Employee satisfaction survey guide

How to perform and leverage a job-satisfaction survey

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Satisfied employees lead to satisfied customers

Research backs this up, and we've all had the experience of dealing with someone in customer service who clearly doesn't like their job. It's not pleasant for anyone.

What's more, satisfied employees stay on your team longer—which means that their expanding talents and deeper knowledge stay under your roof, benefiting your customers and your company. Longer tenures can decrease the costs of recruiting, onboarding, and training. Such employees tend to move to other roles internally rather than jumping ship for career growth.

A survey by Gallup found: "The more disconnected employees feel, the greater their readiness to job hop becomes. While 37% of engaged employees are looking for jobs or watching for opportunities, higher numbers of employees who are not engaged or actively disengaged are doing the same (56% and 73%, respectively)."

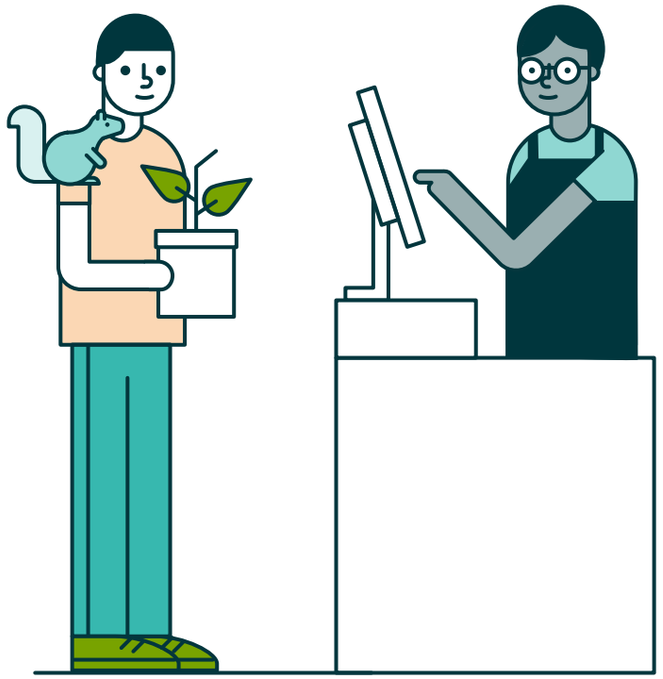
Any way you shake it, satisfied employees are a win. So how do you get there? And how can you find out what's making your employees dissatisfied so you can fix it?

One-on-one conversations are a start. And when your team is small, they come naturally. But with growth, greater team size and tighter time constraints leave you communicating primarily with your managers—and maybe only senior managers or directors, at that. By the time the information you articulated trickles through all the subsidiary channels, at best? It's garbled.

Subsequently, lack of meaningful interaction with leadership may leave your frontline feeling alienated. Who can blame them for not voicing concerns if they're worried their feedback will fall on deaf ears—or worse, that they'll be painted as a disgruntled employee or a squeaky wheel?

We've been surveying our Customer Advocacy team on a quarterly basis since Q1 of 2015, asking for both multiple-choice ratings and open-ended feedback about their job and career satisfaction. It's proven to be an invaluable source of ideas, allowing the leaders of customer advocacy to prioritize and implement changes that benefit the entire team. The survey can even identify more targeted actions, such as those specific to location, team, or employee tenure, when such grouping variables are included in the survey as optional questions. This has kept the quality of our customer service high during a time of significant growth and increasing product complexity, while keeping the churn rate in the team impressively low.

Although we've been using this for our support team exclusively, the following methodology would be useful for any employee survey.



Who to survey (and why)?

