

INSTITUTE FOR PERFORMANCE EXCELLENCE



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The Baldridge Foundation Institute for Performance Excellence

Presents:

Using Stakeholder Feedback Surveys to Drive Performance Excellence

July 25, 2023



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Opening Remarks/Agenda

Introduction **Al Faber, President & CEO, Baldrige Foundation**

Panelist **George Taylor**
Chief Client Officer and Managing Partner
Beyond Feedback

Audience **Moderator – Al Faber**
Questions

Closing **Al Faber Remarks**



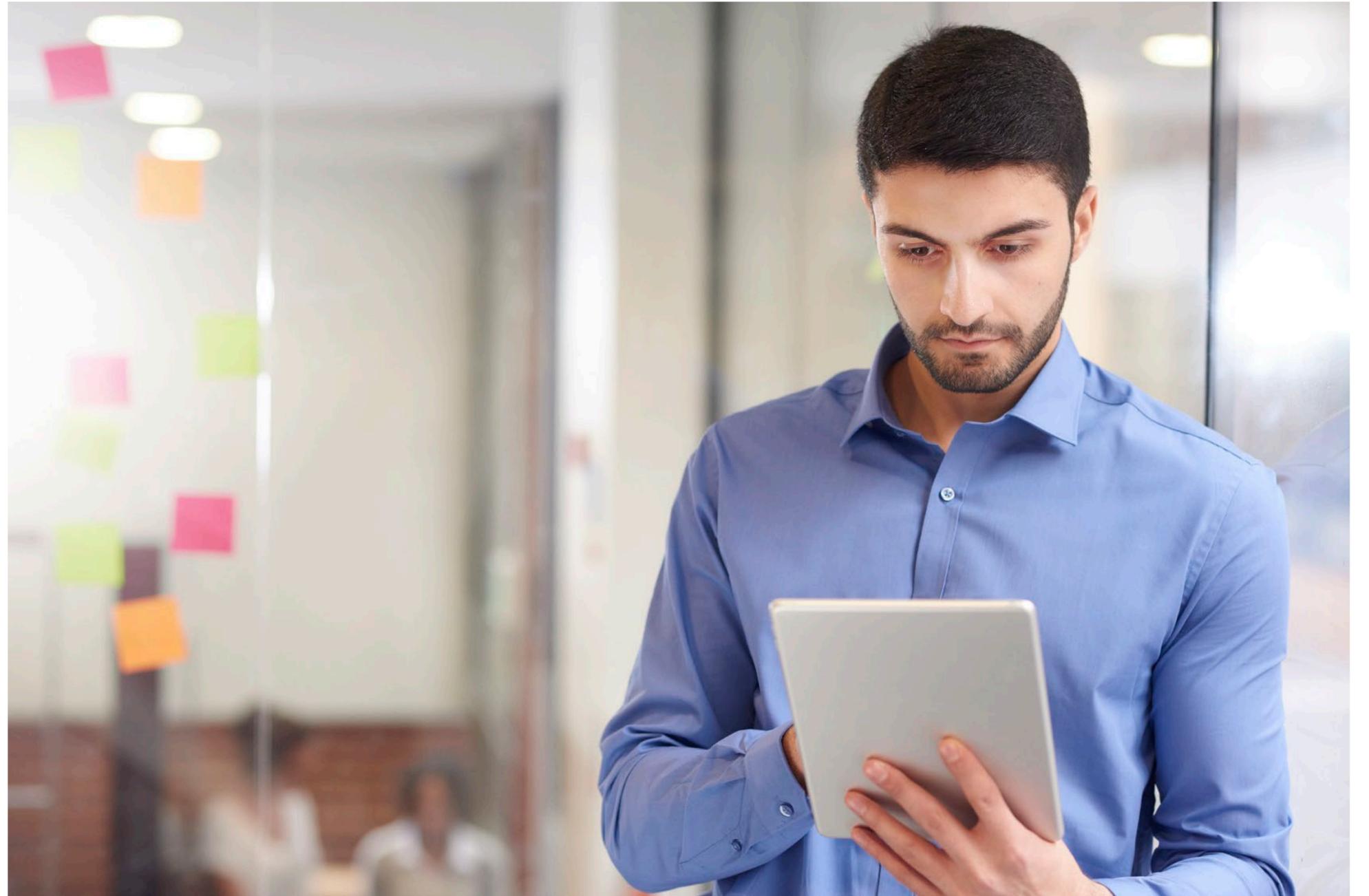
Using Stakeholder Feedback Surveys to Drive Performance Excellence



