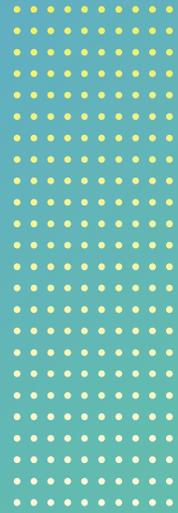




# EMPLOYEE LIFECYCLE SURVEYS

MEASURING THE ENTIRE EMPLOYEE  
LIFECYCLE TO DRIVE RETENTION





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## PART I



# MEASURING THE ENTIRE EMPLOYEE LIFECYCLE TO DRIVE RETENTION



# MEASURING THE ENTIRE EMPLOYEE LIFECYCLE TO DRIVE RETENTION

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Janson sits down at his desk on his first day of work. He just finished the onboarding process, walked through company powerpoints and orientation, and he's thrilled to find branded swag that he'll be using for the next few years. The coffee cup might even make its way back to his house. This new journey of employment feels promising.



**It's been 19 months**, close to the two year mark. The warm fuzzy feelings of joining a new company have faded for Janson. He can't determine if management has his best interest in mind, and he hasn't been promoted. He's starting to get cold feet. But who should he talk to?

He hasn't been able to find the right ears to voice his concerns, and management isn't connecting with him.

Janson's story is not unique. An employee's lifecycle ebbs and flows. Like any relationship, they experience a honeymoon phase, a stable phase, but then they begin to experience a need for new excitement. These pains are issues that need to be addressed sooner rather than later, because as one study just found, [63% of employees](#) at a given company are willing to leave for a new job now. There's no time to waste.

The modern workforce demands that employers collect constant streams of feedback from their employees at all stages of the lifecycle. But is it practical for employers to stay connected with employee needs?



# MEASURING THE ENTIRE EMPLOYEE LIFECYCLE TO DRIVE RETENTION

## Employer Brand And The Employee Experience

Companies are increasingly focused on establishing an “employer brand”, and there has been a lot of buzz around measuring the “employee experience”. Similar to how marketers are tasked with understanding the customer journey, HR organizations are being required to better understand the holistic employee journey from onboarding to exit. Companies must remain competitive as the war-on-talent rages on, and implementing a continuous employee listening strategy is becoming a priority for companies. While this should be a simple process, there are many reasons why companies are failing:



Similar to Janson’s frustrations, employees are increasingly feeling like they aren’t being heard by management, and many times they’re regrettably leaving their jobs due to issues or concerns that could have been easily addressed. Voluntary terminations not only create financial and operational pain but can also tarnish employer brand. Sites like Glassdoor enable current and former employees to voice frustrations with little recourse other than publicly responding to negative feedback.



# MEASURING THE ENTIRE EMPLOYEE LIFECYCLE TO DRIVE RETENTION

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What if you were able to measure each step of Janson's employee experience? What if you could identify and proactively reach out to employees that are at risk of leaving the company? Or even better, what if you could accurately predict and identify where you have trending organizational issues and take action before risks turn into a real issues?

Through continuous employee listening, companies can use people analytics to deploy intentional employee retention strategies as opposed to leaning on outdated practices that are not making an impact.

## Finding Strategic Value In Employee Listening

Many companies that we work with have had new hire and exit surveys in place for years if not decades. Many human resources departments are still using paper forms or Google documents that are low cost and easy to deploy. Typically, new hire and exit surveys are completed as part of a checklist and that's it—companies send out surveys and gather results, but they hit a brick wall. They get overwhelmed with loads of data but little time for aggregating and analyzing the results. It's almost impossible to drive change in this scenario.

As a result, we see a trend where management and executives are looking for more data from Human Resources, but current teams can't generate meaningful analytics on their own administering manual surveys. "I can handle the lifecycle surveys myself," is a common sentiment. "We can internally manage our lifecycle surveys and conduct reporting and analytics," is another. In either case, the end result is the same: companies fall into inaction, little is done to address employee issues and attrition numbers stay the same.



