

How to evaluate the  
Employee Experience (EX):  
Bringing joiner, leaver and  
employee engagement surveys  
together effectively

# Introduction

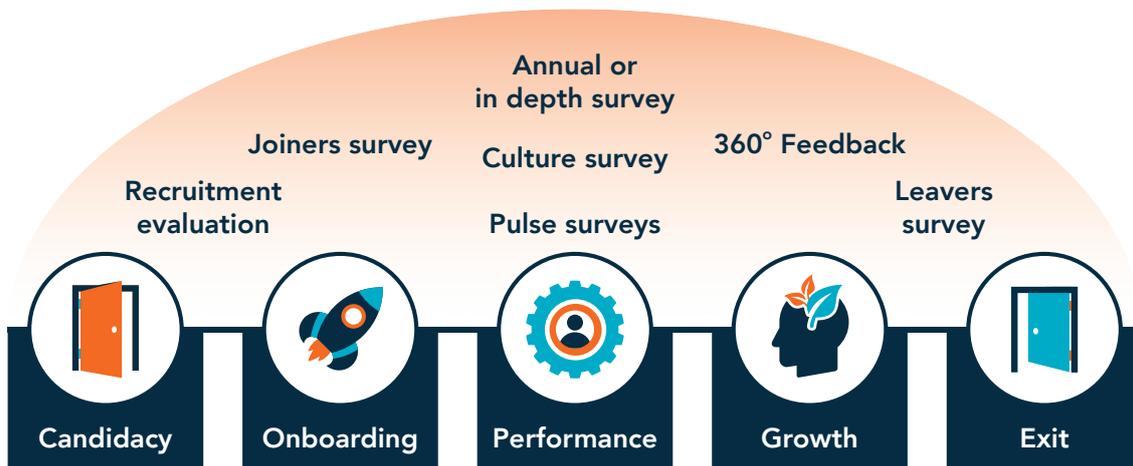


A quick Google will tell you that we are all talking about Employee Experience (EX) – the ‘sum of impressions at all touchpoints throughout the employee lifecycle’ which we have talked about in our [blog](#).

The majority of CEOs cited in the [Worldcom report](#) revealed that they need to increase focus on attracting and retaining employees in 2018. So EX isn't just a HR fad, but a strategic issue that's critical to business performance.

Improving EX is the means to achieving employee engagement and therefore intention to stay and discretionary effort. The majority of organisations take employee engagement seriously, moving to lean, insight rich engagement surveys, and making change happen as a result. We often collect onboarding feedback and exit data to check and improve processes.

However a lot of this data – joiner, leaver, and various other employee survey data sets are often viewed in silos. And that's missing a trick. It's like pass the (employee) parcel. Or Chinese whispers, where each perspective is evaluated in isolation from the next. Wouldn't it be better, in this age of big data, to get a more holistic view?



# First, collect great EX data

If we are going to gain great insights into our overall employee experience, let's start with collecting good quality data.

We've got tons of resources on core employee engagement survey best practice on our website; let's focus below on our guide to best practice Joiners and Leavers surveys.

Find out more about our approach to the core employee engagement survey here:



[How the most engaged organisations do it](#)



[How to create great pulse surveys](#)



# Joiners surveys

When evaluating recruitment and onboarding, you will want to collect objective metrics such as time to hire, cost of hire, acceptance rate, time to get the employee trained and performing, etc.

Joiners surveys will help you collect quant and qual data on the process from the employee's perspective, and should help you understand:

- Practical ways you can improve the process
- Initial employee engagement metrics

## When should you survey?

Evaluation should cover all key aspects of the joining process and can be done once, or at several points, such as:

- **After recruitment:** e.g. evaluate clarity and timeliness of communication about process & start requirements
- **After the first day:** e.g. did they feel welcomed, did they meet their line manager & key people, did they get the resources they need for their job
- **After the first week:** e.g. do they they understand the vision and mission of the organisation and how their role contributes, do they have a clear understanding of their responsibilities
- **After the first month:** e.g. how well trained and enabled they are to do their job, had first formal 121 and feel integrated into the wider team.
  - *It's also a great idea at this point to check if the employer brand communicated at recruitment matches the reality of the brand experience a few weeks in.*

When choosing which point to ask for feedback, remember that waiting too long could risk missing out on valuable insights as the experience won't be fresh in employees' minds. It might be better to survey after each milestone, which will help with accuracy, and sets up a regular process of asking for feedback.

Make sure each time that you acknowledge the results and describe how they will be acted on, to ensure your new employees want to continue to feed back.