The agenda for today will give you insight on how to measure, model, and manage survey feedback from key stakeholders



Survey design best practices to generate actionable insights



Leading organizations align feedback data collection points across the full lifecycle of stakeholder experiences



Employee Experience Example

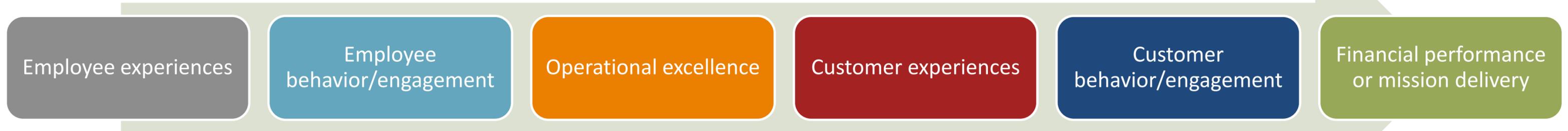


Surveys should be structured to achieve a behavioral goal and measure the key drivers that enable that outcome



What are the key requirements that directly or indirectly drive their behavior/engagement level?

What are the key requirements that directly or indirectly drive their behavior/engagement level?



Examples:

Job/role

- Training
- Workload
- Career oppty

Supervisor

- Communication
- Recognition
- Feedback

Team/Department

Comp/Benefits

Organization

Examples:

Retention

- Likely to stay

Advocacy

- Likely to recommend
- Proud to work

Expansion

- Promote to other roles
- Take on new projects
- Identify process improvements

Compliance

- Adopt new policies

Examples:

Sales representative

- Responsiveness
- Knowledge

Customer service

- Wait time
- Ability to resolve
- Knowledge

Pricing/billing

Product/service

Examples:

Retention

- Repurchase/renew contract

Advocacy

- Likely to recommend
- Serve as reference

Expansion

- Buy new products
- Buy more in future

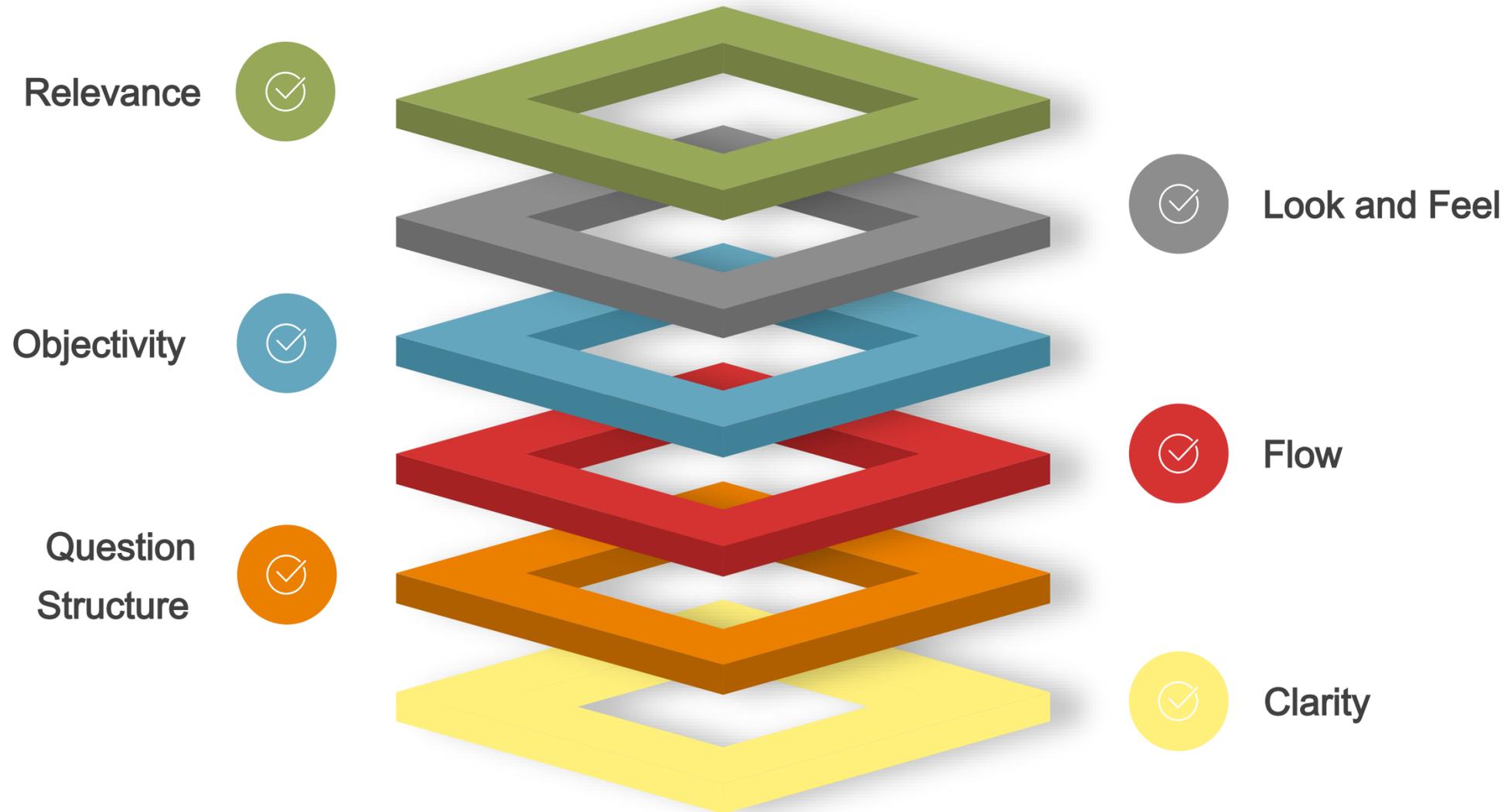
Compliance

- Adopt new policies

To generate actionable insights, you need to apply these key survey design principles



Key Principles of Actionable Survey Design



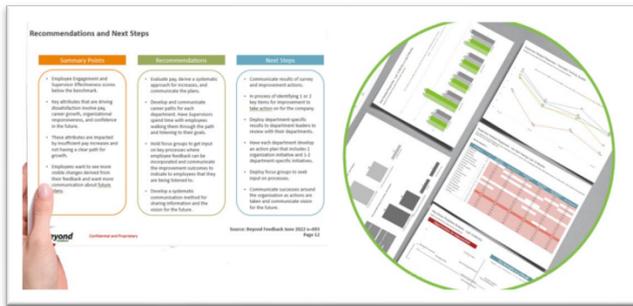
List of Top Priorities

- Keep surveys short
- Clean, simple, and organized
- Frame questions personally
- Keep questions MECE
- Use consistent concept abstraction
- Keep rating scales consistent
- Keep rating scale balanced
- Allow 'Neutral' and N/A options
- Avoid questions you already know
- Don't require responses

Deploy survey results into the organization to multiply your impact



Leading organizations deploy feedback results in easy-to-use formats cascaded to different levels of the organization



