Satisfaction, engagement and loyalty of employees: opportunities and limitations of sociological research

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The relevance of research
Engagement (ECOPSY, AON Hewitt, HAPPY JOB)

Happy job  Engagement — это satisfaction + loyalty + technologies of productivity

https://axes.ru/articles/model-voylechennosti-sotrudnikov-aon-hewitt/
https://happy-job.ru/types-of-surveys/engagement-survey
Engagement factors

GALLUP

- Basic needs
- Management support
- Teamwork
- Employee development
- **12 questions**

AON Hewitt

- Quality of life
- People
- Total Rewards
- Work
- Opportunities
- Company practice
- **55 questions**

HAPPY JOB

- Manager
- Recognition
- Processes
- Colleagues
- Career
- Strategy
- Feedback
- Changes
- Balance
- Terms and Payment
- **55 questions**

ЭКОПСИ

- Loyalty (9)
- Initiative Support (10)
- Satisfaction (9)
- **30 questions**

In this case, factor is characteristic of work, company etc...
Case study of Engagement Survey

• Financial company (4500+ employees)
• Department of Internal Sociological Research (sociologists)
• Adapted Research Methodology
• Monitoring of Employees’ Engagement – measure every quarter (2017-2019)
• Total research timeline – 1-1,5 months
• Applied character of research
• Company Report in general and separate reports on departments
Engagement survey

**Purpose** – obtaining timely information on key performance indicators of HR politics (HR metrics)

**Tasks:**
1. Determine the level of employee satisfaction, engagement and loyalty
2. Analyze the dynamics of indicators
3. Compare results by department
4. To identify the correlation of socio-demographic characteristics with indicators of involvement and loyalty
5. Identify employee dissatisfaction factors
6. Make segmentation of employees by loyalty, involvement

**Methods:**
- For measure satisfaction and engagement – methodology of AON Hewitt
- For measure loyalty – eNPS
- For factors of un-satisfaction – question with “menu” answers (based on answers of open questions)
Methodological features.
Opportunities

«Inside» company
- Adapted communications
- Solidarity
- Random sampling

Information campaign
- New on internal website
- Department Newsletter
- Informing department heads

«Visibility» of Survey
- Research reports
- Researchers Availability

Target motivation
- «Voice of Employee»
- Reports on departments
Study participation

Regular reports for units with $n \geq 10$

Newsletter to managers about the possibility of receiving a report

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Number of reports</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>3Q 2017</td>
<td>632</td>
<td>14%</td>
</tr>
<tr>
<td>4Q 2017</td>
<td>369</td>
<td>8%</td>
</tr>
<tr>
<td>1Q 2018</td>
<td>388</td>
<td>9%</td>
</tr>
<tr>
<td>2Q 2018</td>
<td>422</td>
<td>9%</td>
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<tr>
<td>3Q 2018</td>
<td>519</td>
<td>12%</td>
</tr>
<tr>
<td>4Q 2018</td>
<td>489</td>
<td>11%</td>
</tr>
<tr>
<td>1Q 2019</td>
<td>1200</td>
<td>27%</td>
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<tr>
<td>2Q 2019</td>
<td>522</td>
<td>12%</td>
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<tr>
<td>3Q 2019</td>
<td>720</td>
<td>16%</td>
</tr>
<tr>
<td>4Q 2019</td>
<td>971</td>
<td>22%</td>
</tr>
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</table>
Employee Feedback Culture

**Use**
- Useable: 54%
- Do not know: 27%
- Unusable: 15%

Do you think the polls conducted in our bank are useful or not?

**Trust**
- Im not to trust: 11%
- Sometimc me trust, sometimc me not: 19%
- Do not know: 4%
- Im trust: 66%

Do you trust the results of surveys conducted in the bank, or not?

**Honesty**
- I am not sure of confidentiality, answer as I think: 51%
- Confidentiality doesn’t bother me, I answer as I think: 31%
- Do not know: 3%
- I am not sure of confidentiality, my answers can be transmitted to interested parties: 15%

How openly and honestly do you answer questions in surveys conducted in our bank?
Methodological features.

Limitations

«Inside» company
- Distrust to researchers
- Not «anonymous»
- Results not visible

Information campaign
- «For official use only»

«Visibility» of Survey
- Short research report for public (infographics)

Target motivation
- Department report for managers only
- «Witch-hunt»
Limitations for Engagement Survey

- Internal research don’t give «objective» results
- Only «tested» и «reliable» methodology may be use
- A lot of information in numbers, indicators
- Correlation with other indicators (for example, staff turnover)
- «What can I do with this?» - the possibility of using the results in work
Basic indicators

There is a relationship between indicators
Methodical experiment ("honesty")

<table>
<thead>
<tr>
<th>Period</th>
<th>Beg. October 2018</th>
<th>End October 2018</th>
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<tbody>
<tr>
<td><strong>HR-department</strong></td>
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<tr>
<td>Interviewed</td>
<td>38</td>
<td>46</td>
</tr>
<tr>
<td>Loyalty, eNPS</td>
<td>+26,3</td>
<td>-5</td>
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<tr>
<td><strong>IT-department</strong></td>
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<tr>
<td>Interviewed</td>
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<td>64</td>
</tr>
<tr>
<td>Loyalty, eNPS</td>
<td>-15,7</td>
<td>-28</td>
</tr>
</tbody>
</table>

