How to Conduct an Exit Survey
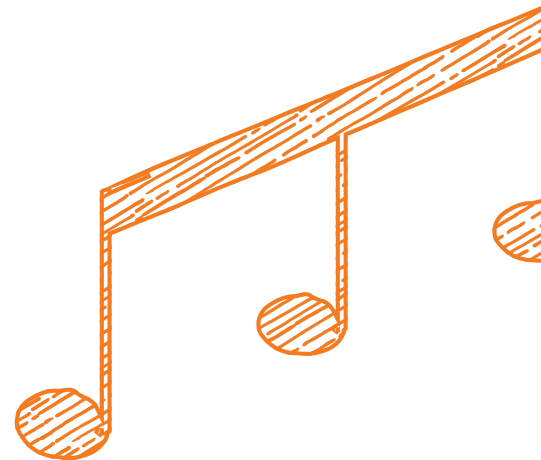
ev - er - y - thing you need to know;

au - thor

Christina Laubenthal
MARKETING CONTENT SPECIALIST

Christina's job is communicating every bit of QW knowledge in a way that clients find both helpful and enjoyable. Lucky enough to have worked for engagement-focused organizations, she loves making those same experiences accessible for all companies. Thanks to her dad, she has a broad knowledge of 1960s Westerns and furniture building. Thanks to her mom, she has other, much more important life.

in - tro - duc - tion

SO, YOU'VE DECIDED TO LAUNCH AN EXIT SURVEY.
OR MAYBE YOU'RE JUST INTERESTED IN LEARNING MORE ABOUT EXIT FEEDBACK.
EITHER WAY, WE'VE GOT ANSWERS FOR ALL YOUR QUESTIONS.

CONTENTS

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WHY SHOULD WE COLLECT EXIT FEEDBACK?

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The Bottom Line

The reason for collecting exit feedback is simple:

Turnover costs your business money, time, and employee morale.

Here are just some of the costs associated with an exiting employee:

- Lost business if exiting employee goes to a competitor

- Lost engagement when retained employees see a peer leaving

- Lost money and time hiring a replacement

- Lost money, time, and team productivity training the new employee

- Lost productivity while the replacement takes time in the early stages of the learning curve

- Lost business through inevitable learning errors

While you should do all you can to retain employees, some will eventually leave – there's no way around it. You need to be prepared to mitigate the costs of those exits by collecting feedback.

EXITED EMPLOYEES ARE 4.2 TIMES MORE LIKELY TO SAY THAT THEY ARE LEAVING

That's right, employees will tell you they're leaving, you just have to ask!

Employee engagement is higher when leadership shows they are committed to understanding and improving turnover, including methods like exit interviews and surveys

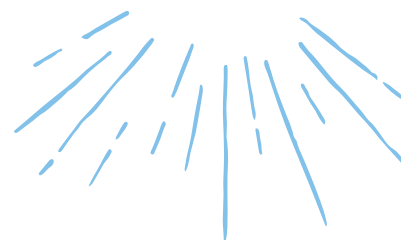**93%** of employees believe that exit feedback is important

87% of employees believe that their feedback can help others at the organization

The bottom line? Collecting exit feedback can help your organization avoid costly exits in the future and can assure employees of your current commitment to their well-being.

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HOW SHOULD WE COLLECT EXIT FEEDBACK?

Each organization needs to make several decisions when choosing the means by which they'll collect this all-important feedback. Here, we've laid out some of those crucial, first-step decisions.

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Make These Decisions First

Exit interview or exit survey?

Here we are, talking about exit surveys, and you're probably wondering, "What happened to the exit interview?"