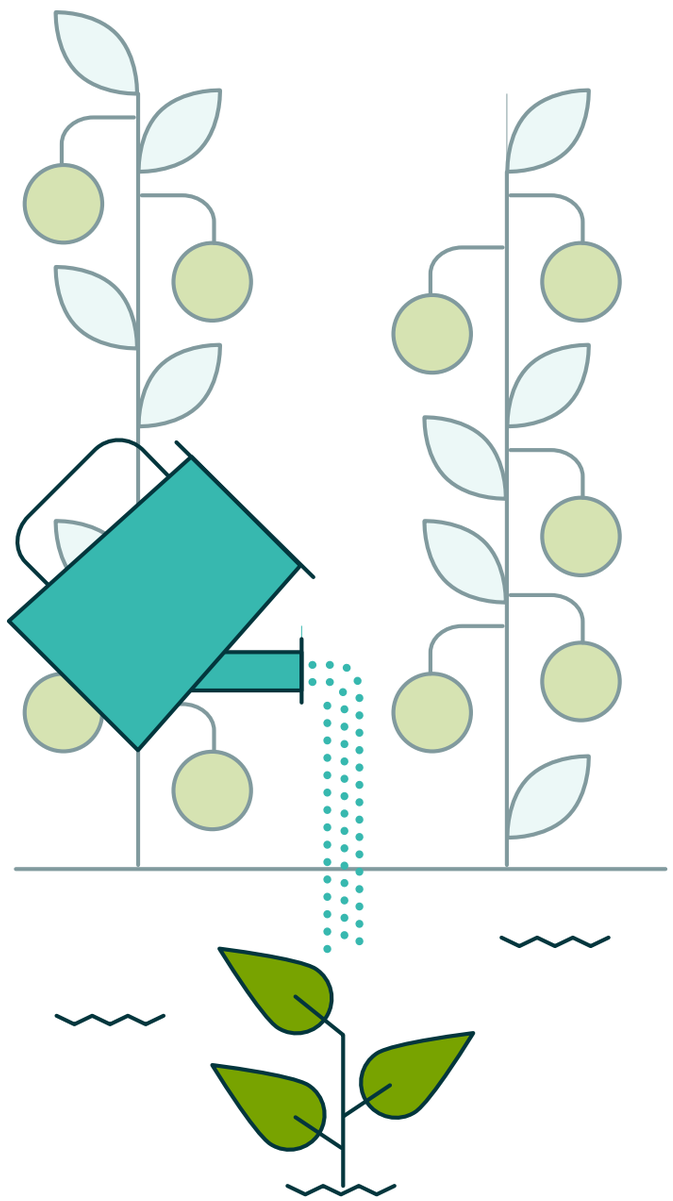
At Zendesk, we survey the full-time employees in our Customer Advocacy team, including not only the frontline support agents but also our team leads, managers, and support operations team. Of course, you might want to expand your survey to include part-time employees and contractors. But our survey method has broad potential—we believe you could effectively survey any group of employees, or even all of them, by tweaking the questions you ask.

When surveying for employee satisfaction, it's useful to realize that a new hire's perspective is likely to be more about the interviewing and onboarding experience than the job itself. As long as you're surveying new hires about their onboarding experience (which your company should), 90 days can be a good time to start including them in your general employee-satisfaction surveys.

How often to survey (and when, and why)?

Several approaches to how and when are workable, but keep these points in mind: **Sufficient time to collate, digest, and communicate the results, and then plan and take action, is critical**. That way, there's at least the possibility of improvement between one survey and the next. Surveys that are spaced too far apart may result in important issues falling through the cracks, while surveys that don't provide enough time to take action on what's been learned can feel like wasted time.

For a growing company, quarterly surveying can be a good frequency. If your company is more mature, and change takes longer, an annual survey might be more appropriate.



Another approach

Survey staffers at specific points in their tenure—for example, every three months from their start date. That may not yield the clearest full picture, but you could gain a steady trickle of data that casts light on employee-experience patterns, as well as on budding problems.

You could also time your surveys around other company-wide surveys and/or review cycles. It's best to schedule these apart from those events, though. Satisfaction surveys could be affected by the results of annual reviews, for example (for better or worse, but in ways unrelated to the day-to-day feedback you may be seeking). A team-focused job-satisfaction review that's close to a more general company-wide survey could also result in survey burnout.

