

Survey DIY & Customisation Exposed

Uncovering the survey options that won't give you quality results, and debunking the notion of bespoke employee engagement surveys

If the critical factors driving your engagement initiative are lowest cost and quickest delivery, making it just a perfunctory exercise, then this paper is perhaps of no use to you. However, if the quality and accuracy of your output is of key importance then read on.

In pursuit of better engagement and loyalty within your organisation, a variety of survey options can help you measure where you currently sit. Designing your own survey and doing the reporting in-house in order to keep costs down may seem like an attractive prospect, but there is far more to it than meets the eye. In fact, the concept of customising a survey instrument to suit the needs of your own organisation is fundamentally unsound as it undermines the scientific construct of engagement itself.

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Introduction

Making the decision to embark upon an engagement initiative is the easy bit, as there is a wealth of evidence to prove that employee engagement positively impacts upon organisational performance across all sectors. However, the decision on how best to go about measuring engagement, loyalty and alignment within your organisation, and identifying the key metrics that will enable you to leverage them, is a more difficult proposition.

A variety of survey products exist within the marketplace and, like most things in life, you get what you pay for. The idea of designing your own survey, or using one of the many templates available online, may seem an easy option, but how do you know whether it is underpinned by a proper scientific understanding of engagement? How are you going to execute advanced inferential modelling to identify the statistically significant drivers? Hopefully you are getting the message – capturing meaningful employee engagement metrics is not a ‘walk in the park’.

This paper summarises the survey options available and how each one delivers, or doesn’t deliver, against the key quality requirements for effective engagement research.

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Key Quality Requirements

QUESTIONNAIRE PSYCHOMETRICS

Organisations spend huge amounts of money on psychometric tools to identify personality traits, capabilities and the integrity of individuals to help make decisions during staff selection. Sadly, the same quality demands are not routinely made of employee engagement surveys, with the result that the psychometric standards within this research sector are not as exacting. To secure precise and meaningful survey metrics, you must first source a psychometrically sound and balanced survey instrument that accurately elicits the opinions of your employees about themselves, their job, the leadership and your organisation in general. Some key psychometric considerations are as follows.

Firstly, differences in the wording of questions will produce different responses. Even **small changes to question wording can have a substantial impact upon the responses received** (25%+ variance). Survey questions can be worded in many different ways, and there are many different ways in which survey questions can be worded poorly. These include biased, ambiguous, leading or framed, double-negative, value-laden, double-barrelled, hypothetical and vague, to name only a few.

Secondly, when completing a questionnaire, the answer to a question can be influenced by previous questions and by previous answers. **The order of survey questions has a direct impact on how respondents will interpret and respond to the overall questionnaire.** When question order is not considered during survey design, several problems can occur, most notably bias and priming, where the response to a question is inadvertently conditioned by preceding questions.

Lastly, there are many different response scales available, and used, within employee research, which seriously challenges the statistical reliability of comparing survey results if your scale is not selected correctly. For example, the 5-point agreement (or Likert) scale commonly used in employee surveys, which was developed for scenarios where there is a reasonable chance of data being normally distributed, produces a naturally positive bias. The 5-point scale is simply not sensitive enough to capture a true subjective evaluation from employees and is an example of poor scale selection. Scientific testing concludes that a 7-point Likert scale is the 'sweet spot' for employee surveys and achieves the sensitivity required in the face of any positive bias. **The response format and response scale you choose are therefore critical factors in survey design.**

CONSTRUCT VALIDITY

Unfortunately, some survey providers simply repackage employee satisfaction surveys and label them as employee engagement surveys, with no changes to the actual structure. However, the content of your survey must focus on measuring your construct of interest; so, **if engagement is the target, the survey instrument must actually measure engagement.** This is known as construct validity and is critical to the viability of your research.

You will find countless definitions of engagement in the marketplace, with suppliers attempting to brand their own 'engagement index', even when their survey instrument isn't actually based on a scientific mapping of the theoretical basis for engagement. The lack of critical thinking in this area and the conceptual disparity among suppliers makes it more difficult to pin down what engagement is really all about. The only way you will get a true feel for the construct of engagement is by immersing yourself in the scientific and academic research behind it. If you want to save yourself several years of in-depth enquiry then take a look at the Gravitas white paper 'The Engagement Imperative'.

FACTOR RELIABILITY

High-quality surveys must provide comprehensive coverage of the construct and sub-constructs being measured. Examples of sub-constructs of engagement might be: leadership, development, recognition or communication. These are essentially the factors that provide structure to your survey. **If the factors in your survey are poorly designed, meaning the questions don't measure anything accurately, then the results will be meaningless.** Individual questions must be precise, actionable, of practical importance and provide a meaningful measure of the related sub-construct.