# MEASURING THE ENTIRE EMPLOYEE LIFECYCLE TO DRIVE RETENTION

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Revamping your new hire onboarding and exit survey process can seem like an ambitious task, and far too often these initiatives lead to frustration and abandonment. The purpose of this ebook is to provide a framework for redesigning (new hire, exit) and expanding (e.g., stay, 360, etc) your employee listening programs to unlock real value.





## PART 2



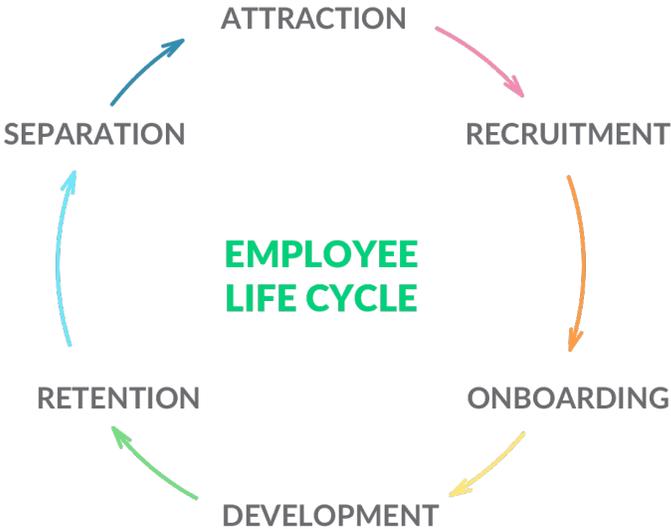
# THREE COMMON ISSUES WHEN MEASURING THE EMPLOYEE LIFECYCLE



# THREE COMMON ISSUES WHEN MEASURING THE EMPLOYEE LIFECYCLE

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When developing our approach at Workify, we analyzed the data in 10,000+ surveys to understand the key points at which employees we're looking to provide more feedback and developed a more employee-centric view on the traditional employee lifecycle. As we worked with our clients to implement a more modern, agile approach to employee listening, we noticed three common challenges that our clients were facing.



