

Chapter 1

What Is a Quick Questionnaire? And When Should You Use One?

WHAT'S IN THIS CHAPTER?

- Short Surveys in Organizational Measurement
- Customized Questionnaires versus Standard Questionnaires
- Limitations of Surveys Performed by In-House Staff
- How to Find a Questionnaire
- Next Steps After Selecting a Survey

Short Surveys in Organizational Measurement

Think for a minute of organizational measurement as photography. Employee surveys are like group photos, both formal and informal. The full-length, periodic, organizationwide employee survey is a formal group photo. It requires lots of effort from many people in order to succeed. A full-length employee survey usually contains fifty to one hundred questionnaire statements, called *items*.

A short, focused survey, by contrast, is a snapshot. It is a brief, occasional poll that is usually carried out in response to a specific need. Snapshots aren't designed to tell the whole story. They excel at capturing slices of organizational life. This book addresses the snapshot. Most of the questionnaires in this book are ten to twenty items long. Because they are short and ready for use, we call them *quick questionnaires*. Exhibit 1.1 shows where they fit among the types of employee surveys.

EXHIBIT 1.1**Questionnaires Presented in This Book**

	Full-Length Surveys	Short, Focused Surveys
Customized questionnaires	Often developed in conjunction with a survey professional	See Chapter Eight
Standard questionnaires	Developed through multiple repetitions until no further revisions are required	Quick questionnaires

In our consulting practice, we hear requests for all types of measurement. Organizations often ask for portraits—psychological or behavioral assessments—intended to help individuals increase their success on the job. Yet these portraits tell little about the context in which the individuals work. An organization’s human resource department might request 360-degree feedback, for instance, to develop managers’ skills. But the environment in which they practice their skills will either support or inhibit their individual skills and efforts. For this reason, the group opinion poll is sometimes the best place to start.

Short, focused surveys can address all of the topics that longer surveys address, just not as many of them at once. They can help with the small midcourse corrections that, uncorrected, might lead the organization far astray of its destination. But the quick questionnaires in this book are not just short versions of full-length employee survey questionnaires. The two types of questionnaires have different uses. Exhibit 1.2 compares and contrasts the two.

Chapter Two discusses the broad questions that many organizations ask and supplies a template for a general morale survey. Chapter Three supplies a subject index to the questionnaires in later chapters. It shows how to identify which questionnaires in this book can be used to address the issues. Before selecting a questionnaire, though, there are two topics to consider: the value of customized versus standard surveys, such as those presented in this book, and in-house versus third-party survey administration.

Customized Questionnaires versus Standard Questionnaires

In acquiring this book, you have added some standard questionnaires to your toolbox. Standard questionnaires are written for use “as is” in a broad assortment of situations. They should contain items that have been used in

EXHIBIT 1.2

Comparison of a Full-Length Employee Survey with a Short, Focused Survey

Your Employee Survey Goals	Use a Full-Length Employee Survey	Use a Short, Focused Questionnaire
Establish a long-term survey program.	✓	
Make a broad assessment of organizational culture.	✓	
Determine if specific aspects of culture are changing.		✓
Determine if there's movement in one or two baseline opinions.		✓
Gather reactions to sudden or major changes in the work environment.		✓
Measure opinions on a broad set of topics.	✓	
Measure opinions on a limited and specific topic.		✓
Measure opinions organizationwide, across all work units.	✓	
Measure opinions in smaller units.		✓
Create a benchmark before a major change initiative.	✓	
Determine how a major change initiative is perceived.		✓
Create an inventory of training needs.	✓	
Determine if training needs are being met by training efforts.		✓
Determine if management is communicating effectively overall.	✓	
Determine if management is communicating effectively within specific units or on specific issues.		✓
Follow up to a longer or routinely scheduled survey.		✓

multiple situations and refined through usage. Customized questionnaires are written for a specific situation. They employ situation-specific language and concepts and are designed for one-time use or repeated use within a single organization. Each type of questionnaire presents advantages and disadvantages.

Strengths of Customized Questionnaires

If an organization has a specific mission statement, a vision, and a set of values, it has probably developed its own wording to describe these concepts. It also may have developed core competency statements for its jobs, which are the behaviors and skills that support the stated mission.

