



KARIANBOX

Choosing the right employee listening platform

10 'kick the tyre' tests

- ✓ The top 10 capabilities to assess
- ✓ The killer questions you need to ask
- ✓ The red flags to watch out for

Listen better,
make meaning,
inform action

Technology is revolutionising employee research. The pandemic has highlighted the need for flexibility and speed in listening to employees. Responding to fast-changing circumstances, crowdsourcing solutions and keeping a finger on the employee pulse has been critical for organisations.

At Karian and Box, we work with complex multinationals and large UK businesses to shape and improve their listening strategies. We also help them to harness the technology they use to make meaning from employee feedback and inform action with insight.

Platform agnostic, we absolutely see the value that comes from agile, flexible and intuitive tech solutions to aid the process of employee listening. We also empathise with clients who have purchased and onboarded solutions that promise the earth but, when deployed, don't give them what they need.

Sadly, there are many technology providers out there touting shiny tech solutions and survey platforms that purport to help organisations listen to their people's views, but which don't always stand up to scrutiny.

You really do need to inspect under the hood, ask the right questions and 'kick the tyres' of technology providers, so you can avoid kicking yourself after you've bought an employee listening engine and found it wanting.

So, how can organisations test technology providers? In our experience, there are 10 capabilities to assess when sourcing employee research and listening platforms.

In this guide, we provide the killer questions to quiz technology providers with and outline the red flags to watch out for – helping you give those tech tyres a thorough kicking before you sign on the dotted line.



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The top 10 capabilities to assess when choosing a listening platform

Whether they claim to be an employee feedback platform, employee engagement tool or employee survey software provider, if you really want to put technology providers to the test, these are the 10 capabilities you need to assess.



Strategic considerations



Practical considerations

Some of these are mission-critical aspects. A few are admittedly more geeky and technical – but are just as important. If the scope of your listening plan requires a particular approach, or specific outcomes, then it is important you check off each of the tests.

A great technical user experience is not enough to **unlock the power of employee listening and get under the skin of issues.**

The tech must be able to gather and extract feedback in a way that is actionable, otherwise the organisational impact is likely to be minimal – leading to low engagement with the platform. Employees need to trust that you are going to do something with the feedback they share.



Qualitative text analysis

Do you get meaningful text analytics or glorified word clouds?

Some tech platforms offer 'advanced' AI-driven and automated qualitative analysis that makes meaning of thousands of employee comments; others are so basic that they are near meaningless.

- Word clouds are the pre-schooler equivalent of qualitative analytics. Some platforms offer text analytics that offer little better – and are a waste of money and time.
- A handful of advanced tools are at the upper, postdoctoral level. It all comes down to the sophistication and continual upgrading of the algorithms that underpin the solution, as well as the way the results and codeframes of that analysis are presented back.



Questions to ask a prospective supplier:

- Does the text analysis use 'key word' coding, or do they use more advanced, narrative-based coding and analysis?
- How can your tool break out multiple topics and sentiment in a single comment?
- What is the output of your tool? Can we edit the labels for thematic groupings?



Competitor benchmarking

How rigorous and wide-ranging are the supplier's benchmarks?

- Do the supplier's sector benchmarks genuinely reflect the sector's norms, or are they simply a notch above asking a stranger on the street for their opinion?
- Some suppliers genuinely incorporate the breadth and depth of your sector or geographies in the benchmarks. Others have very limited numbers and are dubious in their efficacy.



Questions to ask a prospective supplier:

- Who else exactly (in your sector) is in the supplier's benchmark data set – and how recent is the data? Are those organisations comparable to yours? How many clients are in each benchmark?
- How many employees are used to provide each sector score for any specific benchmark? Tens of thousands, hundreds – or just tens of people?
- Are we included in our own benchmark data? What percentage of the data does any one client make up? One of our clients recently realised their own data made up more than a quarter of the benchmark data against which they were being compared.



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Self-serve surveying

How easy is it to self-serve and build intuitive surveys, dashboards and reporting solutions?

Many suppliers make a big song and dance about the simplicity with which organisations can build, run and report on surveys. This is a critical 'selling point' for the Software as a Service (SaaS) model; you pay a license fee and then you're off to the races – managing the end-to-end process yourself. That requires two things:

- The solution to be practical, really simple-to-use and easy to learn. Some require you to have a PhD in advanced programming simply to switch the thing on. Others are incredibly user friendly. Many are a mix of both – with components that anyone can use easily but with aspects that are more complicated and require in-depth learning.
- The supplier provides quick 'human' support when you need extra technical advice and/or hands-on help if things aren't going as you expect. Again, this can vary considerably – in speed of support, the depth of expertise, the skills of those providing that support or simply the time zone they work in.



