Top Tips for a Seamless Survey Participation Season

Today's Presenters:

Michele Maner

Lead Compensation Analyst

Olivia Sedler

Senior Product Manager

payscale

Today's Agenda

- Preparing for survey season
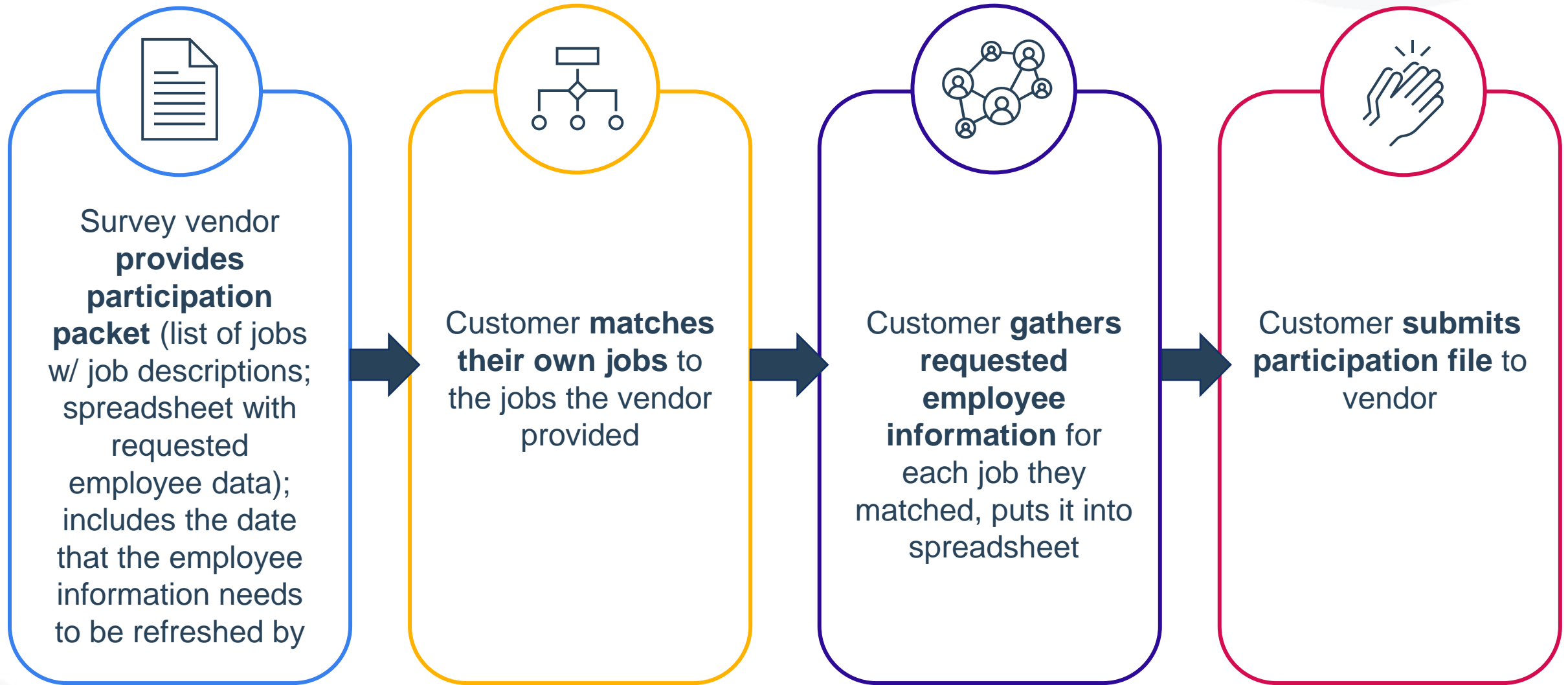
- Tips and tools to get through the season

- Q & A

Poll: How seasoned are you with survey participation?

