Engaging the Workplace

Using Surveys to Spark Change

Sarah R. Johnson
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FOREWORD

Sarah Johnson is a valued and respected member of the Perceptyx team, and I am honored to call her my friend, as well as my colleague.

With the candor that characterizes good friendships, Sarah reminded me recently that there was a time when I did not believe in consultants. My comeback was that my assessment was based on the fact that I had not met many good ones. In fact, Sarah is the one who changed my mind completely. She was my first encounter with a “real deal” consultant, so she became my guiding light.

As you read this book, you will see why Sarah is an effective consultant. She has deep professional experience, derived from insights learned through hundreds of client relationships over dozens of years. She has experienced the full spectrum of the survey business. Clients speak of her with almost reverent acclaim, and her colleagues know that if she is on the team, only good things will happen.

Yet, although Sarah is a professional, she is also practical. Instead of citing academic publications throughout this book, she refers to practical solutions, without mumbo jumbo or condescension. She is a survey expert, but she is eager to offer simple solutions, such as her 1-2-3 approach to survey action planning. In Engaging the Workplace, Sarah repeatedly calls for clearer definition of purpose
and consistent communication, and provides suggestions that bias a survey toward success.

Employee surveys are extremely valuable. They provide an opportunity for a corporate conversation when employees want to be heard and management wants to listen. The timely insight gained from survey data in the hands of managers and HR professionals helps uncover the real issues in the workforce, so that strengths can be celebrated and problems can be solved. At Perceptyx, we enable people and organizations to thrive. Employee surveys help us to do that. That’s why surveys remain our main purpose.

If you are a seasoned survey veteran, this book is the manual you wish you’d had 10 years ago. If you are just getting started with surveys, this book will give you a head start and a map to avoid the weeds. If you follow Sarah’s advice, it may lead to the coveted “seat at the table” that HR professionals so desire, but are often denied.

Dave Belcher
Chairman, Perceptyx
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Surveys have become an ubiquitous tool in organizations. Chances are the organization you work for conducts many surveys, whether it’s to gather feedback on product and service satisfaction from customers or workplace engagement from employees. These internal surveys may focus on company processes and procedures, such as IT support or the food served in the company cafeteria. Employees may be asked to evaluate their manager in a 360-degree-feedback process. More than likely, the organization you work for conducts an employee survey designed to measure employee engagement on an annual or more frequent basis. These employee engagement surveys have become a standard event in most Fortune 500 companies, and many leading companies (think Google, Microsoft, and Amazon) have specialized staff dedicated to designing, administering, and analyzing employee survey data. Dozens of consulting firms, both large and small, provide survey administration and reporting services to organizations.

I fell into the business of organization surveys a bit by accident. My earliest professional position was an internship at IBM corporate headquarters in Armonk, New York. I worked in the personnel research department, which dates me a bit; the phrase human resources had yet to replace personnel in U.S. corporations. Our mission was to conduct research on strategic human resources
issues and report our findings to leaders in the personnel (now human resources) function, as well as senior executives.

When I started my career at IBM in the 1980s, the company was considered a leader in the HR world. It hired professionals trained in human resources and industrial/organizational psychology before these fields of study had become commonplace in business schools, and when typical HR staffs were populated with individuals with company experience but no HR-specific training or expertise. IBM’s HR function was well respected by its leaders and the general HR field, with its programs and practices considered leading edge.

IBM had implemented employee surveys as early as the 1950s, and was one of the first companies to regularly survey its employees. IBM was also one of the first companies to use surveys to measure not only the employees’ experience with the company, but also a construct called employee “morale,” a predecessor of employee engagement. Morale had a very specific meaning at IBM, and over the years the Morale Index became a critical number in the company. The regular company-wide surveys provided insight into long-term trends, differences in the experiences of different employee groups, and an important evaluation of leadership and leaders.

As the team that studied strategic human resources issues, the personnel research department also relied heavily on the methodology of employee surveys. Our work was separate from the ongoing morale surveys that another group within IBM’s corporate human resources organization managed, and our focus was quite different. We looked at cultural differences across the organization. We used survey data combined with employee demographics to create predictive models of how many employees would participate in a voluntary early retirement program. We studied the link between IBM’s Basic Beliefs and organization culture. We dove into employees’ work-life balance issues. Our surveys of the executive population probed
understanding and confidence in the business’s strategy and operating efficiency. We evaluated compensation schemes and benefits programs based on employee feedback.