However you proceed:

1. Pick a method and stick to it.
2. Don't skip or delay surveys. This erodes trust.
3. Give yourself enough time to act on what you learn.

What does the survey look like (and why)?

If you want your survey to return good, actionable information, you need to structure your questions and responses correctly.

The most common way that surveys produce bad data is through poorly designed questions and response structures. Here's an example set of questions, based on our Advocate Satisfaction survey.

First, we ask a multiple-choice rating question:

How much do you like or dislike your current job?

★★★ Like a great deal
★★ Like a moderate amount
★ Like a little
Neither like nor dislike
★ Dislike a little
★★ Dislike a moderate amount
★★★ Dislike a great deal

Then we probe for possible reasons for that rating by asking two separate open-ended questions:

What do you like most?
What do you dislike most?

What makes this a good set of questions? First, we have a multiple-choice question. Results from this question can be turned into a numerical value, which will allow you to compare your results from one survey to the next. And consider these points:

It's a bipolar question: It allows for both "like" and "dislike" answers.
A unipolar question ("How much do you like...?" with answers starting at "Not at all") omits the crucial negative half of the spectrum, which introduces random error and a positive bias in the answers. For the same reason, it's important that the question also includes both "like" and "dislike" (not just "How much do you like your job?").

There are an odd number of possible responses.
This provides a neutral "neither like nor dislike" option—without that, some respondents might answer "like a little" and others might round down to "dislike a little" when they're feeling the same way. As much as possible, you want similar feelings to result in similar responses.

It's asking whether the respondent likes or dislikes their job, not whether they're happy or if they're satisfied.
The list of responses is verbal—not a numeric scale. Such answers provide more consistent results than numbers. People are more likely to agree on what "like a little" means than what a "5" means.

The follow-up text questions give your team the chance to provide feedback on what's working and what's not. It's important that you ask the "like" and "dislike" questions separately:

- To ensure that you're getting fuller coverage on both ends of the spectrum
- To make your post-survey data analysis easier

Other ways of asking the same question

If your results cluster at the very high end of the scale (good job!), you could expand the scale from seven possible answers to nine:

- If you're using a "Like/Dislike" question, add "Like/Dislike a lot" between the "A great deal" option and the "A moderate amount" option.
- If using the satisfaction scale, add "Very satisfied/dissatisfied" between "Extremely" and "Moderately."

As an alternative question structure, you could ask: "Do you like, dislike, or neither like nor dislike your current job?" with three possible answers:

- Like it
- Neither like nor dislike it
- Dislike it

For those who select the "Like it" or "Dislike it" option, you could lead to a follow-up question:
"How much do you <like/dislike> your job?"

- A great deal
- A moderate amount
- A little

Other questions you might ask

"How much do you like or dislike working as a [customer service professional]?"

This question aims to find out how satisfied they are in their career, as opposed to their present job. It should use the same answer scale as the questions above.

"How likely are you to positively recommend or negatively recommend a job on Acme's customer support team to someone you know?"

- Extremely likely to positively recommend
- Moderately likely to positively recommend
- Slightly likely to positively recommend
- Neither likely to positively nor negatively recommend
- Slightly likely to negatively recommend
- Moderately likely to negatively recommend
- Extremely likely to negatively recommend

For this, we recommend asking those who answered in the middle—neither promoters nor detractors—an open-ended text question about why they feel the way they do. They might respond that they don't know anyone appropriate or aren't the networking type, for example.

You may not be able to do anything about those causes as a company, but you can certainly encourage those who are willing to recommend it by providing concrete actions (e.g., pointing them to Jobvite). Similarly, you could provide a link to Glassdoor for people who answered positively.