Executive Leaders

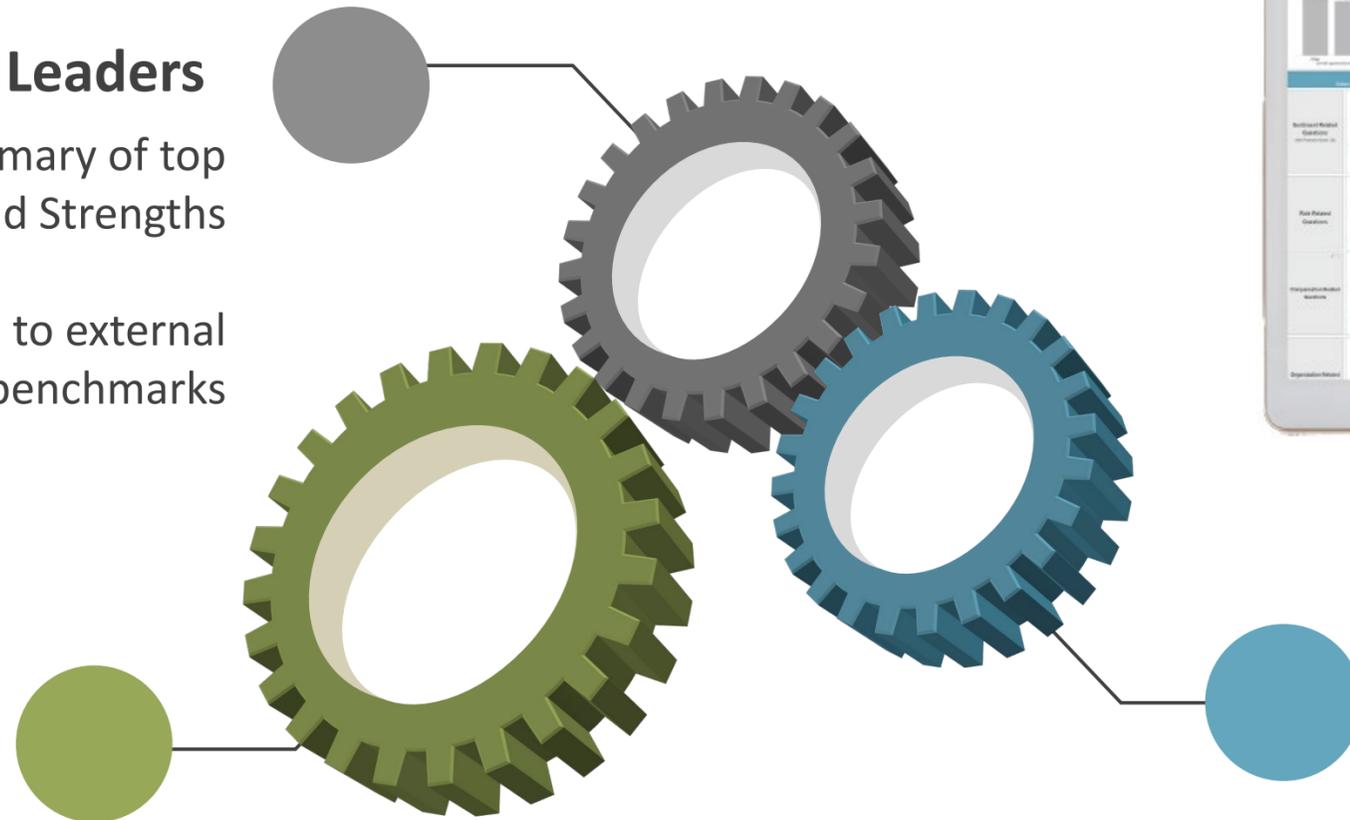
Executive summary of top OFI's and Strengths

Compare to external industry/MBNQA benchmarks

All Employees

High-level view of total organization

Detailed view of team scores



Interactive dashboards for leaders of leaders to drill down into their organizations

Department or Team		Total Organization	
Employee Engagement	55.6%	Supervisor Effectiveness	80.0%
Employee Engagement	61.7%	Supervisor Effectiveness	73.7%

Survey Section and Question	% Favorable for prior year	% Favorable for current year	Favorable change vs year ago	Favorable compared to total organization	% Neutral for current year	% Unfavorable for current year
High team morale	56.3%	83.3%	27.1 pts ▲	13.3 pts ▲	8.3%	8.3%
Good teamwork	62.5%	91.7%	29.2 pts ▲	7.7 pts	8.3%	0.0%
Team follows policies/procedures	62.5%	83.3%	20.8 pts ▲	7.3 pts	8.3%	8.3%
Asked for input	81.3%	90.9%	9.7 pts	22.2 pts ▲	9.1%	0.0%
Effectively resolves conflict	26.7%	18.2%	-8.5 pts	-13.1 pts ▼	36.4%	45.0%

