



Employee lifecycle feedback

Understanding the Moments That Matter Most to Your Employees

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WHAT IS EMPLOYEE LIFECYCLE FEEDBACK?

Employee lifecycle feedback is an approach to monitoring and optimizing the employee experience that involves gathering feedback at different stages in an employee's journey with an organization.

It builds on a traditional census engagement approach to add new, event-specific feedback mechanisms into a program, allowing you to understand the impact of improvements at each stage and how they contribute to the employee experience as a whole.

In a lifecycle program, a census engagement survey - whether run annually, bi-annually or through quarterly pulse surveys - remains the cornerstone of your employee experience efforts. By adding additional feedback mechanisms at the moments that matter most to employees, you can start to focus in on the improvements to make, and where to make them, to have the greatest impact on the employee experience.

WHY LIFECYCLE?

It's widely accepted that an annual engagement survey, while a useful cornerstone of any employee feedback program, is not the 'be all and end all' when it comes to improving the employee experience.

Increasingly, organizations are moving away from this once-a-year snapshot of employee engagement towards a new approach that focuses your resources where they matter most. It concentrates your effort and investment on the moments in an employee's journey that are the most impactful, both for them and for you.

This includes formalized stages like recruitment, training, onboarding and exit as well as more personalized moments, such as when employees return from parental leave, change roles or move location.



The benefits to HR teams and the wider organization include:

- **IMPROVED ACCURACY** - with feedback gathered in the moment, employees are able to give more constructive feedback with the experience still fresh in their minds, rather than having to wait up to 12 months to have their voice heard
- **FASTER IMPROVEMENTS** - with more frequent feedback, you're able to spot issues and act earlier to address potential problems before they spiral out of control
- **MORE EFFICIENT USE OF RESOURCES** - with more frequent, targeted feedback at key milestones, you're able to pinpoint the exact moments where you need to make improvements, allowing HR teams to deploy resources efficiently to target a specific problem at a specific stage in the lifecycle
- **PERSONALIZED EXPERIENCES** - by tying feedback to specific milestones like onboarding, recruitment, promotion, etc., you can move away from a 'broad brush' approach to engagement and start to personalize the experience for employees based on where they are in their journey within the organization

- **GREATER BUSINESS IMPACT** - traditional approaches to engagement have been difficult to tie back to hard business metrics like revenue or profit. Lifecycle feedback addresses this by helping you to understand the precise impact of your improvements on KPIs like attrition rate and productivity, and then link those to the metrics that matter most to the organization as a whole

In this guide you'll find out how to design a lifecycle employee experience program with advice on where to start, how to design your question sets and how to bring your data together to drive organizational improvements.



Quick links: What's in this guide?

MEASURING THE MOMENTS THAT MATTER MOST >

Find out how to define the milestones and moments where you should start collecting employee feedback to have the greatest effect on the organization.

MAPPING YOUR KPIs TO THE EMPLOYEE LIFECYCLE >

At each stage in the lifecycle, you'll have different KPIs you're looking to improve. Find out which ones to focus on and how to define your measures for success.

GETTING STARTED: 3 STEPS TO LIFECYCLE MEASUREMENT >

Learn how to design and build your lifecycle measurement process, and then put it into action.

OUR BEST-PRACTICE TIPS FOR LIFECYCLE FEEDBACK >

See our convenient, at-a-glance guide to gathering data on each stage of the employee lifecycle.

TURNING DATA INTO IMPROVEMENTS >

Find out how you can turn your data into genuine insights and actions that will impact the employee experience.



Measuring the moments that matter most

According to Deloitte's Global Human Capital Trends report, nearly 80% of executives rated employee experience as important, but only 22% judged their own companies as excellent at building a differentiated employee experience.

HOW MANY MOMENTS TRULY MATTER?

A critical starting point to successfully implementing employee lifecycle feedback is defining the moments that matter to your employees.

It's a careful balance - while we know a survey sent once a year isn't enough to deliver results, too many employee surveys can have an adverse effect, creating other issues like survey fatigue and unactionable data.

Over-surveying is a common fear, and our latest research shows employees are happy to be asked for feedback more frequently, with monthly and quarterly feedback the two most popular cadences among employees.

