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## Survey action planning – masterclass conclusions



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## Summary

30 HR professionals met to discuss action planning at a masterclass chaired by ETS plc, an employee research and talent management specialist, in January 2009. The most common issues addressed were those of overcoming inertia in middle management and also convincing managers and employees that the survey can drive business improvement.

HR professionals wishing to attend a future masterclass should [contact info@etsplc.com](mailto:info@etsplc.com).

## Energising middle management to take action

**One HR professional uses the phrase ‘clay layer’ to describe middle management resistance to taking action based on survey results. Most HR professionals at the masterclass report that they need, or have employed, tactics to overcome inertia and maintain momentum. This is the foremost barrier to effective action planning reported by HR professionals.**

### **Delegates shared these solutions, which are proving effective:**

One of the survey questions answered by employees of an IT services company is whether their manager discussed the survey results with them. Their responses are included in individual managers’ scorecards. “It’s made an improvement and hopefully this time round there’ll be a greater improvement,” reports the HR professional who has employed this initiative.

Similarly, in a leading financial services organisation, decisions about bonuses paid to managers and directors are based partly on evidence that actions have been taken in response to the survey. Summarising, the HR professional responsible for it says, “They don’t get bonused if they don’t complete [action plans] and can show an audit trail [but] it took us a long time culturally for people to get comfortable with [it].”

A second financial services company reports increased survey scores that it attributes to the creation of senior manager work groups. Each was given a specific topic and a timeline of twelve months to show improvement. It was made clear that they would be publicly held to account for improvements in their topic areas.

Another company also finds it effective to appeal to peer pressure and competition as a way of changing behaviour. It shares the survey results with senior managers as a group. The scores are colour-coded and all teams’ scores are presented together so that comparisons are obvious.

However, peer pressure needs to be consistently applied if it is to be effective. In a specialist infrastructure organisation, managers have learned from experience that any potential sanctions for not doing something (whether it is performance management or action planning) are unlikely to be employed.

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## Communication

**One of the potential barriers to action planning is that managers do not believe it will increase revenue. Managers de-prioritise action planning in favour of obviously revenue-generating work. Separately, employees may be frustrated if they cannot see actions being taken as a result of their feedback. The masterclass attendees suggested these solutions:**

Executive sponsorship is often recommended as being effective for communicating the importance of the survey to managers, who are then much more likely to take action. Sponsorship can be communicated by, for example, having all survey communications come from the CEO and having the CEO visit each operating unit to explain why the survey is important.

Several participants highlighted the need for management at all levels to understand the causative relationship between engagement and the bottom line. Evidence recommended by ETS – mainly from studies of the retail sector - includes:

- Rucci AJ, Kim SP and Quinn RT. The employee-customer-profit chain at Sears. Harvard Business Review 1998: 82-97. Shows a causal link between employee engagement, customer satisfaction and sales at US retailer Sears.
- Barber L, Hayday S and Bevan S. From people to profits. Institute for Employment Studies 1999. A case study of a large UK retailer. Also, see other engagement publications at [www.employment-studies.co.uk](http://www.employment-studies.co.uk).
- Harter JK, Schmidt FL and Hayes TL. Business-unit-level relationship between employee satisfaction, employee engagement, and business outcomes: A meta-analysis. Journal of Applied Psychology 2002; 87: 268-279.
- Gatenby M, Rees C, Soane E et al. Employee engagement in context. Chartered Institute for Personnel and Development 2009. Recently updated.

An HR professional working for a major leisure company has got insights from companies with a reputation for great customer service, citing Southwest Airlines and Ritz-Carlton as examples. The key learning is that employees must provide great service for their internal customers and be engaged for them to provide the desired level of service to external customers.

Many attendees have success through communicating with employees in an ongoing way, rather than doing it simply to boost response rates. In one manufacturing company, the survey team focuses their messages on what was actually done in response to employee feedback (rather than what was planned to happen) and reports that scores have increased in those areas.

As an HR professional from the construction sector put it: “For the survey to be successful, the people who participate have got to understand what’s in it for them. From the outset, we talked about why we’re doing it and what the benefits were likely to be.”

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## Giving managers the tools to action plan

**Given the significant influence that line managers have on employees, it is clear to many HR professionals that action planning needs to happen locally (as well as centrally). How best to help managers to interpret results and prioritise actions?**

In a professional services company, the HR team helps managers to understand their results and to prioritise a small number to work on. The discussions will also reference other information such as absence and turnover data. In this organisation, the survey is repeated six-monthly so improvements can be tracked.

ETS described its highly-regarded online solution that helps managers to action plan by prioritising the issues most closely linked to engagement. It helps the manager to identify efficient actions to address their issues. Managers identify who will deliver each action and the degree of improvement they are targeting for each issue. Survey owners are able to see how well each issue is being addressed at manager, unit and company levels.

## Speed of response

**HR professionals report that survey results need to be communicated quickly for them to be seen as relevant and for action planning to start in a timely way. However, action planning is being hampered because results are being cascaded and require senior management approval or because their suppliers are taking too long to make the information available.**

In one financial services company, the survey results are now quickly communicated to everyone via the business partner network, which is better than an earlier, cascaded model where senior people saw the data first.

ETS described how the results of a multi-national survey conducted online for a financial services organisation are available for interpretation and action within two weeks of the survey closing.

Talking about their experience of working at professional services companies, one of the delegates says: "If you've got 10 core symptoms to what's causing the issue, you can start claiming success on some of them very early ... you can communicate something straight away and people can see that you're taking it seriously." In one case, training was seen as inefficient. One action that was taken immediately after the survey was changing the course leaders to be fee-earners as they were viewed as more credible and relevant than the original course leaders.

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## About ETS

ETS plc (Expert Training Systems plc) designs, develops and hosts performance management, 360-degree feedback and employee research solutions for world-leading UK and international companies. ETS delivers each client their 'ideal world' by developing a solution to meet their exact needs.

ETS aims to delight its customers through creating their ideal world solutions and through excellent customer service. You can read and see ETS clients talking about their projects and working with ETS at <http://www.etsplc.com>.

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