practitioner's guide

culturejourney® guide to assessing baseline culture and measuring progress over time

by Vidl Work

A practical, values–behaviors–experiences approach for workplace culture professionals

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energy, connection & courage at work

OVERVIEW

This guide is designed for workplace culture professionals who need a credible, systematic approach to assessing current culture and determining whether intentional culture work is making a difference over time. It is not a one-size-fits-all prescription, nor does it advocate for a particular survey or single index. Instead, it offers a blueprint for building a holistic measurement system that adds meaningful qualitative and quantitative data to culture efforts.

The guide can be used to design a full baseline assessment, strengthen existing employee feedback processes, and establish a practical rhythm for tracking priority metrics over time.

This guide is based on the CultureJourney® values–behaviors–experiences method for defining desired culture, described fully in *Leading the Culture Journey: Elevating Everyday Actions to Create Extraordinary Workplaces,* written by Vidl Work co-founders Natalie Johnson and Rebecca Johnson.

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SECTION I: HISTORICAL CONTEXT

Assessing an organization's baseline culture and determining whether it is meaningfully changing over time is complex work. There is no single instrument, metric, or methodology that can fully capture the ever-evolving beliefs, behaviors, experiences, relationships, and systems that shape how people work together.

This area of practice is relatively young in the broader lifespan of complex organizations. Compared with disciplines such as finance, operations, and strategic planning, we have had far less time to establish and refine reliable approaches for measuring culture. As a result, thinking is still evolving, and there are few proven "best practices."

While traditional methods such as engagement surveys, standardized culture assessments, and people analytics can provide useful information, they frequently under-deliver when used alone for reasons we'll cover in this guide.

This guide offers a practical, integrated approach for navigating those limitations and building a clearer picture of both current culture and progress over time.

A. Common Workplace Culture Assessment Methods: Advantages and Limitations

Organizations have typically used six categories of data collection methods to assess culture and related variables. When used intentionally, each can be valuable, but each also has limitations practitioners should understand.

Method	Best use and important limitations
Annual engagement or culture surveys	**Best use:** With consistent administration and a consistent group of respondents, can provide benchmarks on employee sentiment about variables such as trust, leadership, communication, recognition, inclusion, workload, etc. **Limitations:** • Generic tools without flexibility for editing are unlikely to align with the organization's own defined desired culture. • Often ask employees to respond to statements they can't accurately measure because they are too broad in scope (i.e. "This organization values ..." rather than "My leader..." or "On my work team..."). • Tend to highlight employees' perspectives and feelings but without an understanding of why, making feedback difficult to accurately address.

Pulse surveys	**Best use:** Shorter surveys administered monthly or quarterly can track movement on a small number of priority metrics. Their speed and malleability can be useful. **Limitations:** - Frequent administration can create fatigue when questions are repetitive or leaders do not visibly respond. Can create "busy work" for both employees and practitioners.
Existing quantitative people, operational, and performance analytics	**Best use:** Add context to other evaluation tools. Reduce the need for deploying new feedback mechanisms by leveraging what is already in existence. **Limitations:** - Data is often lagging indicators, not leading ones, meaning they highlight issues when they have already happened and undermined the organization. - Often miss the "why," making it difficult to accurately address root causes.
360-degree and upward feedback	**Best use:** Gather feedback specifically on formal leaders who have the greatest influence on the culture of their teams and the organization. **Limitations:** - Can cause friction and undermine culture if employees don't experience transparency around what happened with their feedback, especially from the leader themselves.