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### Keep surveys short and easy

Joiners surveys shouldn't be long so as not to burden new employees. The People Insight model looks like this:

People Insight joiners survey framework			
Stage	Closed questions	Open questions	Key themes from PEARL™ EX model <sup>1</sup>
Post recruitment	7	Reflecting on how the recruitment process could be improved	<b>Theme: Enablement – resources</b> This stage focuses on having the right information at the right time and the right amount in a friendly and accessible way.
End of first day	6		<b>Theme: Enablement – resources and community</b> Making the new starter feel welcomed, orientated, knowing who is who.
End of first week	6		<b>Theme: Purpose – alignment and Leadership – senior leaders</b> Helping the new person understand the organisation's purpose, where they fit and how they contribute
End of first month	6	Reflecting on how the onboarding process could be improved	<b>Theme: Leadership –line manager and first engagement Index</b> Developing a relationship with the line manager, becoming embedded in their role and 'up to speed' with how things are done. First opportunity to evaluate employee engagement – so that you can compare the data later in the lifecycle.

### Tailor your questions to your onboarding process

While a framework is a useful starting point for an onboarding survey, try to tailor the questions to reflect how you onboard your employees. The wording should reflect the experience new employees have just been through, otherwise, you won't get the best quality data back.

# Leavers surveys



While you do all you can to retain employees, some will leave – through resignation, retirement or redundancy. You need to be prepared to mitigate the costs of those exits by collecting feedback, whether they were with you for weeks or years.

When just conducting exit interviews, leavers may not be completely frank in a face to face situation. The data from interviews is also harder to process. Whilst of course you aren't going to let a person go without human conversation, an exit survey with consistent questions allows for more honest feedback, and consistent data analysis.

It's vitally important to handle the leaver's experience professionally, showing the individual respect and courtesy – after all, how they talk about the exit will affect your employer brand, and you may want them to come back.

## When to survey

There's a lot to consider here, so your exit survey should be ready to go for you to be able to complete it at any time. You may want to launch the survey within days of an individual making their leaving announcement while it's fresh. Perhaps in more difficult circumstances, the final days of employment might be more appropriate – or even after they have left. Whatever you choose, make sure the leaver knows there won't be any negative consequences for them of giving the most honest feedback possible.

## What to include

The survey should be very closely aligned to a core engagement survey such as PEARL™<sup>2</sup>, which has been finely crafted for actionability, and based on proven methodology. The main difference is it is written in the past tense, and focuses more on reasons for leaving.

This means you can compare engagement and leaver data sets; the key motivations for leaving can be cross checked against the engagement survey to highlight risk areas at earlier stages of the lifecycle.

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People Insight leaver's survey framework	
Theme from PEARL™ EX model <sup>3</sup>	Question themes – worded in the past tense
<b>Purpose</b>	6 questions – alignment and integrity
<b>Enablement</b>	6 questions – resources and community
<b>Autonomy</b>	6 questions- mastery and wellbeing
<b>Reward</b>	6 questions – recognition and growth
<b>Leadership</b>	6 questions – senior leaders and line managers
<b>Engagement Index</b>	4 questions – excluding intention to stay
<b>Open questions</b>	<ul style="list-style-type: none"><li>• Reasons for leaving</li><li>• What changes might have made them decide to stay</li><li>• What would they change about the organisation</li><li>• Would they be willing to return in the future</li></ul>

### Demographics & protected characteristics

Make sure you track demographics (such as length of service, team or division) as part of your exit surveys. Pay particular attention to trends that involve protected characteristics that are protected by law from discrimination such as gender, race, disability or religion. If you notice a disproportionate number of these employees are leaving, it may be an indication of inclusiveness issues that you will want to address.

