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Pulse Surveys: An Overview

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Abstract

This paper examines the concept and characteristics of “pulse” surveys. We provide an initial conceptual framework for examining pulse surveys based upon a review of published survey literature, how pulse surveys are currently represented by survey suppliers, and the authors’ own practice experiences. The use of the term varies and there does not appear to be one well-defined and generally-accepted pulse survey type. The authors focus on defining characteristics that appear to result in labeling a survey as a “pulse.” The characteristics are grouped into three major facets of surveys: Purpose (e.g., monitoring specific issues), content (e.g., shorter vs. longer, timely topics), and method such as administration frequency and administration methods (e.g., sample vs. census, Web vs. paper).

Pulse Surveys: An Overview

Introduction

Industrial/Organizational psychology has a long and rich history of creating and using surveys for organizational assessment and change (e.g., see Kraut, 1996). Certainly, organizational surveys are not new, but researchers and practitioners continue to renew them by adapting survey purpose, content and methods to meet changing organizational needs and wants (Kraut & Saari, 1999). For instance, the 1990s saw a boom in the development and use of survey technology applied to performance feedback in the form of “360-feedback” or “multi-source feedback” surveys (see Hedge, Borman, and Birkeland’s chapter on the history of multi-source feedback in Bracken, Timmreck and Church, 2001). Another set of adaptations/innovations are the efforts that have been made to link employee survey, customer survey and financial data (e.g., Lundby, Fenlason and Magnan, 2001; Wiley 1996). Perhaps the most powerful adaptations of organizational surveys in the last 30 years came with the advent of the internet and the development and deployment of web-based surveys. Where in the past it was uncommon and “cutting edge” to administer one’s organizational survey over the internet; it is now commonplace.

This paper is the result of the authors’ interest in more formally exploring another apparent adaptation in organizational surveys; that is, surveys that are labeled as a “pulse.” Although the term “pulse” appears to have increasingly made its way into popular usage, the authors were interested in just how shared and consistent the pulse survey concept might be. In addition we were interested in what the uses, advantages and disadvantages might be.

The Pulse survey concept

A direct approach to defining the “pulse survey” concept

The search for a conceptual definition of pulse surveys began with a review of several well-known and relatively recent survey texts (Kraut, 1996, Church and Waclawski, 1998; Kraut & Saari, 1999, Dillman 1999). A review of the index for each book and a skim of targeted chapters (where one would expect to find such a reference) failed to find “Pulse” surveys referred to by name, or presented as a discretely-defined survey type listed under another name with “pulse” as an alias.

A PsychInfo search across all journals, reports, dissertations, books, and chapters in the database with the keywords – “survey” and/or “pulse” and in all search fields yielded 43 “hits.” However, 42 of these hits were for sources that did not deal with organizational surveys but rather such “off-topic” issues as heart beat, pulses of electricity, project names, etc. The closest hit was for an article that detailed the results of an evaluation study of a national organization that serves children (Betts, Peterson, Marczak & Richmond, 2001). In short, there were no references in the entire PsychInfo database to “pulse surveys” by name that focused on employees in organizations.

An indirect approach to defining the “pulse survey” concept

Failing to find any ready and consistently used definitions in survey texts, major journals, etc., the authors reasoned that another method that could be used to define an emerging concept or term would be to characterize Pulse surveys inductively. That is, to define Pulse surveys by finding similarities in characteristics among a large number of cases. The authors again turned to the internet with the reasoning that because established texts and journals were not mentioning “pulse surveys” that the term might be more current than the publication dates for these sources and thus may be more likely to be found in more recent material on organizational surveys. The authors also reasoned that providers of survey services and software would be likely to include references to “hot” or emerging topics on their websites as part of their marketing strategies or general information about their products and services. Given that the vast majority of survey service providers have a website, we decided to search those sources.

A three-step process was used to identify the pool of cases to examine for similarities and differences. First, based on the authors’ experience and knowledge of the organizational survey field, we assembled a list of known providers of organizational survey services (this resulted in 19 firms, all of whom have websites). Second we conducted an internet search for other firms that provide organizational survey services (this resulted in an additional 13 firms). Third, we conducted an internet search using the key words “pulse” and “survey.” Combing through these latter results we identified an additional eight (8) firms.