Qualitative methods such as interviews, focus groups, and story collection	**Best use:** Allow people to describe what happened, what behavior they observed, what meaning they made of it, and how it affected them. Add context that survey scores and existing data often cannot provide. **Limitation:** - Often require careful sampling, skilled facilitation, and disciplined synthesis beyond what most culture professionals currently possess. - Data can be more challenging to responsibly synthesize and interpret.
Observation and cultural ethnography	**Best use:** Observing and analyzing real-time occurrences such as onboarding, meetings, performance conversations, customer interactions, and decision processes helps see the reality of actual experience rather than what people perceive or report. Observation is particularly useful for identifying the gap between stated values, behaviors, and experiences. **Limitations:** - People often change their behavior when they know they are being observed, which can call into question how closely in-the-moment observations match the reality of behavior over time. - Can be difficult to do this work in enough volume for large-scale data collection. - Often requires a high degree of skill in observation, data collection, and synthesis.

B. Why Traditional Approaches Often Under-Deliver

Organizations can invest substantial time and money in assessment and still finish with little more than a colorful report if they do not understand the limitations of their methods or intentionally design and synthesize the data. The following issues affect one or more of the common methods listed above.

- **Measuring sentiment without examining the root causes**

  A low score on an employee engagement survey or 360-degree assessment may show that people are frustrated, but not which behaviors, decisions, power dynamics, or systems create that experience. For example, one team leader's scores on "I trust my leader to lead my team effectively" may be lower than those of other leaders without revealing what team members perceived or experienced that led to those scores. Conversely, a high score can conceal unhealthy norms when people are proud, bonded, afraid of retaliation, or highly driven within an unsustainable or exclusionary culture.

- **Relying too heavily on self-report**

People may answer in socially desirable ways, fear that anonymity will not be protected, agree habitually, choose extremes, or opt out. These risks increase in low-trust settings and among employees who believe honest feedback will carry consequences.

- **Too generic**

Off-the-shelf tools often measure worthwhile dimensions but are unlikely to align fully with an organization's uniquely defined desired culture. Because we cannot measure what we have not clearly defined, organizations usually need to develop their own questions and prompts or adapt existing tools.

- **Using numbers without narratives or narratives without patterns**

Quantitative data can locate differences and trends but not fully explain them. Qualitative data can reveal meaning and context but can overrepresent the loudest, most recent, or most memorable stories. Strong practice combines both.

- **Failing to act visibly**

When employees repeatedly provide feedback and see no meaningful response, the assessment process creates the type of friction culture work is aiming to reduce. Ask yourself and formal leaders of the organization: Are we willing to hear honest feedback about this? If the feedback suggests we need improvement, are we willing to speak transparently with employees about what we learned and then do something about it? If the answer is no, then don't collect that data.

CORE IDEA: Culture Assessment Requires Multiple Methods
Assessing baseline culture and measuring progress over time is, by its nature, complex and challenging. There is no easy way or shortcut. The practitioner's task is not to select a single universally best method. It is to ensure the organization has clearly defined its desired culture and then choose a combination of methods that help it understand alignment and misalignment with this desired state.

SECTION II: IDENTIFY AND DESIGN YOUR ASSESSMENT METHODS

A. Step 1: Begin with a Clear Definition of Desired Culture

Organizations often begin culture measurement by choosing an instrument, comparing vendors, debating question wording, or searching for a benchmark. Those decisions matter, but they are not the best starting point. The more fundamental question is: What, exactly, are we trying to understand and change?

Culture is often described with broad words such as healthy, positive, inclusive, or high-performing. These words can be useful, but they are too open to interpretation to serve as reliable measurement standards. One person's experience of collaboration may feel like unnecessary consensus to another. Likewise, a leader may view resilience as persistence while an employee experiences pressure to tolerate an unsustainable workload. Without a shared definition and specific language, accurate measurement remains elusive.

Therefore, meaningful culture measurement requires a clearly defined desired culture. This guide offers a brief overview of Vidl Work's CultureJourney® method for defining a desired culture. More is available on this topic in the book *Leading the Culture Journey: Elevating Everyday Actions to Create Extraordinary Workplaces* available at http://www.vidlwork.com.

