



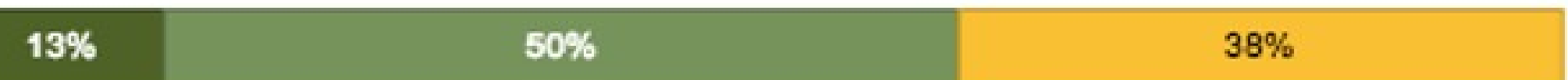
# LIFECYCLE SURVEYS

## Trend Report

---

### Live Item Details

1. Please rate your first 90 days on the job.



2. Please rate the support you receive from your manager.



New Employee Orientation

First 30 Days

Survey Submitted

Survey Submitted

First 90 Days

Year

Enter Survey

Enter Survey

Retirement

Enter Survey

Please respond to the following question(s) or statement(s) with your honest opinion.

1. Please rate your first 90 days on the job.



2. Please rate the support you receive from your manager.



3. Please rate the support you receive from HR.





# INTRODUCTION

---

## LIFECYCLE SURVEYS: A GROWING FIELD

One of the key interests of many organizations today is the move away from large, one-size-fits-all surveys to more specialized surveys across a broader set of objectives. Lifecycle survey programs are one approach to gathering and integrating data in a more holistic manner. These programs are generally comprised of multiple survey or analysis efforts to learn how and why employees enter the organization, work within it, or leave. Lifecycle surveys offer the unique potential to integrate employee opinions and experiences at different points throughout their time at the organization, and to provide insight into how early experiences predict later outcomes, such as how onboarding experiences predict an employee's career success and likelihood of staying with the organization.

OrgVitality recently conducted an industry study to better understand how organizations are implementing, acting upon, and what they are hoping to achieve with lifecycle surveys. The survey was sent to internal survey practitioners at organizations with a strong history of employee surveys. The resulting sample describes the practices of 43 organizations, representing the Fortune 500, government agencies, quickly growing technology start-ups, and not-for-profits. Of the organizations participating, 81% have 10,000+ employees, 10% have 5,000-10,000, and the remaining 9% have 1,000-5,000. Industries include high tech, consumer goods, and manufacturing. This sample provides insight into large scale survey programs across a variety of contexts.





# The Authors

---



Jeffrey Saltzman  
CEO



Scott Brooks, Ph.D.  
Partner and Vice President



Victoria Hendrickson, PhD  
Partner and Vice President

## Industry-focused research

OrgVitality conducted this survey of industry practitioners as part of their work for a new Society of Industrial Organizational Psychologists (SIOP) Professional Practice book series, due out in 2019. OrgVitality partners Jeffrey Saltzman, Dr. Scott Brooks, and Dr. Victoria Hendrickson are writing a chapter for the series that focuses on the growing interest in lifecycle surveys. This chapter will include information about the latest trends, potential pitfalls, and opportunities.



# What Organizations Do

In our survey practice, we strive to provide clients with the latest research and practices, but always within the context of what makes sense from a strategic perspective.

As we increasingly deploy lifecycle surveys for clients, we wanted to take a step back and survey the industry to get an accurate sense of what organizations are doing today, what is effective, and why.

These following illustrations show what is currently happening in survey practices as a starting point for building the ideal lifecycle program.

## A note about our methods:

The first question we wanted to know was how often organizations use surveys to touch on various points in the employee lifecycle.

Beyond that, we also wanted to know whether lifecycle surveys are deployed consistently across the organization, at the business unit level, or to specific groups. The bubbles to the right reflect the percentages of utilization type. As described in the following sections, various lifecycle measurements are deployed differently depending on purpose, sponsorship, and resources.

- Unit Independent: Completely different approach from unit to unit
- Unit Dependent: Depends on the unit – solution and/or use varies somewhat
- Locally Deployed Enterprise-Wide: Enterprise wide solution – managed and deployed locally as needed
- Centrally Deployed Enterprise-Wide: Enterprise wide solution – managed and deployed centrally in a consistent way