A. Have never participated

B. Have participated 1 or 2 times

C. Have participated 3-5 times

D. Have participated 5+ times

payscale

The survey lifecycle

Survey Management

Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec

Participation Season (Give Data)

Waiting Period

Survey Season (Get/Apply Data)

The Participation Process

Survey vendor **provides participation packet** (list of jobs w/ job descriptions; spreadsheet with requested employee data); includes the date that the employee information needs to be refreshed by

Customer **matches their own jobs** to the jobs the vendor provided

Customer **gathers requested employee information** for each job they matched, puts it into spreadsheet

Customer **submits participation file** to vendor

payscale

Tip: Make sure you audit your employee data and compile information

- Ensure the employee data in your HRIS is **clean and updated**. This data is the foundation of your survey participation. If you do use a market pricing system, such as Payfactors, you will want clean data flowing over from your HRIS.

- **Update all of your market pricing and salary ranges**. It will help ensure that you are matching your internal jobs to the survey benchmark jobs accurately.

- Know where **your data gaps** are.

- You should **understand how your internal and external changes affect your data**.

payscale

Demo: 10 new HRIS integrations!

Make informed, real-time pay decisions without system hopping by integrating all of your pay and employee data within Payfactors.
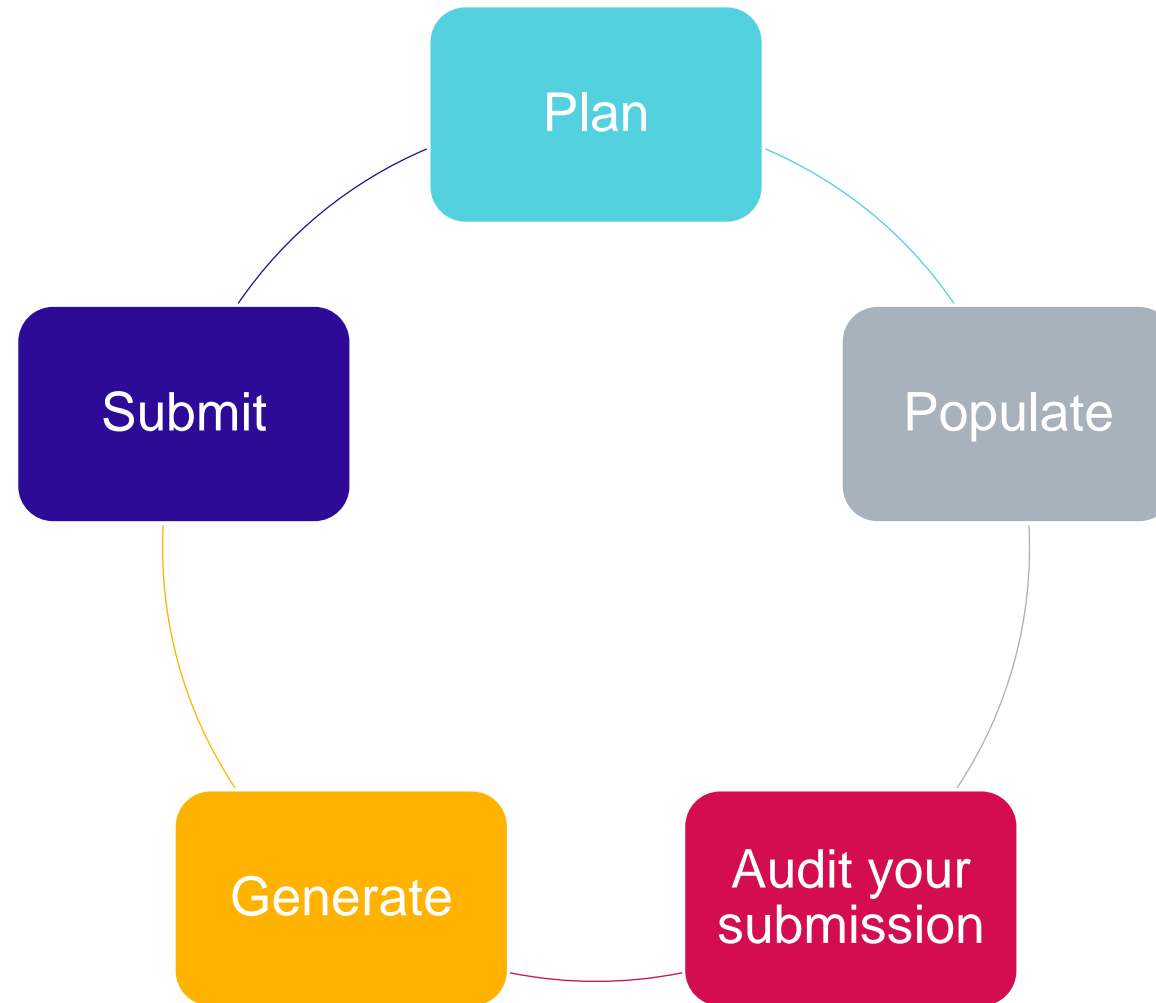
✓ Access current employee data directly within Payfactors to **make more informed decisions** that attract talent and retain great employees.

