



# Switching survey provider: 6 steps to success

Produced by **People Insight**



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# Switching survey provider: 6 steps to success

So you're starting the search for a new survey provider. Maybe something isn't working out, or you're looking for a new approach. Whatever's prompting your move our guide will highlight what you should ask, help you avoid common pitfalls and make the process as easy as can be.

## What's inside:

- ▶ 6 steps to success
- ▶ Migrating your data
- ▶ Designing your survey
- ▶ Getting your team up to speed
- ▶ A best-practice checklist
- ▶ Comparing customer service



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## A word from People Insight before we get started

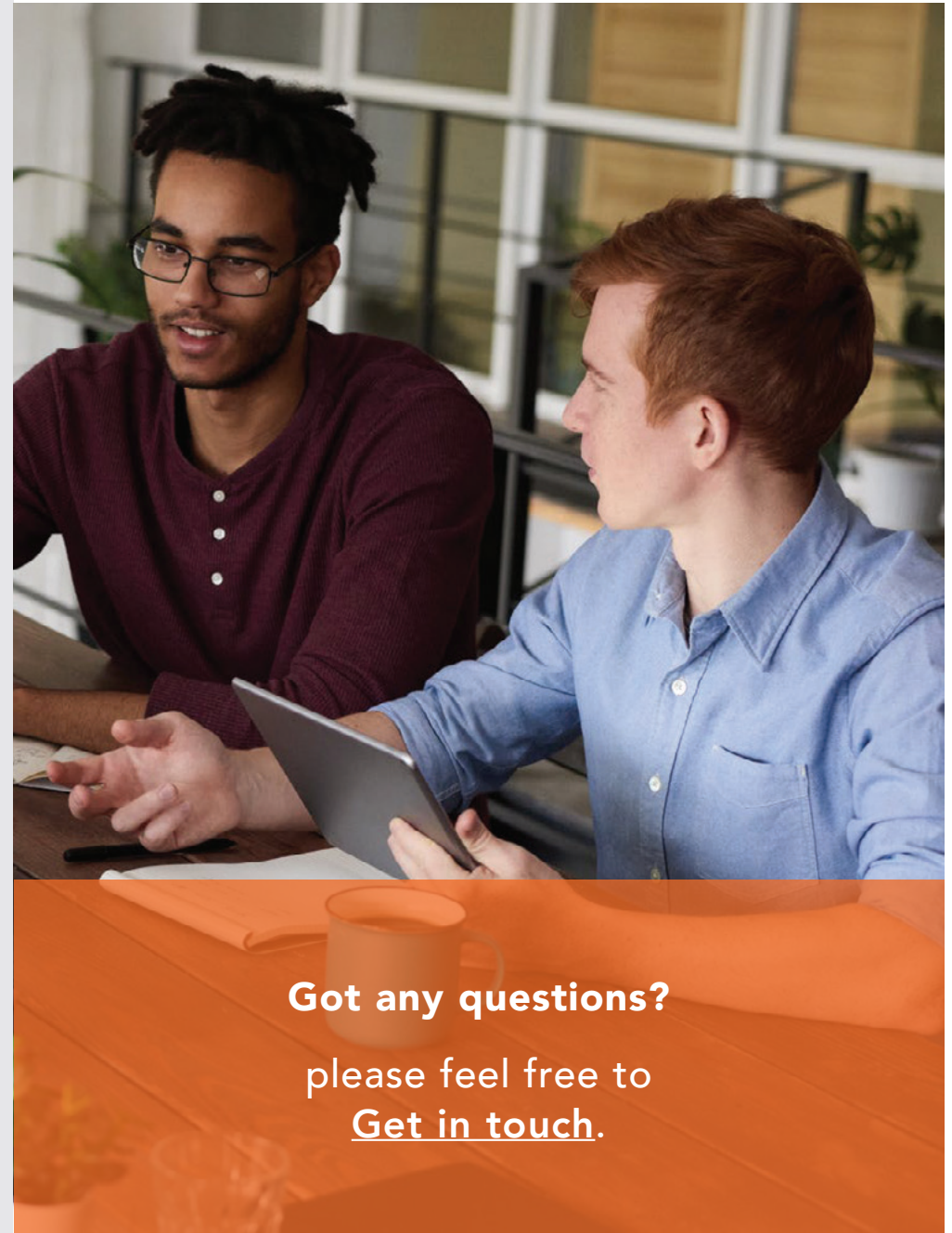
OK. We get it. A survey provider giving advice on which survey provider to choose might sound biased.