The data we collected from employees via surveys fueled a long list of critical studies that provided an ongoing stream of insight to IBM leaders. We were the team they called when faced with a decision that required insight about people and their behavior. Our work helped make the HR function in IBM truly a strategic partner to the company’s leaders. The studies that we conducted were inspired by their information needs, and we routinely met with them to understand the topics that were of greatest value as they ran IBM’s global business. Our work ebbed and flowed with trends in the company and in the business world. The studies we completed reflected what leaders needed to know at that time in the company’s history.

Our research pivoted to meet business needs, and the early 1990s was a very difficult time for IBM. The company was in crisis. This was the beginning the personal computer’s rise, and industry experts were predicting the death of the mainframe computer. IBM owned the mainframe market, which had traditionally generated an enormous amount of revenue and profit for the company, and had been slow getting into the personal computer market.

Industry analysts were describing IBM as bloated, slow moving, and obsolete, and were calling for the company to be broken into businesses to be sold off. Sales, revenues, and the stock price plummeted. John Akers, the CEO at the time, was forced out, and in a move that shocked employees, an outsider, Lou Gerstner, was brought in to run the company.

Any executive joining a company as CEO wants and needs to understand the situation they are walking into. So shortly after Gerstner joined IBM as the CEO and chairman of the board, our team surveyed the company’s top executives on strategy, execution, and
culture-change issues. The survey’s purpose was to assess the current landscape and what was on the mind of Gerstner’s top lieutenants, the team responsible for leading the company in a new direction.

As one part of the project, my team and I ran an analysis that produced a profile of the executive team, reflecting their willingness to change with the times and participate fully in the transformation of IBM. The analysis allowed us to estimate how many leaders were ready to lead, how many needed more convincing, and how many were digging in their heels and resisting change. The analysis provided powerful and sobering insights into the challenges ahead.

Not long after this work was completed and shared with senior leadership, I was reading an interview of Gerstner published in USA Today. He was asked what challenges lay ahead. He replied, “We recently did an analysis that helped me recognize that there are a number of senior leaders who aren’t ready for change.” I couldn’t believe it! He was mentioning my analysis and insights. The analysis my team had completed had shaped the CEO’s perception of the task ahead of him, and influenced his plan of attack. I realized then how survey results, when focused on the right topics and analyzed to provide true insight, could influence the thinking and actions of senior executives.

More Than Check the Box

My experience in personnel research at IBM opened my eyes to the power of employee surveys and the strategic value they can provide organizations. And while I carried that experience and focus to other organizations I have worked for as an internal or external consultant, I found that in many cases the company’s survey had become a “check the box” experience or an exercise in collecting data that were used very narrowly. Too many organizations utilize surveys with a limited focus (to simply measure engagement, as
an example) and collect little data that help illuminate critical issues. Other companies ask just a handful of survey questions that provide metrics, but not much in the way of deep understanding of organizational issues.

These types of surveys are a lost opportunity to not only drive organization effectiveness, but also establish HR as a strategic partner to the organization’s leaders.

The human resources function has long aspired to have a seat at the table with leaders of the company, and has recently realized that data and analytics are a critical tool to make this happen. Senior leaders live in the world of numbers and are fluent in its language. HR functions must develop the same capability. Data and analytics have the ability to transform the HR function into a source of data-based guidance. Analytics can provide insight into culture, leadership, organization change, attrition, customer focus, mergers and acquisitions, employee development, globalization—and employee engagement.

And at the heart of data and analytics is the organization survey, the most strategic and influential program the HR department can implement. A survey touches every employee in the company at the same time, sending a message about what is most important to the company at that moment. Survey results and insights are provided to all divisions, business units, and locations. With access to survey results for their team, managers will be asked to participate in a process of interpreting and acting on the results. Senior executives will be debriefed on the overall findings. These leaders will then discuss the results with managers and employees via emails, videos, and town hall meetings. The results might even be shared with the board of directors. What other HR program or practice has that much reach, that much influence, across the organization?
Untapped Potential
While the majority of organizations conduct some sort of employee survey, many miss the opportunity to collect strategic information or mine the data to provide the insights necessary to drive organization effectiveness. Few HR functions use the survey process and results to become a strategic partner to senior executives. And here’s what is most frustrating: It’s not difficult to transform an employee survey into the engine for an HR analytics strategy that truly drives the success of the organization.