## Satisfaction with Impact

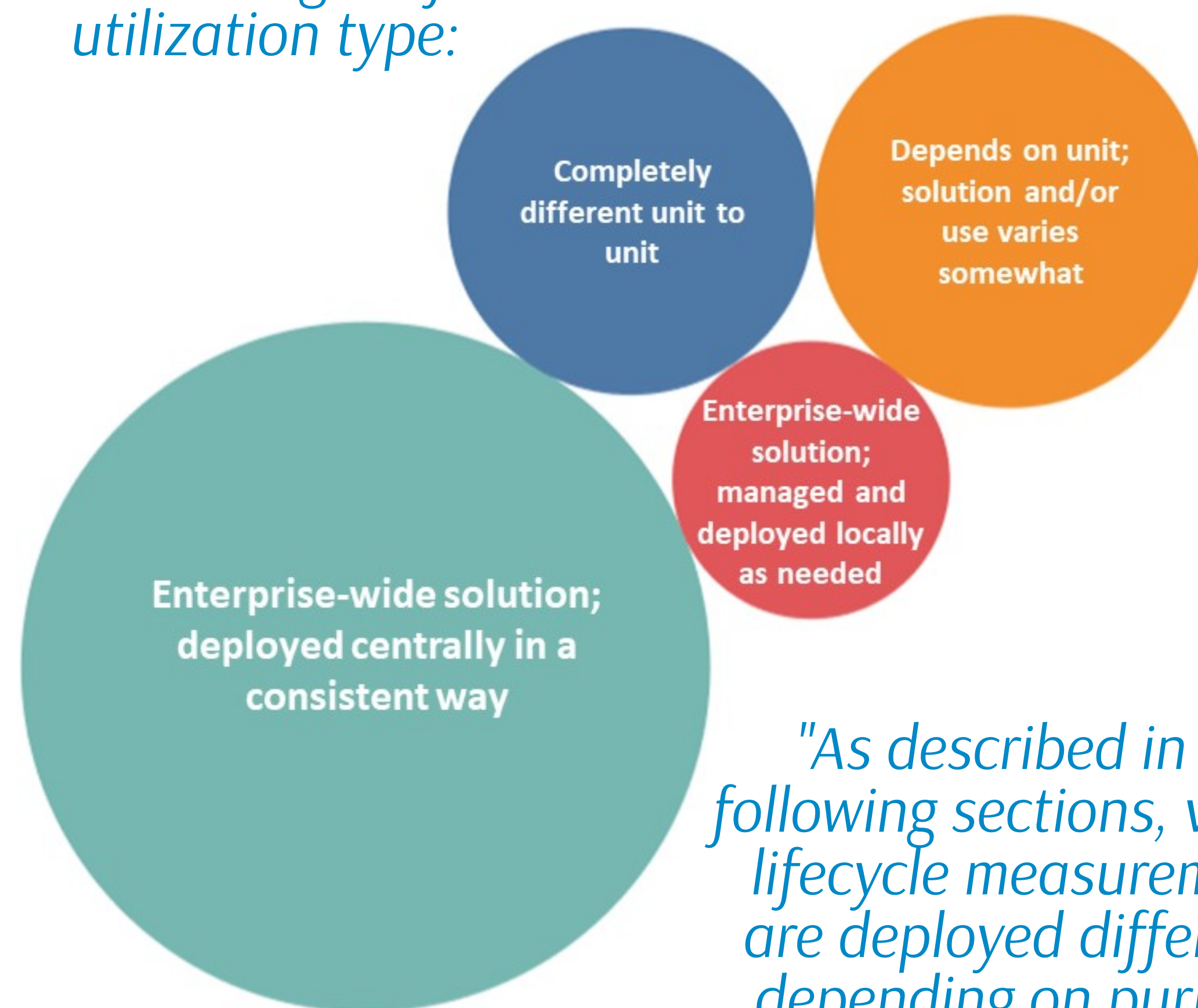
We also wanted to know how practitioners rated the impact of the various lifecycle surveys they conducted. For each of the lifecycle touchpoints, we asked respondents to evaluate how satisfied they are with their impact. The 5-point very satisfied to very dissatisfied scale is reported in a traditional favorable-neutral-unfavorable fashion on the following pages.

The following pages cover a summary of utilization and satisfaction ratings for a variety of lifecycle survey touchpoints, from pre-hire surveys to retirement readiness surveys.