Demographic questions

If your team is large enough, you can ask demographic questions at the end of the survey (once a conversational connection has been made with the respondent), such as:

- Which office do you work in?
- Which team/tier do you work on?
- How long (in months) have you worked in a support position at [this company]? (Multiple-choice answers: 0–6 months, 7–12 months, 13–24 months, 25+ months)

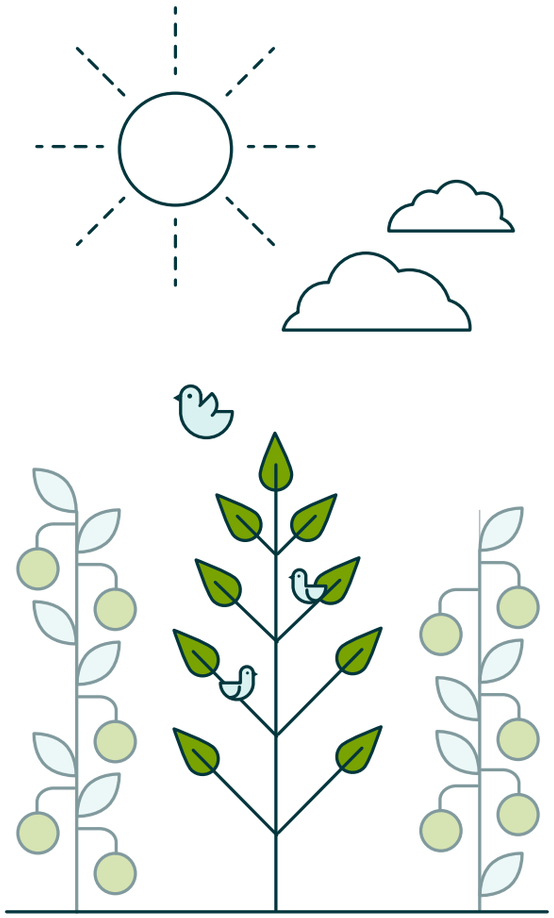
If you decide to ask these questions:

Ask the general feedback questions first

This helps to establish a conversational tone with your audience—before asking demographic questions, which some may be reluctant to answer.

Make it clear that these questions are optional and that the results will not be cross-indexed with the answers above.

Someone who is afraid of being punished for providing critical feedback will probably not want to identify themselves. It's better to get their feedback without the demographic data than it is to force them to supply the demographic data and have them decline to answer at all.



Here's a sample version of what a quarterly survey could look like:

How much do you like your current job?

- ◯ Like a great deal
- ◯ Like a moderate amount
- ◯ Like a little
- ◯ Neither like nor dislike
- ◯ Dislike a little
- ◯ Dislike a moderate amount
- ◯ Dislike a great deal

What do you like most?

What do you dislike most?

Next

To help us better understand your feedback, we'd like to ask you a few optional questions about your current position. Please answer only the questions you feel comfortable answering. You need not answer any of them if you prefer.

In which office do you work?

- ◯ Dublin
- ◯ London
- ◯ Madison
- ◯ Manila
- ◯ Melbourne
- ◯ San Francisco
- ◯ Other

On which team do you work?

- ◯ Tier 1
- ◯ Tier 2
- ◯ Tier 3
- ◯ Operations

About how long—in months—have you worked in a Customer Advocacy or Support position?

- ◯ 0 to 5 months
- ◯ 7 to 12 months
- ◯ 13 to 24 months
- ◯ 25 months or more

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Who administers the survey (and why)?

Someone outside the surveyed group and leadership should always be survey administrator.

Reasons include:

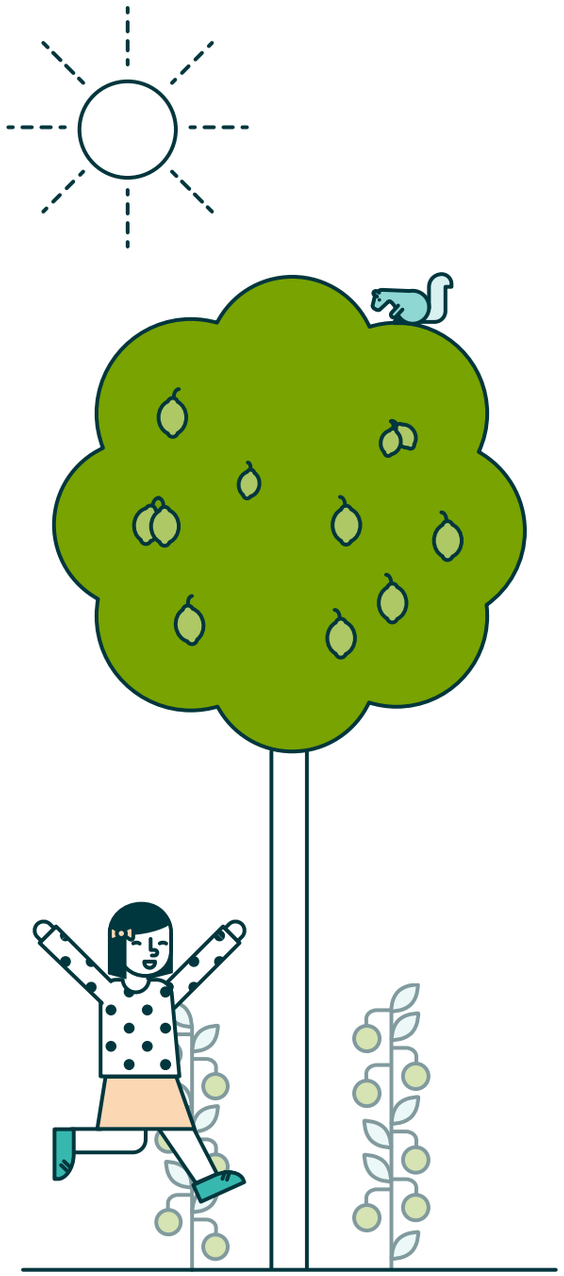
Anonymity versus confidentiality: Confidentiality means that when you respond to the survey, the administrator will know who you are but promises to keep your identity secret. This is probably how you interact with your HR department—you trust them with sensitive information because you know they're not going to share it.

Anonymity is a further level of security: Your identity is unknown to those reading the survey results. This has value in a team survey because it helps your people feel more comfortable voicing critical opinions. Even if, as a leader, you have no plans to retaliate, a team may struggle to trust that. Thus, an anonymous survey should result in a higher response rate, as well as better information.

An anonymous survey must **not** record names, usernames, email addresses, IP addresses, geo addresses, referring URLs, or any other identifying information.

If your survey includes open-ended text questions, and/or demographic questions that could be used to deduce the identity of the respondent, you need a neutral recipient who can sanitize the text responses of any identifying information and ensure that demographic responses are not combined. Ideally, the individual responsible for anonymizing the data should **not** be a member of the surveyed team in any capacity **and** should not be a member of any team with a significant stake in results from the survey.

For example, even though someone from your HR department might seem like a good choice since they're well versed in confidentiality, they may have a direct stake in employee recruitment and retention, which makes them an improper choice. Other teams may also have stakes—e.g., product, sales, and marketing—but the stakes for those teams tend to be lower than those of HR. If you're unable to find someone within your company who fits these requirements (which would certainly be the case if you're surveying the entire company), then you should work with a third-party researcher or organization that can guarantee these standards are met.



How are the results collected (and why)?

There are some important things to keep in mind when choosing a tool to administer the survey:

- Make sure the survey program being used is NOT automatically tracking respondent info. Most are set up with automatic tracking, IP address recording, device used, geo-location, and other respondent info. Surveyors wanting to run anonymous surveys typically must opt out of automatic tracking. Note that this is often not available with free versions of freemium products.
- Use secure survey links (https, not http).
- Maintain secure log-in procedures (e.g., separate device authentication, login behind protected single sign on, etc.).
- Use secure data servers.
- Non-U.S. respondents should consider using servers outside the U.S.
- Some vendors make use of the data they collect for you, so ask for limited or no usage of data by the survey platform vendor.
- Ensure there is sufficient financial liability coverage by the vendor when the vendor fails to maintain data security.
- Your company may have other requirements to outside vendors as well, so be sure to stick to those standards.

