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Survey Design Guidance

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Want to know how Medallia experts design Employee Experience (EX) surveys?

It's a balance between science and art. But they start with a focus on business outcomes, a plan for action, and by keeping the audience at the forefront of your design. Here's how you can do this too!

Let's take a look at three key design elements in a great EX survey:

- **Start with the end in mind and design for actionability** - Choosing the right topics that connect with your business strategy is the first step in creating an EX survey program that improves the business outcomes that matter.
- **Create good questions** - Making sure your questions are clear, neutral, and relevant ensures you get the right data.
- **Design for your audience to get great results** - Creating a relevant user-friendly survey that users will take—and even enjoy—is possible.

Follow our guidelines to create quality surveys that enable you to spring into immediate action and make improvements to the employee experience.

Choose the Right Content

Ask Yourself: Do you know the key business outcome related to this survey and a suitable metric or index to measure it? Are the questions about topics the organization is ready and willing to take action on? Do these topics align with a key business objective?

When choosing content for surveys, use these guidelines to connect the content to outcomes:

- **Audience** - Does the audience have the knowledge needed to answer the question?
- **Actionability** - Can someone do something about the issues raised in the questions?
- **Commitment** - Will someone do something about the issues raised?

Outcomes

Identify the outcome and the metric you can use to measure it. Typically, the outcome is a key business outcome that the company wants to measure and change. It's the primary reason for the survey. For example, if a company's goal is to increase employee engagement, the survey should include an engagement index that measures how engaged their employees are. This index may need to include several questions that approach the topic from different and complementary angles. Using a holistic, multi-faceted approach helps get answers closer to the heart of the outcome.

When designing the outcome metric, ensure that:

- The metric is linked to an outcome that's important to the company.
- The outcome is the output of the business process and not an input or key driver.
- You have adequately captured and measured the outcome—sometimes you may need multiple questions.

Key Drivers

Most of the other questions on your survey should be about key drivers of this outcome—topics that may be impacting the business outcome positively or negatively.

As an example, in an engagement survey, key drivers may include questions about employees' managers, opportunities for growth, and team dynamics.

For important and/or complex topics, such as leadership or management, ask more than one question to cover the most important aspects. For simpler topics, such as role clarity, one question on the topic may suffice.

Create Quality Questions

Ask yourself: Are the questions simple and clear, so that all employees can understand them? Are all the questions relevant and on topics employees can answer?

Effective survey questions need to be clear and easily engaging. When drafting survey items, consider the following questions:

- **Comprehension Level** - Are questions written at a suitable reading level for the audience? Check your community or industry standard.
- **Brevity** - Is the survey concise? Less is often more.
- **Multi-barreled** - Does each question ask about only one thing? Avoid multi-part questions.
- **Acronyms** - Has the survey used acronyms? If so, they should be spelled out.
- **Vagueness** - Does the survey use nebulous/vague terms or jargon? Use plain, clear language.
- **Specificity** - Does the survey ask about what I really want to know?
- **Emotion** - Does the survey contain emotionally charged language or ideas? Be mindful of neutrality guidelines.
- **Leading** - Do any of the questions lead the respondent to respond in a certain way? Your survey should be free from bias.
- **Match Scale** - Are the questions written to match the selected response scale?
- **Directionality** - Are any questions negatively worded? Use positive phrasing as a rule instead.
- **Concept** - Do the questions ask about or represent the correct idea?

Let's have a look at a few example questions, discuss why they need improvement, and show how they can be improved.

Example 1: "Leaders at this company are often unavailable and are difficult to approach."

- Question is **multi-barreled** because it asks about availability and approachability.
- The word 'leaders' is potentially **vague**, as it doesn't name or indicate specific leaders or levels.
- The negative wording **(Directionality)** means that a high score—e.g., agreement—is bad, which can make results interpretation confusing.

Revised, better question: "Senior leaders at this company are approachable."

Example 2: "The ELT exhibits behaviors that are consistent with the current values model of our company."

- The **acronym** ELT may not be understood by everyone.
- **Comprehension level** may not be appropriate for all audiences.
- Question could be more **brief**.

Revised, better question: "The Executive Leadership Team's behaviors match our company values."