When designed, executed, and analyzed properly, organization surveys enable leaders to made data-based decisions about people. Survey results can provide important guidance for the implementation of the organization’s strategy. Surveys can assess the success or failure of organization initiatives such as leadership development, performance management, beliefs and values, diversity and inclusion, communication of organization direction, and even mergers and acquisitions. Surveys can collect insights into what programs, practices, or management capabilities are most valuable to employees and help retain key talent. The results can enable HR staff to provide programs and guidance based on data, rather than on fads, trends, or guesses about what is needed. The staff that controls the data can wield much influence in the organization, and become key advisers to leaders across the business.

This book will help you make the most of a process and tool that likely already exists in your company. It will help you design a process that collects employees’ views on critical issues, wring as much insight out of the data as possible, and drive organization performance. Let the employee survey make you a valuable strategic adviser to senior leaders in your company.
What’s in This Book

Here’s a brief overview of the chapters:

Chapter 1, “Engagement in the Workplace,” lays the groundwork for the shift in organizations from surveying employees about satisfaction with the company to surveying to assess their level of engagement. However, the chapter notes that when the organization’s survey focuses exclusively on engagement, it is wasting a valuable opportunity to learn about what makes the organization effective. Assess and enhance the workforce environment, and engagement will come along for the ride.

Chapter 2, “What Can a Survey Do?” challenges the idea that just by having a survey, the organization will fix all its problems. Asking questions and collecting data won’t drive change. What happens after the survey is far more important.

Chapter 3, “It Starts With Your Strategy,” asks the question that needs to be answered before moving on to survey design: Why conduct a survey in the first place? Survey programs that provide insight into critical company strategies and direction will drive change and enhance the value of the survey program.

Chapter 4, “Survey Strategy Drives Frequency,” addresses the common misconception that acquiring more data more frequently trumps all other strategies. In fact, the organization’s survey strategy should drive survey frequency, not the other way around. More data do not necessarily translate into more action. Build the right survey design and frequency to fuel the analytics engine.

Chapter 5, “Make Your Survey Dynamic,” makes the case for bucking the “one size fits all” trend in survey design. After all, your company is not like any other company. Design a survey that matches your company’s unique issues and information needs. Plus, what’s important to your company can change over time. Balance following historic trends with refreshing the focus of the survey.
Chapter 6, “Getting to the ‘Why’ of Organization Effectiveness,” argues that while measuring engagement is important, the organization is better served by understanding the reasons behind it. Understanding the workplace factors that influence engagement and success will lead managers to the right actions.

Chapter 7, “Surveys Feed People Analytics,” shows how relying on your gut could undermine your credibility with leaders in your organization. Actions based on beliefs and assumptions, or implemented in the wrong place in the organization, use up resources and do little to influence critical issues. Use analytics to identify the right actions.

Chapter 8, “A Consultant Mindset and Your Survey Strategy,” delves into the role change that HR professionals need to embrace to best serve their organization. HR business partners can play a critical role as engagement consultants to senior leaders.

Chapter 9, “Prepare Your Organization to Act,” makes taking action as simple as 1-2-3. While the organization might be inclined to ask the world of managers to justify the amount of time spent on designing and administering the survey, an overly complex process is the enemy of getting managers to act. Make action planning simple and foolproof.

Chapter 10, “Final Thoughts,” ties it all together. What does your organization need to know, and what does it need to do, to become effective and achieve its goals? HR professionals who can answer that question and provide the data and insights leaders need will lead the pack to create an engaging workplace.

This book is intended for HR practitioners, not academics or researchers. That’s not to say that research findings aren’t important to the practice of surveys and employee engagement. They absolutely are. But the intent of this book, first and foremost, is to provide simple, practical, and easy to implement ideas and solutions to get the greatest value out of your organization’s survey.
ACKNOWLEDGMENTS

The majority of graduate programs in industrial/organizational psychology don’t offer classes in employee engagement and organization surveys. Those of us who have spent our careers consulting in this field have gained our knowledge primarily through experience, sharing best practices, and learning from one another.

At its core, consulting is all about teaching clients, expanding their knowledge and insights. The knowledge I have gained, the expertise I have acquired, and the philosophy I teach to my clients is the product of the many wonderful professionals who have taught me.

My thanks to Allen Kraut, who gave me my start in surveys first as a graduate-student intern and then as an associate at IBM. Allen has been a generous and insightful mentor, collaborator, and colleague for more than 30 years.