**But stick with us...  
We know the survey business inside out.**

We design and deliver programmes that improve the experience, retention and performance of tens of thousands of employees like yours across the public, private and not for profit sectors.

We hope you'll find us to be the right fit for you. But whoever you choose, the prompts and tips in our guide will help make the process hassle-free.

**Good luck!**



**Got any questions?**

please feel free to  
**Get in touch.**

# 6 steps to success

Follow these steps to make switching survey partner a breeze.

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## Don't spend forever on it

A lot of people stick with their current provider to avoid the hassle of changing. Procurement processes vary, but rest assured that switching survey partner shouldn't take ages. If you're short of time, hone-in on the criteria that matters most. There are a lot of shiny features on offer but stay focused on what you (and your managers) will actually use.

### Typical timeline

If you have a date in mind for your next survey, timings for choosing a new survey partner might be:

#### Week 1

- ▶ Shortlist your essential criteria
- ▶ Engage key stakeholders in process and timing

#### Week 2

- ▶ Carry out partner research  
(Google search, Chat to peers, Post on LinkedIn)
- ▶ Initial calls/demos with providers
- ▶ Narrow down your list of providers

#### Weeks 3-4

- ▶ Follow-up meetings for further questions
- ▶ Invite proposals from selected providers
- ▶ Review proposals with your stakeholders

#### Weeks 5-6

- ▶ Appoint your new partner
- ▶ Sign contracts & set-up new supplier

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## 6 steps to success

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### Focus on what matters most

Separate your 'must-haves' and 'nice-to-haves' to be crystal clear on what you're looking for from a new supplier. It will make the process smoother and reduce the chance of having to switch again in future. Think about what you expect from your partner and your survey tech, where your current partner is falling short and what you're hoping to achieve by switching.

**Tip:** Use our [best-practice checklist](#) to get started.

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### Get to know your shortlist

Pad out your list of trusted providers by talking to peers, seeking recommendations on LinkedIn and doing a thorough Google search. Hold video calls or meetings with your shortlisted vendors to test out the tech, understand their offer and gauge the working relationship you'd have. If you can, speak to the people who will be running your project to get a sense of how you would get on day-to-day.

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### Discuss what to do with past survey data

You'll probably want to compare survey results with what's come before. It's usual for survey providers to import historical data, so this shouldn't hold things up. To ensure accuracy, look for a provider who will carefully map your old survey items onto your new question set. It's best to talk to providers about this upfront to understand what's possible.

**Tip:** Keep reading for more tips on survey data migration.

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## 6 steps to success

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### Involve the right people

Engaging the right stakeholders early on will save a lot of headaches. Get procurement involved from the start, and check that the process is set-up to evaluate the features with the biggest impact for your team, i.e. flexible reporting or action planning support. Also check that your procurement criteria allows 'like for like' comparisons between partners. For example if you're comparing costs to "run a survey", has every provider included costs for helpdesk, benchmarking and reporting?

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### Choose your partner and set up your survey

**Congratulations!** You've made your choice of survey partner and now it's time to run your first survey together. Your new partner will handle most of the set-up but set aside time to think about your survey comms, survey launch and post-survey strategy.

**Tip:** Find more tips for planning your survey comms in [our guide](#).

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# Migrating your data

One of the most common concerns organisations have about switching survey provider is what to do with their historic data. Most organisations ask to move their historical data across, while others see it as a chance to start from scratch.

