

# The Potential of Pulse Surveys: Transforming Surveys into Leadership Tools

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Pulse surveys are becoming popular as a supplement to traditional, annual surveys that are done to focus on topics like employee engagement or employee satisfaction. The reason for the growing interest in this type of survey comes from two sources. The first is the growing availability of survey technology, and the second is the disillusionment in annual or every-other-year survey work.

The question that remains unanswered is how to use this technology to do something new within organizations. Instead of turning big surveys into lots of little baby surveys, what is the potential for frequent pulse-survey work, and is the outcome good or bad? The answer to that question solidly depends on the degree to which organizations transform their survey process. In this article, I describe how to do just that—to transform surveys into leadership tools. It starts with the pulse idea, but the changes that can happen are about much more than surveys. In fact, when done correctly, employees say that the pulse surveys are not surveys after all; they are new forms of communications.

## **THE BEGINNING: FROM PAPER TO THE WEB**

In the 1990s there was a movement to start putting employee surveys on the web. In most cases, this was done by taking the 50- to 100-item surveys and simply moving

them from paper to computers. There was not a lot of innovation in type of survey, in terms of frequency or content. In most cases, the primary goal was to reduce costs and ease the pain of administration by digitizing the surveys. This is how most firms moved forward in the technology space. Then the employee engagement movement started, and having technology to make engagement surveys less expensive and more readily accessible led to a plethora of companies offering new survey technologies and many varieties of engagement work. Universities also started deploying web-based surveys as an easier way to conduct research. The expectations of the technology advanced as firms built bigger data bases and were able to merge survey data with human resource information systems (HRISs); with the changes, the cost of deploying surveys was reduced over time.

## **TODAY: PULSE SURVEYS ARE IN VOGUE**

If you think of the first wave of survey transformation as from paper to the web, the second phase is from long, once-a-year or every-other-year surveys to pulse surveys. Pulse surveys and more frequent polling of employees are becoming popular solutions to the ever-present employee-engagement problem, identified from big surveys. In an effort to do something about employees being disengaged, pulse surveys often are deployed.

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A few years ago, I conducted a small survey on surveys.<sup>1</sup> It was close to Halloween, and I must admit that I wanted to add some humor to a leadership survey I conduct. So I asked the group of leaders and managers the degree to which they thought their annual employee survey was evil. I used the term *evil*, and defined it in the survey as a situation that is very unpleasant, harmful, or morally wrong. A total of 11 percent of the overall population agreed that their employee surveys were evil, and there were subgroups in which 20 percent gave the nod of yes to the evil survey question. These groups included research and development teams, engineering, finance and accounting, and marketing. When asked whether employee surveys have any value, overall only 24 percent agreed that they did, and only 27 percent thought there was a positive return on investment. Comments focused on the lack of action, irrelevant questions, and feedback that their surveys were wasting time. There were a few comments that were positive, but all in all, we found very few fans of employee surveys. Keep in mind the audience being surveyed were leaders and managers, the group whose job is doing something with the data.

Perhaps the growing popularity of pulse surveys is an effort to take what is good in the traditional annual survey and weed

out the "evil" or less positive aspects of it. A recent article in the *Wall Street Journal* depicted pulse surveys as being used to "provide data on how teams actually feel and catch problems before they fester."<sup>2</sup>

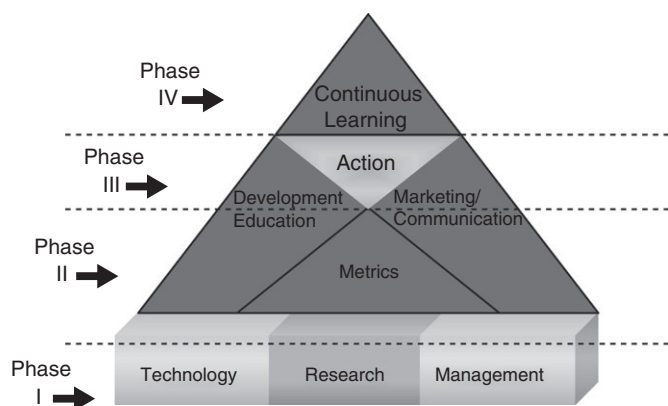
The key to success for pulse survey work will be what happens with the data, but that's not enough. Employees who are being tagged repeatedly for data need to view the process as positive. The pulse data needs to lead to dialogue, which affects action and measurable business results.

### **DATA-DIALOGUE-ACTION-RESULTS**

The dialogue is a key part of the process, and in many cases, employers become so enthralled with the data they forget to engage in dialogue with employees. Pulse surveys can be transformational, but not because they provide repeated measures

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or due to the fact that trend data are certainly more powerful than point-in-time data. Instead, pulse survey work can be transformational because they can become a powerful intervention to engage employees, drive continuous improvement, teach employees, and help leaders, managers, and supervisors all do their jobs better. But to create this type of intervention a lot of work needs to be done. If not done correctly, the pulse surveys can quickly turn into the "evil" surveys we discovered when doing our survey of surveys.