Whether designing your own survey or using a third party practitioner, the construct validity and factor reliability of the survey should be supported by published and peer-reviewed scientific research. The validity and reliability of your survey underpin the validity and reliability of your results.

DATA INTEGRITY

Once you have received your survey results and they have been consolidated electronically, you will need to assess the data for accuracy and completeness before launching into more complex analysis. The data may need to be cleansed of non-response categories such as 'don't know', 'prefer not to answer', 'not applicable', 'not sure' etc. to remove any potential bias in the results. If some participants have responded to only a few questions, or if there are any particular questions that have had a poor response, you may need to remove or average these. You should remove any anomalous data, such as 'outliers', as such results can significantly distort the analysis. Outliers are extreme values in response to a particular survey item, located away from the central cluster of responses, for example at least 3 standard deviations above or below the mean. You should determine the 'confidence' in your data – does the sample reflect the thinking of the larger group for each department under test? You can use the notion of sampling error to determine the probability of the respondents feeling differently to the majority, such as the number of extremely pleased or displeased people.

Data with a large sampling error misrepresents the thinking of the workforce as a whole and is not valid. Lastly, the total number of respondents in each sample under analysis is important for a variety of reasons. Are there enough respondents for the analysis to be statistically viable? Will reporting on a very small department or demographic section breach anonymity or an industry standard code of practice? Does your sampling error support your target confidence level (generally 95%)? Is the sample size big enough to support advanced inferential modelling?

These data integrity considerations are by no means exhaustive but should give you a flavour of why pre-analysis data management is important and must not be overlooked, whichever survey supply option you decide to use.



DESCRIPTIVE STATISTICAL ANALYSIS

Descriptive statistical analysis helps to summarise your data in a meaningful way and identify any emerging patterns, making it easier to interpret the information. Descriptive statistics don't, however, allow you to draw conclusions beyond the data you have analysed or to understand the relationships between different streams of data (different questions in a survey). The statistics are simply a way to describe the data. Producing the descriptive statistics is an important step in your survey analysis to get a feel for the data, for running statistical tests and to reveal any errors associated with the results.

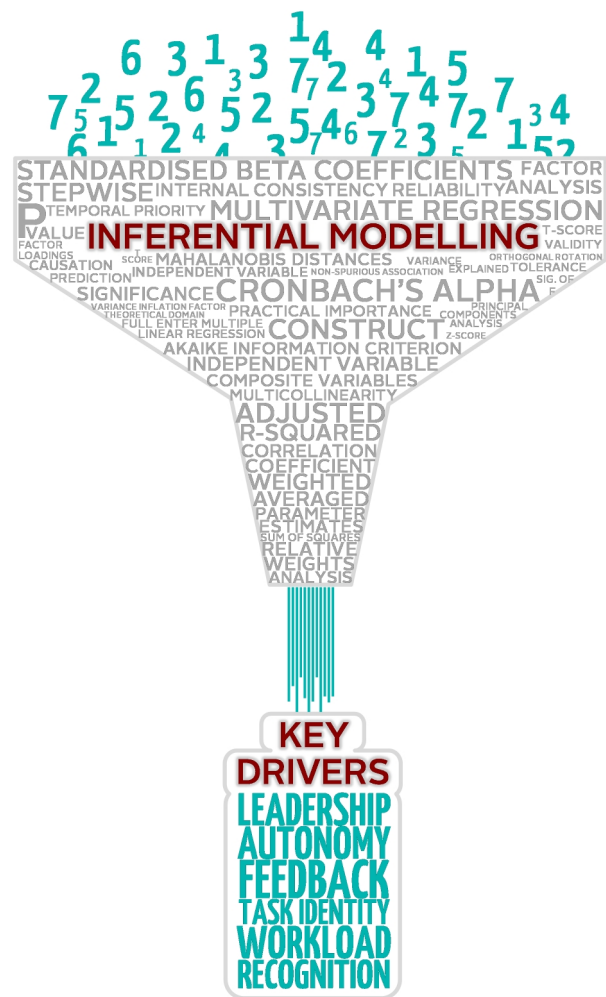
The lowest level of data summary is the percentage of responses across the scale for each survey question (for example, 23% Agree, 35% Strongly Disagree, and so on). This is very basic summary information. Descriptive statistics go beyond this by providing parameters for two main areas: central tendency, and dispersion and variability. Some of these parameters will be familiar and some less so. Measures of central tendency describe how the data clusters around the most common value. They are mean, median and mode. Measures of dispersion and variability are more complex and typically include standard deviation, coefficient of variation, standard error and normality.