Managers

Review of their team-specific scores and comment themes

Compare to other leaders within org for benchmarking

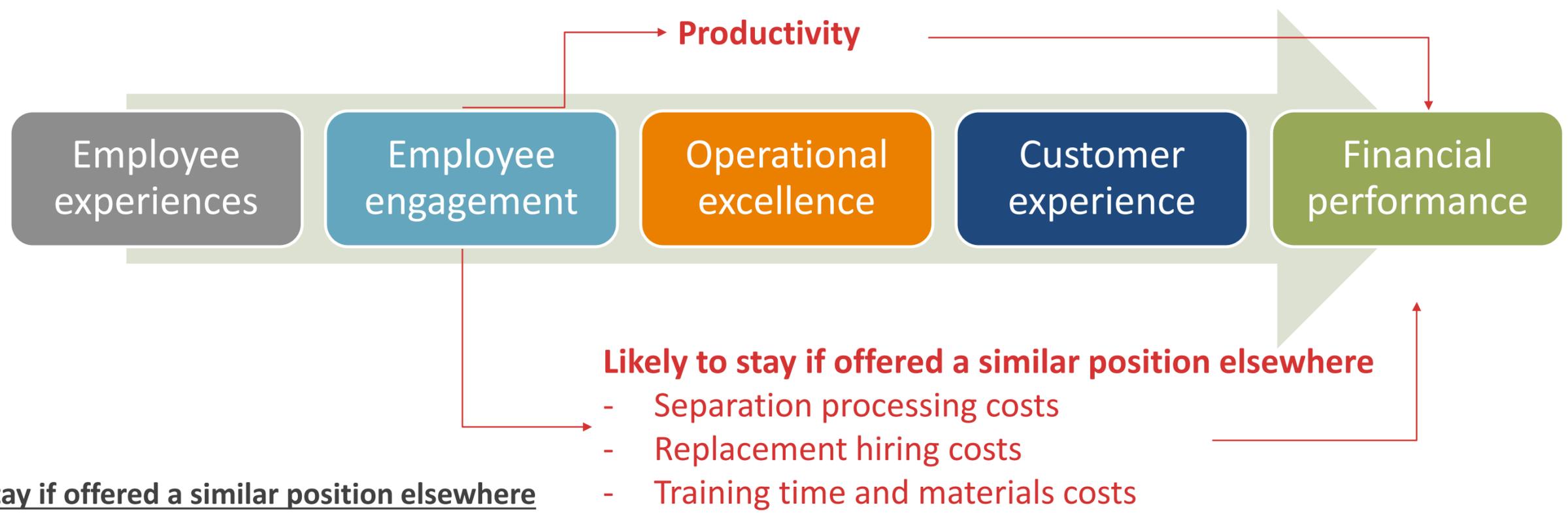
▲ Above Industry Participation Rate **86%** ▼ Below Industry Employee Engagement **62%** ▼ Below Industry Supervisor Effectiveness **74%**