✓ **Eliminate the tedious, repetitive process** of importing and updating your employee data.

✓ **Protect sensitive employee data** with a seamless, secure API integration – no more file shuffling.

Introducing Payscale's expanded seamless API integrations

R remote   UKG   dayforce

paycom   paylocity   gusto

ADP Workforce Now   Namely   ORACLE   ADP
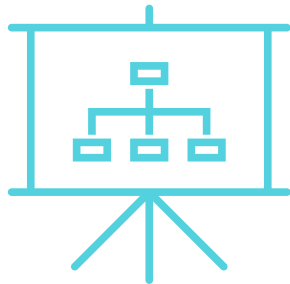
SAP SuccessFactors   bambooHR   HUMI

payscale

Payscale's Survey Participation Process

Plan

Tip: Prepare and plan your survey participation schedule

- Make sure you are getting all your due dates for each survey in order and creating **a clear timeline** for when to complete everything, workback schedules, when to audit your submission, know when to submit and how to balance with other compensation activities.

- A particular survey may not meet all your needs. **Do you need to participate in and purchase more than one survey?**

- You must **look out for external changes** in the surveys you're taking. Some survey providers may completely change their job code taxonomy from one year to the next.

- If you cannot meet a participation deadline, **reach out to the survey provider and ask for an extension** rather than just not participating. Most are happy to grant one as they have built that into their timeline. They want your data!

payscale

Demo

The New Surveys Experience in Payfactors helps the entire survey lifecycle with advanced survey management.

✓ **Understand** your jobs to be done with a **visual timeline** and a centralized view of all your surveys, so you always know what's coming up next.

✓ **Plan** strategically with the help of survey data **utilization metrics**. This helps you evaluate the surveys have the highest ROI, so you can optimize your investment in surveys.

✓ Add your **planned surveys** in Payfactors; we'll provide the materials and due dates to track your progress.

payscale

Populate

Tip: Make a copy of the submission spreadsheet

- One tip is to **make a copy of the submission spreadsheet** and use that as your working document.

- Once you have all data columns complete, then you can copy and paste the values into the submission spreadsheet and **not have any formulas or lookups in the submission spreadsheet**.

- Using a tool can really help make things faster/simpler- **removes the need to copy and paste** from multiple excel spreadsheets into one submission.

payscale

Demo

In the next phase of the survey lifecycle, Payfactors helps you navigate the participation process through a guided workflow.

✓ Use your planned surveys as your 'working document' for participation.

✓ Populate participation-specific matches with the click of a button for your submission this year.

