

Checklist for Measurement beyond Engagement Surveys

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1. Know your objectives.

Make sure you articulate a clear objective and purpose for your measurement. This will help you decide the best way to collect data, determine how to ask your questions, and guide your reporting, analysis and action planning. Be sure to answer these questions:

- Why are you measuring?
- What is the end result that you expect?
- Are you planning to track results over time?
- How will you use the results?
- What questions will the measurement help answer?

2. Plan for action from the beginning.

One of the most common measurement pitfalls is too much focus on administration, reporting and analysis and not enough on action planning. This can be due to the fact that measurement is event-based (There's a start, middle and end.) and reporting has deliverables. By contrast, action planning is more abstract and variable in its shape and form. Plus, it often involves more people with specific ideas and suggestions. So start thinking about action planning when you start your project. Be sure to allocate resources and hold people accountable. Getting information without acting on it is just adding to clutter.

3. Connect the measurement to the business.

Make sure to connect the content and process to what you are trying to achieve as a business. For example, if you are launching a new product or service, you can gather feedback from employees on potential obstacles to a successful roll-out. If you are looking to attract and retain employees, consider asking questions about what motivated current employees to join the company and what keeps them there.

4. Involve others along the way.

Make sure to identify those whose support you need throughout the process—even if you want to keep your measurement under the radar. You may find you need some air coverage. You also may discover others who are planning to do some measurement around the same time with similar or different objectives. So you can make sure your work complements, rather than competes. And who knows? You may even decide to team up.

5. Remember that less is more, but you need multiple reminders.

Make sure to keep your questions short and focused. Remember, the longer the instrument, the more time it takes employees to complete and the more time it takes you and others to make sense of the data. A long survey or too much data can lead to inaction. Yet, even with the shortest of instruments, you may need to remind individuals multiple times to take part in your survey, focus group, interviews or whatever measurement tool you're using.

6. Consider tracking project teams.

Ongoing work teams or special task forces that are focused on project-based work may serve as an ideal laboratory for you to test a hypothesis or assess their reactions to a critical

issue. Just make sure that you've clearly identified business-related objectives, you and others are committed to act on your results and you've got willing participants.

7. Be social.

If your organization has adopted social media tools, be sure to take advantage of all they can offer. For example, mine the data to learn what people are talking about. Post questions of your own. Join conversations. Use the data to help you shape your measurement planning. Or share your results and ask new questions to gain more insights.

8. Avoid over-reporting the results.



The rule of thumb is to report results at the lowest level in the organization. However, this may overwhelm first-line managers who may not have time to address issues or may lack the skills or resources. However, it is important to report results at a level deep enough for meaningful change and action. Refer to the objectives of your survey when deciding on reporting results. Many companies can avoid unneeded reports and analysis by only reporting results for the levels they need to (such as business units instead of departments).

9. Don't forget to monitor your progress.

Once you've set priorities for your results and developed and implemented action plans, don't forget to monitor progress on those actions. By doing so you will ensure your measurement actions get results in organizational change and improvement.

10. Check your processes.

At the end of the project, review the processes to assess what aspects went well and what you should improve the next time you measure. You should consider measurement an ongoing process, not a one-time or annual event. While you may want some questions to be evergreen that you can measure each time, you may find that some lose their usefulness. Likewise, you may have new applications for using the data or new reporting needs that you need to take into account.

 <p>CRITICAL METRICS</p>	<p>Critical Metrics helps companies understand what drives employee and customer success. Since 2004, Founder and President David Youssefnia and his team have been helping clients collect, analyze and interpret data from employees and customers and make connections back to important business issues like turnover, performance, customer satisfaction and loyalty and even revenue.</p>
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