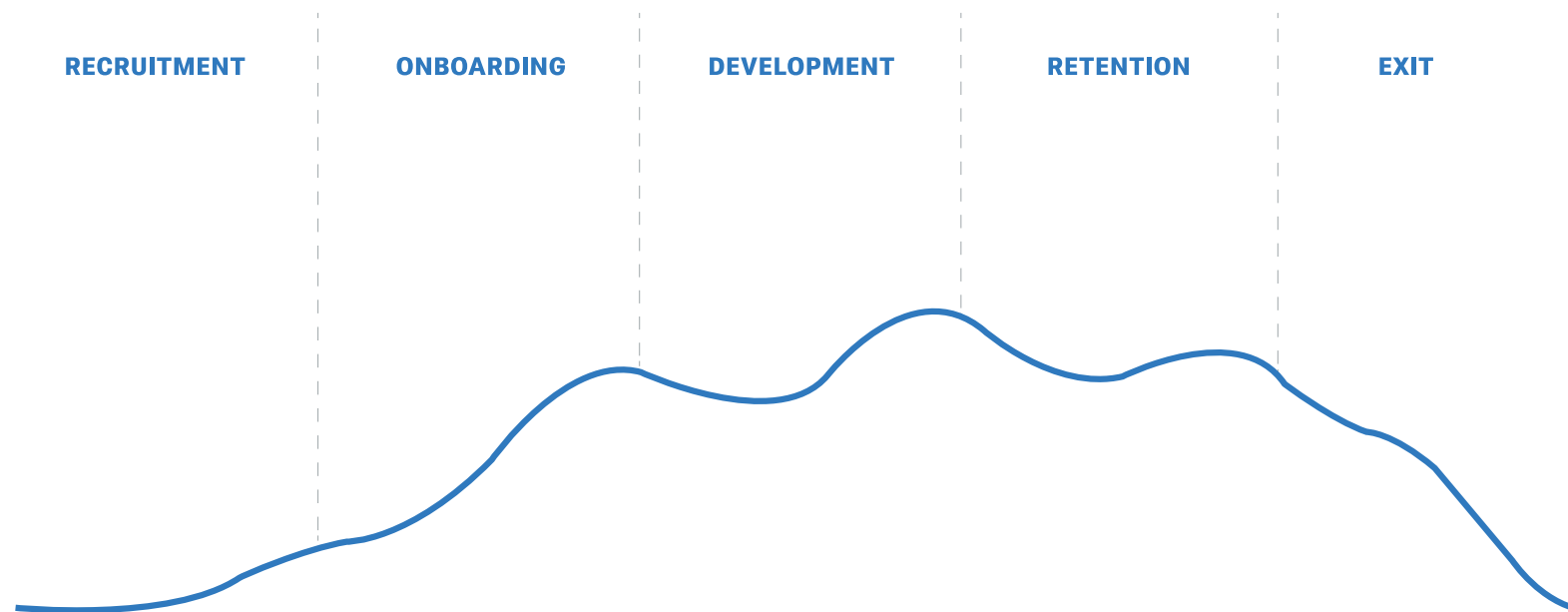
There's no hard-and-fast rule on how often you need to ask for feedback, but if you ask for feedback at moments that maximize value to the organization AND matter to your employees, we've found employees prefer to provide feedback more frequently.



MAPPING FEEDBACK TO THE EMPLOYEE LIFECYCLE

The five-stage employee lifecycle model is the most accepted journey map, charting the moments most critical to employees throughout their time with an organization.

We know that each one impacts the engagement of employees and the value they deliver back to their employer. These are also points at which organizations make significant investments of time and money, so it's important to know if you are getting these moments right.





CUSTOMIZING THE LIFECYCLE TO YOUR ORGANIZATION

While the five lifecycle moments are typical for most companies, your organization may also have unique moments that matter in the employee journey. For example, if relocation is a frequent requirement for your staff, it may be worth monitoring experiences and optimizing your approach to make sure the company is providing the best relocation experience possible.

PERSONALIZING THE LIFECYCLE FOR YOUR STAFF

As well as the moments controlled by the organization such as onboarding, training, relocation, etc., there are plenty of moments outside of your control that can have a significant impact on the experience for your employees.

Take parental leave for example - a uniquely personal experience to an employee that's entirely out of the organisation's control. However, managing how the organization reacts to it to improve the experience before they leave and when they return, is well within the organization's control and can have a positive impact on that employee's experience.

Identifying those more personalized moments and what you can do to improve them provides additional touchpoints that can help provide a more holistic view of the experience.