We then searched each one of these websites for “pulse” or “pulse survey” looking for pulse surveys to be explicitly identified as a type of survey. Unfortunately we only found 14 of the 40 sites that explicitly mentioned “pulse” surveys. While the sites varied in the degree of definition, we found that in some there was only minimal definition of pulse or that some simply mentioned pulse in passing or as more of a brand name than a fully-fledged concept. Given that the soundness of an inductive approach rests to a large extent on the number of cases one can examine (in order to build up a pattern of consistent responses), the authors made the judgment that this approach would also not be sufficient (at least at this time) for defining pulse surveys.

Possible key characteristics of pulse surveys

Given the lack of positive results on both the direct definitional approach and the indirect/inductive approach the authors chose a third approach. This was to develop a draft list of the likely characteristics that distinguish pulse surveys based on the authors’ consensus. That is, if we are (at least at this time) unable to find conclusive definitions of the pulse concept, then we could at least catalog a number of key characteristics that appear to be involved with this type of survey. Once cataloged, these characteristics could be applied in the future to continue to define and discuss the concept of pulse surveys.

In order to assemble a draft of characteristics that might help define pulse surveys, the authors drew upon three sources: 1 – Established schemes for classifying surveys. 2 –

Our practice experience and knowledge of client needs and wants, and 3 – Our knowledge of how other practitioners represent pulse surveys.

As a broad overall organizing structure, the authors chose to use survey purpose, content and methods. These are three areas that Kraut (1996 p. 23) originally defined and that Kraut and Saari (1999) had identified as areas that practitioners were adapting surveys to change with the times. These areas are also covered by Church and Waclawski (1998, p. 12).

Purpose

Kraut (1996) noted two broad purposes for surveys (assessment and organizational change) and eight specific purposes:

1. To pinpoint areas of concern
2. To observe long-term trends
3. To monitor program impact
4. To provide input for future decisions
5. To add a communication channel
6. To perform organizational behavior research
7. To assist organizational change and improvement
8. To provide symbolic communication

-- Kraut (1996, p. 4 – 11).

We reviewed these purposes and also examined our own practice experience (e.g., contacts with multiple clients, experience within organizations) and reviewed several websites on which “pulse” was mentioned with regard to the stated purpose or use for the pulse survey.

Our resulting draft characteristics in the purpose area are as follows:

- Monitor/evaluate specific program/interventions – One characteristic that appears to be emphasized is that of pulse surveys being targeted in some cases to monitor or evaluate specific programs or interventions. This purpose coincides with Kraut’s (1996) purpose to “Monitor program impact.” For instance, although this type of evaluation can be built into nearly any survey, administration may be too infrequent (every 12 or so months) to provide feedback that can both gauge intervention efficacy and provide for mid-course corrections for on-going programs.

Illustrative quote excerpts:

“... efficiently assess the success of an initiative over time with a pulse/feedback survey ...”¹

“... measure how well a change effort is going and provide advance warning of problems...”²

“...obtain real-time feedback about initiatives and morale...”³

“Evaluate the effectiveness of training interventions.”⁴

- Ensuring accountability – A second purpose (related to the first) is that some uses of pulse surveys seem to focus on ensuring accountability for taking action. The

authors see this as consistent with Kraut's (1996) purpose of assisting with organizational change and improvement. A common strategy for ensuring action through survey follow-up is to make sure groups or individuals are accountable by setting a goal and measuring and reporting on progress towards that goal. In order to gauge whether any progress is being made toward a goal, measures must be provided. Therefore, measuring and reporting employee perceptions of progress, perhaps at more frequent intervals, can help to focus attention on a particular goal and provide a data-based indication of progress.