**Question by financial company:** How likely is it to recommend a job at a bank to your friends or acquaintances?

**Happy Job Question:** Are you ready to recommend your company to friends as a potential job?
Correlation with other indicators

- Satisfaction, %
- Engagement, %
- Staff turnover, %
What impact engagement (position)

Manager  Specialist  Total engagement

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Manager</th>
<th>Specialist</th>
<th>Total engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>3Q2017</td>
<td>52</td>
<td>50</td>
<td>41</td>
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<tr>
<td>4Q2017</td>
<td>48</td>
<td>49</td>
<td>52</td>
</tr>
<tr>
<td>1Q2018</td>
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<td>49</td>
</tr>
<tr>
<td>2Q2018</td>
<td>52</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>3Q2018</td>
<td>42</td>
<td>42</td>
<td>42</td>
</tr>
<tr>
<td>1Q2019</td>
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<tr>
<td>2Q2019</td>
<td>15</td>
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<tr>
<td>3Q2019</td>
<td>15</td>
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</tr>
<tr>
<td>4Q2019</td>
<td>49</td>
<td>49</td>
<td>49</td>
</tr>
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</table>
What impact engagement (experience in company)

- 1 year less
- 1-3 years
- 3-5 years
- more than 5 years
- total engagement

<table>
<thead>
<tr>
<th>Quarter</th>
<th>1 year less</th>
<th>1-3 years</th>
<th>3-5 years</th>
<th>more than 5 years</th>
<th>total engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>3Q2017</td>
<td>52</td>
<td>50</td>
<td>41</td>
<td>48</td>
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<tr>
<td>4Q2017</td>
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<td>49</td>
<td>49</td>
<td>52</td>
<td>52</td>
<td>52</td>
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</table>
Latent engagement factors

- Organization changes
- Manager's personality (toxicity / charisma)
Organization changes and engagement (case 1)

Change of department’s head

Organizational Change Possible

- Department
- Company
Manager and engagement (case 2)

Toxic manager

Toxic manager left the company

The new leader has not come yet

1Q 2018 2Q 2018 3Q 2018 4Q 2018 1Q 2019 2Q 2019 3Q 2019

Department

Company
Head of Department and engagement (case 3)

- Usually unhappy department
- Head of department left the company
- The new head has not come yet
- The new head of department has come

1Q 2018 2Q 2018 3Q 2018 4Q 2018 1Q 2019 2Q 2019 3Q 2019

- Department
- Company
What impact employees’ loyalty

<table>
<thead>
<tr>
<th>Serments</th>
<th>Position</th>
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<th></th>
<th></th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>F</td>
<td>S</td>
<td>M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“terrorist”</td>
<td>28</td>
<td>35</td>
<td>28</td>
<td>31</td>
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<tr>
<td>“apostle”</td>
<td>24</td>
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<tr>
<td>“neutral”</td>
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<td>23</td>
<td>25</td>
<td>23</td>
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</tr>
<tr>
<td>Total:</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

F – employee who work with clients; S – specialist of back-office, M - managers

<table>
<thead>
<tr>
<th>Serments</th>
<th>Experience in company</th>
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<th></th>
<th></th>
<th>Total</th>
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<tbody>
<tr>
<td></td>
<td>1 year less</td>
<td>1-3 years</td>
<td>3-5 years</td>
<td>More than 5 years</td>
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<tr>
<td>“terrorist”</td>
<td>15</td>
<td>33</td>
<td>39</td>
<td>35</td>
<td>31</td>
</tr>
<tr>
<td>“apostle”</td>
<td>42</td>
<td>18</td>
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<td>16</td>
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<tr>
<td>“neutral”</td>
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<td>Total:</td>
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<table>
<thead>
<tr>
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<tbody>
<tr>
<td></td>
<td>A&amp;B</td>
<td>C</td>
<td>D&amp;E</td>
<td>I haven’t score yet</td>
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<tr>
<td>“terrorist”</td>
<td>36</td>
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<tr>
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<td>15</td>
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<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

* PPR (personal performance assessment) – processes of value employee achievement. This assessment is based on value of work purposes for period and doing in the process of discussion with the immediate supervisor

This is results of analysis employees’ segments. Results with significant correlation are presented (data for the 3Q2019)
Summary

The success of the engagement study is determined:

- Maturity of the company and HR specialists
- The culture of feedback - the willingness of employees and managers to engage in dialogue
- Practical applicability of the results

Limitations:

- Distrust to (internal) organizers of research
- Limited interpretation of results by HR specialists
For Discussion

1. Is it possible to obtain "objective" data within the company?

2. How to identify what really affects engagement?

3. Does monitoring or a one-time study give an “accurate” result?

4. Applicability of research results?

5. What are the possible management decisions based on the results of the study?
Thank you for your interest in the thesis!

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