WHAT'S GOING WELL?	WHAT CAN BE BETTER?	WHAT ARE NEXT STEPS?												
<ul style="list-style-type: none"> Fit with the job 92% favorable (declined vs 2021) Work independently 92% favorable (improved vs 2021) Believe in the mission 90% favorable (improved vs 2021) 	<ul style="list-style-type: none"> Resolving conflict 35% unfavorable (declined vs 2021) Board involved 36% unfavorable (declined vs 2021) Pay related to work performance 46% unfavorable (declined vs 2021) 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Department or Team</th> <th colspan="2">Total Organization</th> </tr> </thead> <tbody> <tr> <td>Employee Engagement</td> <td>55.6%</td> <td>Supervisor Effectiveness</td> <td>80.0%</td> </tr> <tr> <td>Employee Engagement</td> <td>61.7%</td> <td>Supervisor Effectiveness</td> <td>73.7%</td> </tr> </tbody> </table>	Department or Team		Total Organization		Employee Engagement	55.6%	Supervisor Effectiveness	80.0%	Employee Engagement	61.7%	Supervisor Effectiveness	73.7%
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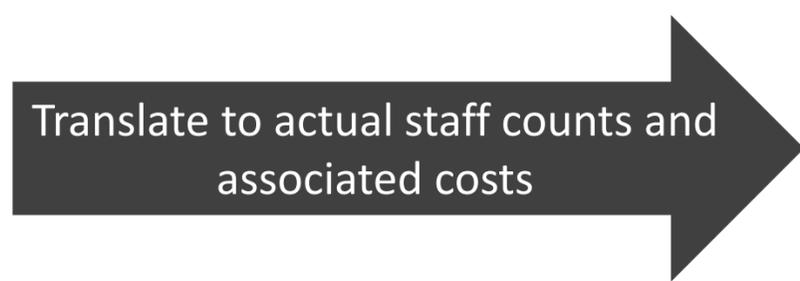
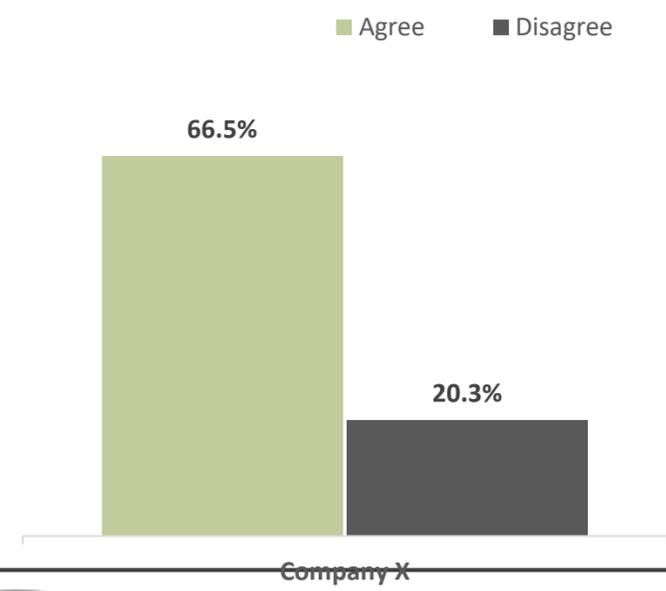
Linkage analytics: connecting stakeholder survey feedback to other data sets



There are easy ways to link survey feedback data to financial value for the organization