# Next, bring all your EX data together

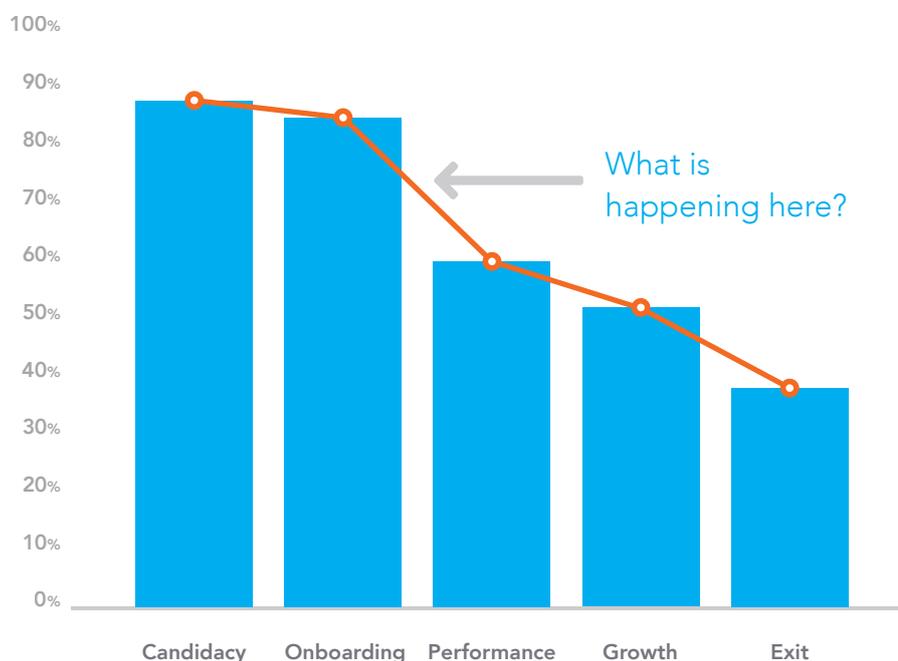
## Why should we bring the data together?

Given the focus on EX we are no longer just looking at engagement at isolated time points. The aim of considering the EX journey is to ensure employees are engaged all along the way from candidacy through onboarding, performance, growth, until we can do no more and they exit.

By mapping out EX at each stage, and **the relationship between stages**, we may be able to anticipate and predict where engagement problems might lie.

For example, we might have been great at developing people during **onboarding** but if this drops off at the next stage, engagement will drop. If we are tracking this, we can adapt - targeting line management & career development programmes accordingly.

### Employee perceptions of opportunities for career development



If our **leavers** data shows a key driver for exit is lack of recognition or support, we can track how we perform on these themes earlier in the lifecycle, and make changes before it is too late.

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So how do we actually bring all our EX data together?

### 1. First use a model, or framework for EX

With all the feedback we collect from employees, the fundamental strategic issue we are trying to understand is;

*Given your experience of the organisation, how likely are you to be engaged;  
to perform and stay?*

Whether the feedback is about **general experience** – employees' overall impression measured by engagement surveys, or **specific experience** of a recent intervention – induction, training, a change programme or a development workshop etc., all the data contributes to the same deeper purpose.

Given this, Josh Bersin<sup>4</sup> talks about the first step as **establishing an overall model** for measuring EX. The model provides the **framework** and **themes** within which EX questionnaires can be developed.

Importantly, using one overall framework means you can compare themes between datasets. You also know you are using a **methodology** designed to evaluate experience for the purpose of engagement.

**The PEARL™ model** includes all aspects of EX that drive engagement, so you can use it through the EX lifecycle to help you understand and adjust your employees' experience accordingly.

The PEARL™ model is made up of 5 themes that are proven to drive employee engagement:

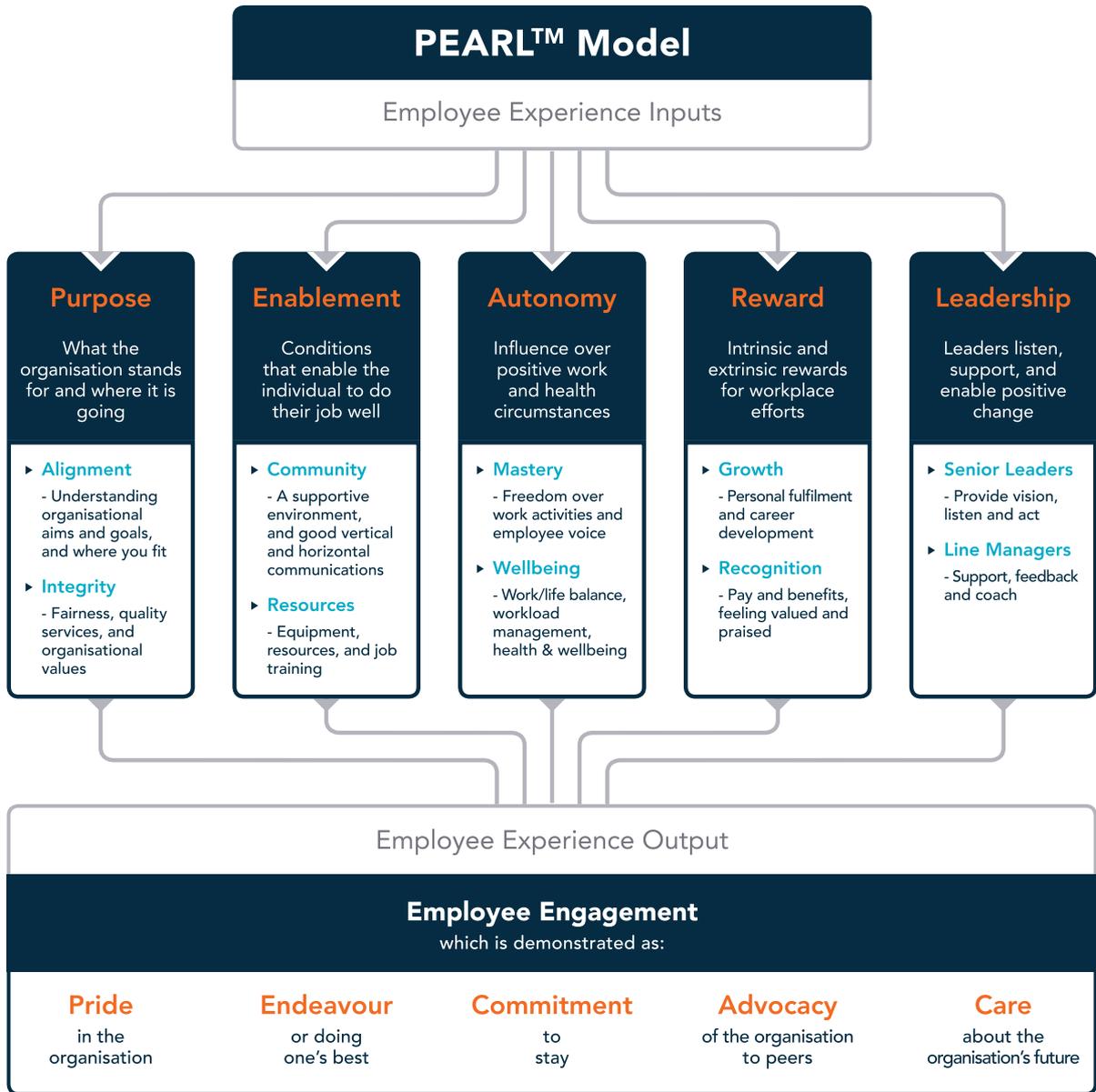
- Purpose
- Enablement
- Autonomy
- Reward
- Leadership

Each of these are underpinned by 2 key employee experience factors, e.g. 'Purpose' is made up of:

- **Alignment** – Understanding the organisation's aims and how I help achieve them
- **Integrity** – The organisation is fair with a purpose I can get behind

This results in a question set based on robust research, covering the full employee experience. It allows sophisticated analyses and provides granularity for action recommendations.

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An example of using the themes to evaluate EX at different points in the employee lifecycle might look like this table below. You can read more about the PEARL™ model [here](#).

People Insight joiners survey framework			
Theme from PEARL™ ↓	Joiners survey 1 month in	Employee engagement survey	Leaver's survey
<b>Purpose</b>	How my role contributes to organisational success has been explained to me	I know how the work I do helps my organisation to achieve its aims	I know how the work I was doing helped my organisation to achieve its aims
<b>Enablement</b>	So far, people have helped and supported me	People help and support each other here	People helped and supported each other here
<b>Autonomy</b>	I think this job is going to make the best use of the skills and abilities that I have	My job makes the best use of the skills and abilities that I have	My job made the best use of the skills and abilities that I have
<b>Reward</b>	So far, I've received thanks or praise	I regularly receive thanks or praise for doing good work	I regularly received thanks or praise for doing good work
<b>Leadership</b>	So far, my manager has treated me fairly and with respect	My manager treats me fairly and with respect	My manager treated me fairly and with respect

So, when constructing your surveys – whether it's to evaluate recruitment, onboarding, training, culture, exit or broader engagement, you can start with PEARL™ for structure. The model is flexible enough to for you to ask the right questions at each stage under a uniting theme.