### Common Lifecycle Touchpoints

Pre-Hire  
Offer Accept/Reject  
Onboarding  
Assimilation  
Employee Opinion  
Confidence  
Exit  
Attrition/Boomerang  
Retirement

### *Percentages of utilization type:*



*"As described in the following sections, various lifecycle measurements are deployed differently depending on purpose, sponsorship, and resources."*

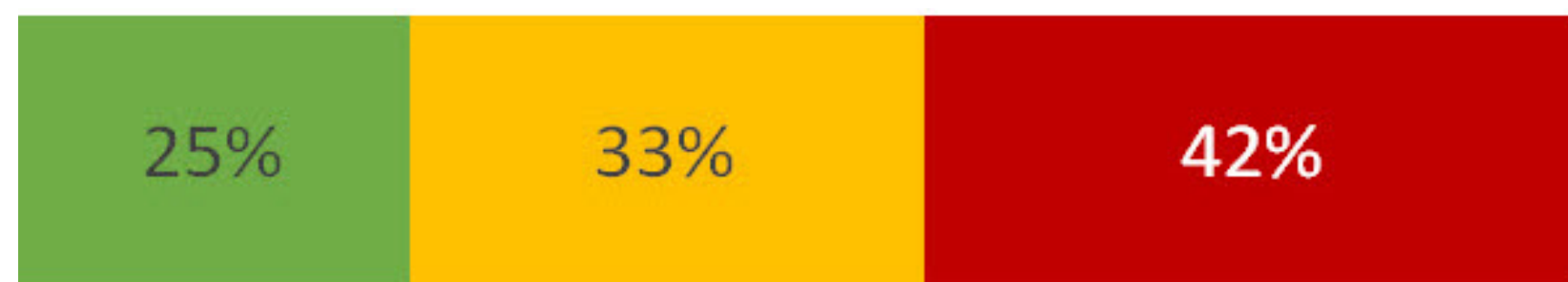


# 1 Pre-hire

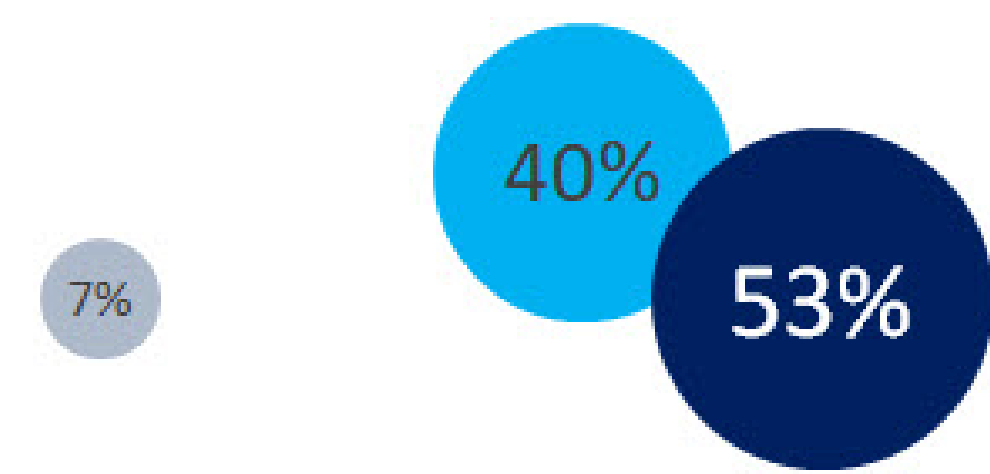
Solicit the perspectives of job applicants, manage a prospect's expectations and an organization's brand

33% Companies currently use this survey

## Satisfaction with Impact



## Utilization



- Pre-hire surveys generally go to all applicants, whether or not they receive offers
- Results provide insight into the company's reputation and an individual's decision process
- 25% of those using pre-hire surveys are satisfied with the impact
- To optimize pre-hire surveys, incorporate themes from exit and boomerang surveys

