Tracking Levels of Employee Understanding and Engagement During Change
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NEED/OPPORTUNITY / BP plc is one of the largest global companies by market capitalisation. Acquisition, growth and a reputation for investment in renewable energy have been coupled with operational challenges in recent years. The result has been a drop in competitive performance. A new CEO and leadership team have sought to restore revenues, reduce complexity and change behaviours through an ambitious program of business simplification.

In late 2007, the BP executive team launched its agenda to focus employees on core business priorities. Employees needed a solid understanding of those priorities and a commitment to changing their behaviours in order to deliver them.

INTENDED AUDIENCE(S) / Concerted communications and engagement activities were launched across the business in late 2007, focusing mainly on the BP management population. BP needed to measure and track the opinions of two primary audiences:

- **BP’s 27,000 managers around the globe:** Managers were subject to major organizational and structural change, and were tasked with delivering tangible improvements in business performance. BP also sought feedback from a sample of its 6,000 senior leaders via telephone interviews in order to obtain a more in-depth insight into their opinions. This population was also undergoing unprecedented levels of change in their roles.
- **All BP employees:** 90,000 employees on every continent, working in different cultures; from senior managers and highly-educated engineers to blue-collar, hourly employees; from oil traders working in Houston, Texas, U.S., to off-shore oil rig operators working in the Gulf of Mexico or the North Sea. Employees across BP were experiencing change and reorganisation, albeit to different extents.

The required research solution needed to account for the wide range of needs for both audiences—in a way that was simple and cost-effective.

GOALS AND OBJECTIVES / The main objectives for BP’s pulse research was to:

- Track the effectiveness of communication and engagement activity relating to the company’s business priorities and expected behaviours.
- Provide comprehensive insight to drive action planning focused on delivering future improvements in employee understanding, engagement and behaviour.
- Conduct the research and reporting in a cost-effective and timely way, delivering better tangible
savings (compared with previous employee research) at a time of cost constraint for the business.

**SOLUTION OVERVIEW**

- Karian and Box recommended a sample-based survey of all BP employees, instead of a census of all employees. This would ensure the findings were statistically valid and representative of target audiences while mitigating the operational and cost impact on the business.
- Tracking pulse research (conducted in January, April and August 2008) was conducted online, with telephone interviews giving more in-depth and qualitative feedback from BP’s senior leaders. The August 2008 all-employee pulse research was conducted online with paper survey responses solicited from frontline employees without web access.
- Karian and Box developed bespoke and innovative research reports based on a new, visual, automated dashboard that would give BP senior leaders a quick, clear picture of the key findings and related insights—enabling them to take subsequent action more quickly.

**IMPLEMENTATION AND CHALLENGES** / Karian and Box supported BP during each stage of pulse research, from question design, translation, and building the online survey, to data analysis and the development of innovative reporting techniques.

**RESEARCH FOCUS**

- The sample-based approach focused research on representative samples of the audiences, thereby ensuring that employees were not surveyed more than twice in any one year.
- Karian and Box worked with BP to develop a core set of questions for each survey, allowing tracking over time. This was complemented by ad-hoc questions that sought feedback on contemporary business issues. Pulse questions focused BP’s strategic measurement approach on six core question themes that measure:
  
  *Two input factors:* Feedback on the internal communication and engagement processes.
  *Four output factors:* Levels of employee awareness and understanding, confidence, trust, and commitment.

**BESPOKE ONLINE SURVEY**

- Karian and Box developed a BP-branded, bespoke online survey for the January pulse survey. This was enhanced and improved for the August survey, and was available in 12 languages including Arabic, Azeri and Mandarin. The survey included complex demographic questions that enabled BP to cut the data by country, business, site location, gender and ethnicity.
- Throughout the field research phase, the client was able to log in to a secure, dedicated results web site, which provided live updates for both audience response rates and survey results across all audience groups. This helped BP manage communications to specific audiences where response rates were too low.
ANALYSIS, REPORTING AND RECOMMENDATIONS

- A bespoke reporting process was developed for the pulse research, providing simple, visual dashboard reports that were well received by BP’s executive team and the board. These reports were further improved to allow greater ease of interpretation.
- An automated system that enabled reports for over 55 businesses to be built quickly and efficiently was built, saving the business approximately US$125,000 in reporting costs.
- Most important, Karian and Box provided in-depth commentary on key areas of strength and weakness in the results for the group and each business area. This enabled busy senior leaders to focus on the key issues and develop effective action plans for improvement in a way that had not been possible in the past. The executive team and board were able to have a clear overview of common issues across the group.