For measurement purposes, this guide assumes desired culture has been defined using the values–behaviors–experiences formula:

1. Core values define what is most deeply important—what the organization intends to prioritize and protect, especially when decisions are complex and the work is hard. We recommend no more than four core values to reduce conflict among values and make them easier to remember and use.
2. Congruent and incongruent behaviors describe what people agree to demonstrate and reward more often, and what they agree to minimize and discourage. Congruent behaviors represent alignment with and demonstration of core values. Incongruent behaviors represent being out of alignment with or undermining core values.
3. Experiences describe the human impact—the thoughts, perceptions, and feelings created by the behaviors an organization repeatedly demonstrates, rewards, tolerates, or discourages. We recommend clarifying the employee experiences those values and behaviors are intended to create.

This formula for defining desired culture shifts the work from a vague aspiration into something concrete enough to discuss, observe, assess, and improve. A useful measurement system looks for alignment and misalignment across all three.

CORE IDEA: Assessing Change Requires a Clearly Defined Desired Culture
We cannot measure what we have not yet clearly defined. Effective culture assessment requires specific, shared language that can be meaningfully evaluated. If your desired culture is not yet clearly defined, start there.

B. Step 2: Identify Data Collection Methods

Before selecting tools, statements, or questions, ensure the values–behaviors–experiences chain is explicit. Then draft a blueprint of the data to measure current alignment with desired culture and how progress occurs over time. A layered approach is highly recommended.

We suggest a four-layer approach. The table below describes each layer's purpose and questions practitioners may consider. Recommendations for designing meaningful tools, questions, and prompts follow.

<table>
<tr><th>Measurement layer</th><th>Purpose</th></tr>
<tr><td>Layer A: Comprehensive annual survey with desired-culture-specific items</td><td>This layer provides the broadest view of how employees currently perceive the current culture, including the extent to which their closest set of colleagues is living its stated values, demonstrating priority behaviors, and creating desired employee experiences.

This type of survey may also assess culture-related variables beyond defined desired culture (such as employee engagement) but must include data collection on values, behaviors, and experiences to provide relevant data.</td></tr>
<tr><td colspan="2">Questions to consider:

Which values, supportive behaviors, undermining behaviors, and desired experiences must be represented in the survey?
Which questions should assess which values, behaviors, and experiences?
Are we asking people to rate others, rate themselves, or both?
Are the questions or statements specific enough that employees across roles and levels will interpret them similarly?
What response scale will provide the most useful information (e.g., frequency, level of agreement, or degree of consistency?
Will the survey include questions beyond the defined desired culture, such as workload, trust, communication, change readiness, or confidence in leadership?
How will we gather data that can be synthesized in a team- or leader-specific way?
What response rate is needed for the results to be considered credible?
How will confidentiality and anonymity be protected and clearly communicated?
How will leaders and employees receive the results and what commitments will be made about follow-through?
</td></tr>
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Measurement layer	Purpose
Layer B: Annual review of existing data that is related to culture	This layer helps practitioners examine existing organizational information through a new lens to identify patterns that may explain, reinforce, or challenge what is found through surveys and other assessments. This type of data might include regrettable turnover, exit interviews, and 360-degree feedback.
Questions to consider: - What existing organizational data could reasonably provide insight into culture? - Which data sources are most closely connected to the organization's values, behaviors, and desired experiences? - What do measures such as regrettable turnover, employee relations concerns, exit interviews, safety incidents, customer feedback, or 360-degree feedback potentially reveal? - Is the data available at a level that allows meaningful comparison across teams, roles, locations, demographic groups, or leadership levels? - Are there gaps in the existing data that should be addressed through future data collection? - Who should participate in interpreting the data so conclusions are not shaped solely by one function or leadership perspective?	

Measurement layer	Purpose
Layer C: More frequent experience-focused pulse surveys or conversations	This layer tracks a small, rotating set of first-person employee experiences between deeper assessment cycles. It can help practitioners notice early movement, emerging concerns, or stalled progress.