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

# 2 Accept/decline

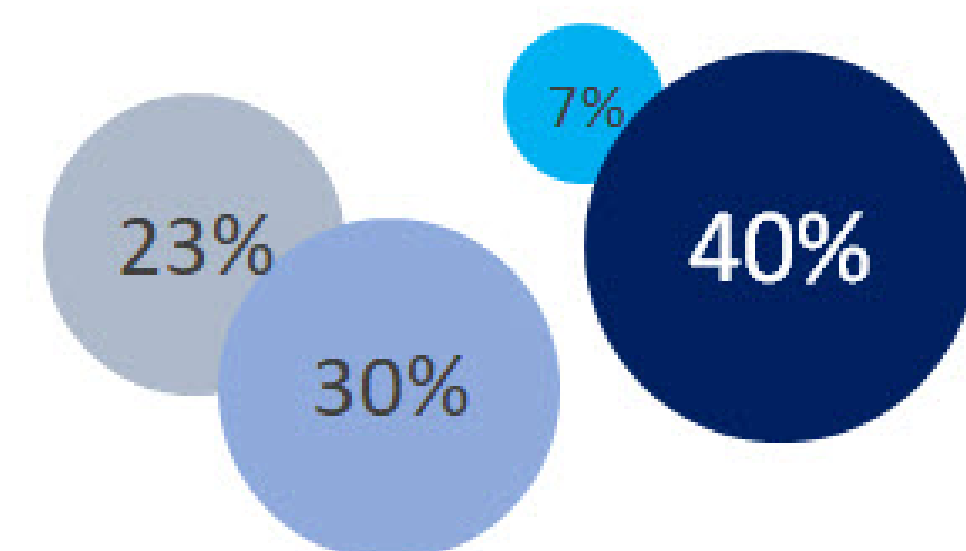
Understand why job applicants accept or decline job offers

30% Companies currently use this survey

## Satisfaction with Impact



## Utilization



- Accept/decline surveys provide feedback on what led to a decision. Results often provide directly actionable implications for how to attract desirable candidates
- Only 17% of those who use accept/decline surveys are satisfied, suggesting that the potential for actionable feedback isn't realized. The more data is segmented by groups, the more useful it is
- Accept/decline decisions often vary by minority groups, making these surveys important for diversity recruiting efforts

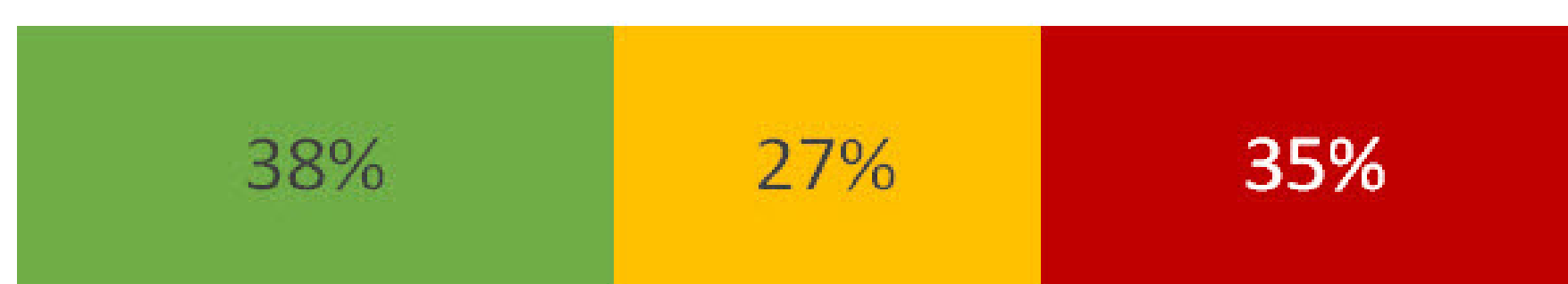
- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

# 3 Onboarding

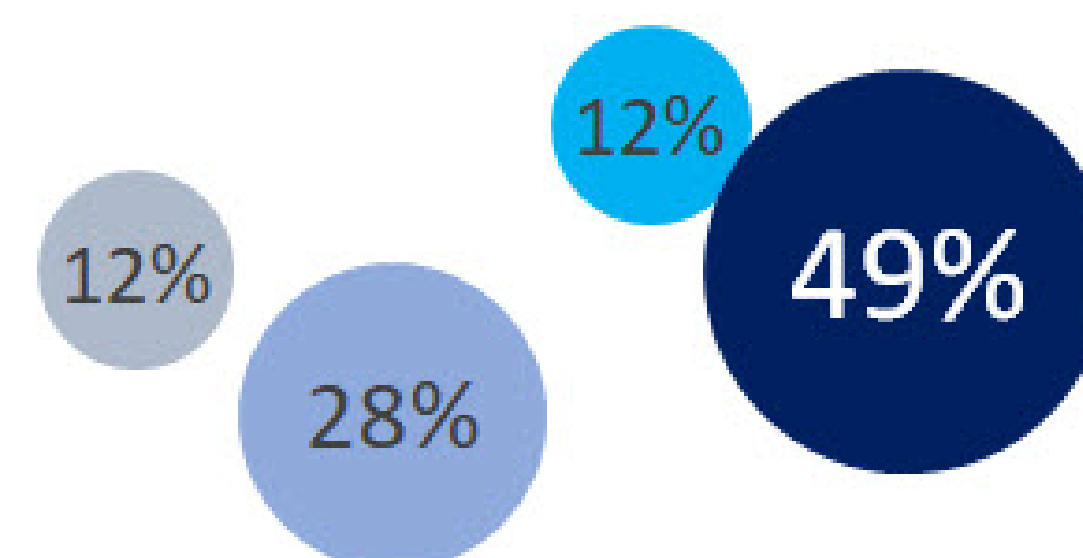
Welcome new hires, help them ramp up to become productive quickly