Whichever approach you choose, there are a few things to bear in mind.

## Choosing your index

When speaking to potential survey partners, it's a good idea to discuss which engagement index they'd recommend basing your survey on. Asking questions that are proven indicators of engagement will help you identify key action areas to boost engagement.

If you're measuring employee engagement, check that providers can back up their questionnaire design with solid evidence from published organisational psychology literature, so you know what you are measuring is robust.

## Mapping survey items

If you choose to import historical data, your new survey will need to include comparable questions so you can measure how engagement is changing year on year. However this doesn't mean you have to stick with your old question set.

Switching provider can be a good time to review your employee experience programme and make sure your survey is asking the right questions. Ask providers which items they recommend including, and how they would map your old survey items onto these to create comparable data.



### A point about scales

Most providers operate on a 5-point scale, with survey responses ranging from 'agree' to 'do not agree'.

This makes historical comparisons straightforward. If you have anything other than this, you can still bring past data with you but it's something to discuss with your provider early on.

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## Designing your survey

At People Insight, we use the PEARL™ index to give a consistent and robust engagement score that works across organisation sizes, sectors and types. When organisations switch to People Insight our team of data scientists take great care to map existing questions with similar ones in our PEARL™ engagement index.

By mapping your old questions to similar ones in the PEARL™ model, we'll create a concise questionnaire that lets you see how your engagement score has changed year on year.

Using PEARL™ means you'll also benefit from consistent benchmarking, a wealth of comparable peer insights and a really reliable measure of engagement.

PEARL™ accommodates custom questions too, if there's something specific your organisation wants to know about, with a database full of insights to compare against.

### More about PEARL™



[Read our infographic](#)



[Watch our video](#)



[Download our whitepaper](#)



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# Getting your team up to speed

Introducing a new supplier or system can put pressure on an already-swamped team. You need your managers to feel confident using the survey tech and using the data to prompt effective action. But you don't want to end up running a helpdesk.

When you're speaking to potential providers, look for one who can support your managers and leaders through the transition and get them up to speed as quickly as possible. Support levels will vary, but you should expect whichever partner you choose to share resources, user-guides and training materials that make your life easier.

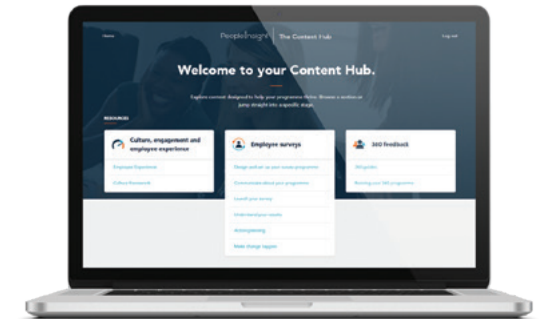
## If team training is on your mind, some questions to ask your provider shortlist might be:

- ▶ What level of service do you offer for training or queries?
- ▶ How will you help us onboard users to the new reporting system?
- ▶ How long does it usually take someone to get to grips with the system?
- ▶ How often do you release updates to your tech? How do you decide on these?

## Looking for something more hands on?

People Insight can run training sessions with key members of your team to get them started quickly, build their confidence in action planning and equip them to make change happen.

[Get in touch to find out more.](#)



## Smart resources

People Insight's Content Hub is a place for clients to access templates, guides and training videos that help teams understand their role in driving employee engagement. Everything on the Hub can be shared with colleagues, freeing up time that clients might have spent fielding tech queries. We also share updates on the Hub when new features are released, so everyone knows how to make the most of their results dashboard.

