



Employee benefits survey 101

Creating an employee survey from scratch





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Introduction

In today's job market, keeping employees engaged, motivated and happy is top of mind for most employers. Informed retention strategies are more important than ever during times of high employee mobility – when retention is challenging, and talent is scarce.

Employee benefits play a leading role in supporting employers' goals of recruiting and retaining a productive and diverse workforce. In fact, employees that rate their benefits as excellent or very good said their benefits made them 66% more likely to stay at their job.¹

But benefit packages are not one-size-fits-all. So how do you ensure you're offering a package that appeals to your diverse workforce as well as future talent that you want to attract and hire?

The simple answer is to ask your employees.

Employee benefits surveys can help you tailor your benefits package to not only meet your employees' wants and needs but also help your company stand out in a competitive job market.



Figuring out how to ask the right questions, in exactly the right way can be challenging. That's why we put together this helpful cheat sheet to guide you through the ins and outs of designing an effective employee benefits survey.



Why are benefits surveys important?

When employees value their benefits, it helps not just with retention, but also with productivity and recruitment. In a recent survey, employees said that an excellent or very good benefits package made them 64% more productive and 67% more likely to recommend their employer to others.¹

Frequent employee benefits surveys are a great way to determine if your benefits package meets your employees' needs.

Asking employees for specific feedback about their benefits helps you pinpoint:

- Where your benefits may be lacking
- What benefits are most attractive to employees
- Changes you can make to retain and attract talent

But it's not just about asking – responding in a way that addresses the needs of employees can positively impact retention rates, employee productivity, employee engagement and recruiting.

In the ever-evolving world of work, these periodic surveys help keep you in touch with workforce wants and needs. That means you can be confident that your benefits package positions you as a strong competitor for top talent.



Best practices for designing your survey

Start with your goal – what you’re trying to find out – and begin brainstorming what information will be most useful to you. Do you want to know what benefits are most popular with your workers? How they prefer to be communicated with? Whether they understand the benefits currently available to them?

Depending on what you’re seeking, a survey can include comparison questions, open-ended questions, rating scale questions and more.

QUICK TIPS

- 1 Leverage a range of tools available from low or no-cost online options to more robust employee listening solutions
- 2 Keep surveys short and simple – preferably no more than 10 questions
- 3 To avoid inaccurate results, limit each question to a single topic
- 4 Ask some open-ended questions to give employees a chance to offer feedback in their own words
- 5 To encourage more candid feedback, give participants the ability to remain anonymous

To help you get started, here are some sample questions to consider:

Are you currently enrolled in our health plan coverage?

- Yes No

State your level of agreement with the following: I am satisfied with the health plan coverage we offer.

- ① Strongly disagree ② Disagree ③ Neither agree nor disagree ④ Agree ⑤ Strongly agree

If you strongly disagree, what would you like to see changed about your plan?

Where do you go to access information about your benefits? (Select all that apply)

- Intranet Colleague Manager Benefits provider Website
 Other (Please specify)

Which of our employee benefits are most important to you (Select all that apply)?

- Medical Insurance
- Retirement Savings
- Paid Family Leave
- Dental/vision
- Mental health resources
- Supplemental health benefits (accident, critical illness, hospitalization, etc.)
- Other
Please explain what other benefits are important to you:
- Flexible/remote work options
- Disability and life insurance
- Paid time off (vacation and sick days)

If we were to add a benefit that we don't offer today, what would you want that to be?

How often would you like to receive communications about the benefits options available to you?

- Once a month
- Once a quarter
- Twice a year
- Once a year

How do you prefer to receive communication and educational resources about benefits?

- In-person
- Webinars
- Email
- HR portal
- Paper brochures, fliers, etc.
- Text message
- Links to videos
- Intranet/Employee website

What is your preferred method to enroll in your benefits?

- In-person with a Benefits Counselor (Enroller)
- By phone with a Benefits Counselor (Enroller)
- Remote screen share with a Benefits Counselor (Enroller)
- On my own (Digitally)
- On my own (Paper)

How satisfied are you with the communication and educational resources related to your benefits?

Extremely Dissatisfied ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩ Extremely Satisfied

What would make you more satisfied?

Do you know what employee benefits are available to you?

- Yes
- No

How well do you understand your benefits?

① What are the benefits? ② Not very well ③ Not sure ④ Somewhat well ⑤ Very Well

How would you rate the importance of having the opportunity to discuss benefits with someone on an annual basis?

① Not at all important ② Somewhat important ③ Moderately important ④ Very important



Create segments for deeper understanding

It's a great idea to also capture employee-specific information in your benefits survey so that you can better segment and analyze your survey data. This helps you understand what different groups of employees need and want. Think about how you may want to parse your data and then create questions that will help you identify feedback from certain groups of employees. **For instance, you may find it helpful to ask participants for information like:**

Age group

Which do you fall into:

- under 25 45-54
 26-34 55 or older
 35-44

Department

Which department do you belong to?

Provide a drop-down list of options.

Please select ▼



Among employees who took advantage of benefits education and advice, 84% reported significantly higher understanding and 76% significantly higher satisfaction with their benefits.²

Gender

What gender do you identify with?

Provide text field response.

Gender Information (Optional)

Location

What is your location?

Provide a drop-down list of options.

Please select ▼

Employment classification

Full vs. part-time employees:

Provide multiple choice range of options.

- Full time employee
- Part-time employee

Seniority

Job role:

Provide multiple choice range of options.

- Executive or C-suite
- Leader of leaders
- Team manager
- Individual contributor

Caregiver status

Are you a parent or guardian to someone?

Yes/no response.

- Yes
- No

Preferred way to learn about benefit options by generation:



GENERATION Z
32% prefer in-person with a benefits counselor



MILLENNIALS
40% prefer benefits portal



GENERATION X
45% prefer benefits portal



BABY BOOMERS
49% prefer printed material



To learn more about creating an employee benefits engagement survey or an employee listening program at your organization, check out our [Stop, collaborate and listen webinar](#).



It is critical that we listen to our employees, and it can be ... that secret weapon in our toolbox."

— Dora Clements, Vice President of Digital Transformation, Unum Group, parent company of Colonial Life



Interpret your results — and put them to good use

Start by grouping data based on the segmenting questions from your survey. You can compare company-wide results with specific segments such as gender, age, department, office location or career level.

Next, analyze the quantitative data from your scale-based and multiple-choice questions. These responses will allow you to quickly identify trends and patterns. Consider using the data to create graphs or charts for easy visualization.

Open-ended questions provide deeper context, but also require more manual analysis. As you read through responses, look for patterns, highlight common phrases or requests, and compare priorities across different segments of your organization. This qualitative analysis may also inspire further exploration in future surveys.

Be sure to act on and communicate your findings as soon as possible. Taking prompt action builds trust and ensures problems aren't swept under the rug. It also assures employees that you care, which goes a long way toward reaching your retention goals — and gaining an edge with future hiring.

Additional Resources

- Check out our [Voluntary benefits guide](#)
- [Three simple tactics to engage employees](#)
- [Are your new hires crossing the 90-day finish line?](#)



Ready to talk to a
benefits enrollment and education expert?
[Connect with us](#)

1. Colonial Life. Employee Enrollment Survey, company-sponsored, 2021. 1,462 U.S. full-time employees responded to the survey in August 2021.
2. Employee Benefit Research Institute and Greenwald & Associates, Workplace Wellness Surveys, 2021.

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