My husband, Bill Johnson, has been my survey research partner for many years. Bill is the most creative statistician I have known in my career, and his innovative approach to survey analytics has both delighted clients and shaped the thinking of many consultants over the years. No one can make data sing the way Bill Johnson can. Many, many thanks for the inspiration and support you have unselfishly provided over the years.
The survey research teams I led at IBM, Eastman Kodak, Genesee Survey Services, and CEB provided an endless supply of ideas and insights, and working together we pushed the practice and science of organizational surveys into new territory.

The time I have spent at Perceptyx has been the cherry on the top of my career in organizational survey consulting. Dave Belcher, Jack Morehouse, and John Borland have given me the professional freedom to spend my time on the aspects of consulting that give me the greatest joy. Jack’s groundbreaking research and thinking on engagement and survey practices is at the core of the Perceptyx philosophy, and is reflected in much of what you will read in this book. Thank you from the bottom of my heart for allowing me to be part of your organization.

Most of all, endless thanks to Fran and John Rassenfoss, who made everything possible.

Sarah Rassenfoss Johnson
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Organizational surveys have always been about something. Whether it was job satisfaction, morale, or commitment, surveys have always had a focal purpose and metric. This focus area is the survey’s reason for being, why it was being done in the first place.

Organizations have been using surveys as early as the 1940s; they became increasingly more common in the 1950s, 60s, and 70s, achieving commonplace status in the 1980s and beyond. Today, the majority of organizations conduct some sort of employee survey. A recent study found that 76 percent of Fortune 500 companies survey their employees annually, and 61 percent of midsized companies conduct an employee survey at least once per year (Masztal et al. 2015).
Early examples of surveys focused on the workplace and job satisfaction, and included questions about job elements, co-workers, and management, as well as relatively mundane topics like the cafeteria and parking lot. Over time, survey content evolved to include questions about the company, confidence in leadership, and satisfaction with pay, benefits, and job opportunities. Job satisfaction as a focal area evolved into organization satisfaction. Many companies developed unique content that reflected their employment philosophies, such as the IBM Morale Index, which I worked with early in my career. Academics created and validated scales measuring satisfaction, which could be included in their research on job or organization satisfaction, as well as in an organization’s survey.

Much research had been conducted over the years to demonstrate the value of surveys in organizations and the importance of metrics such as job or organization satisfaction. This research sought to connect job and organization satisfaction with important business metrics such as stock performance, sales, profits, and turnover to demonstrate the monetary value of investing in employees and building strong employee relations.

While the research found statistical relationships between the measures, the direction or causality of this relationship varied from study to study. In some studies, job or organization satisfaction was a driver of organization performance metrics. In others, organization performance metrics were drivers of job or organization satisfaction. The logic behind satisfaction driving organization performance made sense, as did the logic of organization performance influencing employee satisfaction.

So which was it? What should organizations do to maximize success? Should they improve employee satisfaction to enhance organization performance, or was it more important to enhance organization performance to grow employee satisfaction? Clearly both satisfaction and performance were important, but the equivocality
of their relationship caused some organization leaders to question the quality of research and the value that employee satisfaction and surveys brought to the organization. If the relationship wasn't clear or consistent, wasn’t it simply a waste of time and money to conduct an employee survey and act on the results?

From Satisfaction to Engagement

Beginning in the late 1990s, a new focus area for surveys emerged: employee engagement. While employee engagement shared many of the same characteristics as job and organization satisfaction, it differed in a fundamental way. Satisfaction as it was originally conceived focused on how employees felt about the organization. It measured the extent that employees’ expectations or needs were fulfilled by the organization or the job. Did the organization deliver what was implied or promised? Employee engagement included this element of satisfaction (although it didn’t use the word satisfaction), but went further to incorporate how employees behaved or intended to behave based on whether their expectations or needs were met. The behavioral elements of engagement included:

- **Discretionary effort**: How hard were employees willing to work for the organization? Would they go above and beyond for the company?
- **Intention to stay with the company**: How likely were employees to look for another job?
- **Advocacy behavior**: Would employees be willing to recommend the company as a good place to work, or would they recommend the company’s products or services to others?