76% Companies currently use this survey

## Satisfaction with Impact



## Utilization



- Onboarding surveys help identify what cohorts of employees need in order to come up to speed quickly and be effective in their role - both in terms of logistics (computer set up) and general expectations (how will success be defined)
- Often these surveys are heavily focused on logistics, and not on broader role expectations
- Can be linked with performance data, helping to identify what onboarding patterns help employees come up to speed quickly

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution



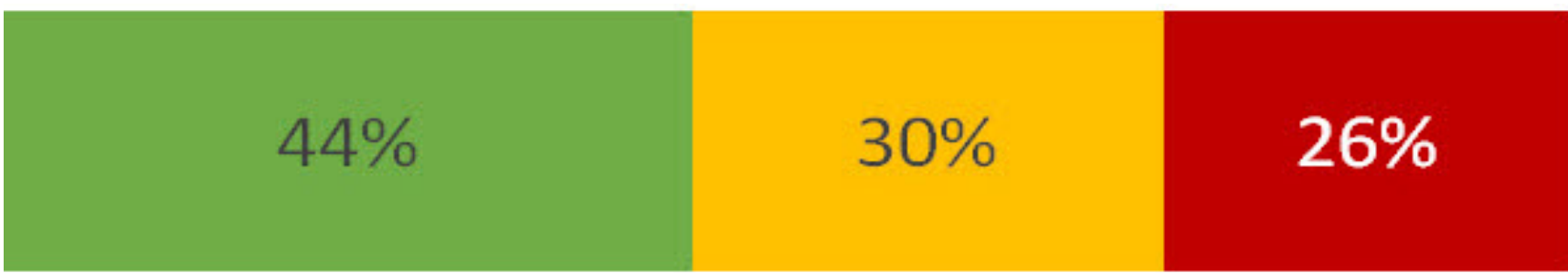
4

Assimilation

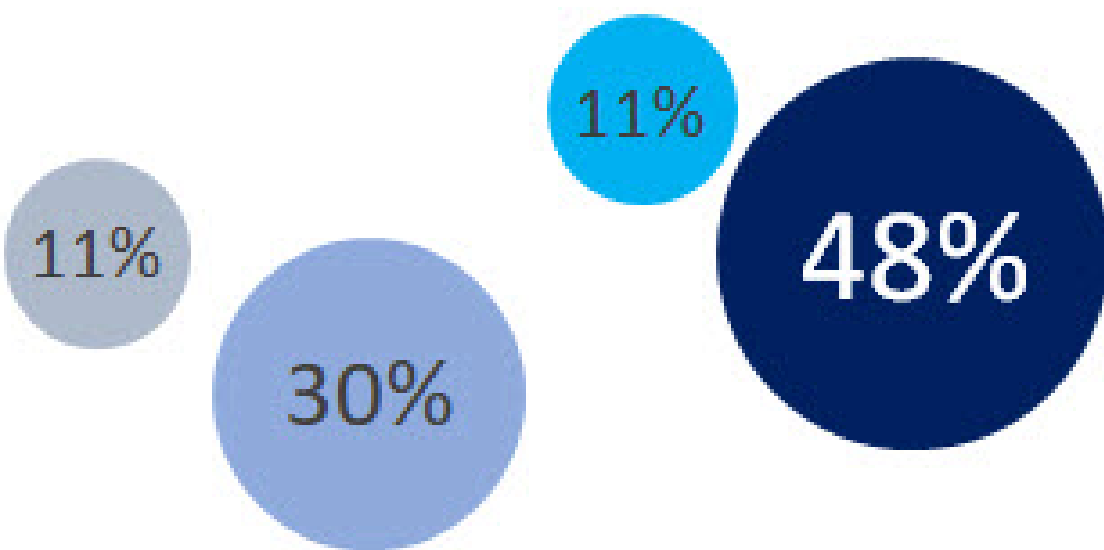
Evaluate how new employees ramp up to productivity; often done around 90-day mark