Questions to consider:

- Are there desired employee experiences that are most important to monitor more frequently?
- How frequently should pulses be administered given the pace of change and the organization's capacity to respond?
- Which groups or teams may benefit from closer monitoring because their experiences differ from the organizational average?
- How will pulse results be interpreted alongside the comprehensive survey?
- What contextual events—such as leadership changes, restructuring, workload surges, or major initiatives—should be considered when interpreting results?
- Who will review pulse findings, and how quickly will the organization respond when concerns emerge?
- How will employees be informed about what the organization is learning and doing in response?

Measurement layer	Purpose
Layer D: As needed qualitative data gathering	Uses one-on-one and group listening sessions to understand the stories, dynamics, and context behind quantitative findings.

Questions to consider:

- What specific survey result, pattern, discrepancy, or concern requires deeper exploration?
- What do we need to understand that cannot be learned from numerical data alone?
- Who should be invited to participate so the conversations reflect a meaningful range of roles, levels, identities, locations, and experiences?
- Would individual interviews, small-group conversations, or a combination of both create the safest and most useful setting?
- Who should facilitate the conversations, and how might that person's role or identity affect candor?
- What questions will help participants describe specific behaviors, experiences, stories, and system conditions rather than offer only broad opinions?
- What conditions are needed for participants to feel psychologically safe enough to speak honestly?
- How will confidentiality be explained, protected, and maintained?
- How will facilitators respond if participants raise concerns involving misconduct, discrimination, safety, or other issues that may require formal action?
- How will notes and themes be documented without exposing individual participants?
- How will qualitative findings be integrated with survey, pulse, and existing organizational data?
- How will the organization communicate what it heard without becoming defensive, minimizing concerns, or overgeneralizing from a small number of voices?
- What action will follow the discovery process so employees do not experience the conversations as another instance of being asked for input without seeing a response?

Quantitative Design

When creating or editing surveys, pay particular attention to what questions or statements you use, how they are worded, and what feedback mechanism each item is associated with.

- Use observable behavior-based wording whenever possible: "From my perspective, my leader invites input early in the decision making process" is more specific and actionable than "My leader is collaborative."
- Use first-person experience wording for felt outcomes, recognizing that people cannot accurately judge how others feel, what they think, what they are ready for, or capable of. They can only accurately report on their own feelings, thoughts, and experiences. For example: use the prompt "I feel safe asking my leader for help" rather than "Our organization is psychologically safe."
- Ask employees to rate a clear timeframe, such as "during the past three months," when memory and recent events may distort responses.
- Avoid combining two ideas in one item. Instead of "I feel comfortable making mistakes and asking for help", include two separate prompts: "I feel comfortable making mistakes" and "I feel comfortable asking my leader for help."
- Include both leader-focused and colleague/team-focused items when the relationship source matters.
- Use a consistent response scale across cycles. Frequency scales are usually best for behaviors; agreement or experience scales can be used for first-person experiences.

Qualitative Sampling Principles

A handful of convenient interviews rarely represents an organization. Purposeful sampling should reflect relevant differences in level, role, tenure, location, shift, and function. External and internal practitioners should also consider how their role, relationships, and perceived alignment with leadership may affect candor.

Qualitative sessions should explore examples rather than only opinions. Ask: What happened? What did people do or avoid doing? What seemed to be rewarded or discouraged? What conditions made that behavior more or less likely?

C. Step 3: Fine-Tune to Ensure Connection to Desired Culture

As you make decisions on methods, tools, questions, statements, and analysis, keep your definition of desired culture clearly in mind. Identify decision-useful indicators that are strongly linked with core values, preferred behaviors, and desired employee experiences.

Every set of values, behaviors, and felt experiences will present a large number of opportunities for questions, response prompts, and analysis.

You'll need to simplify data collection design to ensure the data is manageable and actionable. Consider the idea of minimum viable measurement: collect only enough data to identify patterns, compare sources, and decide where deeper exploration is needed.

Layer A: Measure the full desired culture—but with restraint

The comprehensive survey is the only layer that should broadly represent all values, priority behaviors, and desired experiences. You do not need several variations of every item. Choose the clearest statement that best captures each behavior or experience.