The addition of a behavioral element clarified the relationship with organization performance metrics. Employee engagement as a metric made sense to senior leaders. Engagement wasn’t just about “feelings,” those squishy things that some senior leaders didn’t know
what to do with. It was also about important actions: Were employees willing to give the company their all, and was the company able to hold on to top talent? These questions are important enough on their own, but even more so given the relationship between engagement and organization performance. Study after study found that employee engagement had a direct and positive influence on turnover, sales, profits, inventory turns, customer satisfaction, and more. On his website, author Kevin Kruse (2012) maintains a compendium of research studies linking employee engagement to multiple business outcomes.

Employee engagement took off like wildfire. As an external consultant, I was astonished at the wave of companies and leaders that wanted to talk about engagement, learn about it, implement a first-ever survey focusing on engagement, or retool an existing organization survey to focus on engagement. Senior leaders spoke to their employees about engagement in town hall meetings. Others were quoted in articles about how important engagement was to the success of their organization. Engagement became widely understood and accepted by leaders in a way that job and organization satisfaction never did. So great was the influence of engagement on the vernacular of senior executives around the globe that a Deloitte study found that 87 percent of organizational leaders view engagement as one of their top challenges (Brown et al. 2015). The rate of engagement’s adoption as an important metric for organizations and the degree to which leaders embraced it was extraordinary.

Early research on engagement identified its basic building blocks of commitment, discretionary effort, intention to stay, and advocacy behavior, although there was a fair amount of variability between the researchers studying the topic. Some included questions measuring absorption in tasks or the job, or the perceived speed with which the workday went by. Consulting firms that worked with client organizations to design and administer surveys
added their spin to the metric, including elements such as enablement or the organization context. Organizations themselves further modified the construct to reflect their culture and focus.

Before long, employee engagement became a fractured construct. A Google image search of the phrase *employee engagement models* will return pages and pages of divergent approaches to conceptualizing and measuring employee engagement. The plethora of models has created confusion for leaders and HR professionals. Which is the best? The most accurate? For the most part, they share common elements, and each has benefits and failings. And to be honest, many of them work in the right context.

Even more concerning was the fact that employee engagement had become an obsession. Many senior leaders focused on their employee engagement “score”—that is, the average percent favorable score for all questions in the engagement category—and its change from previous surveys almost to the exclusion of every other metric in the survey. Managers were stack-ranked on their teams’ employee engagement score, with the bottom-scoring managers required to participate in special development programs, subject to additional coaching, or even pulled from a management role. Engagement scores became a factor in making decisions on promotion or leadership potential. One CEO announced that his goal was for the company to have the highest engagement scores in the industry. As managers and leaders felt the pressure to maximize employee engagement scores, it is no surprise that some of them turned to more nefarious plans, including pressuring employees to respond to the survey questions favorably.

As would be expected, plans were developed across organizations to improve employee engagement. After all, feedback and action planning are two of the cornerstone activities of the survey process. But given the obsessive focus on engagement in some organizations, managers and leaders occasionally turned to simple
feel-good actions, such doughnuts, pizza, and employee appreciation parties, to boost engagement. Actions became increasingly shallow in many organizations, encouraged by a new industry of suppliers of employee recognition products and events said to drive engagement. Just about everything was identified as an influencer of engagement, from vacation time to T-shirts to plaques to wearable fitness devices.

**When the Focus on Engagement Is Too Much**

Some of you might have read the preceding paragraphs and thought, “So what’s the problem here?” What could be wrong with having leaders who are focused on employee engagement, particularly if it drives company performance? Shouldn’t managers get counseling if their teams have low engagement scores? And doesn’t it make sense that the worst offenders should be moved out of management? How is it wrong to treat employees to doughnuts or pizza or parties?

On the surface, nothing. Employee engagement is a very important construct in organizations. The impression that it has made on senior executives’ thinking is extraordinary. There is no denying that the link to business performance has been essential in making employee engagement a critical focus area in companies around the world, resulting in the implementation of valuable actions in many organizations. Many leaders have been enlightened to the value that employees bring to their organizations, and the payoff that can be gained by investing in employees.

But at the same time, leaders may not know what to do about it. The Conference Board reported that while 90 percent of executives understood the importance of employee engagement, less than half understood how to address the issue (Ray et al. 2014). Without a complete understanding of the issue, it is no surprise that leaders gravitate to what they do best: Focus on the numbers and metrics.
As a result, many leaders and HR teams have a narrow understanding of employee engagement and how to address it in their organizations. Generally, employee engagement is one of many measures in an organization survey. A well-constructed survey measures employee engagement in addition to other important elements of organization effectiveness, ranging from the job itself, to relationships with managers and leaders, to opportunities for development and career growth, to compensation and benefits. These elements help diagnose organization health and indicate productive areas for action and improvement. Many of the elements are themselves drivers of engagement, meaning they can increase or decrease employee engagement depending on how effectively they are implemented in the organization.

