

When is the Best Time to do an Employee Engagement Survey?

Best Practice Guide



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"Don't put off until tomorrow what you can do today."

We all know the saying, but how many of us can honestly claim to have adhered to this sage advice at all times?

Whether it's a complex project or simply replying to an email, most of us have put off tasks when the best course of action would have been to simply complete them as soon as possible. And employee engagement surveys are no exception.

At its core, an engagement survey is a strategic tool designed to capture an honest snapshot of your employees' experience. It measures their connection to the mission, their belief in leadership and their overall satisfaction with the work environment.

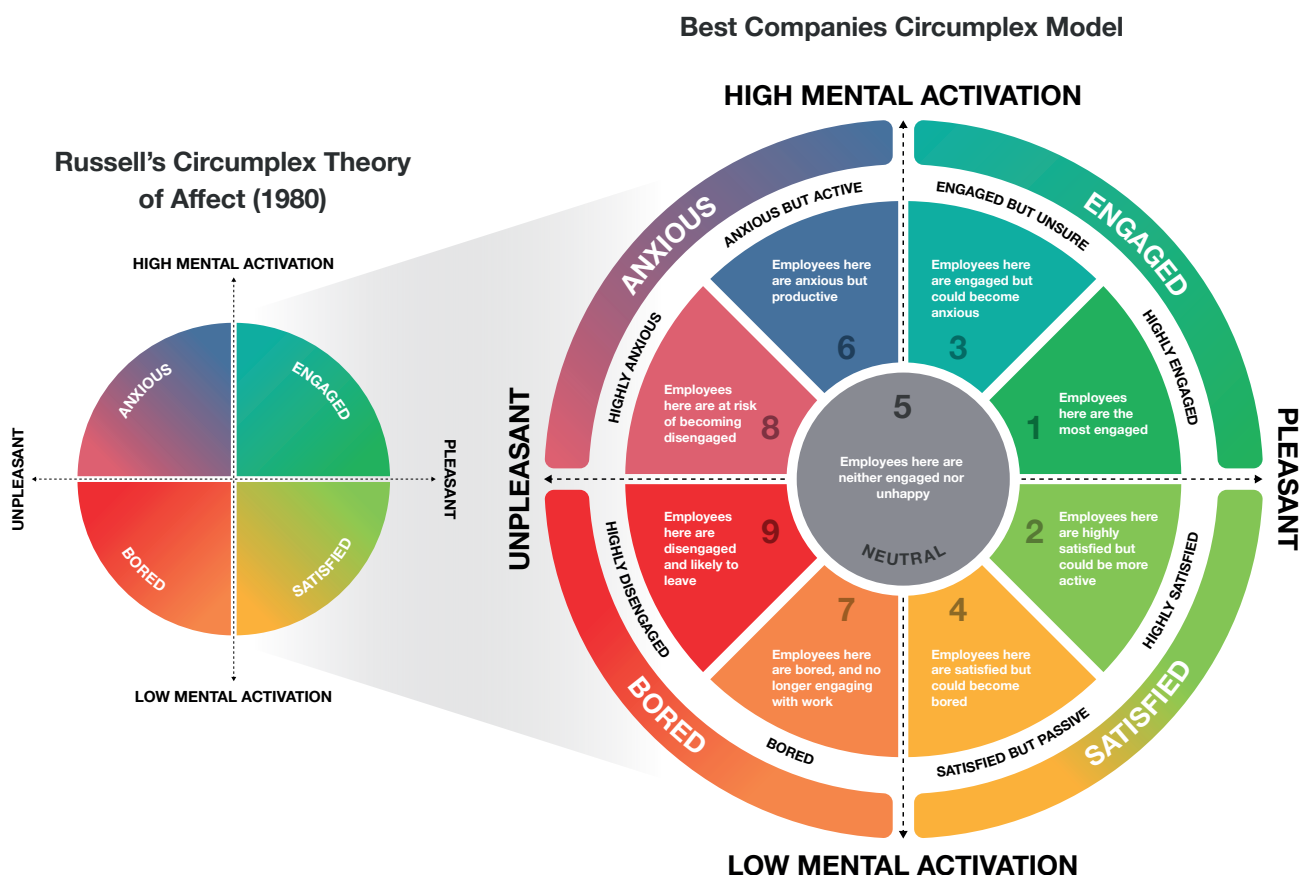
As a senior HR leader, you likely want nothing more than an accurate and timely view of engagement, especially during times of uncertainty. However, a common and costly mistake is in the timing. Delaying a survey, or timing it to follow "feel-good" events like bonuses, provides inaccurate, short-lived insights and delays action. Yet, convincing senior stakeholders that now is the exact time to gather this crucial data often presents a major hurdle.