Questions to ask a prospective supplier:

- Can we demo aspects of the tool or, even better, try-before-we-buy to ensure we get a first-hand experience of the solution – is it as easy as you say it is?
- What is your client / customer success model? How much hand-holding is available for implementation support after the initial deal is signed?
- Where geographically is the maintenance or technical advisory support and do you offer 24/7 availability – especially if we have international operations? How responsive are you to our needs? And what are your service level agreement (SLA) timings – 1 hour, 4 hours, 24 hours, longer?.
- How much customisation is available if it is self-serve?



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Data integration

Can the platform integrate other data sources, such as performance ratings, sickness absence or training information, to enable rounded-EX insights?

- A handful of solutions can integrate wider HR MI and/ or other people data. This can enable linkage and employee lifecycle analysis, helping identify which aspects of the employee experience have the biggest impact on engagement and behaviour. This should be a basic offer. ANY platform should be able to seamlessly integrate HR metadata and allow for the import of data from other sources. Sadly, this is far from the reality in some cases.
- Some platforms enable API-based links to their people data. This makes the process automatic, more cost-effective and less error prone. Others have the capability to enable employee data sets to be used in the platform. However, these are often manual, labour-intensive and require methodical building offline and then continual updating as the HR MI changes (e.g. survey / leaver data).



Questions to ask a prospective supplier:

- What solutions do you offer for integration with our HR MI? Do you have any form of partnership with them / have worked with them before?
- How can we bring other data sources into the platform for analysis?
- What other business tools can you integrate with (think about tools you use widely such as Microsoft Teams or Zoom)?



Correlation and other advanced analysis

Does the system enable automated correlation or key driver analysis?

Which factors play the most important role in driving employee engagement or other desired outputs? This is an important focus of employee research – and was once the preserve of data scientists and large, offline spreadsheets. However, some platforms now provide fairly advanced analytics pre-built into their survey reporting tools. Some use simple correlation analysis, while others offer more robust regression.

- There are, of course, limitations with this type of automated, ‘at-scale’ advanced analysis. It can be overly deterministic. Without the right interpretation and guidance, it can lead to unintended insights and action. Is the analysis solution overly simplistic? Does it help managers understand the difference between simple correlation and true causation?
- As a starter for ten, it can empower managers and leaders to quickly pinpoint those factors that are contributing to their teams being, for example, engaged or disengaged. However, some solutions are too brutally simplistic in their approach and lack any sophisticated guidance for managers. Managers might get the hang of it, or they might cause a lot of unintended damage.



Questions to ask a prospective supplier:

- What statistical analysis does your platform support?
- How are the results communicated to individual line managers? Can they all access this type of information, and is it communicated simply and in a way that managers can interpret and act on?
- Can your tool denote statistically significant differences to responses?



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Action planning solutions

Does the platform incorporate built-in action planning solutions, and how intuitive are they?

Some solutions have interactive action planning guidance built into them. These are responsive and reflect the feedback provided by teams, and can be incredibly useful. However, that usefulness is predicated on the quality of the action planning solutions, tips and ideas that the platform 'nudges' team leaders to try.

- When fully automated, these tend to work off algorithms, spitting out pre-defined action plans and recommendations based on triggers in an individual leaders' survey scores. While cost-effective and seemingly practical, often these are too basic and, therefore, invariably not particularly helpful. What is provided rarely takes in contextual factors about the organisation, such as priorities and existing programmes of work. The narrative therefore feels very generic and fails to land.
- A range of providers enable organisations to tailor and/or shape a range of actions, which are then uploaded into the system. As such, it provides the best of both worlds – predefined action ideas that are more targeted and relevant to that organisation's managers.



Questions to ask a prospective supplier:

- How does action planning work in your system? Can managers select items to take action on and build plans on the platform?
- Is this action planning guided and, if so, can we influence the advice given to individual managers?
- What visibility is there in the action planning tool for the central employee engagement / experience team?



Question flexibility

Are you constrained by the platform provider's cookie cutter question types and scales – or do they provide real flexibility?

Scales might not seem important, but they really, really are. One well-known supplier provides a very limited range (5-point scale questions, an open text question and multi-choice). That's fine as far as it goes, but it creates major limitations when surveying particular aspects of organisational culture or securing richer insights into employee experience.