## Three Common Issues With Employee Listening Practices:

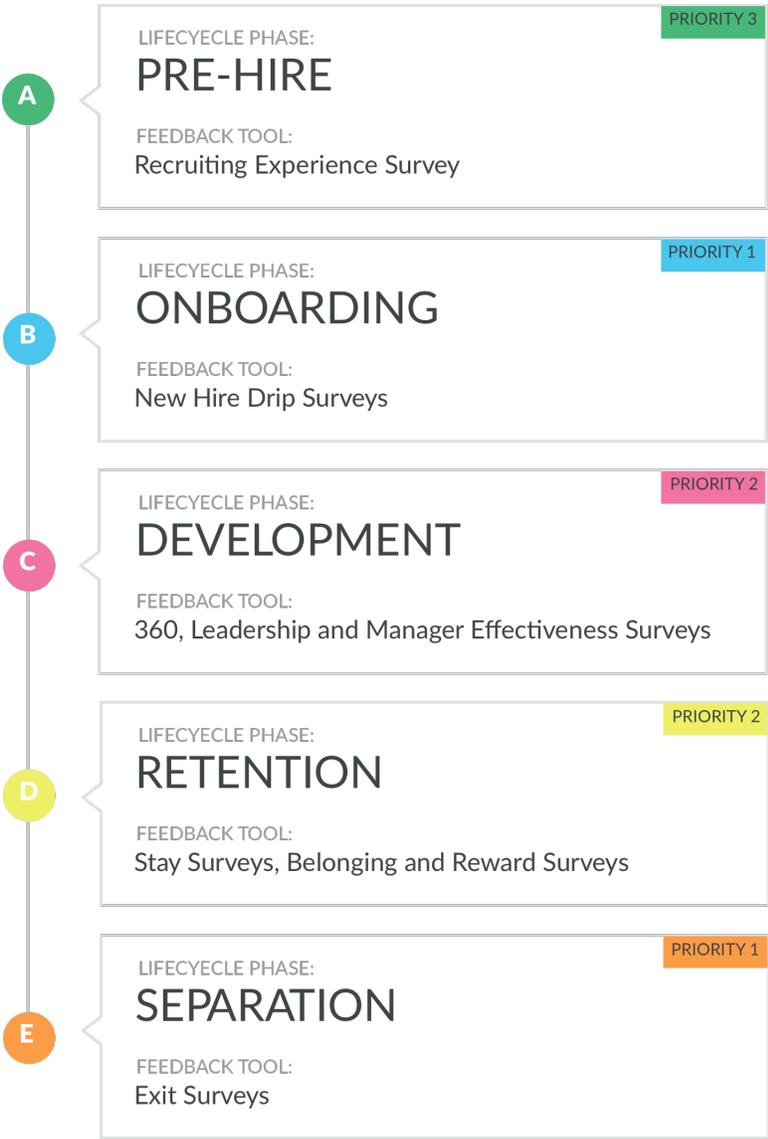
1. Companies Are Lacking a Holistic View
  - Most organizations are only measuring one-off stages in the life-cycle and as a result have gaps in the employee experience
  - HR departments do not have robust analytics on employee lifecycle surveys - making it difficult to pinpoint causes of disengagement
2. Process is Highly Manual And Time Prohibitive
  - Companies have little-to-no systems automation resulting in the need for human intervention
  - Inability to keep up with the survey volume
3. There's No Way to Look at Data in Batch
  - HR doesn't have the ability to efficiently digest information in aggregate leaving the data useless, particularly if the process is manual
  - When HR does have the bench strength, manual analysis is prone to error and reporting is delayed



# THREE COMMON ISSUES WHEN MEASURING THE EMPLOYEE LIFECYCLE

We recommend starting your effort to revamp your process by assessing which aspects of the employee lifecycle you are currently tracking and creating a phase timeline for gathering more complete data. Our recommended prioritization is below:

Exhibit [A]: Employee Lifecycle Feedback Areas





## PART 3



# THE IMPORTANCE OF NEW HIRE SURVEYING



# THE IMPORTANCE OF NEW HIRE SURVEYING

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When a new candidate joins your team, they typically bring excitement and energy to the organization. Generally speaking, new hires are the most engaged of all employees. They're excited to get to work, and they want to hit the ground running.

To ensure that new hires are [onboarded correctly](#), and their engagement is sustained, new hire surveys are a key part of any companies' employee listening strategy.

But far too often, companies seem to miss the mark on this critical step in the new hire process. For these companies, **there are three common reasons they want to implement new hire surveying:**

1. They think they are hiring great candidates and get excited about them during the recruitment process, but the candidates turn out to be average at best.
2. They hiring great candidates, but they leave after a short period of time.
3. They are uncovering employee concerns and issues deep into the employee's tenure.

If any of these scenarios are occurring in your organization, you probably want to take a closer look at your new hire process. Many of our clients experienced all three of these challenges before they partnered with us and launched their new hire onboarding survey strategy.

Has your organization found itself with the problem of hiring the wrong people, not seeing the results from your new hires that you were expecting, or your employees leaving after short stints? If you answered yes to any of these questions, you should strongly consider launching or revamping your onboarding surveys.



# THE IMPORTANCE OF NEW HIRE SURVEYING

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## How Does a Modern New Hire Survey Work?

After an individual joins an organization, once they're onboarded and assigned their seat—maybe even prior to their first cup of coffee—we recommend a more agile approach that is akin to a marketing drip campaign. The key element here is to begin collecting feedback from your new hires as quickly as possible. The purpose of the new hire survey is to gauge the quality of experience the employee has had during the hiring process with an organization and their ability to make an immediate impact.