63% Companies currently use this survey

Satisfaction with Impact



Utilization



- Assimilation surveys focus on performance and integration with organizational life
- While they are slightly less popular, those that run them are often more satisfied with their impact
- Can be helpful in identifying key disconnects in expectations, difficult policies, practices, or cultural norms

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

5

Employee Opinion

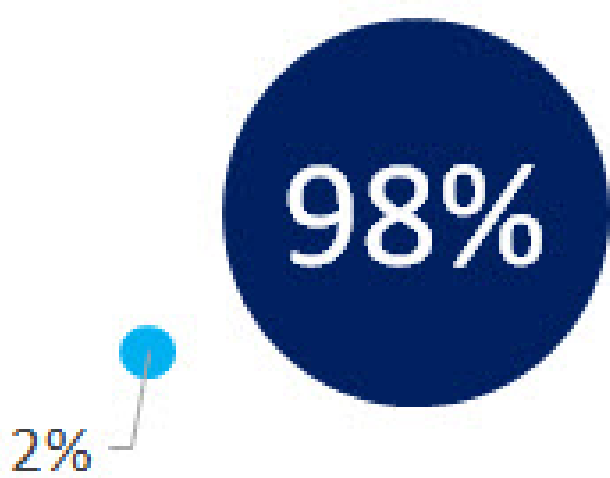
Evaluate employee opinions ranging from employee centric, such as engagement and satisfaction to more strategic topics relevant to leadership

100% Companies currently use this survey

Satisfaction with Impact



Utilization



- All companies in this sample ran employee opinion surveys of some type, almost all managing them centrally/enterprise-wide
- A clear majority of respondents are satisfied with their employee surveys, making this not just the most common type, but the most impactful
- Universal deployment makes them invaluable in evaluating organizational experiences, from engagement to turnover risk, with key splits by length of service or other markers in the lifecycle

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

6

Confidence

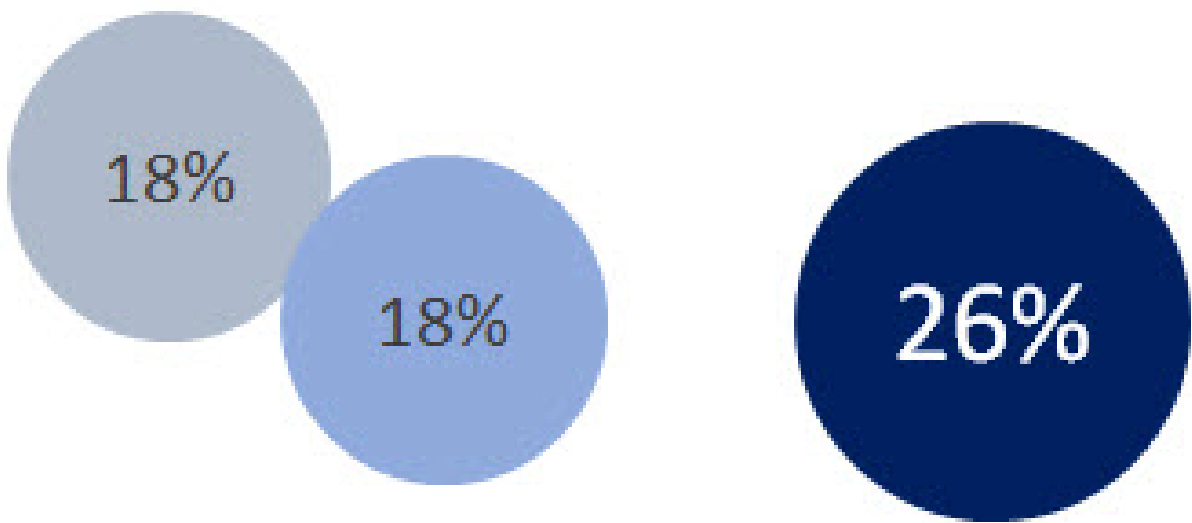
Enlist employee perspectives to predict important outcomes or events