Illustrative quote excerpts:

"...ideal tools for assessing progress in improvement efforts on an issue either across the organization or in a specific [group]." ⁵

"... a means of periodically taking the pulse of the newly integrated organization to sense where there may be integration problems or where integration and post-closing transitions and changes may not be occurring fast enough." ⁶

"...used to examine trends, and immediately catch changes so the organization can react quickly. ..." ²

"...identify and respond to employee concerns in a timely manner." ⁷

"Enable people and teams to track progress on performance improvement." ⁴

- Responsiveness – Another apparent purpose for pulse surveys is that they are/can be more responsive to the organization's needs in several ways. Some organizations' business environment may change so rapidly that surveying even yearly may not be frequent enough to reflect the reality of the marketplace (e.g., monitoring the drivers of customer service representative turnover in the highly competitive telecommunications market). This purpose is similar to "To provide input for future decisions" (Kraut, 1996, p. 7) but puts greater emphasis on the urgency or adaptiveness of the process to gather input in a fast-cycle. Therefore, surveys that can be more quickly fielded are likely to also provide greater responsiveness to the market environment.

Another need that pulse surveys appear to be targeted towards is the ability to quickly construct surveys as they are needed. That is, the organization may not foresee a particular issue ahead of time and may be interested in obtaining feedback, perhaps about how employees are reacting to a particular issue. This seems to relate to two purposes outlined by Kraut (1996): "To pinpoint areas of concern" and "To add a communication channel" (pp. 5-8). Of course, this use assumes that pulse surveys would be more "real time" (e.g., deployed via the web) so that they have the potential to satisfy these two purposes better than other surveys that have longer cycle times from inception to completion (e.g., a "traditional" organizational survey that is administered once a year) so that they can more efficiently pinpoint concerns and establish a communication channel.

Illustrative quote excerpts:

“...flexible online surveys designed to augment a routine employee opinion survey.”⁸

“...a real-time action focused measurement and communication process...”⁹

“...curious about current customer trends in the marketplace...”¹⁰

“...obtain feedback on the current service environment...”¹¹

- Administration cycles that reduce burden on the employee population – Although not specifically mentioned by existing sources, our practice experience indicated that some organizations sought to use pulse surveys as a way to smooth out peak demands of traditional survey administration (e.g., census surveys with a long administration window administered for weeks at a time). Pulse surveys have the potential to reduce this large periodic disruption and still collect necessary employee input by staggering surveys of groups across time.

Illustrative quote excerpts:

“...flexible online surveys designed to augment a routine employee opinion survey.”⁸

“...keeping a finger on the pulse of your organization between annual or bi-annual employee surveys...”³

Content – As with the purpose section, the authors’ drew upon several sources to define likely characteristics in terms of content. Surveys can of course differ in terms of content in several ways: length, breadth/comprehensiveness of content and focus on specific programs or issues:

- Length – Surveys can have a wide range of lengths (e.g., Church and Waclawski, 1998 cite instances of four up to 250 items). Of course, survey length can and does vary based on a host of factors including the purpose of the survey, organizational culture and other issues (e.g., if the surveying organization is a member of a norms consortium and as such, has a mandate to include a certain set of items used in the consortium). But the author’s experience and several other sources suggest that the pulse concept tends to place a premium on fewer items. Shorter surveys make responding less burdensome which may be especially important if a large number of employees are to be regularly surveyed (e.g., to keep response rates high, reduce time away from other work).
- Comprehensive vs. focused content – Surveys can also vary in terms of how comprehensive they are in coverage. Surveys may cover a wide variety of issues or topics in order to gain a full and complete picture of the workplace. On the other hand, surveys can also be more focused on a few areas or special topics (e.g., Kraut and Saari, 1999) that have been identified as central concerns for the

organization (e.g., have been established as “key drivers” of employee satisfaction). In some cases, content might be so tightly focused that it is concerned only with the evaluation of specific initiatives or programs using a few specialized questions (e.g., “Did your manager meet with you about the XYZ initiative?”). Finally, content may also vary on the basis of whether the pulse survey is supplementing an existing census type survey (that has a comprehensive array of questions and topics), or if the intention is to replace it.