**To ensure successful onboarding, consider identifying clear output metrics for your new hires such as:**

- Understanding of the company's culture and values
- Visibility into leadership's vision and strategy
- Clarity of individual roles and responsibilities
- Level of support from direct manager
- Ability to connect with teammates
- Commitment to build personal connections
- Blockers to making contributions to the company
- New hire's level of satisfaction - i.e., employee Net Promoter Score (eNPS)

### **Sequence of New Hire Surveys:**

The initial pulse survey is sent the first week of arrival, followed by a survey on day 30, and a final survey on day 60 or 90. Each survey is customized towards the variables that will be present at each stage of the new hire's lifecycle.



# THE IMPORTANCE OF NEW HIRE SURVEYING

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**Survey One** - Onboarding Stage: Were you treated well during your recruitment process? Was recruitment organized well? Was everything on time? Did you have all of the tools you needed before you started your job? Have you met your manager?

*Exhibit (B): Week One Onboarding Survey*

First Impressions	Employee Value Proposition
I have a clear understanding of my role and responsibilities at Company Name.	Which of these factors were most important in your decision to join Company Name?
I have a clear understanding of the benefits available to me.	- Development / Career
I have been provided the tools required to make an immediate impact.	- Employer Brand / Reputation
I have had a high-quality 1x1 with my manager.	- People / Environment
	- Compensation / Benefits
	- The Job Itself

Note this ranking question is asked again in Month 3 to establish whether the reason people now stay is different from the reason they joined.

**Survey Two** - Integration Stage: Do you have everything you need to do your job well? Do you actually understand what your job is? Has your manager had a structured series of conversations with you?

**Survey Three** - Contribution Stage: Does this role match-up to what you were expecting? Do you feel like you have the right capabilities to do the job? Is there more that you need to learn?



# THE IMPORTANCE OF NEW HIRE SURVEYING

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*Exhibit [C]: Months 1, 2 & 3 New Hire Survey Questions*

Month 1	Indicator
I am making a positive contribution to Company Name and my team.	Contribution
I have ongoing, high-quality 1x1s with my manager.	Management
I would recommend Company Name as a place of employment to my friends. (Rank 1 - 10 where 10 is highest).	eNPS
Month 2	Indicator
I am making a positive contribution to Company Name and my team.	Contribution
I have high quality conversation with my manager about my development since joining Company Name.	Management
I would recommend Company Name as a place of employment to my friends. (Rank 1 - 10 where 10 is highest).	eNPS
Month 3	Indicator
I am happy with my onboarding experience at Company Name.	N/A
I am making a positive contribution to Company Name and my team.	Contribution
I would recommend Company Name as a place of employment to my friends. (Rank 1 - 10 where 10 is highest).	eNPS
I would seek out the opportunity to work with my manager again in future.	Management





## PART 4



# SURVEYS TO MAINTAIN EMPLOYEES, THE STAY SURVEY



# SURVEYS TO MAINTAIN EMPLOYEES, THE STAY SURVEY

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Many organizations find that key employees begin to leave their business three to five years into their tenure. This is the average lifespan for employees in a job. If a new job is not found internally, the employee moves on. And given the level of investment in more tenured and more senior level employees, these can be the most painful losses to swallow - organizationally and financially.

Businesses are realizing that a stay survey at the 12-18 month mark is the solution. This is enough time to talk to employees and gauge where they stand with a company. While these surveys are effective, they may not be as effective as anonymous engagement surveying.

In an anonymous engagement survey, you can still look at every employee within a company, including those that have worked for 18 months. Your tenure groups remain an area of focus.

So while stay surveys are valuable and available, we recommend learning about an entire engagement population all at once. Though you may notice an issue with a particular tenure in a stay survey, other factors may be at play in your organization that won't be visible to you unless you conduct a complete engagement diagnostic.