# Selecting your new survey provider: best practice checklist

For your survey programme	Must have	Nice to have
An evidence-based model	<input type="checkbox"/>	<input type="checkbox"/>
Bespoke programme design: - Annual surveys, pulse or something else - Measure engagement, culture, retention, wellbeing – or something else	<input type="checkbox"/>	<input type="checkbox"/>
Inclusive surveying (mobile, tablet, offline if needed)	<input type="checkbox"/>	<input type="checkbox"/>
Multiple language options	<input type="checkbox"/>	<input type="checkbox"/>
Custom survey branding	<input type="checkbox"/>	<input type="checkbox"/>
Live response-rate tracking	<input type="checkbox"/>	<input type="checkbox"/>
Automated survey reminders	<input type="checkbox"/>	<input type="checkbox"/>
Survey comms support	<input type="checkbox"/>	<input type="checkbox"/>

For your survey provider	Must have	Nice to have
A good reputation and client testimonials	<input type="checkbox"/>	<input type="checkbox"/>
Sector experience and understanding	<input type="checkbox"/>	<input type="checkbox"/>
Responsive customer service	<input type="checkbox"/>	<input type="checkbox"/>
Value for money	<input type="checkbox"/>	<input type="checkbox"/>
Access to resource library	<input type="checkbox"/>	<input type="checkbox"/>
Robust data security policy	<input type="checkbox"/>	<input type="checkbox"/>

For interpreting your data	Must have	Nice to have
Quick access to results	<input type="checkbox"/>	<input type="checkbox"/>
Time-saving features	<input type="checkbox"/>	<input type="checkbox"/>
Online results dashboard	<input type="checkbox"/>	<input type="checkbox"/>
Simple to use	<input type="checkbox"/>	<input type="checkbox"/>
Peer / external benchmarking	<input type="checkbox"/>	<input type="checkbox"/>
Robust data security policy	<input type="checkbox"/>	<input type="checkbox"/>
Support managers to take action	<input type="checkbox"/>	<input type="checkbox"/>
Insights for leaders and managers	<input type="checkbox"/>	<input type="checkbox"/>

## Comparing customer service

The support you need from your survey partner will depend on your experience with previous survey programmes and the resource within your organisation.

Here are some questions to ask yourself as you compare customer service models:

### Are you happy with a hands-off approach?

If you're experienced at running survey programmes, you might feel comfortable using self-serve technology, virtual support and online training. You'll usually have a customer service contact, but not someone dedicated to your programme's success.

### Or are you looking for more support?

A more personal approach suits people looking for guidance and insights that will boost their survey programme. Look for a provider who offers a dedicated client manager to handle your survey technology, manage timelines and keep your programme on track.

Choosing the right partner can transform your survey experience and increase post-survey action. **But don't just take our word for it >>>**

## Why A2Dominion Group made the move to People Insight.

"We switched to People Insight from an accreditation survey in 2016. We needed a more flexible, approach to engagement surveys and more meaningful, actionable data – delivered quickly!

What we've found really useful is People Insight's post survey support; results presentations, action planning workshops and train the trainer exercises to help our managers do effective action planning. What this means is the survey and change are part of the daily fabric of how we work, not just a check-box exercise.

The service from People Insight has been faultless. They are effective and efficient, whilst providing knowledge and good insights. If we were to rate People Insight against the following criteria, they would get 10 out of 10!

- ▶ Provide bespoke service
- ▶ Dynamic & flexible
- ▶ Fast turnaround
- ▶ Transparent
- ▶ Engaging
- ▶ Less burdensome
- ▶ Make engagement 'business as usual'

I would not hesitate to recommend People Insight to other organisations looking for an engagement partner to meet their specific needs."

**São Gorgueira**, Head of L&D and Engagement, **A2Dominion Company of the Year, Employee Engagement Awards 2019**

**Read the full case-study** to see how we helped A2Dominion improve employee engagement and develop a culture of success.

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# Solve your employee engagement challenges

People Insight help organisations create their ideal culture for success with surveys, listening strategies and industry expertise.

Share your employee engagement challenges and our team of expert organisational psychologists, supportive project managers and sophisticated survey technology will help design a programme to achieve your business objectives.

To find out more contact us at:

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T: 0203 142 6511

E: [enquiry@peopleinsight.co.uk](mailto:enquiry@peopleinsight.co.uk)

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Surveys



People Analytics



Consultancy