It is vital to understand that, with employee engagement surveys, the value is not in the score, but the speed of the insight it provides. In this report, we will look at when is the best time to do an employee engagement survey, and why three common survey timing challenges are actually opportunities.

Why Timing is the Key to Clarity

Employee surveys don't just measure engagement, they capture a moment in time, an accurate picture of the employee emotional landscape in your organisation.

One means of measuring engagement is through **Russell's Circumplex Theory of Affect**. This model shows how employees move across states of activation and satisfaction, from highly engaged to highly disengaged.



The Best Companies Circumplex Model evolves this theory by dividing into nine sections that identify whether employees are highly engaged and energised, anxious but active, satisfied but passive, or bored and disengaged.

Understanding your employees' psychological state is essential for interpreting survey results accurately, thereby enabling you to identify the strategies that will help move your employees into the 'Highly Engaged' bracket.

This model also highlights the importance of your survey timing.

Surveying during bonus periods or major organisational changes can shift employees temporarily into "pleasant" zones, masking deeper issues like anxiety or boredom. Conversely, it is precisely in times of change, stress, and uncertainty that this feedback is most critical, offering a vital signal to leadership. These insights allow CEOs and teams to strategically reprioritise and utilise the information to best navigate the uncertainty rather than being distorted by temporary fluctuations.

The Importance of Doing an Employee Engagement Survey "ASAP"

The sooner you know, the sooner you can act ✓

This is the most critical point. Delaying your survey delays the feedback, which, in turn, delays the necessary, data-driven action. Every day you wait is a day an underlying issue goes unaddressed, potentially lowering morale and making key employees more susceptible to offers from competitors. Immediate insight accelerates your ability to intervene and improve.

Identifying workplace issues before they become crises ✓

Engagement surveys uncover concerns that employees might otherwise keep quiet. Surveying in a timely fashion allows your organisation to find and resolve these issues quicker before they lead to burnout, high turnover or low productivity.

Preventing the erosion of trust ✓

If employees think that the organisation is delaying a survey, or worse, trying to game the system by waiting until after bonuses have been given, it suggests a lack of genuine commitment to their experience. Surveying without delay demonstrates transparency and a willingness to face the truth, which is a powerful builder of trust.

Capturing authentic feedback ✓

The most valuable engagement data reflects the employees' actual day-to-day reality, not a short-term reaction to an external event such as rewards and bonuses. Surveying immediately - outside of major company events or high-stress periods - captures a more accurate measure of the work environment.

Gaining a competitive advantage ✓

High turnover is expensive, disruptive and a drain on resources. By surveying and acting fast, you gain the data-driven insights needed to refine your retention strategies and cultivate a culture of continuous improvement, enabling you to attract and keep top talent faster than your competitors.



They say, 'ignorance is bliss'. It's not; ignorance is ignorance. If you don't know what's going on in your business, you don't know how to run your business. It's as simple as that."

Sam White, Managing Director (Natural Resources) - Costain



When is the Best Time to Survey?

→ Turning 'Challenges' into Opportunities

The deployment of an employee engagement survey often encounters significant scheduling complexities.