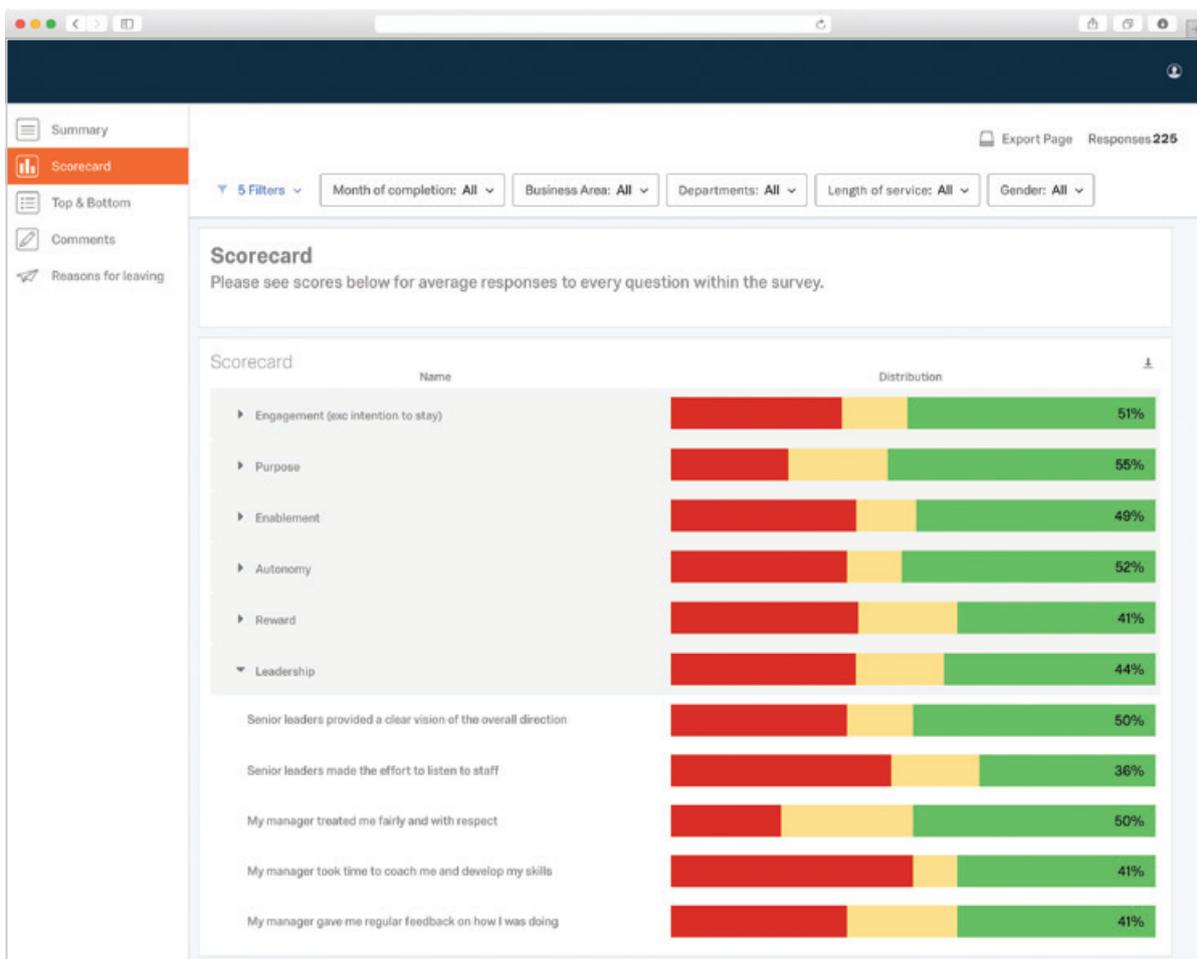
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## 2. A platform for data reporting & analysis

To support your analysis, of course you need all your data in one place. If you run all your employee surveys through one platform, your results dashboard should allow you to compare data sets and themes. That means you can track your EX objectives throughout the employee lifecycle. For example, you can spot any 'danger signs' of early disengagement that you know from exit data makes people likely to leave; e.g. low sense of community & support, or line management that doesn't meet expectations.

It should be easy in your dashboard to switch between datasets, to compare results and see the trending themes.

### Leaver's survey online dashboard



The above example shows results of a leavers survey on an online dashboard. Results are grouped into PEARL™ themes, with each theme broken down into questions. **To see the full functionality & features of our joiners & leavers dashboards, contact us at [enquiry@peopleinsight.co.uk](mailto:enquiry@peopleinsight.co.uk)**

# Conclusion



If we are going to do a great job of tracking and improving EX, we should be starting by collecting excellent quality data from employees at all appropriate touchpoints in the lifecycle.

According to ACAS, it costs £30,000 to replace an employee - and the majority of this expense is the time it takes to get a new person up to speed.

If we use a global EX framework and a comprehensive data platform, not only can we see all the data in one place, but we can map out the experience and anticipate and predict problems before they happen. This should help us in our ongoing aim of retaining the best people, and reducing the turnover costs.

## We'd love to talk

To find out more about how People Insight can help you evaluate EX with joiners, leavers, employee engagement and many other survey types, contact us at:

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