A practical target might be:

- One rating statement for each value
- One or two rating statements for each priority behavior
- One or two rating statements for each desired experience

For an organization with three values, nine priority behaviors, and nine desired experiences, that creates approximately 21 core culture items. That is enough to establish a meaningful baseline without producing an exhausting survey.

Layer B: Select a few meaningful existing indicators

Practitioners should not attempt to connect every existing organizational measure to every value. Instead, they might identify three to six data sources likely to help explain the survey findings.

The question to ask is: "Which existing data might help us better understand whether the experiences reported in our survey are isolated perceptions or part of a broader pattern?"

Layer B is primarily an interpretive review, not another large data-collection project.

Layer C: Rotate only the highest-priority experiences

Pulse surveys should not remeasure the entire desired culture. They should track the small number of perceptions, feelings, and experiences most relevant to the organization's current need for timely information.

A practical pulse might contain:

- Three to five rating statements

- One optional open-ended question

Example:

If you have been working with a team experiencing significant friction and transition, you might deploy a pulse survey several months after beginning the work to assess:

- Emotional response to the work so far
- The degree to which they have integrated new language and skills into their everyday work
- Concerns about continued work
- One open-ended response

Example:

If the organization is currently focusing on inclusion and voice, it might pulse:

- “I believe my leader values me for who I authentically am.”
- “Most of the time, I believe my ideas are welcomed on my team, even if they are not the ideas that are eventually used.”
- “I feel safe offering a perspective that differs from the majority view.”

Later pulses could rotate to experiences associated with other values.

Layer D: Use qualitative inquiry only when needed

Qualitative data gathering should be triggered by a question the other layers cannot answer. Practitioners do not need a separate interview guide for every value unless the data indicates that level of exploration is necessary.

CORE IDEA: Get Support Where You Need It
Designing effective data collection tools and analyzing them responsibly is complex work. Get help from internal departments or outside consultants if you need it.

SECTION III: IMPLEMENT, ASSESS, COMMUNICATE, REPEAT

Designing a thoughtful measurement blueprint is important, but the credibility of the process will ultimately depend on how it is implemented, interpreted, communicated, and repeated.

The assessment process is itself a culture experience. Employees notice what they are asked, who is invited to participate, whether it feels safe to respond honestly, how leaders react to difficult information, and whether anything changes after the data is collected. A technically sound assessment can still undermine trust if it is poorly introduced, interpreted without sufficient care, or followed by silence.

For that reason, practitioners should treat implementation, interpretation, communication, and follow-through as essential parts of the culture-building process, not as administrative steps that happen after the "real" assessment work is complete.

A. Year 0/Baseline: Implement

A baseline assessment establishes the organization's best available picture of its current alignment with its desired culture before or early in a significant culture-building effort.

The goal is to gather enough credible evidence to identify meaningful patterns, understand where alignment and misalignment are generally occurring, and select a manageable number of priorities for improvement.

A strong baseline will typically draw from three or all four measurement layers described in Section II:

- A comprehensive survey that assesses priority behaviors and desired experiences
- A review of selected existing organizational data
- Qualitative inquiry that provides context for quantitative findings
- When useful and feasible, direct observation of workplace practices and interactions

1. Clarify the purpose before launching

Before collecting data, define what decisions the assessment is intended to inform.

Possible purposes may include: establishing a baseline before launching a culture initiative; identifying the behaviors most responsible for creating or undermining desired employee experiences; understanding meaningful differences across teams, roles, locations, or employee groups; selecting priorities for leadership development, team development, or systems redesign; or all of the above.

Practitioners should be able to complete this sentence: *We are conducting this assessment so that we can make better decisions about ___________.*

Without this clarity, organizations often collect far more data than they can use or interpret every low score as a separate problem requiring immediate action.