A customized questionnaire can target specific issues or competencies and use language familiar to members of the organization. It can incorporate terms common to that organization, such as *colleagues*, *associates*, or *coworkers*. Customization can give the look and feel of an insider's writing. Thus, the survey and reports are better positioned to gain support from key stakeholders. Customization is also helpful when people in many locations will be surveyed, because the questionnaire may contain location-specific questions and reports.

But a big question is this: *How easy is it to create your own customized questionnaire?* On the surface, questionnaire creation may appear easy. But in our experience, each usable questionnaire item takes about thirty to forty-five minutes to create—and that comes after what can be difficult negotiation over selection of topics. If the instrument is standard length, it will contain fifty to one hundred items. Therefore, the development time is significant. Moreover, this work usually involves several people and several reviews. Surveys, in other words, are often more difficult to create than they appear.

In addition, questions must be carefully tested. Wording must be clear to all audiences, or their responses may obscure the meaning of the data, hardly what anyone wants.

Comparative results are also an issue. On first administration, a new survey item will yield results that have little or no basis for comparison. And sometimes the results contain no message at all. Consider the distribution of results from the following question:

The management training offered over the past year has been effective.

<i>Totally disagree</i>	<i>35 percent</i>
<i>Somewhat disagree</i>	<i>5 percent</i>
<i>Neutral</i>	<i>30 percent</i>
<i>Somewhat agree</i>	<i>5 percent</i>
<i>Strongly agree</i>	<i>25 percent</i>

How should you interpret this result? This particular response distribution is *trimodal* (meaning that it has three relatively equal response groups), and so the item is a poor candidate for further use. We know only that people's viewpoints range from poor to excellent in relatively equal numbers. It's hard to get a message from the data—except the message that additional research may be needed.

When to Use a Custom Questionnaire

A university adopted five core values that were intended to drive its business practices: Pursuit of Knowledge, Respect for Individuals, Academic Stewardship, Service to the Community, and Excellence. The principles were intended to inform not only service delivery to students but also relations with other stakeholders, such as suppliers and employees. There was disagreement among the administration over whether these values could or should apply to employees. After prolonged discussion, they decided the values must apply in all cases. Otherwise, they were simply customer services practices, not core values.

Sometimes the discussion about the implications was heated. For instance, the university had a community outreach program for single parents in which it provided short-term day care so that they could attend classes. But employees could not use the short-term day care to attend to their own needs or complete their own degrees. In fact, some employees in hourly positions were disciplined if they were as little as three minutes late. In other words, clients were treated in alignment with the stated value, but employees were treated another way.

The institution decided to do an employee survey to measure the beliefs about the core values and gauge their acceptance. It created customized items to reflect the values, but also selected standard ques-

tions that fit the value definitions. Some customized values statements included these:

Respect for individuals: "I feel I am treated with respect by my coworkers."

Service to the community: "I feel this university is involved in and committed to improving life in our geographic region."

Excellence: "Employees in my department are willing to put in as much effort as is necessary to get the job done to the best of our ability."

When the administrators saw the core values translated into employee questionnaire items, they got their first eye-opener. They didn't need to do a survey to realize there were instances of mixed messages. Ultimately, they did the survey, and the results supported their suspicions. They recognized that their stated values looked like window dressing. They had to improve alignment and took several quick steps to reduce the gaps.

A custom questionnaire was best in this situation because the organization had well-defined core values and beliefs. It also detected specific gaps between words and actions in the workplace. The university aimed for alignment on specific issues. Within a year, another administration of the survey showed that alignment had indeed improved.

In summary, the quick questionnaires in this book are a time-saving resource, but sometimes customized questionnaires are called for. If you need a few customized questions, see Chapter Eight. If you need an entire customized questionnaire, survey professionals are well equipped to help.

Value of Standard Questionnaires

Survey outcome has as much to do with productive discussion of work and reward issues as it does with information gathering. The use of surveys gives an organization the potential to make progress and exchange honest feedback. It removes the dynamics of face-to-face conversation and avoidance of subjects that might lead to conflict.

