



The Training Registry Guide To Surveys and Assessments

By David Snyder, CEO
Snyder Inc. and
Richard Boren, Founder
The Training Registry

www.mindread.net

www.trainingregistry.com

The Training Registry: 919.847.0331

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Introduction

Many companies are finding that online surveys and assessments are extremely useful and cost effective. Surveys and assessments done online help companies gather information fast, and compared to the pen and paper surveys of yesterday, the difficulties of administering surveys and assessments have diminished considerably.

Online assessments and surveys, some of the most popular of which are the multi-rater (such as “360”), are enormously valuable for the richness of the organizational insight they provide. However, not all companies use surveys and other employee assessments as effectively as they could. This paper will provide an overview of assessments and surveys and attempt to answer some of the most common questions related to their use.

Definitions:

Survey--A survey is a simple, straightforward instrument that collects responses from people and then presents the data in a simple format, such as percentages and averages. Companies use surveys, for example when they want to find out what their customers or team members feel about certain issues. The focus is typically on the aggregated results rather than on any one particular respondent.

Example:

Dear Team Member/Customer

	Poor	Fair	Avg.	Good	Exc.
Do you think our company has a reputation for customer service excellence?	1	2	3	4	5

If you gave such a survey to 100 or 1000 people, and the average score was 3 (mediocre), then you could assume that your company did not have the reputation for excellence that you would desire for it to have, in the best of circumstances. (Most people would like to have such an average to be at least 4, which commonly signifies “good” on a 5 pt. scale, otherwise known as a Leichart scale.

1. An **Organizational Survey** or “**Organizational 360**” surveys how an entire department, team or company would rate the **company** itself, or the **department** itself, or even the **team** itself on some issue of concern.

The first example given in this paper was an example of question that might appear on an Organizational Survey:

Dear Team Member/Customer

	Poor	Fair	Avg.	Good	Exc.
Do you think our company has a reputation for customer service excellence?	1	2	3	4	5

What is the use of survey data?

Most of the time, companies use survey data to determine what course of action they need to take to improve their service or reputation.

In the case cited above, the survey results would suggest the company may want to conduct customer service training.

Other actions taken by a company as a result of survey data might include:

A. Changes in organizational structure

B. Implementation of incentives for better customer service performance

C. Counseling/coaching employees

D. More careful screening (assessments) during the hiring process

Caution:

The Training Registry and Snyder Inc. caution companies against using generic or “boilerplate” surveys.

In general, surveys are not worth the paper they are printed on if they are not carefully thought through.

The most important part of the administration of any survey or assessment is the phase when the company sits down with appropriate team members or a consultant and carefully designs the exact questions that will be used in a survey or assessment.

For more information on this phase of the process, feel free to contact the Training Registry for assistance at 919.847.0331.

Unlike some other companies, which offer generic 360 instruments, **The Training Registry** and **Snyder Inc.** help organizations to create truly customized **online assessments** that measure attributes and performance indicators that are important to the individual organization. A critically acclaimed management author (*How to Mind Read Your Customers*, 2001, AMACOM Books), Snyder also prepares personalized reports explaining all findings in solutions-oriented language that companies and individuals can readily understand.

Assessments

Assessments differ from surveys in that they are more complex and are designed to measure traits or qualities or skills that are important to the company.

An assessment is usually designed to screen candidates for a job, or to assess whether employees have the skills, attitudes, aptitudes and character traits that are needed for continued success in a particular job.

As mentioned, The Training Registry Founder Richard Boren has teamed up with David Snyder, to help provide companies with assistance in developing assessments and surveys that will address the issues that companies want to have addressed.

As with surveys, assessments are of no value unless they address the questions and concerns that a company truly needs to have evaluated and if there is scientific logic behind the questions.

An assessment generally seeks to **measure** a personal characteristic or attribute--such as a skill, a knowledge base, an attitude, or a list of character traits or competencies that may be needed for a particular job.

There are 2 types of assessments

1. Self/Individual Assessments

Following is a question that may be asked of sales person, for example, if a company were attempting to assess **sales knowledge**:

Success in Sales Is:

- A. 90 percent relationship building and 10 percent financial skill.
- B. 50 percent relationship building and 50 percent financial skill.
- C. 90 percent financial skill and 10 percent relationship building.
- D. 60 percent financial skill and 40 percent relationship building.