Announce the survey in advance of sending it out. Your team might be skeptical if they've been burned—by previous surveys that weren't followed through on, or that resulted in retaliation. Also, don't they have actual work to do? Articulate your vision for why the survey matters and how you intend to act on what you learn. Get buy-in from the leaders throughout your team, and have them encourage the team to respond. Set a deadline that gives everyone some time to think about their responses, but not so long that the survey is forgotten! A week is good.

Continue to encourage responses throughout the survey period. And remind your team that you're doing this to better serve them.

What's done with the results (and why)?

Once your surveyor has the results, several steps must be taken before the results can be communicated back to you and your leadership team, and then to the team at large.

STEP 1

Cleanse the text responses of any personally identifying information.

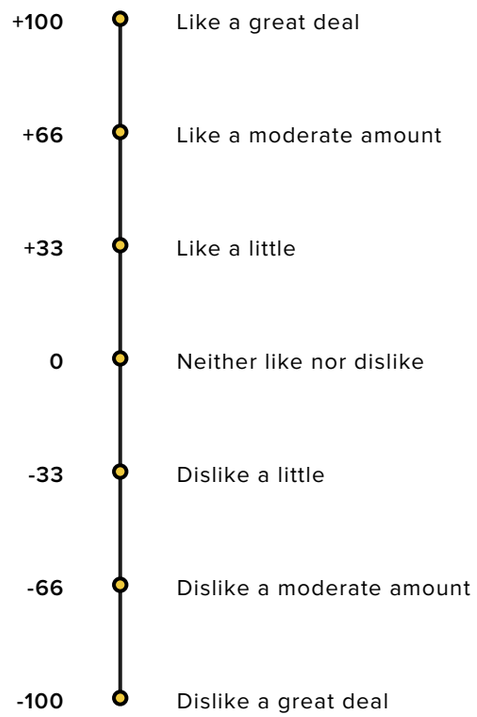
It's critical that this be done before the results are returned to the leadership team.

- Verify that no respondent tracking data is included. Remove if included (and revise procedures in the next round). Then, create an anonymized data file.
- Create a spreadsheet with all responses to all non-demographic multiple-choice questions; e.g., for the multiple-choice questions assessing job satisfaction, career satisfaction, and likelihood of recommendation. No other data would be included on this sheet.
- Create separate sheets for all responses to EACH individual open-ended question; e.g., "Why do you like your job?" on one sheet and "Why do you dislike your job?" on another. This is where the responses need to be anonymized, by removing any names, places, or other clues to who might have made the comment.
- Create separate sheets with all responses to ALL multiple-choice questions and ONE demographic variable; e.g., if you have a single job-satisfaction question plus three optional demographic questions (office location, team/tier, and tenure), the file would include three separate sheets, each of which would contain the job-satisfaction answers plus one of the three demographic questions.

STEP 2

Aggregate any numerical results.

Questions on multiple-choice rating scales (such as the example "like/dislike" question) can be turned into a numerical value by giving each response a value—for example, a seven-point scale can be scored as follows:



(A nine-point scale would use values of +/-100, +/-75, +/-50, +/-25, and 0 instead.)

Then you can total the results and divide by the number of responses in order to get an average value.

If you asked demographic questions, you can calculate averages for each of the categories (e.g., the average value for team members with a tenure of 13–24 months). Unless your team is very large, don't produce values combining more than one demographic question (e.g., level 2 agents in your London office with a tenure of 0–6 months), as that can quickly reduce the level of anonymity in your survey.

STEP 3

Look for patterns in the open-ended text answers.

Often you may see that many people are talking about the same or similar issues. Grouping the answers into general categories and totaling the number of responses (both positive and negative) for each category can help you prioritize which items need to be acted upon. Over time, this can reveal how well your efforts are paying off. It's possible to use text-analysis tools to do this step, but human interpretation is much more likely to give useful results.

STEP 4

Communicate results produced in the previous step to the leadership team.

The surveyor can then deliver the aggregate numerical results, the cleansed individual text responses, and the grouped trends in comments.