Some organizations have become so focused on the employee engagement score—the number produced by the survey—that they have forgotten the point of the survey. Too many well-written and comprehensive surveys end up being boiled down to a single metric or number that leaders dwell upon.

I can understand how this happens. HR functions have long striven to be strategic partners with the C-suite. Being a strategic partner often requires coming to the table with data, and surveys can provide no end of data. And the link between the employee engagement score from the survey and organization performance metrics was a boon to many HR functions.

However, what started out as a great opportunity to connect with leaders and influence their thinking about the role of people in the company has instead produced a limited focus indeed. I have worked with multiple clients who collected survey data on many topics, but only shared the engagement scores with their leaders, cut by demographics such as business unit, country, tenure, or job type. Despite arguments to provide an analysis of all survey results, they resisted, not wanting leaders to lose their focus. In some cases, even
if they did present a broader interpretation on the overall health of the company, the only data leaders were interested in were the engagement scores. Employee engagement has become the hook of the survey.

Such narrow focus is a lost opportunity, for many reasons. First and foremost, employee engagement is an outcome measure. This means that employee engagement cannot be influenced directly ("Be more engaged!!") but rather through elements of the work experience that have been shown to affect employee engagement. These elements vary from company to company in terms of their influence on engagement, but often include the work employees do, their ability to be successful in the company, empowerment, confidence in the future of the organization, the capabilities of colleagues, communications, opportunities for career growth, and their relationship with managers. These elements are as important to measure and understand as employee engagement. They all influence organization success in their own way, and each deserves study, interpretation, and action for the organization to be effective. However, they have often been undervalued, as employee engagement has become overvalued.

This is not in any way to say that employee engagement is not important. It absolutely is, and it deserves attention. But when we allow it to become the primary focus of the survey results, then we have done the organization a disservice. We have prevented the organization from accessing important information that can enhance its overall success.

**Beyond Employee Engagement**

The focus of the organization survey shouldn't be employee engagement, but organization effectiveness. Engagement is one of many elements that make up organization effectiveness. Rather than focusing on *employee engagement* as a noun—a score, a thing, or a
target to be achieved—we should focus on engage as a verb. How can we engage employees? What can we do to create an organization and a work environment that is engaging for employees? Employee engagement was never meant to be about the score, but what the survey results can tell the organization about how successfully it is engaging employees in its mission, strategy, and objective. Achieving high levels of employee engagement is the end product of creating a work environment that is engaging. It is time to think differently about what employee engagement is, and the role it plays in organization effectiveness and in organization surveys.

Every organization aspires to be successful, although success can be defined differently across organizations: dominant market share, high profits, strong year-over-year growth, the highest customer satisfaction, or the most innovative products. Each has a strategy and set of objectives, inspired by its definition of and criteria for success. An organization’s success is influenced by performance, both individual and organizational. It requires clear focus and direction, ample access to resources, the right talent with the right skills, and efficient processes designed to deliver on the company’s objectives. Performance is also a function of employee engagement, as we have learned through years of research. Employee engagement influences performance, which in turn influences organization success. This relationship is pictured in Figure 1-1.

What we sometimes forget is that organization success can have a significant influence on engagement. All of us can think of examples of successful companies with high engagement, and unsuccessful companies with understandably low levels of employee engagement. That makes sense. But in reality, it is more nuanced than that: There are successful companies with low levels of employee engagement and unsuccessful companies with high levels of employee engagement. So what gives?
A few years ago, I was speaking about this topic at a conference when an HR business partner at a local company approached me. She described a fast-growing, dynamic company that had recently had an exponential increase in sales and profitability, and was hiring large numbers of new staff daily. The company was getting great press, and the sky was the limit for its growth. But she told me that its employee engagement scores were very low, which was a bit of a mystery to senior leaders. She wondered why employees were so unhappy in the midst of such success.