Exit interviews are great, and they are a necessary part of an exit process, but alone, *exit interviews are flawed.*

Consider the pros and cons of each:

	EXIT INTERVIEW	EXIT SURVEY
PROS	• A conversational-style allows for the interviewer to guide the conversation as needed, focusing, clarifying, or following up on areas of distress or concern.	• Surveys are easily distributed. • Because questions are the same on each survey, analysis can be done to determine trends. • Anonymity allows the employee to tell hard truths without fear of losing a recommendation.
CONS	• Exiting employees have a tendency to sugarcoat things in order to leave a good last impression. This tendency is exacerbated in face-to-face interviews. • Interviews don't allow much time to reflect before answering.	• A survey may be an impersonal way for an employee to mark their leaving, as exit interviews might normally bring closure to a departure. • Surveys are much easier to ignore, avoid, and leave uncompleted.

Recommendation: Interview & Survey

We advocate starting with an exit survey, then conducting an interview around the gaps in the survey. This allows you to gather standardized data *and* dive deeper into employee responses, providing a complete picture of the exit.

PROS +/− CONS

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Standardization or flexibility?

Organizations can mandate that all their departments use the same collection method, or they could leave it up to directors' or managers' discretion. While the ability to customize a survey or interview seems like a good thing, this can actually prevent the trend analysis you intended to do when starting your exit survey process.

Recommendation: Organizational Standard

We recommend organization-wide standardization so HR leaders can identify trends and benchmark against other organizations' data, like engagement, performance, etc.

Paper or online?

Online surveys are here to stay: they allow for inexpensive, quick deployment, and data that is automatically aggregated and organized. Online surveys also have the capabilities for more advanced design features, such as drop down menus and scroll bars.

Recommendation: Completely Online

If at all possible, we advise an all-online exit survey method. This will ensure your data is all in one place and easily available. If not all employees have access to a computer or email address, ask your HR leader or exit partner for unique links that your employees can use on a shared computer, mobile phone, or at-home computer.

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WHO SHOULD TAKE THE EXIT SURVEY?

Another easy answer… everyone!

The next section will walk you through the different people to consider when deploying your exit survey.

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All Exits are Important Exits

Four types of exits exist, but it's common for organizations to address only one or two.

Voluntary Turnover
Employees who choose to leave your organization, for a variety of reasons

No company can avoid every single "I quit!," but gathering feedback after that happens can help you reduce turnover and make current employees' lives better. These employees may be tough to get information from, as they are hesitant to burn bridges they might need in the future.

Retirement
Employees who are removing themselves completely from the workforce

Don't fall into the thinking that retirements are inevitable and out of company control; do this and you will forfeit some of your most valuable information. Collecting retirement exit data will give you a picture of the improvements that should be made to engage older employees, and it will help you understand what's needed to keep employees for the long haul.

Internal Transfer
Employees who leave one position in your company for another position, also in your company

An effective exit survey helps you determine if employees are truly interested in another role or if they're running from a bad manager, distrust in coworkers, or a lack of growth opportunities. These surveys help leadership see what is working on an organizational level and where individual teams can improve.

Involuntary Turnover
Employees who have no choice in leaving your organization; in other words, employees who are fired

Many organizations run from these types of interviews or surveys, afraid of overly critical responses and jilted employees. However, every story has two sides – and the employee's side can help you understand your organization. Maybe the employee was underperforming because of a bad skills development program; maybe he or she had already secured a job and was a week away from resigning anyway.

Recommendation: Every Single Exit

An incomplete data set is a waste of time and money – so, from the beginning, survey every single exit. It can be intimidating to ask for feedback from a fuming employee, but listening to every employee shows humility, concern, and a commitment to progress.

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6 EMPLOYEE GROUPS
YOU DON'T WANT TO FORGET ABOUT

It really is important to make sure you're everyone is everyone. Don't let data that could improve your workplace walk out the door.

✓ PART-TIME EMPLOYEES
✓ TEMPS
✓ C-SUITE EXECUTIVES
✓ INTERNS
✓ CONTRACTED EMPLOYEES
✓ PEOPLE WHO QUIT AFTER ONLY A COUPLE DAYS

Each of these people offers a unique and valuable lens through which they knew your organization.

A Complete Picture

Traditionally, interviewing or surveying the exiting employee was enough. However, adopting the concept of 360 feedback, companies are now starting to survey the exiter's peers, direct reports, and managers – dubbed, the social exit survey. Data from different relationships shows a more complete picture of the exit, giving you information the exiter himself didn't share.