The survey questionnaires themselves, whether standard or custom, are vehicles, not ends in themselves. The real leverage of an employee survey is in the activity of the people who carry it out. Thus, a well-crafted general questionnaire that follows the rules of good item writing can do an excellent job.

A standard questionnaire should, by definition, have several administrations before it becomes “standard.” With repeated use, the items can be refined and improved so they are well understood by most employees and are proven to gather valuable information.

Norms are based on the repetitive use of survey items. Each time a question is asked, the response data can be added to the averages behind that question. If your organization’s responses differ from the average, you can investigate the reasons. Such differences can lead to more interesting questions or provide assurance that you are doing better than other organizations or than your own organization under a prior administration.

A Short, Focused Survey Did the Job

A law firm with sixty employees was experiencing unwanted turnover. The human resource manager suspected the problem but needed data to support his assumptions. Two of the partners, both highly skilled attorneys, were unskilled as managers and were driving talent out of the firm. Despite repeated suggestions for training, the partners felt they were too busy and the firm’s revenues too dependent on their case activity to take time away for management development. The senior partners never witnessed these lawyer-managers’ unskilled handling of employees; they saw only that the two were very skilled lawyers. In frustration, the human resources manager turned to a twenty-one-item survey on management practices, similar to the Employee Opinion Survey on the Individual Employee’s Manager in Chapter Four. When results were reported, the two unskilled partners’ numbers told the story. Among the most telling items were these:

“My manager gives me adequate feedback on the work I do.”	48 percent unfavorable
“My manager is fair in dealing with people.”	45 percent unfavorable
“My manager sets clear goals and objectives.”	41 percent unfavorable

Each item received more than 40 percent disagreement, with the item on feedback leading the pack. The conclusions were inescapable, and the senior partners finally understood the implications. The two unskilled managers were signed up to attend training. One of the attorneys soon relinquished management responsibilities and returned to individual contributor status. The other went on to get additional management development. Within six months, turnover dropped significantly.

Standard Surveys and Comparative Data

While you’re planning your reports, consider whether you wish to develop norms. In most employee survey work, norms are represented by the mean, median, and standard deviation of responses to a question. They describe how employees at other companies who have taken the same survey answered the same or similar question. They help compare your organiza-

tion's performance to other organizations on key questions and show how you differ from the average (Exhibit 1.3). See the questionnaire items in Chapter Two, which are provided with norms from our database of more than sixty thousand survey responses.

EXHIBIT 1.3

General Norm versus Results for Your Organization

Considering everything, I am satisfied working for this organization at the present time.

	Strongly Disagree, Disagree	Neutral	Strongly Agree, Agree	Mean Score on a Five-Point Scale
General industry	17.6%	18.5%	63.9%	3.62 (N = 60,205)
Your organization	23.8	24.4	51.8	3.36 (N = 888)

Source: *Performance Programs, Inc., Employee Feedback Database, 2004.*

Without the normative information, you would not know that you are weaker than a sample of companies in the general employment market. Norms illustrate the similarity of your weak or strong areas to other employers. We supply norms for thirty items in this book. For instance, in Chapter Two, the questions with the least favorable responses show where many organizations score poorly. Communications and compensation, for instance, are weighted toward the unfavorable side by most everyone. Your organization may need to work on these areas, but the general norms may show that everyone else does too.

Norms help prioritize change efforts, but they can also have false allure. They may feed curiosity or fuel a competitive streak. Remember that your organization's capacity to improve is your chief concern. Work on your areas of relative vulnerability. If you plan, you can develop your own norms after one or two repetitions of a questionnaire. Internal norms are valuable and recommended because they help monitor the effectiveness of the organization's responses to its actual challenges.

Limitations of Surveys Performed by In-House Staff

The questionnaires in this book will help you conduct your own surveys. Nevertheless, you should consider the following points before choosing to conduct the survey using in-house personnel. The issues raised here are true whether you use the questionnaires in this book or develop your own.

Perception of Safety

Using an outside research firm can increase respondents' confidence in the promise of anonymity. It increases the employee's perception that any unflattering rating he or she gives will remain anonymous. This confidence in anonymity boosts response rates and increases the likelihood that employees will give candid information.