STEP 5

Now it's time for the leadership team to take a hard look at the results and decide which critical issues need to be addressed.

A survey that doesn't produce action is not going to be treated seriously the next time you give it. If you're not planning on doing anything with the answers, then why take up your team's time in the first place? If you don't follow through, your team will stop talking to you, or, maybe worse, will just tell you what they think you want to hear.

It may sound counterintuitive, but the negative comments are a gold mine. Addressing the issues they raise will show that you took complaints seriously and are willing to spend your time and energy to make your team's work lives better.

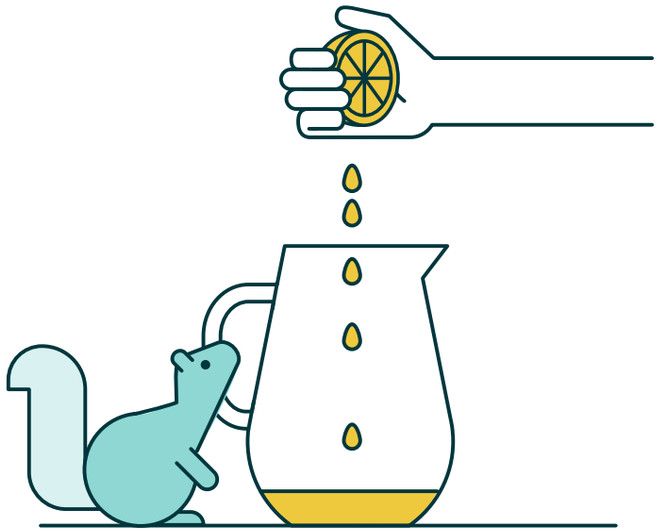
Set yourself up for success by setting realistic, smart goals. And by that we mean specific, measurable, agreed upon, realistic, and time-based. Allocate the necessary resources and set milestones. Weigh these projects against your other responsibilities in terms of cost and benefits. Consider the cost of agent turnover—recruiting, onboarding, training, and time to mastery—if you ignore the feedback, and the potential benefits of delivering on that feedback.

STEP 6

Finally, it's time to communicate the results back to the team.

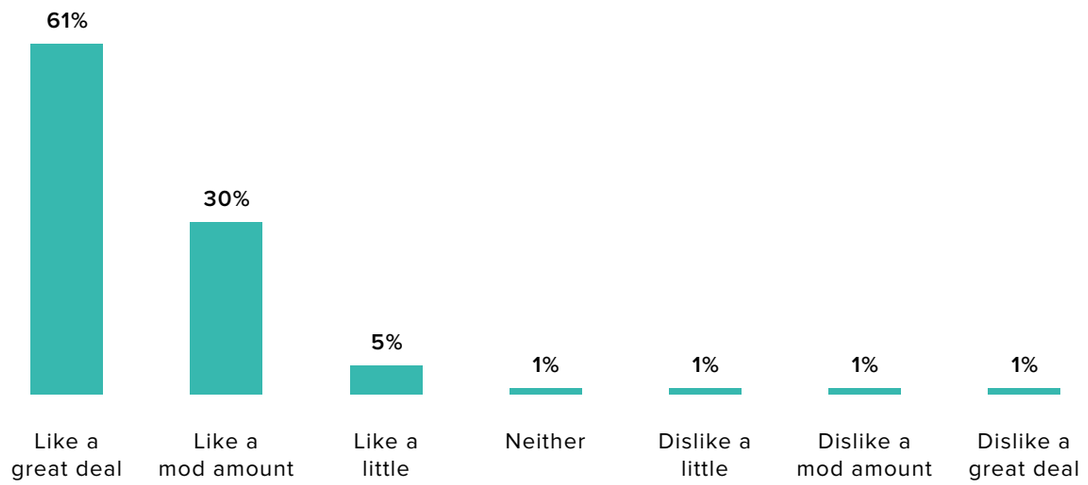
A slide deck presented live (and recorded, for those not in attendance) is a good way to deliver results in a visually compelling way. Ideally, someone from the leadership team should co-present alongside the surveyor so any questions can be addressed. Include:

- Charts showing the results and mean value of each multiple-choice question
- Averages for the categories in any demographic questions you asked
- A histogram showing the number of positive and negative comments by category (note that you don't need to provide the individual text responses at this stage)
- Comparisons to previous surveys (if any)
- An explanation of the survey methodology, including how the values are calculated from the multiple-choice questions, how you assure anonymity, etc.