## **Important Elements of An Effective Stay Survey Include:**

- Confirming the employee's confidence in the future of the organization
- Measuring the quality of the employee's relationship with their manager
- Assessing whether the employee can see a clear career path for the future
- Identifying barriers preventing the employee from wanting to stay with the organization for the long term





## PART 5



# A SIMPLE APPROACH TO EXIT FINDINGS



# A SIMPLE APPROACH TO EXIT FINDINGS

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## What Are Exit Surveys?

Employees leave an organization for one of two reasons: they voluntarily choose to leave, or they are terminated. Once an employee begins the process of leaving, there is often a two week notice period, which is the window where an employer wants to determine what led to an employee's departure.

Most businesses do some sort of data collection when employees leave, but it's often poorly organized and inconsistently executed. And unlike new hire surveys where your organization has time to prepare, an exit survey only gives you two weeks or less to obtain feedback, so timely execution is important.

Many businesses attempt to have a conversation with people before they leave, usually in the form of an exit interview. The problem is that honest, unfiltered feedback is typically hard to capture in an exit interview. Increasingly, employees are seeking multiple channels for providing feedback, e.g., web, mobile web, app, SMS, etc. Particularly with exit surveys, it's important to have automated processes that give the parting employee options and reminders for providing feedback.

**Note On Survey Differences:** *In exit surveying, businesses should consider deploying different surveys for employees who voluntarily leave and those that are terminated involuntarily.*

## A Simple Approach to Exit Findings

A successful exit survey will ask employees to rank the reasons they are leaving. This gives a prioritized ranking of the factors contributing to each employee's decision to exit the business.



# A SIMPLE APPROACH TO EXIT FINDINGS

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Exit surveys should be issued the moment an employee gives notice, and similar to new hire surveys, exit surveys are attributed to the individual employee. This gives organizations critical insight into why certain high-value employees are leaving.

## This Means You Avoid Exit Interview Interrogation

One of the pitfalls of the typical approach to learning why an employee is leaving is that this information is often gathered in an exit interview. In worst case scenarios, an exit interview never even happens. And in best case scenarios, the entire exit interview is spent discussing surface level reasons for an employee's departure.

A more effective approach is to deploy the exit survey the moment you know an employee is leaving and capture feedback in advance of the interview. When the exit interview takes place, you don't need to play the role of reporter, because you've already learned everything you need to know. You can jump right into the meat of the conversation.

*"I see you're leaving because your career development opportunities weren't met?"*

*"You weren't getting along with the manager?"*

*"You changed career paths?"*

With exit surveying in place, you have a targeted conversation and avoid getting caught in minutia during the interview.



# A SIMPLE APPROACH TO EXIT FINDINGS

## Current Data Accumulation Is Not Working

The pain for exit surveys is similar to new hire surveys. Companies are spending all of their time finding out why employees are leaving. They perform interviews and send out paper surveys, but all of this information is returning in different formats. There is no aggregated sense of what's actually going on, and companies are having trouble responding to this information.

Surveying should find out why employees are leaving an organization before they leave, not after. This way you have the opportunity to influence outcomes.

*Exhibit [D]: Sample Exit Survey*

Question	Question Type	Indicator
I would recommend Company Name as a place to work to my friends.	1-10 Scale	eNPS
Working at Company Name lived up to the expectations I had when I joined.	Likert	Commitment
I would seek out the opportunity to work with my manager again in future.	Likert	Management
I believe the people who lead Company Name are strong role models for our values.	Likert	Leadership
While I worked at Company Name, I was treated fairly and with respect.	Likert	Connection
I would consider returning to work at Company Name in the future.	Likert	Commitment
Rank the following factors in order of how strongly they contributed to your decision to leave Company Name:	<ul style="list-style-type: none"> <li>Role &amp; Responsibilities</li> <li>Leadership / Direction</li> <li>Management</li> <li>Career Opportunities</li> <li>Company Culture</li> <li>Reward</li> <li>Personal Circumstances</li> </ul>	
Please tell us more about the most important factor affecting your decision to leave.	Qualitative	Qualitative
What one thing about our culture at Company Name should we strive to protect?	Qualitative	Qualitative
What one thing could we have changed to make you want to stay with Company Name?	Qualitative	Qualitative