**Exhibit 1. Data and Dialogue Driven Leadership Model™**

## STEPS TO TRANSFORMING PULSE SURVEYS INTO LEADERSHIP TOOLS

The model that I use for this work is in Exhibit 1. Phase 1 in this model focuses on getting the baseline system in place; I call it the three pillars, and the phase 2 through 4 pieces focus on the five steps needed to assure an ongoing, business-focused implementation. First, most pulse-survey work requires technology. Collecting the data is the easy part; the big technology questions you need to ask are about how to report back the results. When doing pulse surveys, the process of collecting and feeding back data speeds up considerably. If you do not get results to managers, leaders, and all employees quickly, you are at high risk of transforming your process into a very negative experience. Also, when doing pulse survey work, you need to think about the organization's structure, which changes quite a bit. How do you get new employees into the system and assure their data rolls up in the right place? Do you provide reports to managers that are historical or dynamic? Historical reporting shows you data for

departments and groups that may not exist anymore (due to changes in structure), while dynamic reporting focuses on the people who are there today. Dynamic data management is much more useful if you are coaching managers.

Research on the goals of the process and how frequent data are needed is an important baseline step. Frequency should match the rhythm of your business. If you are reporting out financial, sales, and quality data weekly, then employee data also can be collected and reported weekly. Employee data should match, not counter the overall business model; it should be one source of information, in addition to other data, being used for dialogue, action, and results.

The third pillar focuses on project management, which is essential to make a complex process simple to users. As the implementation moves forward, the phase 2 work comes next.

The first piece of work in phase 2 is establishment of a metrics strategy. This is different from negotiating a set of survey questions. A metrics strategy is a plan that focuses on questions and timing. The map of items sets out which questions are trended (asked regularly), and it also provides

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opportunity to spontaneously include new questions. The spacing of strategic questions, customized items, validated questions, drill-down questions, news inquiries (asking employees what they see, new ideas), fun questions, input from senior management, and more must be established. A well-done metrics

strategy is the first step in transforming surveys into leadership tools. The metrics strategy is what makes the difference between a survey and a leadership tool.

Phase two also focuses on the initial work needed in communications and training. You will note that in Exhibit 1 those two bodies of work span from phase 2 to phase 3, and the reason for that is that as you move from phase 2 to 3, the type of activities grow in complexity. In phase 2, an organization is rolling out initial communications, determining who gets data, and informing them, working on how results are shared (e.g., PowerPoint reports, online reports, infographics, or other options). Employees need well-done communications about the goals of the system, levels of privacy, how data are being used, and more. However, the key to transforming a survey into a leadership tool is escalating from simple and necessary communications to marketing. Marketing is the key to driving high-impact action. Blending the data with communications on business initiatives, celebrating success, and more help business leaders move beyond the annoying survey experience. Timing and content in the marketing approach are part of the bigger project-management plan.

The third critical component in phase 2 is education, and this goes beyond simple communications. Managers need to really understand the metrics in place so that they are comfortable taking action. If technology is in place, managers and employees need to learn how to use it; this takes time and must be built into an overall implementation strategy. Timing of all these pieces is important because training before one has data leads to ineffective retention.

Phase 3 builds on all the work done in the earlier stages. At the core of phase 3 is

action, and note how central that piece is in Exhibit 1. Any survey plan that happens without documenting and marketing action will be suboptimal. I can't tell you how many organizations I meet with that spend millions of dollars on survey work and have absolutely no record of the action taking place and what the return on investment is of these dollars and time (employee and leader time). Actions can be big or small; you can document monetary returns on investment (ROI) or ROI stories. However, the best stories have a beginning, middle, and end, and that means actions should lead to results, and documentation for those results is best. Successful projects that are part of a leadership tool focus on actions (which must be measured, recorded, and communicated) and are able to discern the return on investment from your work. Also in phase 3, education moves from tactical to strategic by focusing on development work—managers using data from employees to become better managers.

Phase 4 is focused on continuous learning. The pieces of the model come together in this last phase, and employees as well as leaders learn from the data, dialogue, action, and results. I have used data for leadership-development work, employee meetings, case-study development, and more.

## **SURVEY IMPROVEMENT IS NOT A TECHNOLOGY STORY**

The opportunity for pulse-survey deployment is not a technology play. Getting data more frequently alone will not improve performance at the individual, team, or firm level. However, learning how to use frequent data as a leadership tool can be a significant change and/or intervention that leads to



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Human resource management (HRM) groups have not, traditionally, been in

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the business of providing frequent data on anything to leaders. The weekly, monthly, and quarterly business reviews most leaders conduct include data from finance, accounting, sales, operations, and marketing—but not from HR. Instead, HR data often becomes a big “event.” The burden of the massive survey led to a search for alternatives, and that is how technology came to be a critical factor in changing how surveys are done. But the focus was on doing the same thing without paper; most companies started with the goal of reducing the burden of collecting data. They did not begin by thinking through the refocus of the entire process. Thus, technology versus process was the goal.