Visual reports for each business area incorporated the Karian and Box Ambassadors Matrix. This matrix is used by Karian and Box to determine how many employees are ambassadors (have both a good understanding of the business priorities and are engaged with them), bystanders (high understanding, low engagement), loose cannons (high engagement, low understanding) or wreckers (both low understanding and engagement).

Correlation analysis of results provided a picture of the key drivers for low or high engagement. This approach has helped BP understand why respondents provide lower scores, based on how they have answered specific questions. This insight has helped BP to focus future communication activity on some of the areas that cause high or low levels of engagement, thereby adding value to the research process.

The benefits of the visual, dashboard reporting system also include:
- A highly visual, simple and intuitive way of presenting research results over time, as preferred by BP’s executive management team.
- Fast and effective identification of key areas of strength and weakness for each reporting group, both on a micro and more general level.

EXAMPLE AMBASSADORS MATRIX

For reasons of confidentiality, actual examples of BP reporting or data are not provided. Any data provided is purely for example and will not reflect the results obtained in any internal research.

![Ambassadors Matrix Example](image-url)
PROJECT MANAGEMENT
Effective and highly responsive project management of the pulse research throughout 2008 has been critical to delivering timely, accurate and cost-effective research and reporting. Karian and Box applied its rigorous workflow process to ensure detailed project time scales and day-by-day project plans for each of the three pulse surveys (January, April and August 2008) were adhered to.

CHALLENGES
The two primary challenges faced were to:

- Develop a reporting approach that delivered very short, simple reports and commentary while concurrently giving meaningful insight. This was achieved by developing clear, color-coded visual representations of data (via dials and thermometers), enabling BP leaders to quickly see how their business is performing. As such, this freed up limited reporting space for added value commentary and insight.
- Maximise the reach of the research while minimising the logistical, operational impact on the business and keeping costs down. Large-scale employee research on global companies like BP can be costly and add pressure to meet survey targets on already busy leaders. Using telephone interviews for sourcing senior leader feedback also helped meet this challenge.

EXPENDITURE/BUDGET
Karian and Box conducted 2008 pulse research on time and on budget, delivering major cost savings compared with previous employee research—for example, delivering the all-employee pulse research much faster than, and at approximately 30 percent of the cost of, employee research conducted in 2006. This was achieved by:

- Developing a lean, simple research process for BP, using the sample-based approach compared with a full census survey.
- Building an automated reporting process.
- Managing the project in a cost-effective way to ensure lower costs are passed on to the client.

MEASUREMENT/EVALUATION /
The pulse surveys have helped BP to measure and track the effectiveness of communication and engagement activity, thereby focusing subsequent activity on those areas critical to improving employee understanding and engagement.

- The survey findings and related guidance from Karian and Box have helped BP senior leaders to take the necessary, targeted actions throughout 2008 to achieve these improvements.
- BP leaders have been able to regularly track employee views in a way that caused minimal disruption to the business and enabled the organization to identify trends quickly and respond to these issues with speed and focus—something that was not possible with previous employee surveys.
- Examples of tangible improvements across 2008 include:
  A strong increase in the number of ambassadors across the business
  Solid and, in many cases, double digit increases in questions relating to employee...
understanding of business strategy and priorities
Increases in employees seeing visible evidence of senior leaders living the relevant behaviours

Client feedback has shown that Karian and Box has delivered against the project objectives:
“Karian and Box’s responsive approach and expertise helped the BP communications team implement a measurement program that was efficient, timely and generated actionable insights for BP’s senior leaders at a time of significant internal change.” —Dr. David Bickerton, director of communications, BP plc