Illustrative quote excerpts:

“... usually less than 10 questions ...”¹

“...designed to augment a routine employee opinion survey.”⁸

“Short, focused surveys ...”⁵

“A short survey including numeric and open-ended questions...”⁷

Method

The authors also examined existing sources and our own practice experience to identify likely characteristics that might define or distinguish pulse surveys from other surveys in terms of method issues. As several authors note (e.g., Kraut, 1996; Church and Waclawski, 1998) surveys can vary on several facets of methodology, including the frequency of administration, whether administration is to a sample or census and the delivery mechanism (e.g., Dillman, 1999; Kuhnert and McCauley, 1996)

- *Administration frequency* – Surveys can also vary in terms of how frequently they are administered. While the prototypical organizational survey might be thought of as a survey conducted once every 12 – 18 months this is not necessarily the case with all surveys. Surveys might be administered more frequently than once a year. For instance, tracking managers’ actions to increase accountability for a year-long program roll out would likely require more than one survey (e.g., quarterly or bi-monthly). It is notable that frequency may also depend to some extent on the practical aspects of how quickly the information can be gathered and disseminated to those who need it. For organizations equipped for web deployment of surveys this means surveys can be administered and reported upon in a matter of days or hours versus weeks.

Illustrative quote excerpts:

“... repeated monthly or quarterly.”¹

“... a means of periodically taking the pulse of the newly integrated organization ...”⁶

“...generally administered frequently...”¹²

“Continuous random surveying...”¹³

- *Census or sample method* – The extent to which an organizational survey is a census or sample is a well-known distinction in survey research (Church & Waclawski, 1998; Dillman, 1999; Kraut, 1996). For instance, census strategies tend to be preferred when the purpose is large-scale organizational change (e.g., Church & Waclawski, 1998; Kraut, 1996) that involves work-group level change. Sampling surveys, in contrast, may be used when the issues are more companywide or to check on the employee population’s understanding of issues and initiatives (Kraut and Saari, 1999). They also can have some advantages of being smaller and easier to administer and as a consequence, be less costly (Church and Waclawski, 1998). It is also likely that sampling can help reduce survey fatigue/over surveying across the company, especially if a survey or surveys are being administered more frequently. If the idea is to obtain more frequent feedback from the employee population then a sample strategy may be most appropriate.

Illustrative quote excerpts:

“... distributed to a small sample ...”¹

“...administered frequently and randomly to sample groups...”¹²

“...enterprise-wide...”¹⁴

“...organization is divided into randomly selected employee groups; each group is surveyed on a rotating basis.”⁷

“Continuous random surveying, to a random sample...”¹³

- *Delivery method* – Surveys also differ from one another in terms of the delivery method. A wide variety of distribution and collection methods are now available such as paper, telephone and Web (e.g., Church and Waclawski, 1998; Kraut and Saari, 1999; Kuhnert and McCauly 1996). Because pulse surveys appear to often be directed at faster creation, administration and reporting turnaround (hence the overlap with the responsiveness purpose), Web-administration methods are likely to be preferred to a paper-based option when shorter cycle times are an issue because they are better suited to quick deployment than traditional paper-and-pencil surveys.

Illustrative quotes excerpts:

“...flexible online surveys...”⁸

“... delivered via the Internet ...”⁵

“...administered via the Internet.”¹²

“...web-based surveys.”¹⁴

“...distributed over email for most employees...”⁷

A working definition

It appears to the authors that the definition of a pulse survey could be flexible and encompass one or more likely several of the foregoing characteristics. However, in an effort to move the concept forward, our opinion as practitioners (after this review) is that, *in general* “Pulse surveys” refer to a class of surveys used to supplement or in some cases replace the more “traditional” approach to organizational surveying (i.e., a comprehensive content survey administered to all employees once every 12 – 24 months). They are most likely to be conducted over the Web (primarily in order to take advantage of the quicker deployment and reporting the Web can afford) and are more likely to be administered more frequently than a census survey in the same organization and to a sample of employees.