New technology can speed up the survey process, make it less painful, and even make reporting faster. But if you only use technology to do the same thing—just doing surveys faster—the effect on the business remains low.

### **SURVEYS DONE ANNUALLY ARE AN ANNUAL REPORT; PULSE SURVEYS ARE A SUPPLEMENT OR AN INTERVENTION**

No matter how slick your technology and interface, doing an annual employee survey of any kind (culture, satisfaction, engagement, etc.) is an annual report. It is

a backwards-looking exercise. As such, it will never be given the kind of attention that other kind of data warrant in business. Making things worse is the ritual of using benchmark data. This is an even more backwards-looking body of work. Companies do a survey at time 1, get results at time 2, and then they compare their time 1 data to a bucket of data from other companies before time 1. But they take action at time 3. Think about making business decisions about how your stock price compared with that of your competition six months ago. The exercise of benchmarking is all about comparing yourself today to how your competition was doing months and maybe even years ago.

Born out of frustration from the annual or every other year event, pulse surveys are becoming very popular. Pulse surveys

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are being used more often because the technology is easy to obtain, either from external vendors that specialize in pulse surveys, from companies that sell self-service technologies, or from internal technology tools that include survey technology. Managers, leaders, and communication and HR professionals are all using these tools. Many surveys are being utilized in organizations today, and the larger the firm, the more surveys are being deployed.

However, what most firms are doing is taking a not-so-great tool (the annual or every-other-year survey) and deploying baby versions of it more frequently. There is no

fundamental change in thinking through the goals of more frequently going out to employees, and thus, the effect on the bottom line remains minimal.

Effective pulsing requires the right metrics strategy and leaders who understand the power of getting real-time data from employees. It also requires science. Predictive metrics are key to being able to take fast action to avoid problems.

Effective pulsing is not just a communications tool. A lot of the firms doing this work today are creating avenues for voice, but in many cases, it's a tool that creates a conversation of complaints. The constant "what do you think about" questions may provide answers that allow someone to obtain budget for a new intervention, but it also can start a conversation that is not necessarily needed. Consider the fact that each survey question starts a work-based conversation, and are those survey items what you want people to be talking about? Thus, effective metrics strategies should be designed to include predictive, leading indicators as well as include questions that enhance, in a positive way, the company conversations that are needed to support culture and achieve business goals.

The data and dialogue—and it is important to make sure the dialogue is part of the solution—should drive action that will lead to results. Documented results from the work we have seen to date include:

- ❑ Call center turnover reduced by 60 percent in three months.
- ❑ Over 2,000 percent ROI in one year with organizations going through several acquisitions.
- ❑ Patient satisfaction, in hospital settings, increasing in just three months.
- ❑ Leaders effectively averting what could have been disasters in various business units.
- ❑ Turnaround of a manufacturing facility in six months—leading to approved budget from board of directors to retool the plant.
- ❑ Improved union relations in a manufacturing facility.
- ❑ Employees learning from their own data; improved retention.
- ❑ Companies using the process as a recruitment device; employees want to be heard; they want to learn, and the pulsing work has been viewed as a competitive advantage.
- ❑ Successful 90-day plans for new leaders.
- ❑ Support culture-change work, quickly and effectively implemented.
- ❑ Helping leaders avoid burnout and manage the workplace more effectively.
- ❑ Driving innovation at all levels in the company.
- ❑ Changing performance-management conversations by employees reviewing their own data and using it in regularly scheduled one-on-one meetings with managers.
- ❑ Improved management learning by including the pulse data in weekly, quarterly, and annual business-review meetings.

## CONCLUSION

Surveys have become very popular over the past 20 years, particularly as part of employee engagement programs. Today, we are seeing a lot of firms looking for what's next. They have tapped out what they can do with their annual or every-other-year surveys. While these surveys do provide important information, in the same way that an annual report does, they

will never be tools that help leaders, managers, or employees in their day-to-day jobs.

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Thus, the promise of pulse surveys seems to be to take the momentum of the positive work done with engagement to a more frequent level. However, through over 20 years of experience doing pulse surveys, we have learned that the move to this type of work is not just a new technology implementation, and to be successful you have to think carefully about process. An implementation must include a well-developed

metrics strategy, training to all parties involved, a complementary communications and marketing plan, and more. The pulse data must become part of the business for the work to have a significant and positive effect on measurable business results.

## NOTES

1. Welbourne, T. M. (2007, January/February). Are employee surveys evil? Ragan Communications Journal, pp. 26-28. Also posted on line in 2008 at [http://www.eepulse.com/documents/pdfs/are\\_surveys\\_evil.pdf](http://www.eepulse.com/documents/pdfs/are_surveys_evil.pdf)
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