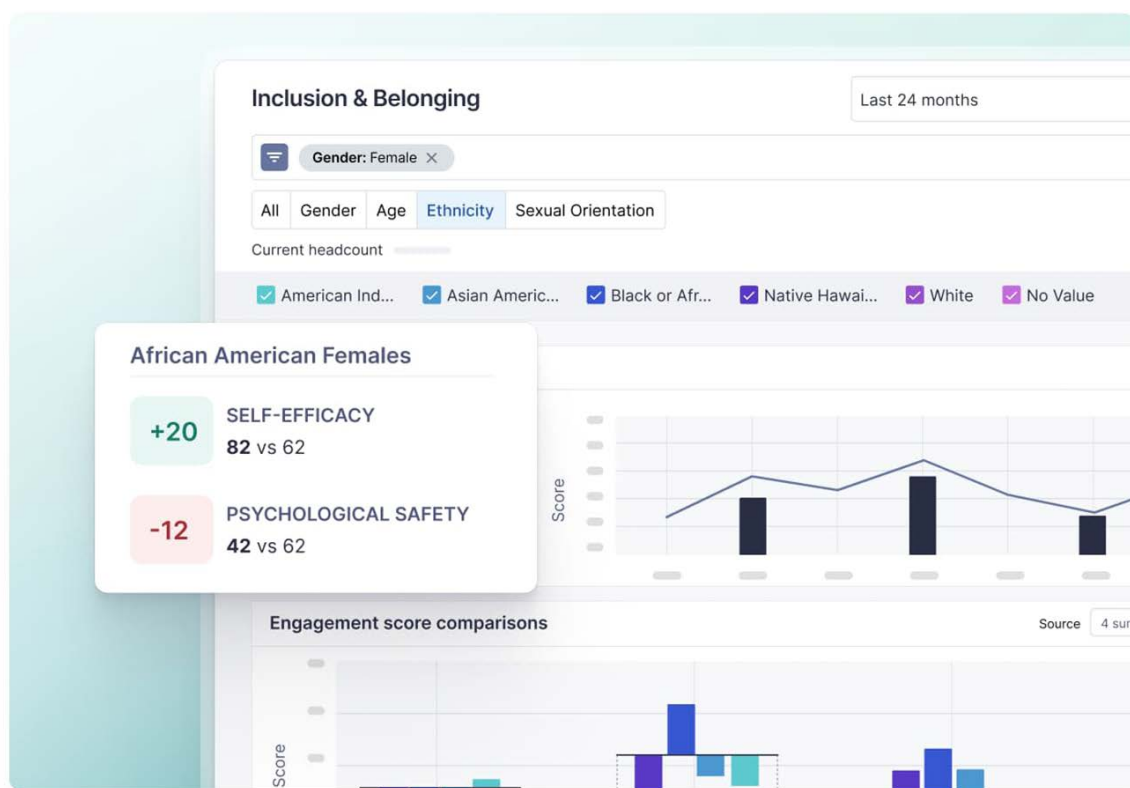
Diversity, equity, inclusion, and belonging (DEIB) dashboards offer one powerful example of how to leverage engagement data on an ongoing basis. For instance, a DEIB dashboard provides insight into whether specific employee groups feel like they belong and are supported by the organization. Lattice's DEIB Analytics combines demographic and HR program data together to equip people leaders with the insights they need to develop an informed strategy and track progress toward building a more diverse, equitable, and inclusive workplace.

Conclusion

When you ask employees to complete an engagement survey, they trust that their answers will be used to improve the workplace. If you don't make good on that promise, running surveys might actually do more harm than good. But getting to that next step is often easier said than done — which is why so much has been written about crafting surveys, not how to respond to them.

Remember, people strategy is business strategy. Like any conventional sales or revenue target, engagement can be tackled by looking at the data, setting goals, and following through. And thanks to technology, HR teams have never been better equipped to execute on that promise.

Lattice is here to help. We bring engagement, performance, compensation, and goals together in one place. Thousands of companies use our people management platform to develop engaged, high-performing teams. Learn how we can help you deliver on your latest engagement survey by <u>scheduling a demo</u>.

About Lattice

Lattice is the people success platform that enables HR leaders to develop engaged, high-performing teams. By combining continuous performance management, employee engagement, development, compensation, and growth in one solution, organizations get powerful, real-time analytics that leads to actionable insights turning managers into leaders, employees into high performers, and companies into the best places to work.

The Lattice People Success Platform
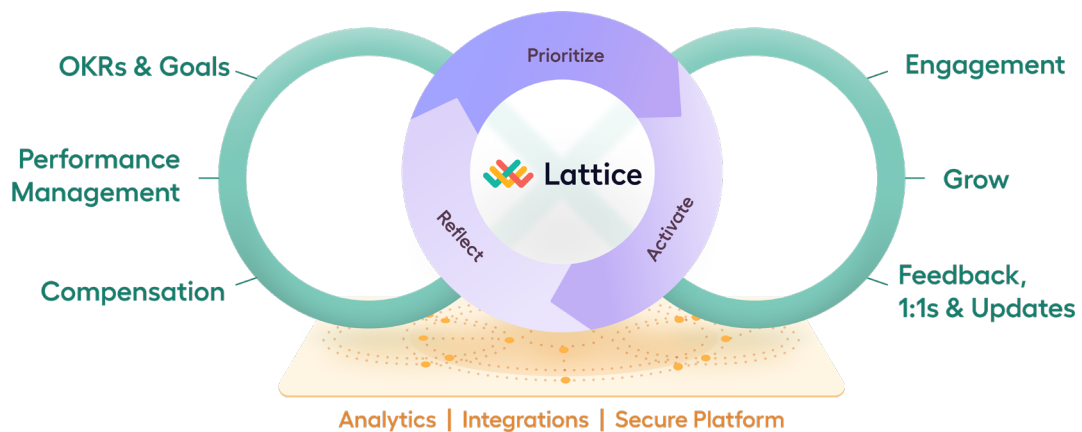
Lattice works with companies that aspire to put people first. Whether redefining the beauty industry or building self-driving cars, all of our customers have one thing in common: They value their employees and want to invest in the development and success of their people. To see Lattice's platform in action, schedule a product tour.

Trusted by the best places to work

Discover how Lattice empowers thousands of companies to build award-winning cultures.

Request a demo