

# CASS BETTINGER & ASSOCIATES

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## HOW TO ADMINISTER THE CORPORATE CULTURE SURVEY

### 1. Consider the timing of the survey.

- We highly recommend conducting corporate culture surveys prior to acquisition or mergers in order to compare and/or contrast organizational differences.
- We discourage conducting a corporate culture survey around the year-end holiday season.
- Are you undertaking a major project such as a system conversion that might be disruptive to the organization? If so you may consider postponing the survey until completion of the project, or at least be aware that these unscheduled events can alter the cultural norms in your organization.

### 2. Select the demographic breakouts for the organization.

- The following are examples of demographic breakouts. Keep in mind that each institution has it's own unique structure and will want to adapt the breakouts accordingly.

**Example Only** - Small Organization – fewer than 50 employees

<b>Position:</b>
1. Salary
2. Hourly

Or

<b>Position:</b>	<b>Length of Service:</b>
1. Exempt	0 to 2 Years
2. Non Exempt	Over 2 Years

**Example Only** - Larger Organization – one from each box

<b>Position:</b>	<b>Length of Service:</b>	<b>Location/Function:</b>
1. Officer	1. 0 to 2 Years	1. Branch Locations
2. Non Officer	2. Over 2 to 5 Years	2. Staff/Administrative Support
	3. Over 5 Years	3. Operations Area

**Example Only** – Larger Organization – one from each box

<b>Position:</b>	<b>Length of Service:</b>	<b>Location/Function:</b>	<b>Region:</b>
1. Management	1. 0 to 1 Year	1. Technology	1. Northern Region
2. Staff	2. Over 1 to 3 Years	2. Administration	2. Southern Region
	3. Over 3 to 6 Years	3. Production	3. Eastern Region
	4. Over 6 to 10 Years	4. Customer Service	4. Western Region
	5. Over 10 Years	5. Legal/Audit	

The above represents **examples only** – select breakouts that make sense to your organization whether large or small. You need not be limited by the above examples.

Do keep in mind, however, that groupings of fewer than 12-15 employees will impair the confidentiality of the survey. It is critically important that employees feel confident that their responses to the survey will be kept absolutely confidential.

- You will be sent instructions via e-mail to set up your survey on-line. The instructions will take you to the site where you will be able to preview the survey. There may be verbiage in the survey that does not fit exactly the terminology used by your company (e.g., the survey refers to senior management as sr. vice presidents and above). If this is the case with your organization, let us know and we will adapt the survey to fit the company.***
- Announce to the staff that a corporate culture survey is going to be administered in the near future. We recommend that the President of the company sign the memo/fax/e-mail, etc., announcing the survey, and that he/she encourage open and candid participation with a guarantee of complete confidentiality. The following is a sample memo:***

**To: All employees**

**As you may know, our industry is undergoing tremendous change. The proliferation of new competitors, both industry and non industry, are aggressively targeting our best customers. In our ongoing commitment to become a high-performance company, I am committed to creating and reinforcing a corporate culture in our organization that is strong, positive, adaptive to change, and supportive of our strategic plan.**

**In order to help us evaluate our existing corporate culture we need your input. Please complete the survey as instructed. Your response will be absolutely confidential and anonymous so please be as honest and candid as possible. The results of the survey will be tabulated and shared with you at a later date.**

**I appreciate your invaluable input.**

*Albert Lincoln*  
**President**

5. *Provide clear directions for completing the survey on-line according to your company preference. Establish a cut-off date for employees to complete the survey – be sure to emphasize this date to employees to ensure maximum participation.*
6. *The employee is asked to respond to 92 statements that range from strongly disagree to strongly agree; 6 trend statements that range from much worse to much better; plus two additional statements.*
7. *The 92 statements fall into 20 component categories as follows:*

<ol style="list-style-type: none"> <li>1. <b><u>Strategic Focus</u></b></li> <li>2. <b><u>Leadership</u></b></li> <li>3. <b><u>Personal Commitment to High-Performance</u></b></li> <li>4. <b><u>Attitude Toward Change; Innovation</u></b></li> <li>5. <b><u>Philosophy, Standards, &amp; Values</u></b></li> <li>6. <b><u>Organization Structure</u></b></li> <li>7. <b><u>Performance Standards</u></b></li> <li>8. <b><u>Orientation and Training</u></b></li> <li>9. <b><u>Performance Review</u></b></li> <li>10. <b><u>Discrimination and Favoritism</u></b></li> </ol>	<ol style="list-style-type: none"> <li>11. <b><u>Recognition and Rewards</u></b></li> <li>12. <b><u>Tolerance of Mediocrity</u></b></li> <li>13. <b><u>Policies and Procedures</u></b></li> <li>14. <b><u>Teamwork</u></b></li> <li>15. <b><u>Communication</u></b></li> <li>16. <b><u>Marketing Orientation; Commitment to Quality Service</u></b></li> <li>17. <b><u>Sales Culture</u></b></li> <li>18. <b><u>Quality of Supervision</u></b></li> <li>19. <b><u>Morale</u></b></li> <li>20. <b><u>Attitude Toward Profitability</u></b></li> </ol>
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8. *In addition, open-ended questions can be added to the survey. These should be specific in nature, and we can assist with development.*

Participation in the survey can be monitored during the process through the company client site. The report is available on that site upon completion of the survey (the day after the survey closes).

**IF YOU HAVE ANY QUESTIONS PLEASE CALL (239) 596-2890 or send an e-mail to [ccbettinger@earthlink.net](mailto:ccbettinger@earthlink.net)**