It is important that descriptives are produced and considered during the analysis of your survey data as they are a fundamental part of the statistical toolkit and underpin any conclusions you will draw from the overall enquiry.

ADVANCED INFERENTIAL MODELLING

Whereas descriptive statistics simply describe what's going on in your data, inferential statistics will reach conclusions that extend beyond the immediate data to fuel your corporate decision-making. **By far the most critical output of an employee engagement survey is the identification of key drivers, which can only be accurately derived from advanced inferential modelling.**

So what are inferential statistics? A full explanation is well beyond the reach of this paper, but in simplistic terms inferential modelling uses a blend of multivariate techniques, including multiple regression, to assess the strength of relationships between independent (causal) variables and dependent (effect) variables. The independent variables with strong relationships are the key drivers that are leveraging engagement and loyalty (the dependent variables). Inference will also allow you to generalise your findings from the sample to the wider organisation and enable you to assess the impact of follow-up actions on your improvement objectives. In essence, inferential statistics are used to answer cause-and-effect questions and make predictions about outcomes. So, for example, if your key driver analysis (KDA) identified leadership as a key driver of loyalty, the strength of the relationship between these two will enable you to predict how much improvement could be gained in employee advocacy and retention by rolling out a leadership development programme for your management team.



ACCURATE KEY DRIVER IDENTIFICATION

The most common survey analysis tool used to measure whether there is a relationship between two variables is called correlation. It is a measure of how synchronised variables are (e.g. when one goes up, so does the other). **While correlation is a useful preliminary measure to determine relationships, it cannot be used to identify key drivers in a multivariate scenario,** such as employee engagement. Regression is a more advanced technique that goes a step further than correlation. It is used to predict relationships between multiple variables by isolating the effect of one variable while controlling all the others. Using regression is not without its problems, hence the need for expertise and the use of additional techniques to add controls and to get the best results.

To simplify a complex subject, if advanced inferential techniques are not used to isolate the significant predictors (key drivers) within your organisation, and their identification is based solely on correlations, or even worse basic descriptives, then the ultimate prize from your engagement effort – identification of the key drivers – is out of your reach.

COMPREHENSIVE REPORTING

Another critical stage in your engagement initiative is ensuring that you have a comprehensive reporting package that accurately reflects employee opinion and provides readily understandable metrics that are both actionable and insightful. All too often, reports fall into one of two typical categories: they are either too simplistic and descriptive (averages and percentages) or too complex and 'un-actionable' (full of meaningless minutiae). **It is not only vitally important to get the right balance when reporting metrics, but they must also be presented in a format that facilitates decision-making, or the engagement effort will fall over at the last hurdle.** A professional, high-end reports package should include items such as: levels of engagement, global and local underlying themes, key drivers, deeper insights into risk and opportunity, ROI and financial impacts, actions, next steps and pointers. Lastly, consider the different types of report required for your different audience levels. For example, you may need an executive summary, a comprehensive report, an employee presentation, a comparative dashboard, and so on.

EMPLOYEE CREDIBILITY

Obtaining a clear picture of the state of engagement and loyalty within your organisation will be a tough undertaking without the honest input of your employees. If people don't buy into your survey process, not only will you squander time, money and effort on your project, but you won't capture the accurate feedback required to drive your engagement metrics and corporate decision-making. Therefore, your employees' acceptance, involvement and faith in the survey process is crucial for a successful outcome.

If employees have trust in their leaders and their motives for administering an engagement survey (it's for the benefit of the organisation and isn't associated with any hidden agendas) then you are half way there. However, to gain complete trust, the process must offer absolute confidentiality and anonymity for all employees. If people know that the survey is completely confidential and that open and honest feedback is encouraged and expected, the battle for employee credibility will be won.

Partnering with an independent survey practitioner is the surest way of building a high level of employee trust in the survey process.

Knowing that the survey is being administered, collated and analysed confidentially by a third party secures confidence in the process, resulting in the candid responses that you require.

COMPLIANCE TO ETHICAL STANDARDS

Carrying out an employee survey may seem fairly innocuous, given that it's an internal exercise within your organisation. However, whichever survey option you choose, it is strongly recommended that you follow the appropriate industry guidelines to ensure privacy and ethical compliance. Various leading research associations and societies have documented best practice and industry standards for employee enquiry, for the protection of both the employer and the employee. **Codes of conduct and guidelines ensure transparency and confidentiality throughout the research process and, as you would anticipate, support the best interests of participants.** Reputable practitioners and research houses will be signed up to one of the governing bodies, such as MRS, ESOMAR or CASRO, and are bound by compliance to their codes. Additionally, depending upon the data being captured in your survey, the management, disposal and reporting of information may be subject to the Anonymisation Code of Practice issued by the ICO.