✓ Use your market pricing matches as a first step without leaving the platform. No more hunting down and juggling spreadsheets.

payscale

Audit your submission

Tip: Implement checks and balances

- **Keep a copy** of what you do, so that you have for next year

- **Avoid sending multiple survey matches** to one company job

- Keep in mind the **do's and don'ts of job matching**

Here are some of the dos and don'ts of job matching:

✓ **DO** match jobs based on description and level

✗ **DON'T** match jobs by title (as these can vary widely by organization)

✓ **DO** select the two best data cuts for hybrid positions and weigh them accordingly

✗ **DON'T** match jobs by base salary

✓ **DO** use your most up-to-date job descriptions and organizational levels

✗ **DON'T** use degrees and educational credentials to match jobs unless it's clearly stipulated in the description

✓ **DO** look at changes to jobs, as well as new or emerging jobs

✗ **DON'T** factor in certifications or licenses to match unless they're in the job description

✓ **DO** include updated yearly merit increases

Demo

Payfactors helps you follow best practices when it comes to survey participation and management.

✓ After you populate your data automatically, then, you can follow the guided workflow to easily audit for duplicate matches and errors.

✓ This helps you get it right the first time and avoid time-consuming back and forth with vendors.

✓ These participation-specific matches are saved for future re-use. This future-proofs participation for years to come and ensures continuity, efficiency, and data accuracy for not only your organization, but for survey data and the industry as a whole.

payscale

Generate
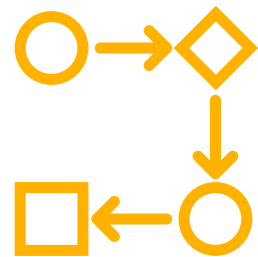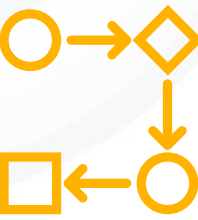
Tip: Don't leave blank fields or submit incomplete data.

- **Save time** on the front end by completing all fields so you don't have to revisit.
    - Don't leave blank fields or submit incomplete data.

- If a field is not applicable, **indicate that** rather than just leaving the column or field blank.

- Ensure any part-time salaries and other compensation elements are **converted to full-time equivalent**, if the survey indicates to do so.

- **Complete all parts of the survey** including HR and employee benefits policy and practice questionnaires.

payscale
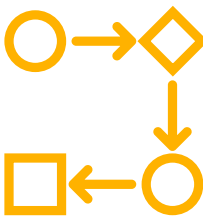
Demo

Payfactors helps you participate effortlessly today and future-proof your participation for years to come.

- ✓ Once you've cleaned up your matches, then, generate your report with a template we provide

- ✓ Payfactors will pull all relevant and available data into the report using your matches populated in the previous step

- ✓ Empty columns within the report will be clear in this stage
  - o Be sure to fill in empty columns with data stored outside of Payfactors when needed

- ✓ Export the report you generate and submit!
  - o Indicate columns that are not applicable to your organization when you submit the report

payscale

Submit →
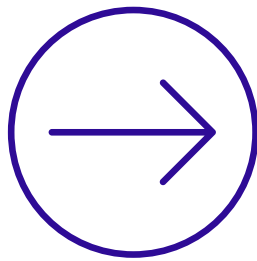
Tip: Celebrate and keep an eye out

- Even with exercising all the due diligence provided, **it is not uncommon to hear back** from the survey provider with requested corrections, don't panic.

- Give yourself grace, **it takes practice** to achieve a clean initial survey submission, especially if you are participating in multiple surveys at once that all request differing data in differing formats. Know that **this is common.**

payscale

What do you do after you submit?

payscale

The survey lifecycle

Survey Management											
Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec

Participation Season (Give Data) → **Waiting Period** → **Survey Season (Get/Apply Data)**

payscale

Poll: Which feature are you most excited about?

A. New HRIS integrations

B. Survey planning

C. Data population

D. Submission auditing

E. Generate your report

payscale

Interested in a demo of Payscale's Survey Management solutions?

Let us know in the polling tab of your dashboard!

Q&A

Feel free to ask any questions in the Q&A section!

payscale