Limitations and future research

Despite the authors’ efforts, we found no established body of work defining or exploring the concept of a “pulse” survey. Because of the lack of established commentary on pulse surveys, it can safely be said that the concept is still in flux and a common understanding is only general at best. As a consequence, this paper may well raise as many questions as it answers. Although this is an initial effort to explore and define this concept, (beyond simply accepting the definition of a handful of commercial sources), hindsight reveals some limitations and possible improvements that could be made moving forward.

Certainly, reviewing websites for references to “pulse” surveys should not be considered an exhaustive survey or benchmarking effort. However, given the presence of most survey firms on the web (i.e., it is safe to assume that the web is used as a channel for marketing one’s services), it seemed a reasonable approach as an early attempt to characterize the concept. On the other hand, it is also possible that some firms view the use of the term “pulse” as a competitive advantage that they are unwilling just yet to broadcast on the internet for their competitors. This could have limited the review to only those firms who chose to publicly market the survey.

Also it should be recognized that our development of the possible characteristics were no doubt influenced by our knowledge of the marketplace as practitioners. That is, we may have become aware of certain characteristics because of awareness of other survey providers or through conversations with clients who may have had exposure to individuals or firms using “pulse surveys” as a service offering.

A central limitation of our inductive approach was the lack of a sufficiently large number of cases, as only 14 websites specifically mentioned pulse surveys. It is also probable that there is an untapped pool of cases that exist within organizations that are not survey software or survey service providers. These organizations may well be (or have been) employing pulse type surveys for some time. A logical next step might be to conduct a survey of both providers and consumers of survey services and ask them to rank or rate the draft characteristics in terms of what would define a survey as a “pulse” in their minds or organizations.

Conclusions

Despite the increasing use of the term “pulse survey” the organizational surveys field appears to lack a definitive meaning for the term. Yet, some readers of this paper might question if we should even care about the definition of this apparently emerging concept. While the authors acknowledge this may not be an earth-shattering issue, they feel that it is important to explore for several reasons.

First, it is important for I/O survey practitioners to remain informed about new developments and trends in our field in general. The concept of a “pulse” survey is such a development.

Second, we believe that it is in the field’s best interest to critically examine our terminology and strive to use clear and operationally precise language when communicating in organizations, among practitioners and with clients.

Third, if I/O survey practitioners are not shaping or responding to the needs of organizations and emerging trends, we may be left “on the sidelines” and be less able to constructively shape the rigor and approach of emerging techniques. For instance, some of us remember the “early days” of competency modeling in which many I/O practitioners derided the terminology and practice as “watered down job analysis.” Yet, competency modeling gained strength and rigor (partly due to the efforts of I/O researchers) and is now an established part of many organizations. In the same way “pulse” surveys may be an emerging approach that may gain more popular acceptance, consistency and use over time. I/O survey practitioners can either be in a position to apply their knowledge and skills to help to shape this concept or remain in a reactive posture. To date there seems to have been relatively little public sharing of practice experience and knowledge among I/O psychologists about this issue (e.g., a brief search of recent SIOP conference programs and TIP found only passing references to “pulse” surveys). We hope that this paper will help to raise the issue and stimulate public consideration and debate.

In summary, while practice experience indicates that “pulse” surveys may be adaptive and helpful for some organizations, we see no evidence yet of a consistent or widely shared concept. We think it is an emerging concept and it is likely coalescing around at least some of the key characteristics brought out in this paper. Because of this, it would be wise for practitioners to take some time to operationally define what they mean by a “pulse” survey when working within and across organizations.

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End notes

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| <p>1 Clear Picture Corporation</p> <p>2 Toolpack Consulting</p> <p>3 InTouch</p> <p>4 Psymmetry</p> <p>5 Metrus Group</p> <p>6 Wiznami</p> <p>7 Metacomm</p> | <p>8 Compendium Corporation</p> <p>9 eePulse, Inc.</p> <p>10 Foresight Survey Support</p> <p>11 Q-Niche</p> <p>12 Business Development Specialists, Inc.</p> <p>13 Multirater.com</p> <p>14 Inquisite</p> |
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