While the instinct is to wait for a quiet period free from disruption, the reality is that major organisational events create high-stakes windows that can either compromise the data or enrich it significantly.

Rather than viewing these events as inconvenient scheduling 'challenges,' the focus should shift to understanding the unique impact these milestones have on employee sentiment.

By understanding and strategically navigating the temporary noise and emotional shifts associated with these periods, we can transform them into powerful 'opportunities' to capture the most honest, actionable and sustainable insights into the true state of organisational engagement.

→ Change in Leadership

A new leader's first 90 to 120 days are a sprint to understand and engage their people, but they often operate in an information gap. They rely on a slow drip of anecdotal evidence, filtered manager reports or limited one-on-one sessions. This approach is inherently subjective, time-consuming and prone to overlooking systemic issues.

As such, there are many reasons why undertaking an employee engagement survey during this initial period is the perfect way in which to gain a deeper understanding of teams and to inform people strategies.





Rapid diagnosis and cultural intelligence

The immediate engagement survey acts as a powerful strategic shortcut allowing the new leader to bypass the “honeymoon phase” and acquire objective data quickly. This data instantly illuminates:

- **Morale hotspots:** Which teams or departments are struggling most with resources, workload or communication?
- **Systemic pain points:** Are issues related to transparency or a lack of clear vision?
- **Cultural nuances:** What do employees truly value right now, be it flexibility, career development or meaningful recognition?

This instant feedback allows leaders to focus their energy and resources on the most critical issues as soon as possible. By demonstrating strategic competence through data-driven action, they earn credibility early.

Blameless feedback and higher candour

A core benefit of the transition survey is the protective insulation it offers new leaders. Any negative feedback (such as low scores on communication, poor morale in a specific division or frustration with resources) is rightly perceived as a legacy of the previous administration.

This separation of cause and effect dramatically encourages candour. Employees are often hesitant to give established leaders negative feedback because they believe the issues are too entrenched to change. During a transition, the risk of consequences is perceived as lower, leading to:

- **Higher response rates:** Employees feel their voice finally matters.
- **More honest comments:** Uncensored, qualitative feedback provides rich context.

Additionally, new leaders get a unique Hero Opportunity. They are tasked with cleaning the slate and fixing deep-seated, painful problems, all based on objective data. Crucially, they get to be the solution without ever having been the cause. They step in to heal the organisation, a powerful position that rapidly builds goodwill.

→ Bonuses and Rewards

A common, but ultimately misguided, strategy is scheduling engagement surveys immediately after awarding bonuses, distributing raises, or delivering large rewards. This is flawed because it generates a temporary boost in satisfaction.

The “sugar rush”

The happiness derived from a financial reward is often short-lived. It provides a “sugar rush” of positive feeling which artificially inflates engagement scores.

It's like asking someone how they feel about their job right after they've been taken out for a steak dinner. The good feeling about the lunch doesn't fix underlying issues with their actual work, their manager or their work environment.

This results in inaccurate insight. This data is unreliable for making meaningful, long-term strategic improvements. When the “sugar rush” fades, the real issues remain, unaddressed and festering.

Financial satisfaction vs. True engagement

The crucial distinction lies between satisfaction and engagement. While a bonus certainly satisfies an immediate need or desire, it rarely impacts the deeper drivers of engagement that contribute to long-term performance and retention.

- **Satisfaction is transactional:** It's a temporary feeling tied to a specific exchange (work for money). A bonus acts as a strong, but fleeting, positive transaction.
- **Engagement is relational:** True engagement is driven by factors like feeling valued, having clear career progression, a sense of purpose, trust in leadership and the resources to do the job well.

Surveying immediately post-bonus masks the critical issues that drive employees to disengage with the organisation. A high score on the day after payday can be interpreted as a vote of confidence in leadership, when in reality, it may only reflect financial contentment. This leads to a dangerous risk: a false positive.





In this instance, leadership might conclude that the organisation is healthy and halt efforts to investigate real problems with workload distribution, poor communication or toxic team dynamics.