(The preferred answer, according to many sales experts, is A. So by using this assessment, the company can ascertain whether the candidate taking this assessment has real-world knowledge of the sales profession.)

2. Multi-rater Assessment

A multi-rater assessment is an assessment that is offered to numerous people to get their combined or “averaged” opinions on a series of questions.

2. The most common type of multi-rater assessment is a “360” assessment. It is called 360 assessment because it provides a complete “circle” of opinion from many people. An Individual 360 might measure how a group of colleagues rate one of their fellow co-workers on a particular aspect of his/her job or position.

For example, a company might be interested in knowing what kind of reputation John Doe has for customer service.

So they may give an online assessment to a group of John's co-workers and ask a number of questions like this:

Please rate your colleague in the following areas:

1.	Customer service excellence	Poor	Fair	Avg.	Good	Exc.
		1	2	3	4	5

Obviously if the average (or "360") score from John Doe's co-workers came back at "2," (Fair) then it may be safe to say that John Doe needs customer service training or coaching in order to improve his skills. Or, John may need a conversation with his manager to see if anything is troubling him and causing him to lose concern for his customers and his customer service skills.

Summary on 360s:

To summarize, a 360 Degree Assessment is an established tool that assists individuals in leadership positions to evaluate themselves and others by receiving feedback from a variety of sources with whom they and their employees interact. Among those typically providing feedback are self, peers, direct report employees and supervisors. This assessment method provides the person being assessed with a more complete perspective of work team interactions in order to develop a personal educational growth plan. Assessments may also be completed for multiple members of work teams. The process begins with consultation for customized assessment tool development and concludes with analysis of the feedback received.

Reports and Action Plans

The Training Registry and Snyder Inc. can help you design assessments and surveys so that you can use the information to either build or purchase specific reports and action plans based on the data. Following is a fictitious sample overview of a report written for a fictitious company named Universal Health Care (our invention) that used surveys to assess internal customer service objectives.

“Universal Health Care” Survey Overview – A SAMPLE REPORT

Universal General Health Care System asked for an organizational 360 report on a team of 25 people responsible for coordinating and implementing diversity policies and for monitoring the effectiveness of those policies.

To conduct the survey, the executive team met with a consultant and spent a half day deciding which members of four key teams would be involved in the survey, and what questions they would be asked.

It was decided to include people from the following teams:

- Customer service
- Sales and Marketing
- Information Systems
- Senior Management

Purpose of Survey – (SAMPLE)

The purpose of the survey was to see whether there was consensus among the departments on the effectiveness of diversity policy implementation.

It was recognized that the 360 feedback instrument would not give “absolute answers” to any question but only provide talking points and potential discussion areas for improving dialogue and action-planning among the departments. It was understood that the consultant would:

- 1.) Meet with key members of the teams who took the survey to share general findings.
- 2.) Conduct a debriefing session to allow those members to give their own interpretation of those findings.
- 3.) Help facilitate a working session as part of the debriefing in which members would construct a detailed action plan for any necessary changes stemming from the debriefing session.

Initial Findings – (SAMPLE)

Some of the respondents chose the “non-applicable” answer (N/A) answer choice, so there was not a perfect response rate among all participants to the questions. However, there were enough responses to the questions across all departments to draw a fair prediction of strengths and weaknesses in the diversity program.

Initial findings presented to the team in advance of the debriefing meeting were as follows:

- 1. Senior management was much less confident than other teams that strategic diversity workplace plans were properly developed.**
- 2. Senior management's assessment of consistency in diversity planning was lower than they would have considered optimal. (2.6 on a 4 pt. Scale.)**
- 3. Senior management's assessment of the quality of data keeping and projections of workforce composition were lower than they would have considered optimal. (2.4 on a 4 pt. scale.)**
- 4. Senior management's overall assessment of how well diversity issues were resolved at the executive level was lower than expected. (2.2 on a 4 pt. scale.)**
- 5. On many major quality indices regarding diversity management, senior management gave the organization a grade of only C to C+, which most would consider to be unacceptable.**
- 6. On several major quality indices regarding diversity management, the customer service department appeared to feel the organization was doing much better than senior management perceived. In some cases, however, the situation was reversed.**
- 7. Overall, senior management gave a lower level of "importance" to certain issues such as "employee relations" that would seem to be of more importance, especially if diversity management is the goal.**
- 8. It would be important for the teams to meet to resolve and address the significant disparity in perception over diversity management effectiveness among senior managers and the other teams.**