As we talked more, a few things became apparent. Employees were working ridiculous hours. They rarely had the tools and resources required to accomplish what was being asked of them; the workplace philosophy was to get the work done no matter what. They were developing processes and procedures on the fly as the company expanded, and the way work was to be completed was continuously evolving. Performance goals and objectives were as ill-defined as work processes and procedures, so employees were
concerned that their accomplishments would not be adequately evaluated on performance reviews, or recognized through salary increases, bonuses, or even compliments. Employees didn’t see a path forward for their skill development or career growth. They were overwhelmed and felt as though the organization’s success was solely the product of their blood, sweat, and tears. The HR partner said that if you walked through the office, it was clear that there was no joy, excitement, collaboration, or fun—and no hope that things would get any better.

The company was successful, but its employees were not. Organization success does not always translate into high levels of employee engagement. I have worked with several organizations that were highly successful but had low levels of employee engagement. The common denominator in each of these companies was the employees’ inability to anticipate and achieve their desired level of success in the company. Employees reported that they were working day and night, often with substandard tools and resources and with inefficient processes. The companies were successful, but that success required a herculean effort on the part of employees. Burnout rates were high, and opportunities for development and career growth were limited or nonexistent. Employees did not see a future for themselves; they stayed only long enough to add the experience to their resumes.

Most of these companies emphasized the success of the organization at all costs. The success of employees either wasn’t considered important, or the company failed to invest the time and resources necessary to help employees recognize their opportunities to be successful. These were not companies that built loyalty or camaraderie, and they certainly struggled to retain their best employees.

It’s not enough for the organization to be successful to influence employee engagement. Employees need to feel confident they can
be successful in the organization. They need to be able to anticipate their success as a member of the organization. Just as different organizations have different definitions of success, each employee can have their definition of personal career success in that organization. The goal for organizations is to provide a work environment where employees can succeed not only in their role as a contributor to the organization’s goals and objectives, but also personally through doing rewarding work, interacting with talented and collaborative colleagues, being recognized for their contributions, and growing in the company in a meaningful manner.

When organizations place too much emphasis on an employee engagement score, they fail to understand the broader picture of what it is like to work in the company. They sacrifice the opportunity to understand if they are providing the right work environment to attract and retain critical talent. They won’t uncover the obstacles to effective processes and communications. They won’t learn what employees need to understand to have confidence in the organization’s future. They have lost a critical opportunity to overcome barriers to achieving success.

**Where the Survey Fits In**

Survey content, to be truly effective in driving organization success, must be multifaceted. A comprehensive survey will do more than just measure employee engagement; it will evaluate organization effectiveness, identify barriers to effective performance, and provide the data necessary to understand the factors that influence both engagement and employees’ anticipation of their success in the organization. The survey can pinpoint where decision making is stalled, communications are breaking down, and work processes are slow. It can indicate where additional training is required, where resources are constrained, and where culture is discouraging employees from taking the risks required to create innovative products and services.
It’s not just about engagement. It’s about effectiveness and success, both at the employee and organization level.

The good news is that as attracted as senior leaders are to employee engagement, they are more interested in identifying and overcoming obstacles to effectiveness. Identifying ways to improve organization performance is music to their ears. Expanding the focus of the survey beyond employee engagement provides rich data that can be used in many ways and across many functions and subunits within the organization. It transforms the survey from being a tool with a single-metric focus into one for diagnosis, change, and improvement.

Here are six steps to broaden the focus of your organization’s survey:

1. Reframe the purpose of the survey. Rethink the survey’s name and branding to focus on organization effectiveness and link it to important organization initiatives such as strategy and objectives.

2. Spend time with senior leaders, both to capture the data and insights they need to run the business and to shape their thinking on what the survey can do for them strategically. Share examples of how survey data analytics can provide critical insights that drive important change.

3. Create a communications strategy that places employee engagement in the context of organization effectiveness, signaling to the organization that the survey is about more than just generating an employee engagement score.

4. Sharpen the content of the survey to include questions that address the fundamentals of organization effectiveness. Write questions that are actionable at multiple levels of the organization, from the most senior leaders to frontline managers and supervisors.

5. Present a comprehensive review of the survey results to leaders. Share engagement scores, of course, but spend
more time discussing the barriers to effectiveness—and, consequently, the barriers to high levels of employee engagement.

6. Refocus action planning from improving employee engagement scores to removing the barriers to performance and enabling employees to anticipate their desired success in the company. When organizations focus on enhancing performance and success, employee engagement comes along for the ride.

The popularity of employee engagement among senior leaders has been very effective in creating interest in and commitment to surveying employees. That’s great news. Now that we have their interest, it is time to shift their focus from just employee engagement to a more comprehensive and strategic use of organizational surveys and data in the company.