By the time the next survey cycle arrives, typically six to twelve months later, the underlying morale could have significantly deteriorated, and key talent may have already been lost, all while leadership was operating under the delusion of high engagement.

The strategic timing

To acquire reliable data that reflects the true, sustainable state of the organisation, surveys should be done before or at least six weeks after any bonuses or raises.

This delay allows the temporary euphoria to subside and permits the core drivers of engagement to surface naturally, providing leaders with the actionable insight required for strategic improvements.



As a growing organisation, it was really important to us to get external validation of where we were, where we were going, and what the development needs were for our people. Feedback from employees is always important, but it's particularly important in a growing organisation when you've got new people coming in who won't necessarily be aligned to your culture."

Adam Boddison, CEO - APM

→ Mergers and Ownership Changes

Whenever an organisation goes through a merger or a change of ownership there is a significant transition, leading to uncertainty and potential anxiety for employees. While maintaining a finger on the pulse of employee sentiment is crucial, the timing of an employee engagement survey must be strategic to yield meaningful, actionable results rather than adding to the existing noise or capturing fleeting, fear-driven responses.

How soon after the merger or leadership change should you do an employee engagement survey?

The most beneficial times to deploy an employee engagement survey align with key milestones in the integration process, offering defined contexts for feedback.

1. The post-communication phase (3-6 Months)

This window, typically 3 to 6 months after the merger closes or the new ownership takes over, is often the optimal time for a comprehensive survey. By this point, employees have:

- **Received clarity:** Major decisions about leadership, structure and key company policies have usually been announced and implemented.
- **Formed initial opinions:** They have had time to experience the new management style, work environment and cultural changes first hand.
- **The “honeymoon” is over:** The initial excitement or relief has worn off, and the daily reality of the new organisation is setting in.

The survey at this stage should focus on integration effectiveness, communication quality, leadership visibility and the perception of cultural fit.

2. The stabilisation phase (9-12 Months)

A full-scale survey at this point serves as a check-up on the long-term success of the integration efforts. By this point, employees have:

- **Adjusted to the new normal:** The initial transition period is over, and the daily routines and processes of the combined entity are firmly established.
- **A longer-term perspective:** They have a clearer view of their future within the company, including career paths and the stability of the new organisation.
- **Moved past short-term anxieties:** The focus has shifted from immediate survival or change management to long-term issues like organisational commitment and overall job satisfaction.

The goal of the survey at this stage is to confirm that engagement levels are stabilising or improving post-transition and to identify any lingering structural or cultural issues that may be dampening enthusiasm or driving key talent to consider leaving.

Setting the stage

While it's wise to wait a few months for the post-merger dust to settle before launching your employee engagement survey, it's highly recommended to complete the setup and communication plan for the survey ahead of time.

This preparation serves two critical purposes:

- It ensures a smoother, faster start when the time is right to survey. When you're ready to press "go", you can launch immediately, capitalising on the context.
- Early preparation sends a powerful signal to your workforce that – even while stating that the launch will be deliberately delayed until the transition settles – you have firm commitment to giving them a voice and that their opinions are valued.

→ Organisational Change

While bonuses and mergers represent high-profile extremes, it is often the more common, sustained pressures (redundancies, strategic shifts, poor financial performance or the rollout of massive cross-functional projects) that create the deepest trenches of employee anxiety and uncertainty.

When leaders face significant internal or external pressures, the instinct is often to batten down the hatches and wait for a "calmer" time to survey. This is a profound mistake. These moments of significant change, resource strain or negative news are not obstacles to surveying; they are the critical windows of opportunity for honest, actionable feedback.



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It's no surprise to me that from that point where we came out of the pandemic – when we were authorised as a bank – we've seen a seven-fold increase in our lending. We've created sustainability in our profitability. And I put that entirely down to having the strong engagement from our employees. And Best Companies has been at the heart of us both understanding that and driving that.”