Results of Debriefing – SAMPLE – TO BE FILLED IN BY COMPANY

As a result of the half-day debriefing and planning session, it was decided that the strengths and weaknesses of the organization with regard to diversity planning, implementation and effectiveness were as follows:

Strengths:

- 1.
- 2.
- 3.
- 4.

Weaknesses:

- 1.
- 2.
- 3.
- 4.

Key observations for improvement offered by the team were as follows:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Action Plan – (SAMPLE – TO BE FILLED IN BY COMPANY)

As a result of the discussion detailed above, the department heads decided to take the following steps:

30 Day Plan:

- A.
- B.
- C.

60 Day Plan:

- A.
- B.
- C.

90 Day Plan:

- A.
- B.
- C.

Further responsibilities of the consultant as requested by the organization.

As a result of the action plan they created, the organization requested that the consultant be contracted to assist with the following services:

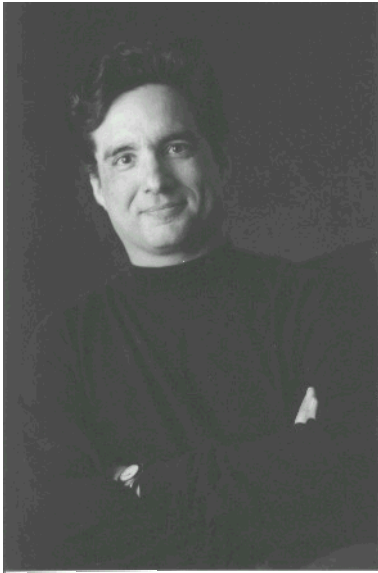
- A.
- B.
- C.

Conclusion

Online surveys and assessments provide a quick and cost effective method for studying customer and team member concerns, as well as hiring, training and development objectives, across a broad range of issues.

To receive any additional information not covered in this brief overview, please feel free to contact Richard Boren, Founder of the Training Registry, at 919.847.0331.

David Snyder Biography



Author of the critically acclaimed book, *How To Mind Read Your Customers*, David Snyder is also Chairman and CEO of Snyder, Inc., and works nationally as performance management and teambuilding expert. (See www.mindread.net.)

Snyder is also Business Development Counsel for Headway Corporate Resources, a leading national staffing and human resources corporation headquartered in New York City, where he helps to design many of the corporation's strategic offerings and recruiting models. (See www.headwaycorp.com.) As a business teams troubleshooter, Snyder has helped corporations to improve their training efforts in the areas of sales, marketing and customer service. He has also helped manufacturers and other organizations to achieve higher productivity by improving performance measurement systems, team communications, and training.

Snyder's book, *How To Mind Read Your Customers* has been praised by corporate leaders for its emphasis on integrity and ethics in business, in addition to its strong focus on behavioral psychology as applied to marketing. *How To Mind Read Your Customers* was listed **First** in *Sales and Marketing Management Magazine's* Best New Business Books for 2001. It is published by AMACOM (American Management Association.)

At Harvard, Mr. Snyder participated in research conducted on brain waves and emotion at the Mind/Body Medical Institute of Harvard Medical School / Beth Israel Deaconess Medical Center and is named as a co-author on findings published in the January 1996 issue of *The Journal of Behavioral Neuroscience*. The Mind/Body Medical Institute is one of the most distinguished institutes in the world for the study of stress and human behavior.

Snyder has also conducted research on the critical thinking styles of students and the issues that impact critical thinking, problem solving and writing abilities not only in the corporate environment but also in the industrial workplace. He has developed a wide range of programs in these areas for colleges, manufacturers and corporations to help improve critical thinking and problem-solving skills.

Tel: 919.510.5443

Cell: 919.920.0551

dsnyder@mindread.net