Fig.1 offers a summary of the main survey supply options available in the marketplace and how they commonly stack up against the key quality requirements for an effective employee engagement project.

Fig. 1

QUALITY STANDARDS BY SURVEY OPTION

	'Do-it-Yourself' Internal Survey	Online Survey Vendor ¹	Standard Survey Practitioner	High-End Engagement Practitioner	Practitioner Survey Customisation ²
Questionnaire Psychometrics	✗	⚠	✓	✓	⚠
Construct Validity	✗	✗	⚠	✓	✗
Factor Reliability	✗	✗	⚠	✓	✗
Data Integrity	⚠	⚠	✓	✓	
Descriptive Statistical Analysis	⚠	✓	✓	✓	
Advanced Inferential Modelling	✗	✗	⚠	✓	⚠
Accurate Key Driver Identification	✗	✗	⚠	✓	✗
Comprehensive Reporting	⚠	⚠	⚠	✓	
Employee Credibility	✗	✓	✓	✓	
Compliance to Ethical Standards	⚠	✓	✓	✓	

- ✓ Likely to meet requirements
- ✗ Unlikely to meet requirements
- ⚠ May / may not meet requirements

- 1 Use of an online survey software tool, assuming the use of a questionnaire template provided by the vendor and vendor managed reporting
- 2 If a survey is customised to 'suit your organisation's needs' then the quality aspects will reduce as shown

Supply Option Pros and Cons

DO-IT-YOURSELF INTERNAL SURVEY

PROS

- ✳ Potentially the cheapest direct cost option (but internal hidden costs for administering the project must be considered)

CONS

- ✳ Little or no psychometric, analytical, statistical or reporting expertise
- ✳ Little or no scientific understanding of the engagement construct
- ✳ Time-intensive project impacting upon normal business activities for key personnel
- ✳ Weak credibility with employees

ONLINE SURVEY VENDOR

PROS

- ✳ Survey templates and reports are available with a quick set up and relatively inexpensive process
- ✳ Good credibility with employees as data is held by a third party (but some people view electronic responses as traceable and prefer a paper survey)

CONS

- ✳ No paper survey option, which may be a practical necessity
- ✳ Often don't offer engagement surveys as this is too difficult for online surveys to measure
- ✳ Key driver analysis is not available as this requires human intervention and cannot be automated by software

STANDARD SURVEY PRACTITIONER

PROS

- ✳ Can provide a psychometrically balanced survey instrument and detailed descriptive reporting
- ✳ Strong credibility with employees as data is held externally by a third party

CONS

- ✳ Analytical and statistical expertise may not be at the required level for effective key driver analysis
- ✳ Scientific understanding of the engagement construct may be weak
- ✳ Metrics may not be comprehensive or offer deep enough insights to aid decision-making

HIGH-END ENGAGEMENT PRACTITIONER

PROS

- ✳ A psychometrically balanced survey instrument accurately mapping the construct of engagement
- ✳ Analytical and statistical expertise with full inferential modelling for effective key driver analysis
- ✳ Comprehensive reporting and advanced metrics, providing deeper insights to fuel decision-making
- ✳ Strong credibility with employees as data is held externally by a third party

CONS

- ✳ Potentially higher project cost consistent with the higher-quality output

SURVEY CUSTOMISATION

PROS

- ✳ None

CONS

- ✳ Bespoke survey questions to suit an organisation's needs will seriously reduce the validity and reliability of the instrument as the engagement construct will no longer be sufficiently mapped
- ✳ Inferential statistical output will not effectively identify key drivers

Conclusion

There are many practising vendors who offer a wide spectrum of products when it comes to surveys, research and consultancy. Vendors with a large portfolio of products offering psychological assessment and analytics for employees, customers and individuals are invariably in the 'jack of all trades' camp (master of none) and are attempting to target too large a client base. Some suppliers are more directional in their approach and offer a reasonable quality of output, but in the main their survey metrics consist of exhaustive descriptive statistics and key drivers derived from simple correlations, which quite simply 'doesn't crack it'.

The only way of ensuring that you are getting a high-quality output from your survey initiative is to commission a high-end, focused engagement practitioner to take control. This will ensure that your valuable time and energy are not wasted and that you capture the true pulse of your workforce, thus enabling you to develop effective improvement programmes.

high-end employee engagement metrics for the discerning organisation

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