## PART 6



# OTHER EMPLOYEE LISTENING STRATEGIES

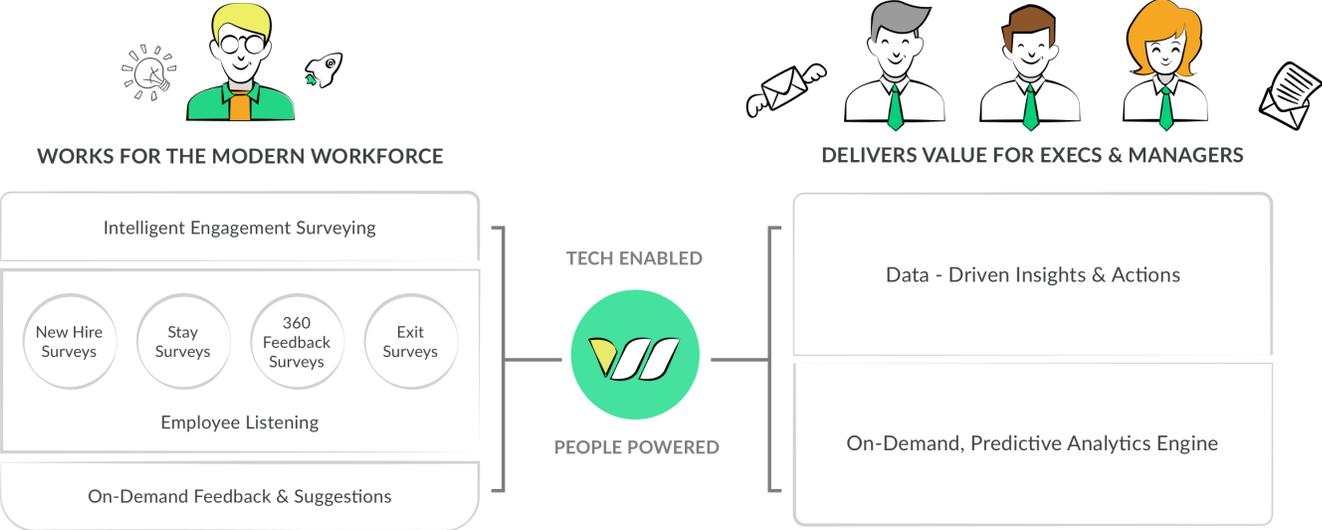


# OTHER EMPLOYEE LISTENING STRATEGIES

Employee Listening is the most rapidly evolving component of the Engagement Measurement landscape. Here are some additional tools that you should consider when formulating your employee listening strategy:

- Anonymous Suggestion Box
- Social Engagement and Recognition Tools
- 'Open Door' approaches for leaders and HR teams

## THE NEW INTERFACE FOR EMPLOYEE ENGAGEMENT

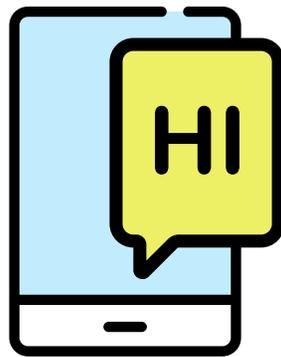


Are you collecting lifecycle data but feel like you be doing more? Learn more about Workify's all-in-one engagement measurement platform at [GetWorkify.com](https://www.getworkify.com).



# EMPLOYEE LIFECYCLE SURVEYS

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# About Workify

Workify is an all-in-one employee feedback platform with native, advanced analytics and business intelligence capabilities that help world-class companies drive better business results.