Decide Flow, Length, and User Experience

Ask yourself: How about the flow of the questions—is it logical, with the most important ones first? And have you created a user-friendly experience by keeping the same response scale (similar answer options) throughout and ensuring the survey is an appropriate length (neither too long nor too short)?

Overall flow and user experience matters. You need to take respondents on a journey to optimize their experience and your results.

Survey Anatomy and Flow

To create an easy-to-use survey, consider the following guidelines on your survey's flow:

- **Open with an introduction** to set the stage for the purpose of the survey.
- **Provide instructions at the beginning** that give details such as timing, confidentiality, etc.
- **Define key terms** that are used throughout the survey.
- **Start with your outcome metrics,** then move on to questions/categories that are most important. This helps set the stage for the topic of the survey and ensures data is collected on what matters most first.
- **Group questions into topic categories** so that respondents can focus on one broad topic at a time and don't have to constantly "shift gears" as they move through the survey.
- **Randomize questions** within question categories to avoid biases that may appear simply because of question order.
- **Limit required questions** to those that are critical to your analysis or closed-loop processes. Too many required questions can result in higher abandonment rates or poor data quality.

Question Types and Response Choices

What you ask is critical, but how you ask it is also significant. Choose the proper response scale—or the answer options a user can select from—e.g., strongly disagree to strongly agree. Follow these guidelines to ensure quality response scales:

- **Use five-point scales** for your closed-ended or quantitative questions. Five-point scales make your survey mobile-friendly and also allow respondents to answer the survey quickly. Since 5-point scales list each of the scale descriptors, it's easy for respondents to quickly understand each response option and accurately answer questions. Consider using this agreement scale for most questions on your survey: Strongly Disagree; Disagree; Neither Disagree Nor Agree; Agree; Strongly Agree.
- **Include a "neutral" option in your scale.** With the 5-point scale, for example, "Neither Disagree Nor Agree" is the neutral option. It's incredibly important to include a middle-ground option for respondents who don't feel consistently positive or negative about a particular aspect of their experience.
- **Label each response option** to help make choosing easier, because clearly defined options leave less to interpretation—e.g., everyone understands what "Strongly Agree" means, what "Agree" means, etc.
- **Use one response scale—**e.g., all questions have an agreement scale—when possible, to streamline your survey and promote comprehension.
- **Keep the response direction the same** to avoid confusion. Medallia recommends always starting with the most negative responses first for web-based surveys, regardless of the scale being used. For mobile surveys, we recommend starting with the most positive—i.e., highest rated—response first. This ensures that your survey easy to read and predictable, even to those speed-reading through your content.
- **Avoid "Not Applicable" (N/A)** whenever possible, as this results in inactionable data. Ensure you include this option only when an experience truly may not be applicable to someone. Note: an exception is in demographic information questions such as gender, in which "Prefer not to answer" is typically included.
- **Add one to three open-ended questions—**i.e., qualitative or comment questions—to provide context for close-ended questions. For EX programs, it's best practice to put open-ended questions at the end of the survey, because responding to closed-ended questions first helps respondents provide richer comments on a variety of important topics.
- **Ask for feedback on a specific** topic in an open-ended question. For example, instead of asking a catch-all question such as "Is there anything else you want to tell us?", ask "What is one way we could improve the onboarding experience?" If the question is too open-ended, you may receive concerning responses. This, in turn, may require the company to follow up as a legal obligation.

Survey Length

How long should a survey be? The answer depends on the type of survey. A survey measuring a complex and high-value subject, like employee engagement, should be longer than a survey on a simpler topic such as a department meeting. To keep your survey to an appropriate length, keep to critical topics and avoid tackling too many in one survey.

Recommended Lengths:

- Engagement Survey: 30-40 questions
- Pulse Survey: Varies depending on the topic selected, but typically 10 questions or fewer
- Employee Moment Survey (e.g., onboarding & training): Typically between 5 and 20 questions
- Event feedback (e.g., quarterly company all-hands meeting): typically 5 questions or fewer

Conclusion

Well-constructed employee experience (EX) surveys can help serve as the backbone of an effective employee listening program. Surveys are not the only way to listen to your employees, but if used properly, they can provide valuable data to identify where your organization is performing well, help you identify areas of opportunity, and generate ideas straight from your employees.

If you need more help with designing surveys, our Medallia Professional Services team can work with you to ensure your program is a well-designed success!

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