Likely to stay if offered a similar position elsewhere



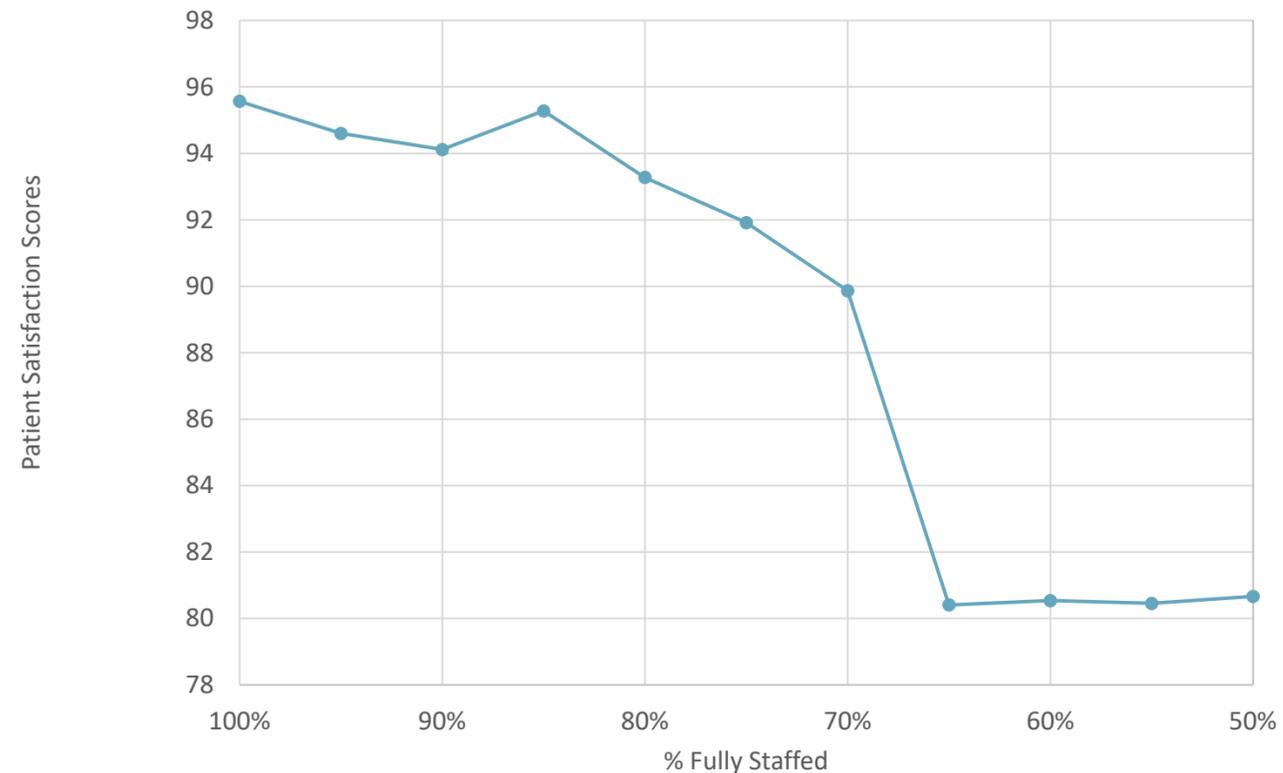
Projecting 68 staff members will leave in next two years
Based on an average salary of \$45K per year
 Projected annual turnover costs are \$655K
 Including lost productivity, annual costs are \$1.35M

There are more sophisticated ways to link survey feedback data to operational data for the organization



Healthcare example:

Linking together patient satisfaction scores and staffing levels across multiple facilities to optimize patient satisfaction scores



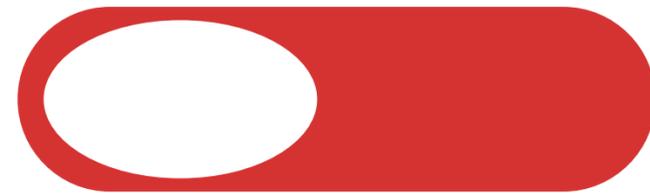
Key steps for this type of analysis:

1. Identify disparate data sets that may create unique/informative insights when combined
2. Define the organizational unit of measure (department, facility, customer segment, etc.)
3. Use the same unit of measure for both data sets (e.g. pull department data in both)
4. Define the time period and use the same time period for both data sets
5. Link the two data sets together using common data fields and time periods
6. Aggregate the combined data to identify new insights and patterns

Action planning for stakeholder survey feedback insights



Leaders that use feedback insights effectively are disciplined about what they do and don't do



To Not Do List

- Use data only to validate your pre-existing opinions or strategies
- Use phrases that disempower you as a leadership team
- Get defensive about the feedback
- Try to identify who said what in the comments
- Develop a strategy around one comment
- Let criticism go to your heart or praise go to your head



To Do List

- Identify one or two actions you can improve
- Get to the root cause of issues or opportunities
- Set a timeframe for completion and milestones for progress
- Plan through your actions comprehensively
- Communicate, communicate, communicate

Leading organizations structure their feedback action planning process from brainstorming to action plan



Lead your team from brainstorming

To...