HOW TO CHOOSE YOUR MOMENTS THAT MATTER

To define the moments that matter within your organization, start with the basic phases of the employee journey and then add any additional experiences you want to measure using a simple A-B-C rule:

Moments that matter are

ACTIONABLE

As well as being important to the employee, the moment must be something the organization can influence and change through its actions.

BUSINESS-RELEVANT

Choose moments that are linked to KPIs and initiative improvement – i.e., those that offer ROI to the organization.

COMMON

Select experiences that are generally shared or commonly encountered across your employee base, or by major groups within it..



As well as meeting the 3 simple rules above, there are common events within any organization which act as useful waypoints for when to gather feedback from your employees:

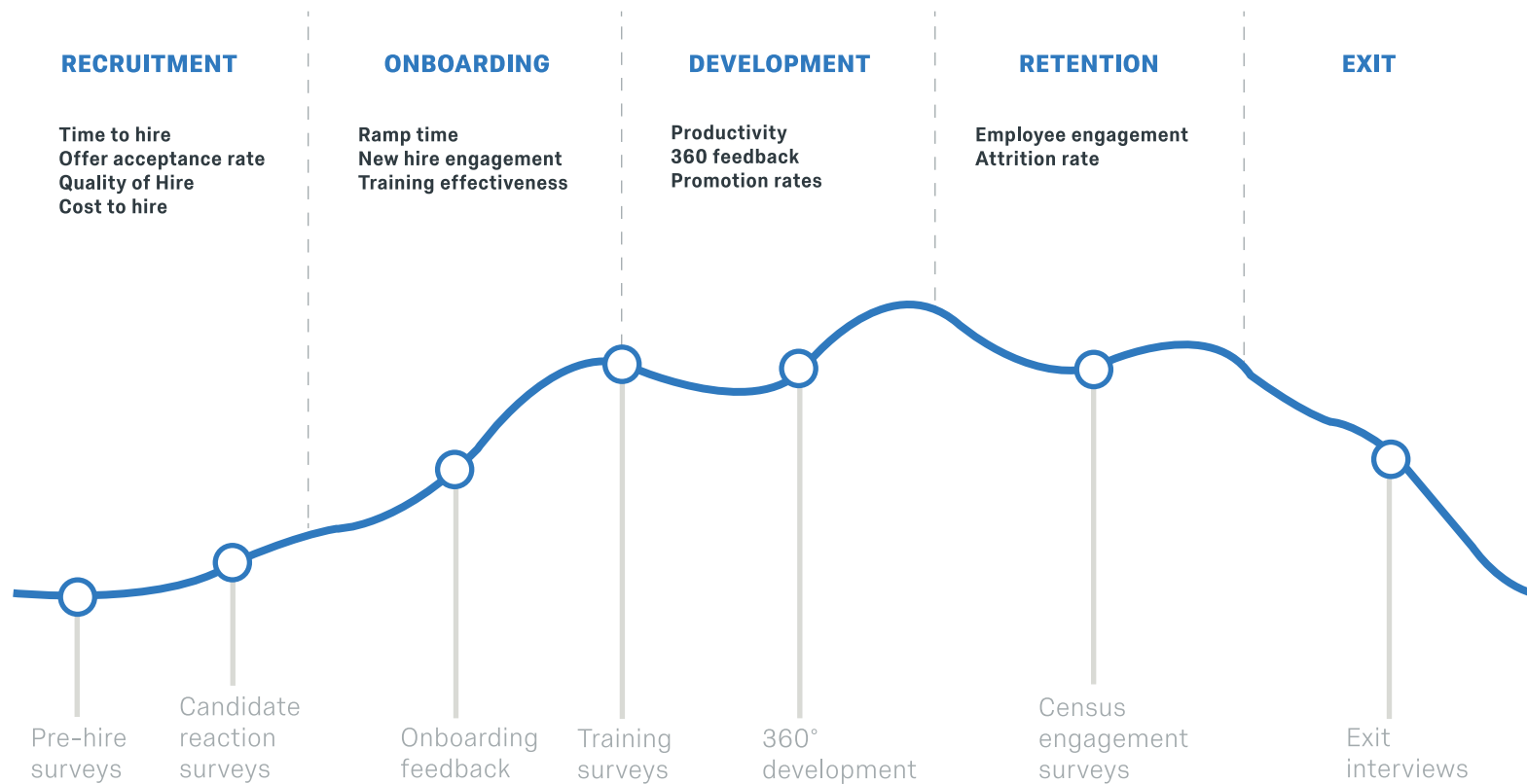
- **CHANGE** - at natural transition points like entry, exit or location change
- **RECOGNITION** - at performance review stages, such as quarterly reviews
- **MAJOR MILESTONES OR ACHIEVEMENTS** - for example, promotions, role changes and work anniversaries
- **KEY CUSTOMER INTERSECTIONS OR MILESTONES** - for example, after signing a new customer, during quarterly customer account reviews or alongside your [customer feedback program](#)
- **EMOTION** - in situations that could involve heightened emotion or unique personal needs (e.g., resolving a workplace problem or returning from parental leave)