Process Consulting

A professional survey provider brings expertise to the survey process itself. The vendor can review the survey plan, communications, and feedback approach. He or she should know how to avoid errors such as ineffective presurvey communications, unclear survey instructions, unclear deadlines, and problems with survey or report formats. It has been our observation that the administrative process is where many in-house surveys fail. We have often been asked to step in when a survey was faltering.

Norms

Norms provide outside comparison for the questionnaire items on the survey. Survey professionals can often determine whether your results are typical for your type and size of business.

Report Formatting and Production

It is best to design and format employee survey reports before the questionnaire is finished, an issue that most in-house survey producers don't think about ahead of time. If for this reason alone, you might want to use an experienced survey provider or buy a software product that has templates specifically designed for employee surveys. Reports, after all, are what you want from the project. They are the beginning of the all-important feedback stage. The number and variety of reports, however, can become daunting. We've produced as many as four hundred different reports for a single employee survey. Acceptable reports can be produced by many common software packages.

How to Find a Questionnaire

Chapter Three provides a list of one hundred symptoms of organizational difficulty and suggests surveys to address them. If you wish to go directly to the questionnaires, they are organized in four ways: top employee survey questions (Chapter Two), issue-focused surveys (Chapter Four), mission-focused surveys (Chapter Five), and event-related surveys (Chapter Six).

As you begin to read and use the surveys themselves, you may see some blurring of the distinctions among them. The issue-focused questionnaires speak to traditional problem areas, but also to an organization's aims and sometimes could as easily be classified as mission focused. The mission-focused questionnaires speak to organizational ideals—but since no organization ever achieves all of its goals, they could also be viewed as issue focused. We offer some rules for selecting among the categories along with brief descriptions.

Top Employee Survey Questions

The thirty-item collection in Chapter Two is based on research in our questionnaire database. It contains the ten questions our clients have asked most often, the ten questions that tend to have the most negative response, and the ten that have the most positive response. You may wish to use the items as a survey or simply refer to them as a resource when developing your own survey. Each item in this section is accompanied by norms from our database.

If this is your first survey and you aren't sure of the issues, you might use this as an exploratory survey. Since norms accompany these items, you'll have a basis for comparing your results with results of others who have taken the surveys. However, remember that this questionnaire was extrapolated from a collection of eighty-five questions and is not focused on any particular topic.

Issue-Focused Surveys

Eleven issue-focused questionnaires cover common topics that trouble many organizations: communications, one's own manager, management in general, job satisfaction, organizational change, coworker relations, fairness and diversity, employee engagement, workplace resources and safety, compensation, and benefits. These are provided in Chapter Four.

Mission-Focused Surveys

Five questionnaires are designed to probe employee understanding of the organization's vision or values or acceptance of its strategy. They address the topics of organizational mission and values, innovation and creativity, quality practices, customer care, and ethics. They measure whether leadership messages make the right impression. For instance, what is the readiness for hearing and accepting messages surrounding ethics? Customer care? Safety? Quality? These questionnaires are in Chapter Five.

Event-Related Surveys

Three questionnaires are designed for specific points in time: new hire, exit, and posttraining. These are provided as examples, but may require customization depending on your situation. We provide more detail in Chapter Six.

Next Steps After Selecting a Survey

After selecting one or more surveys, read Chapters Seven through Ten for the insider tips that can help your survey be successful. If you are inexperienced with surveys, these chapters will be especially helpful. For an even more thorough look or for a complete guide to creating an entire survey process, you may want to get a copy of our books: *Employee Surveys: Practical and Proven Methods, Samples, Examples* and its companion volume *The Employee Survey Question Guidebook*.*

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An employee survey creates an opportunity to communicate about the health of an organization. Much of its value is in the process and the conversations that ensue. If you follow the steps set out in this book, you will be on your way to getting better information, and better discussion, about your organization.

* Connolly, P. M., and Connolly, K. G. *Employee Surveys: Practical and Proven Methods, Samples, Examples*, and its companion volume, *The Employee Survey Question Guidebook*. Old Saybrook, Conn.: Performance Programs, 2003.