40% Companies currently use this survey

Satisfaction with Impact



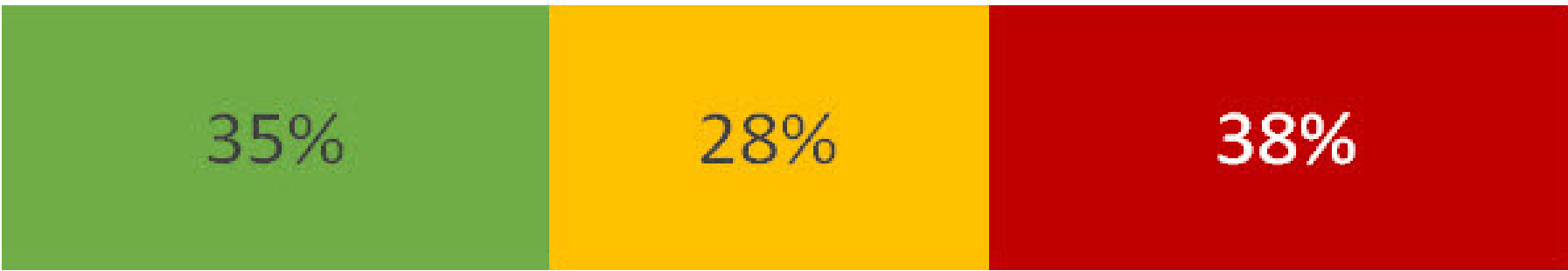
Utilization



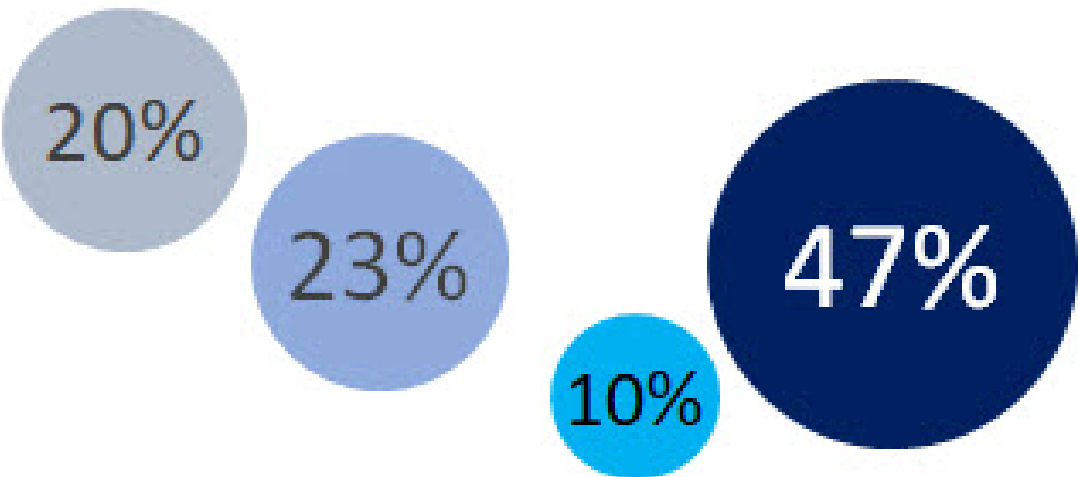
- Confidence surveys enhance an organization's visibility into operations, and help predict whether goals, targets, or expectations will be met
- Deployment can vary dramatically from central to local, likely following the performance focus on an organization or specific business unit
- Often demonstrated to clearly predict actual performance by gathering the collected wisdom/predictions of those close to the action
- Can anticipate and help manage barriers to success when administered with the right rhythms

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

Satisfaction with Impact



Utilization



- Almost all organizations engage in some kind of exit survey
- Organizations are split on their effectiveness; about 1/3 satisfied with impact, and about 1/3 dissatisfied
- One caution: Exit surveys can tell you a lot about employee perspectives at the time of departure, and about their decision process, but an annual opinion survey sliced by exiting vs. staying employees can do a better job of predicting future turnover