Mapping KPIs to the employee lifecycle

A major benefit of lifecycle feedback is the ability to tie improvements in the employee experience back to KPIs that demonstrate the impact on the business as a whole.

At each stage in the lifecycle, there are established KPIs for the HR, training and development, onboarding and recruitment teams. Collecting feedback at each of these key stages will help you demonstrate how your improvements are impacting your core KPIs.





While each stage has its own KPIs, they're all interdependent, with each KPI having an impact on one another across the whole lifecycle. Viewing these KPIs in silos risks underestimating their impact on the organization's core operational metrics. But by taking a holistic view of the combined dataset, HR teams can start to identify what actions, at what stages in the lifecycle, will have the biggest impact on the business as a whole.

For example, ramp time obviously has an impact beyond onboarding. A shortened ramp time will not only impact productivity, but will affect engagement too. Similarly, an increase in employee engagement has been shown to reduce attrition and increase productivity.

WHY MEASURE EXIT DATA?

At the 'Exit' stage, the goal may be to gather data and feedback on what impacts KPIs in the other stages, rather than to attach a specific KPI to the exit process. For example, by understanding why people are leaving the organization, you can intervene more effectively at the retention stage to reduce your attrition rate.

So while the exit stage itself has no specific KPIs attached, it is an essential touchpoint that informs your actions and improvements at other stages in the lifecycle.



GETTING STARTED

3 Steps to designing & implementing your lifecycle program

STEP 1 BUILD THE FOUNDATION FOR SUCCESS

To be successful, every employee feedback program needs to get 4 key pillars right - so start by making sure you have the following foundations in place:

- **EXECUTIVE ALIGNMENT AND CULTURE** - establish a culture of feedback and transparency, driven by executive leaders who see feedback as an integral driver of employee experience and organizational improvement.
- **EXPERIENCE FEEDBACK SYSTEMS** - you'll need to have the tools, tech and the resources to be able to gather and analyze feedback at every stage in the lifecycle.
- **ENGAGEMENT AND ACCOUNTABILITY** - empower managers and leaders to take action by giving them to tools to visualize and analyze the data and establish action plans for improvement.
- **EXPANSION AND SCALE** - make sure your tech set-up is designed to scale. You'll likely start out small and grow your program over time. If it's set up right to start with, scaling will be easy. If it's not, there could be a lot more work down the road.

STEP 2 IDENTIFY THE FUTURE STATE

Effective lifecycle measurement is always targeted at a desired future state – i.e., it is goal-driven. So when you're in the early stages of planning, make sure you've outlined the current state of various stages of the employee lifecycle, and at a minimum, started to discuss the optimal direction for their future. Even better, set clear goals for where you want each stage to be.

This step ensures the team's alignment on the 'why' behind the measurements you're putting in place and will help you:

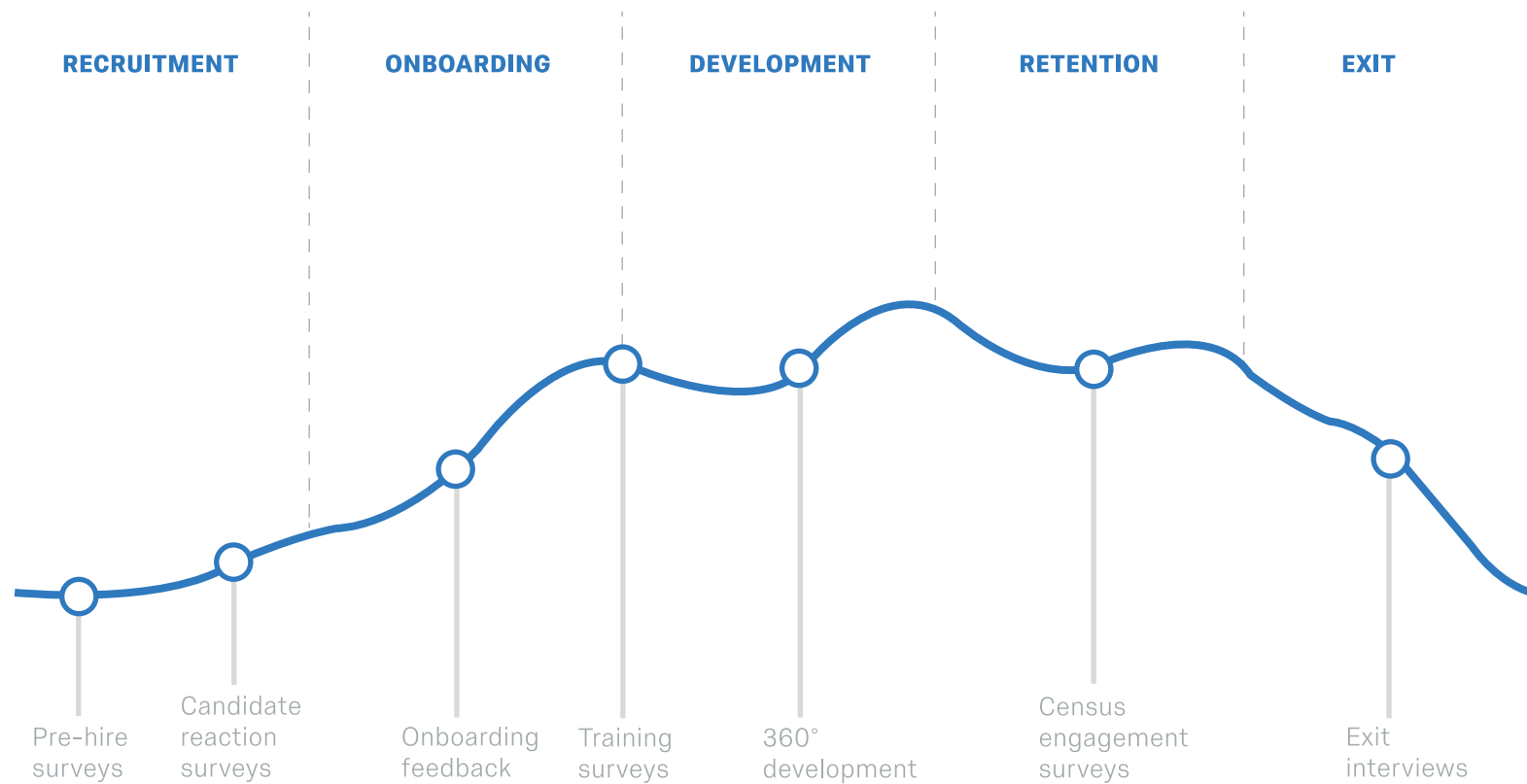
- **DETERMINE THE QUESTIONS OR TOPIC AREAS** - are most important to include in each survey mechanism
- **ALIGN THE TEAM** - to common goals
- **ENSURE MEASUREMENT IS TARGETED ON DRIVING REAL CHANGE** - and isn't just measurement for measurement's sake

Once your lifecycle program is in place, revisiting these initial goals should help make sure any changes to your measurements – or actions taken as a result of them – are moving you in the right direction. When used in combination with a focus on KPIs, the future state becomes the guiding light for your program.



STEP 3 PUTTING YOUR PLAN INTO ACTION

You can now start to launch your different feedback mechanisms for each stage.





Before you go live, here are a few things to think about:

- **HOW OFTEN TO MEASURE** - while many of the lifecycle stages will be triggered automatically by an event (e.g., onboarding or training surveys) through your HRIS, where you're including census engagement surveys into your program, you'll still need to decide on a cadence, whether that's annual, bi-annual or a [quarterly pulse survey](#).
- **WHO YOU'LL ASK FOR FEEDBACK** - will you ask all your employees for feedback or will you use sampling? Note that for sampling to be effective, you'll need at least 5,000 employees in your organization - [see our guide to whether sampling is right for you](#).
- **YOUR MEASUREMENT PRIORITIES** - it's important to plan carefully to avoid implementing ineffective, or worse, cumbersome and disengaging employee feedback mechanisms. Prioritize the measurements that can provide the greatest ROI to the organization or address the most significant pain points for your employees. For example, if employee turnover is low, investing in exit measurement first does not address a need of the business. However, if the organization has recently invested in a new candidate management system, there's a clear need to assess its impact on the candidate experience.