Consider these groups to include in a social exit survey:

Intra-team peers
These colleagues worked with the exiter on the same team, and they likely know a great deal about the exiter's work habits, job complaints, and career goals. These colleagues also shared a large majority of the exiter's time, and they can tell you if the exiter was a team player.

Cross-team peers
Cross-team peers can tell you about how your exiter worked with people who thought or worked differently. Cross-team peers also have great insight into the exiter's communication style.

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Managers

Managers can be expected to know the exiter and his work fairly well – after all, that is one of a manager's jobs. A manager can be insightful for looking at exiter work style, project completion, and communication with authority. A manager is also likely to know what an exiter might be lacking in a particular position or skill-set.

Direct reports

If your exiter managed someone, they need to be surveyed. Direct reports can speak to an exiter's leadership, communication, and goal-setting abilities. An exiter might also feel freer to express company concerns to someone without authority over them.

Other colleagues

Make sure your survey allows for 360 colleagues to invite others to participate. Your employees might think another colleague is better equipped at answering the questions, and the employees need to be able to invite that person's voice.

Recommendation: Exiter & 360 Collegues

We advise organizations to talk to both the exiter and the 360 audience. Feedback from both sources is absolutely essential to balance biases and fill in content gaps. Additionally, a social exit survey often serves as a "stay interview or survey," showing current employees that leadership is committed to understanding and improving the workplace.
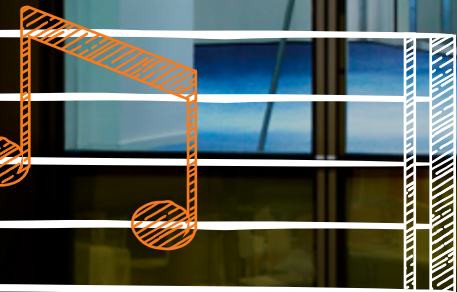
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WHEN SHOULD WE COLLECT EXIT FEEDBACK?

The "when" can often seem like an afterthought, but timing is an essential part of your survey strategy. Let's look at what you need to consider when deciding on your survey schedule.

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All in Good Time

You'll find that best practices for when to conduct an exit interview or survey differ by industry and company. When deciding on your timeline, here are five things to consider:

1. Timeliness

How long will it take your systems to get the survey or interview set up and in place? If your external partner takes 48 hours to launch the survey, plan accordingly. You'll also want to put a deadline on when responses must be submitted.

2. Completion

Would you like to ensure the interview or survey gets done? Schedule the interview or survey for when the employee is still with you, or provide flexibility for them to complete after departure.

3. Honesty

Would you like to get the most candid comments? Conduct the interview or survey the day after the employee's leaving is announced.

4. Perspective

Would you like to give the employee time to cool off or gain perspective after the resignation or firing is announced? Consider conducting the interview or survey during the final days of employment or even after the employee has moved on.

5. Sensitive Questions

Are you interviewing or surveying anyone in addition to the exiter? Collect this feedback after the exiter has left to make potentially sensitive questions a little easier.

**Recommendation:
Consider Your Employees**

Do what is best for your employees, and you'll get thorough and honest feedback that meets your needs.

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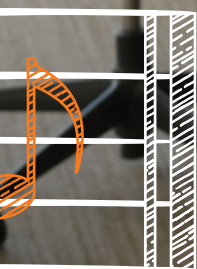
WHAT QUESTIONS SHOULD WE ASK?

This is the meat and potatoes of your exit survey – and you need to get it right. In this section, we'll look at what your survey goals could be, what topics could be discussed, and what an easy-completion survey looks like.

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Better Questions = Better Insights

Follow these two steps to create the content in your exit surveys.