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

Satisfaction with Impact



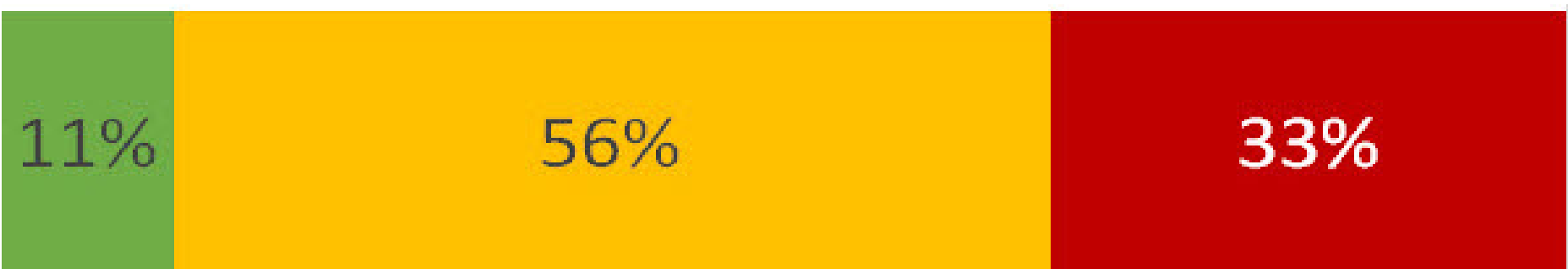
Utilization



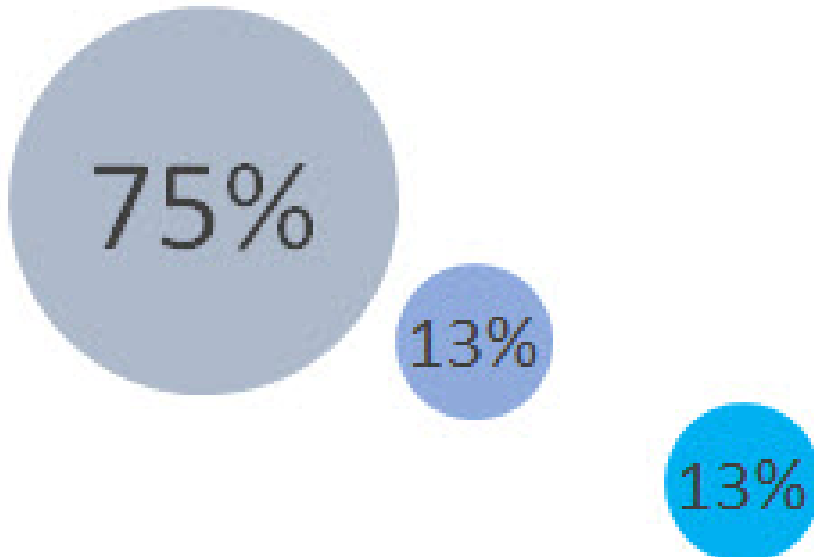
- Attrition/boomerang surveys are not very common, and are rarely centrally deployed when they do happen
- Companies are often unsatisfied with impact
- Can apply to a fairly specialized audience, where formerly employed "alumni" form an important part of the future job candidate pool

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution

Satisfaction with Impact



Utilization



- Preparation for Retirement surveys are the least common survey lifecycle touchpoint, with no centrally deployed enterprise wide instances across the survey respondents
- Likely very situation-specific, as with periodic cases of offering early retirement packages
- Can become increasingly important as large proportions of an organization reach retirement age, particularly in cases where employees have choices around when to retire

- Unit Independent
- Unit Dependent
- Locally deployed Enterprise Solution
- Centrally deployed Enterprise Solution



---

# Organizations Aspire to More Effective Lifecycle Metrics Integration

Only 1 in 5 (21%) report connecting data across various lifecycle touchpoints, with the most common connection between employee opinion and exit surveys. This is not surprising. Not only are these two clearly the most common kinds of touchpoints, but they are bound together by a very clear outcome metric of employee turnover.

Several organizations commented that they are in the infancy of this kind of analytics integration, and aspire to connect more of their data for better insight into the holistic employee lifecycle. In particular, many aim to create better predictions of outcomes, whether business metrics, turnover, or other metrics.

While this lifecycle approach holds promise for in-depth insight, it does come with challenges. Many organizations struggle with mechanical data considerations. Often surveys are collected through different processes or vendors that aren't compatible. Some surveys are confidential while others are anonymous, making it difficult to combine or even compare results. Other challenges relate to the frequency of surveys. Several respondents noted that there are so many surveys happening in their organizations that it's hard to create a point of focus for action.

---

It is clear what organizations are looking for: Integration of data to create unique insight so that it can be cascaded throughout the organization to drive action at all levels, rather than from a centralized Center of Excellence. There are mechanical data considerations as well as new kinds of reporting design requirements, yet driving towards this goal as articulated feels important – it's all about action in the end.





[OrgVitality.com](http://OrgVitality.com)