- **CHOOSE YOUR STARTING POINT AND ROLL OUT GRADUALLY** -

for many good reasons, most organizations won't be ready to implement a full lifecycle measurement program straight away. It is important to calibrate the introduction of your program relative to the current feedback culture of the organization, the readiness for change, and the resources available to support a lifecycle program. Onboarding is often a great place to start – the strength of your onboarding program sets the initial tone for an employee's experience as a part of your organization – and a great onboarding experience helps employees adjust and learn their new role efficiently so they can quickly deliver value back to organization. Automating onboarding surveys at key milestones during the process allows you to understand the effectiveness of your program and diagnose any unmet needs or risks pertaining to new employees.

NEED SOME HELP PLANNING YOUR LIFECYCLE STRATEGY?

Drop us an email at sales@qualtrics.com or [book a demo](#) to walk through the process with one of our experts.



Best-practice tips for lifecycle employee feedback

With your lifecycle program ready to launch, make sure you follow these best-practice tips to ensure your survey is designed to get you the most useful data.

	CANDIDATE REACTION SURVEYS	ONBOARDING SURVEYS	POST-TRAINING EVALUATION	EXIT SURVEYS
WHY RUN THESE SURVEYS?	<ul style="list-style-type: none"> Improve attraction and selection processes Improve offer acceptance rates Identify and eliminate legal and compliance risks Improve the candidate experience 	<ul style="list-style-type: none"> Reduce time and costs associated with onboarding new hires Reduce the amount of time it takes to ramp new hires Ensure a consistent and effective onboarding process Positively influence early engagement levels 	<ul style="list-style-type: none"> Improve training participation and completion rates Optimize your training and development offering (i.e., expand effective and remove ineffective learning initiatives) Improve learning, transfer of training and ultimately job performance 	<ul style="list-style-type: none"> Reduce unwanted turnover rates Understand reasons for employees voluntarily leaving the company Identify which events in the employee lifecycle have the biggest impact on turnover
BEST-PRACTICE TIPS	<ul style="list-style-type: none"> Include a single survey at the end of the pre-hire process Survey both passing and failing candidates once a final decision is made Only survey candidates who have had meaningful exposure to the hiring process (e.g., at least 1 interview) Tailor questions to your specific pre-hire process 	<ul style="list-style-type: none"> Consider doing only 'end of onboarding' vs. 'ongoing onboarding' measurement to avoid survey fatigue Survey employees immediately after the onboarding process Make sure these surveys are confidential Tailor questions to your process 	<ul style="list-style-type: none"> Implement Level 1 Evaluations to measure employee reaction to training Implement Level 2 Evaluations to measure learning and mastery immediately after training Implement Level 3 Evaluations to measure transfer of training several months after course 	<ul style="list-style-type: none"> Survey exiting employees immediately when they provide notice Embed the exit survey into a formal off-boarding process to drive response rates Quantify reasons for leaving by avoiding relying on only text responses Run driver analyses to understand what drives final employee perception of the organization



Using your results to drive improvements

The final, but crucial, step in any lifecycle program is to turn your feedback into insights and actions that drive improvements across the organization. Here's how to follow through on your measurements to drive improvements:

MAXIMIZE YOUR INSIGHTS BY CONNECTING LIFECYCLE FEEDBACK

Combining the feedback you've gathered across key moments in the employee journey can provide powerful insights that can't be attained through single-measurement approaches. Here's how to maximize your organization's ROI on lifecycle measurement:

- **GENERATE HYPOTHESES ABOUT RELATIONSHIPS BEFORE MEASURING AND ANALYZING** - start off with an assumption or a theory about what drives the data you're measuring, then see if you can prove or disprove it with results.
- **CLEARLY DEFINE THE UNIT OF ANALYSIS** - individual-level analysis generally provides the greatest confidence in results, but in the case of engagement surveys or other confidential employee feedback, this isn't appropriate. Instead, use the lowest-level or most localized unit of analysis (such as team/work group, location, or business unit).
- **MAKE SURE UNITS OF MEASUREMENT ARE CONSISTENT** - To link your data, the unit of analysis must be consistent across what you're measuring and how your predictions are quantified. For example, if you're looking for a link between employee engagement and onboarding, if the onboarding experience is scored out of 10, you will need to make sure the employee engagement measure is also expressed numerically, rather than as a Likert scale (e.g., very satisfied / somewhat satisfied / neither satisfied nor dissatisfied/ somewhat dissatisfied / very dissatisfied).
- **MAKE SURE PREDICTOR VARIABLES COME BEFORE OUTCOME VARIABLES** - to draw predictive conclusions, the predictor variables need to be measured before the outcome variables. For example, if your hypothesis is that higher wages predict higher employee engagement, you need to record the increase in salary before measuring engagement in order to show a relationship.
- **AVOID 'ANALYSIS PARALYSIS'** - slicing and dicing the data by different variables or at lower levels doesn't always provide additional clarity. It is important to take a step back and ensure the analysis you are conducting is still in line with the hypotheses you want to test and likely to deliver actionable data.