- Studies have shown that surveys that are one long list of 5-point scale questions 'strongly agree' to 'strongly disagree' make for a poor user experience and increase the chance of bored employees responding to all questions in the same way. Mixing question formats (and ordering – see test #10 below) ensures a better level of engagement as employees think through and respond to questions.
- Another change is non-industry standard scales. Many academic studies have highlighted that question scales matter. Most organisations use 5-point Likert scales, which are seen to provide optimum levels of accuracy while being sufficiently simple for large-scale employee surveys. Over 90% of employee surveys use this version of the Likert scale. As such, those who only allow the use of 7-, 6- or even 4-point scales impair their ability to benchmark across other similar organisations.



Questions to ask a prospective supplier:

- What restrictions (if any) are there on the question and scale types on your platform?
- If we want to adapt scales for our own research, does that impact your ability to benchmark?



Question targeting

How much can you tailor and 'route' questions based on the responses employees provide?

- Some suppliers enable organisations to tailor questions based on how employees have answered other questions in the survey, with the most advanced ones allowing this routing to happen 'in page'. Questions appear or disappear depending on how someone answers the previous question. This can be incredibly valuable if you want to dig deeper into topics and secure targeted feedback based on a sub-population's profile, outlook or behaviour.
- Many mid-market suppliers do not provide such tailoring. Instead, it's everything or nothing. That's fine if you want the lowest common denominator of feedback across a population, but it inhibits your ability to focus in on specific issues experienced by parts of your population.



Questions to ask a prospective supplier:

- Can employees who've answered one question in a particular way be prompted with supplementary questions based on the different ways they've responded?
- Can that routing happen in page, or only on a subsequent page?



Construct validation measures

Does the platform enable you to mitigate the impact of 'gaming', over-representation or bias?

The concept of 'construct validation' is an important one in shaping objective surveys that secure meaningful feedback. This can mean a number of things and has implications for tools that help enable it.

- One route to ensure construct validation is through automated question order rotation. Multiple studies have shown that the ordering of questions can have an influence on response positivity. If the order of questions can be automatically randomised, this limits the order-effect bias that can take place in surveys.
- Another critical factor is sampling and weighting of both survey invites and of the resulting data. If a survey is open only to part of a population, ensuring the pool of invitees is representative of the whole is key. As is the need to ensure that results are weighted to reflect the demographic proportions across the population. Some tools have such solutions pre-built into the design of the survey and results analysis. Put simply, others do not.



Questions to ask a prospective supplier:

- Does the tool enable automatic question rotation?
- Does it have built-in sampling or data weighting tools?



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Data output formats

Can you download dashboards into multiple formats – PDF / PowerPoint and other outputs – to better enable offline reporting?

This is one of the most common grumbles we get from our clients. Leaders don't always want to spend time reviewing an online dashboard. They might want to download and shape results into a report or a presentation. Too often, survey platform providers look at the world from their own perspective and that of the data engineers who designed the solution. They don't always look at it from the practical end-user experience.

- You COULD take screen grabs or download individual chart images and put them into a PowerPoint report. But that's suboptimal. Having a tool that flexibly gives you access to results online AND enables the download of information into multiple formats is far more user-friendly.
- This is often the area where the gap between what clients see in the sales process and what they experience once a project is underway is the widest. It's also often an area that business stakeholders find particularly important, so it's critical to get right.



Questions to ask a prospective supplier:

- What formats can results be downloaded in? Can a leader / manager dashboard or other dashboard of results be downloaded, in their entirety, in PowerPoint?
- Can they be downloaded as a single PDF file or do we have to download individual components separately as image files?
- Please can we see an example of report generation and formatting? Is the format customisable, i.e. can we put it in our company template?



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Additional reading

The Forrester New Wave™: EX Management Platforms For Large Enterprises, Q1 2020: The 12 Providers That Matter Most And How They Stack Up

This in-depth study is designed to help large organisations select the right tech provider for their needs, providing an objective evaluation of the 12 market leaders in employee listening and research technology, including Qualtrics, Glint and Medallia.

Each technology provider is scored against 10 criteria – from ‘surveying methods’ to ‘validity of results’, ‘insights visualisation’ to ‘unique vision’ – and can also help you make the case for having a complete listening program as part of your EX strategy.



The study comes at a cost to read but is a worthwhile investment. Download it by visiting:



[The Forrester New Wave™: EX Management Platforms For Large Enterprises, Q1 2020](#)

As employee insight specialists working with the likes of Barclays, bp, BT, Co-op, Diageo, GSK, HSBC, Nestle, the NHS, Royal Mail, Sainsburys, Tesco, Vodafone and many more, we have kicked the tires and seen under the hood of many employee research and listening platforms.

If you want any more impartial advice, or to discuss an employee listening project that's on the horizon and for which you need to source a platform, please do not hesitate to get in touch by email or connect with me on LinkedIn.

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