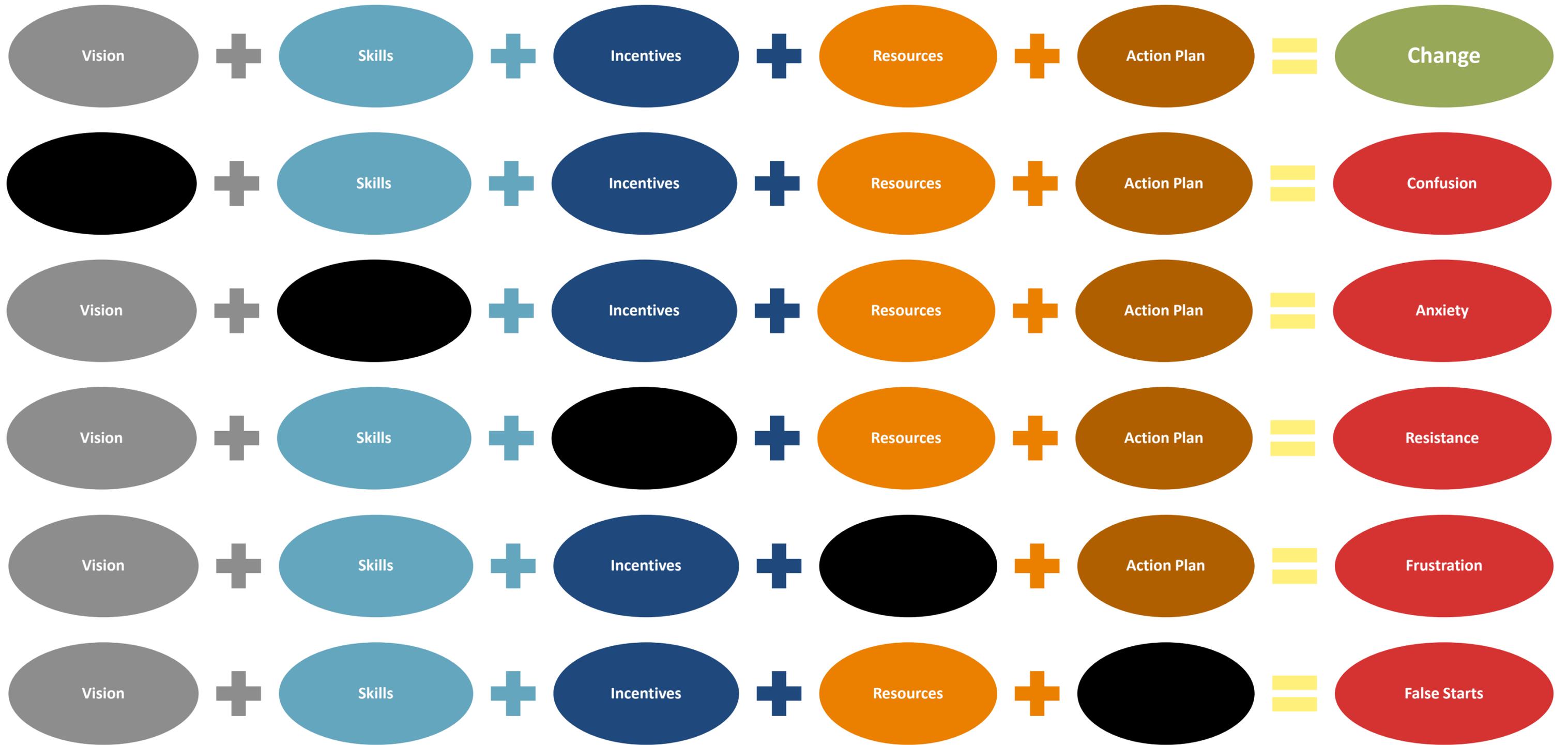
Team-specific action planning

What are the facts you heard from the survey?	What could our team do to improve the results?



Team	Action # 1	Action # 2	Action # 3
Brief description or name of action			
Who will lead this on our team going forward?			
What specific things will we do in the next 30 days?			
What support will we need from other teams?			
What will this look like in 6 months?			
How will we measure or define success in this area?			

Organizations that drive performance excellence embed stakeholder feedback into their organizational systems



Form a Team

Gather a team to adopt these concepts and principles within your organization

01

Baldrige Community

Gain expertise from local Baldrige programs, Institute for Performance Excellence, and MBNQA leaders

02

Go Beyond Feedback

We're glad to talk with you, even if there is not a project involved – email: george.taylor@beyondfeedback.com

03

Panelist Questions and Discussion



George Taylor
Chief Client Officer and Managing Partner
Beyond Feedback



Al Faber
President and CEO
Baldrige Foundation
(Moderator)





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