1. Create an Exit Survey Foundation

Best practices use exit surveys to capture a complete picture of the employee's time with the organization. To get actionable insights from your interview or survey, aim to understand these four aspects in every exit survey:

Impact: the overall perceived effect this departure will have on your organization

Preventability: The avoidability of the exiting employee's departure

Cause: The reason the is employee leaving

Direction: the next steps for the exiting employee

2. Customize Your Survey

You may find it best to customize your survey for region, department, or position (this may be a great opportunity to get help from a survey partner). You can even add questions that gauge employee engagement. This list of common exit survey topics is a great starting point, but don't let it limit you:

- Job Responsibilities and Performance
- Employee Job Orientation and Training
- Mentoring Programs
- Working Conditions
- Opportunities for Skill Development and Career Advancement
- Supervision and Management
- Work Satisfaction
- Workload Distribution and Schedule Flexibility
- Salary and Benefits
- Organizational Culture
- Organizational and Work Group Communication
- Effectiveness of Exit Process

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3 TIPS FOR EASY-COMPLETION SURVEYS

When writing your interview or survey, make sure to write in a way that will ensure it will be completed with as little frustration as possible. The more efficient and effective you can be, the better information you'll get from your exiter.

- Keep surveys to 10 minutes (about 35 multiple choice/ 7 text entry). If absolutely necessary, you can deploy a follow-up.

- Make sure questions are short and direct; don't include multiple questions in the same item.

- Group your interview or survey by topic; this will keep the mind on a single train of thought.

Recommendation: Custom Survey with a Solid Foundation

No two organizations are the same, and it's naïve to think that any two organizations should use the same exit survey. As long as your exit survey is built on a solid foundation, feel free to add items that are unique to your organization.

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How do I set up employee data?

Entering employee data – no matter how you do it – will allow you to analyze and find patterns in your exits. Here, we'll walk you through how to do just that.

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Making Data Easy

Setting up the proper demographics before your exit survey begins will ensure that it will yield the most actionable data later on. Take the time to strategize about what will be most helpful to your organization.

1. Select which demographics to track

To see how certain groups and subgroups performed on particular items, you'll need to collect some sort of demographic data. Consider sorting by the following:

- Age
- Race
- Sex
- Office location
- Position or role
- Team
- Salaried v. hourly
- Part time v. full time
- Tenure

7 PROTECTED CLASSES

It is wise to pay particular attention to trends that involve members of protected classes, those that are protected by law from discrimination. Those demographics include:

- Age
- Race
- Sex
- Religion
- Disability
- Pregnancy
- Military service

If you notice these employees leaving in above average rates, it may be an indication that your workplace needs work on being inclusive, not just diverse.

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Learn how to build about workplace inclusivity.

2. Decide how to connect or collect the demographic data

- Self-reporting

- You can have employees self-report their demographics by including questions on the exit survey. Beware, though, that too many questions may cause sloppy answers.

- Pre-load before survey

- A manager or HR staff member can manually enter demographic data for each exiting employee.

- HRIS Integration

- You should have the ability to integrate your exit survey with your HRIS – this will make tracking down multiple data points much easier.

Recommendation: HRIS Integration

We believe that the best option it to integrate your HRIS and your exit survey (make sure to keep this in mind when looking at vendors!). To most effectively address exits, you want easy, demographic-rich analysis efficiently as possible.

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WHAT SHOULD WE DO WITH THE DATA?

It is important that the data you collect be useful to your company, and not just take up space in the back of someone's filing cabinet. This section details the steps to take once you've collected your surveys.

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Turn Demographics into Decisions

These four steps will take you from numbers on a page to organizational change.

1. Slice and dice for thorough understanding.

Here's where your demographic data comes in. If you planned it strategically before the survey was launched, you should have no problems now.

## 2. Look at trends to spot problems early.

Data becomes most useful when we can spot trends or themes. With your sliced and diced data, you can more easily see these patterns. You might look at a certain metric over time, look at the correlation of two metrics, or compare the same metric between different groups.

3. Look at big picture and identify changes to be made.

Look at what the trends mean for you and your company. Are there processes you need to change? Improvements that need to be made? Do your results match your vision for the organization? If you've conducted an exit interview and an exit survey, this is the time to join the two data sets together.