GENERATE ACTIONABLE INSIGHTS

Collecting data is an essential part of your program, but it's not the whole story. It's equally essential to be able to interpret and act on the data appropriately. If your data isn't translated into outcomes, you risk not only a wasted investment, but skepticism from staff members and ultimately, a detriment to your employee experience – the opposite of what was intended!

Turning data into results begins with the nature of the data itself. It needs to be actionable, which depends on the kind of questions you ask, who you ask them of, and the formats you use to collect and aggregate the feedback.

Actionable data is:

- Honest and unbiased – staff feel comfortable expressing themselves openly
- Representative of the workforce or population – either via a full population survey or a carefully calculated sample
- Collected using items/questions that are targeted and direct
- Specific, in the case of open-ended questions
- Timely – i.e., collected via feedback channels that are as close to real-time as possible
- Appropriately accessed by the right stakeholders

- Collected in a format that can be aggregated and broken down for analysis

With actionable data in place, you then need to decide who will take action and how the flow from data to results will be sustained over time. Here's how to make sure action planning becomes part of the rhythm of your organization:

- Senior leaders set the example – if leadership isn't demonstrably on board, it's unlikely the workforce will be
- Managers participate in the process of selecting action plans – it's not just a top-down mandate that forces managers to take certain actions
- All employees, even individual contributors, are encouraged to create their own personal action plans
- The process attracts influential champions at different levels and internal case studies are shared
- The process owner / HR communicates and advertises the results of action plans throughout the organization
- There is follow-up with employees (e.g., follow-up pulse surveys or face-to-face meetings with managers)
- Participation in the process is used in action planning as a meaningful data point – managers who take communication and action seriously are probably some of your better natural leaders

For more details, [see our guide to actionable data.](#)



TAKE STEPS TO PREVENT SURVEY FATIGUE

For your employees, taking surveys is work. And in many organizations, workloads are already heavy enough that an additional task is stressful. While your organization as a whole may be convinced of the value of more frequent surveying, your employees still need certain considerations to be met to conserve their time and energy.

Otherwise, there's a risk they will become burned out on surveys and unwilling to participate effectively in the feedback program. Here are our tips for preventing [survey fatigue](#):

- **MAKE FREQUENT SURVEYS SHORTER** - The more often your surveys run, the fewer items they should have. For example, a weekly survey should have a maximum of 10 questions, a monthly one could have 10-15 questions, and a quarterly survey could have 15-20. If you run your survey twice a year, up to 30 questions may be acceptable, although results will vary between organizations.
- **AVOID MANDATORY QUESTIONS** - Forcing respondents to answer can cause frustration and even prompt survey abandonment.
- **LIMIT QUESTION SCOPE** - Be as specific as possible in your question wording to minimize the effort from staff. One way to do this is to limit the time-scale for their answers. For example, on a quarterly survey, ask staff to consider your question in the context of the last 3 months only.
- **LINK SURVEYS TO BUSINESS MILESTONES** - Try aligning your survey with regular events like quarterly reviews or reports, so that it's viewed as a routine rather than a disruption.
- **COMMUNICATE THE PURPOSE AND THE OUTCOMES** - Clearly state why the survey is being run, and what you'll do with the findings. Likewise when actions or decisions are taken, explain how survey responses contributed. This will help reinforce the value of the survey and confirm that staff opinions matter in how the business is run.



Turn employees into **AMBASSADORS**

Get powerful insights at every stage of the employee lifecycle and empower managers throughout the organization to take actions to increase engagement, productivity and retention.

- Automate feedback at every moment that matters
- Share team-level insights automatically with managers
- Set action plans and monitor improvements
- Tie your HR initiatives to key business metrics