Carl D'Amassa, CEO - DF Capital



The opportunity in uncertainty

Significant organisational change, whether it's a structural realignment or a difficult redundancy process, acts as a stress test on your culture and leadership's credibility. Surveying during these high-stakes periods provides four irreplaceable insights:

- **Measuring the emotional impact of strategy:** When a new strategy is announced or a major project consumes vast resources, employees often lose sight of their day-to-day purpose. A timely survey cuts through the noise to measure the true cost of change in terms of clarity, workload and anxiety. It tells you if the new strategy is being embraced or if it's merely generating confusion and burnout. It allows you to assess the real-time engagement deficit caused by the resource drain of a major project.
- **The candour of crisis:** In a climate of poor financial performance, downsizing or a looming threat, the stakes are perceived as higher, which paradoxically can increase candour. Employees often feel the need to be brutally honest about what is truly broken - whether it's broken processes, toxic management or an unsustainable workload - because they know the organisation's survival depends on fixing it. Delaying a survey during these times suggests that leadership is either unaware of the pressure or unwilling to face the painful truths.
- **Building trust through transparency:** Nothing erodes trust faster than perceived secrecy during periods of financial difficulty or pending layoffs. By launching a survey when the atmosphere is thick with rumour and anxiety, you send a powerful, visible message: "We acknowledge this is difficult, and your voice matters right now". This proactive outreach demonstrates leadership's commitment to making data-driven decisions even, and especially, when the news is bad.
- **Identifying flight risks early:** In times of widespread change or financial strain, your top talent becomes highly susceptible to competitor offers. They are actively evaluating their future. A survey conducted during this period serves as an early warning system. It reveals which specific groups feel most insecure, which are most impacted by the new strategy's workload or which are most disengaged due to poor communication. This insight allows for highly targeted, pre-emptive retention efforts before your key people walk out the door.

The best practice remains consistent: Don't wait for calm. Change is the new normal. By treating these moments of organisational change not as a reason to delay but as an essential opportunity to listen, you gain the most authentic, unfiltered data required to steer the organisation safely through the transition and retain the trust of your employees.



→ Best Practice

Focus on consistency

The best time to survey is when you are ready to act. Beyond that, advocate for establishing a regular, predictable survey calendar (for example, annually, with shorter, more focused quarterly “pulse” checks) to track progress over time. Consistency is far more important than trying to find a “perfect” date.

Avoid known extremes

To ensure you capture authentic day-to-day sentiment, advise against scheduling your core survey during:

- **Major financial events** (like annual review or bonus distribution).
- **Peak holiday seasons** (which lead to high PTO and low participation).

Prioritise effective actions

Above all, the best time to survey is when the organisation is ready and committed to acting on the feedback. A timely survey followed by no action further damages employee trust.

- **Communicating the results:** Share the high-level findings openly, acknowledging the positive and the negatives.
- **Forming action teams:** Empower employees (not just managers) to work on solutions for the issues they raised.
- **Creating accountability:** Tie follow-up actions and improvement metrics to leadership and management goals.

From Insight to Action

Don't fall into the trap of post-bonus bias or the paralysis of waiting for a “perfect” time.

The true value of an employee engagement survey is the insight it provides and the quality of the action it drives, not the score itself.

True, lasting engagement is built on continuous, honest listening and tangible, visible change.

Let's stop putting things off until tomorrow.

Discover more about how an employee engagement survey can transform your organisation using accurate, unbiased feedback. **Discover more...**





Helping make the world a better workplace

For over 25 years, Best Companies has been the UK's leading authority on **employee engagement** and **organisational health**. Our mission is simple: to help organisations create environments where people truly love to work.

With our proven 8-Factor Methodology, we help **Measure** and **Improve** how employees feel about their working lives, supporting organisations to become better places to work, boosting performance, productivity and profitability.

We go beyond recognition.

We provide actionable insights that empower HR and leadership teams to drive meaningful change, supported by next-generation tools that **Elevate** the performance of people leaders.

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