4. Share.

Present your findings to employees and leadership with recommendations. Many organizations might shy away from sharing this type of information with employees, but it is essential that your ground troops know that you care about and are addressing whatever turnover problems exist.
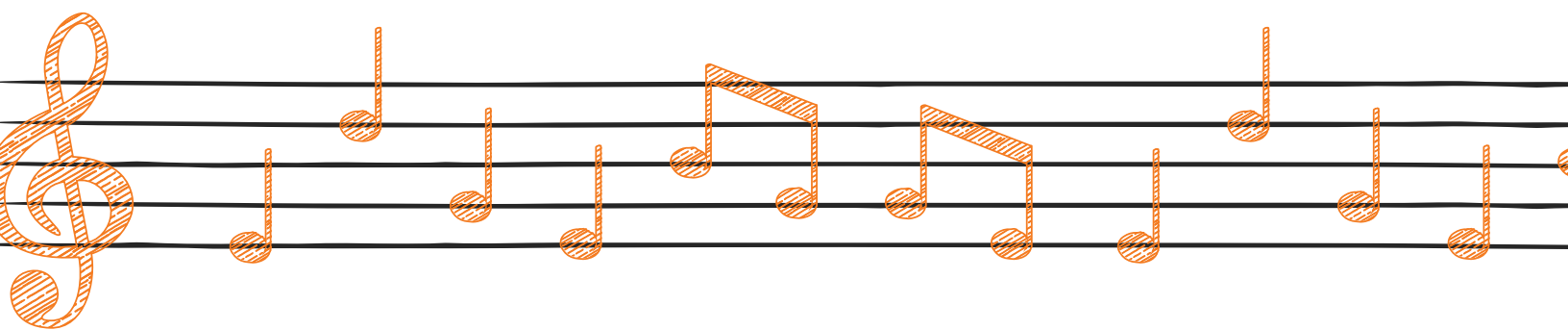
WHO SHOULD CONDUCT MY SURVEY?

An exit survey can't be launched in a vacuum; you're going to need some help. Make sure you're choosing the right solution with the information in this next section.

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Many organizations conduct exit surveys themselves, inaccurately believing that this will save the organization saving time and money. For an internal survey to be launched, an HR representative must write, deploy, facilitate, collect, and analyze the surveys. The more time spent on these menial tasks, the less time the HR rep has for addressing the problem of turnover.

So what's an HR pro to do? Consider the four benefits of using an external partner or platform (self-service).

1. Save Time and Resources
Rely on the experts to more efficiently supply, administer, and crunch the data of your exit survey.

2. Promise Employee Confidentiality
Get better insights into your organization's shortcomings when exiter's can be sure of their anonymity.

3. Simplify Survey Customization
Depend on your partner to craft a survey that fits the uniqueness of your organization and its turnover strategy.

4. Understand Trends and Themes
Sure, you could try to divine turnover patterns from loads of spreadsheets, but we bet you'd rather draw conclusions based on straightforward, dynamic reporting site.

Recommendation: External Partner or Platform

We believe that the best option it to integrate your HRIS and your exit survey (make sure to keep this in mind when looking at vendors!). To most effectively address exits, you want easy, demographic-rich analysis efficiently as possible.

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6 FEATURES YOUR EXTERNAL PARTNER SHOULD PROVIDE

✓ INTEGRATION WITH YOUR HRIS

✓ ZERO TIME TO LAUNCH EXIT SURVEY

✓ METRICS TO UNDERSTAND AND ANALYZE EXIT INFORMATION

✓ AGGREGATE, ONLINE REPORTING CAPABILITIES

✓ TURNOVER PROFILE CREATION

✓ ABILITY TO ATTACH INTERVIEW NOTES

Looking for more help on choosing an exit survey software? Look here.

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What's the next step?

Put Quantum Workplace to the test

Interested in getting the most out of your exit feedback?
Want to know what features we have to offer.

Visit our product page

Sign up for a demo

Learn more about exit interviews and surveys

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