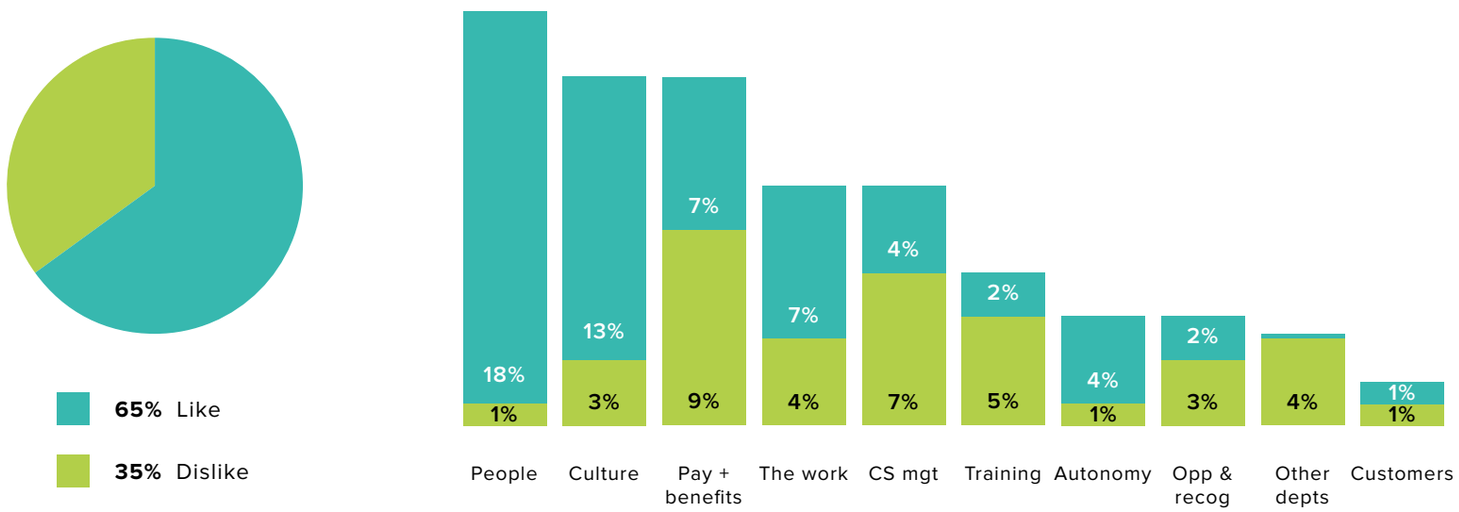


Sample results:

How much do you like or dislike your current job?



And here is a pie chart and histogram showing the pattern of positive versus negative comments by subject area:



Once you've presented the results, it's time to communicate what you intend to do about them, such as:

- Progress on commitments made following prior surveys (if any)
- New commitments based on this survey, with your plan for achieving them
- If there are significant issues that you're unable or unwilling to address, give your reasoning for them as well

Allow your team some time to ask questions, and encourage them to talk to their supervisor if they have concerns they'd rather not share in a group setting.

Conclusion

Relationships are complicated.

But with ongoing communication and a feedback loop built on trust and solid data, they can also be healthy, long-lasting, and rewarding for everyone involved.

This guide was written by Lori Gauthier. Lori is Zendesk's Director of Marketing Research, where she conducts research involving employees, customers, and prospects. Lori holds a Ph.D. in communication and a Ph.D. minor in psychology from Stanford University, where she taught the communication research methods course and conducted survey-focused research.

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