2. Confirm scope and representation

Determine which parts of the organization will participate and which groups must be represented for the findings to be credible. Consider differences such as: function or department, formal leadership level, work location, shift, tenure, employee classification, or other characteristics that meaningfully shape how work is experienced.

The purpose of segmentation is not to rank employees or make lasting judgments about teams or units. It is to determine whether groups experience the culture in meaningfully different ways and help decide where resources may be needed first or most.

Decisions about segmentation should be made before data collection begins whenever possible. They should also account for whether anonymity can realistically be protected. Practitioners should not promise anonymity if reporting results for small groups would make respondents identifiable.

3. Prepare leaders before preparing employees

Formal leaders will strongly influence whether employees experience the assessment process as credible and safe. Before launching the process, leaders should understand:

- The purpose of the assessment
- What will and will not be measured
- How confidentiality and anonymity will be handled
- What their role is in encouraging participation without pressuring employees
- When and how findings will be shared
- How they are expected to respond to difficult feedback
- What follow-through will be required of them

Leaders should not attempt to influence how employees respond, speculate publicly about who gave particular feedback, or explain away concerns before the findings have been fully interpreted.

4. Communicate clearly with employees

Inform employees about what is happening before they receive a survey, interview invitation, or listening session request.

Initial communication should explain:

- Why the organization is conducting the assessment

- How the assessment connects with its defined values, behaviors, and desired experiences
- What employees will be asked to do
- How long participation will take
- Whether participation is voluntary, mandatory, or “expected”
- How anonymity and confidentiality will be protected
- Who will have access to raw and summarized data
- When employees can expect to hear the results
- What the organization is committing to do afterward

Avoid promising that every concern will be addressed immediately. Instead, commit to reviewing the findings responsibly, selecting a small number of priorities, communicating decisions transparently, and returning with progress updates.

5. Administer the comprehensive baseline survey

The comprehensive survey should broadly represent the organization’s desired culture while remaining restrained enough to support strong participation and useful analysis.

Keep the survey open long enough to allow participation across shifts and work arrangements, but not so long that the process loses momentum. During the response period, reminders should encourage participation without making employees feel monitored or coerced.

6. Gather selected existing organizational data

While the survey is open or shortly afterward, gather the small number of existing indicators identified in the measurement blueprint. These may include regrettable turnover, exit-interview themes, absenteeism, customer feedback, leadership 360-degree feedback, or other relevant data.

These measures should not automatically be treated as direct measures of culture. Their purpose is to add context and help practitioners examine whether employee-reported experiences are consistent with other organizational patterns.

For example, a low score on the question prompt “I feel my teammates value me for who I authentically am” combined with meaningful differences in promotion or turnover patterns may warrant deeper inquiry. However, the existing data alone will not explain why the differences exist.

7. Use qualitative inquiry to deepen understanding

Qualitative inquiry should help explain patterns, not simply repeat survey questions in conversation form.

Select interview or listening-session participants purposefully so the organization hears from a meaningful range of roles, levels, locations, tenures, and experiences. Avoid relying only on volunteers who are highly engaged, highly dissatisfied, or already close to the practitioner or leadership team.

Practitioners who engage in listening sessions and interviews should be skilled in this type of conversation and data collection.

CORE IDEA: A Baseline Is a Starting Point
The baseline is not a permanent label placed on the organization, a leader, or a team. It is the best available picture of the culture at a particular moment, based on the methods and participants included. Its value comes from helping the organization see its current reality more clearly and make better choices about what to address next.

B. Synthesize and Interpret Data Responsibly

Culture data rarely tells one simple, uncontested story. Survey scores may differ by group. Qualitative themes may challenge the organizational average. Existing metrics may appear to support one interpretation while interviews suggest another.

Responsible interpretation requires practitioners to resist the pressure to produce certainty too quickly.

1. Begin by analyzing each source separately

Review each form of evidence on its own before combining it with the others.

For quantitative data, examine:

- Overall patterns
- Distribution of responses, not only averages
- Meaningful differences across groups
- Items with unusually high disagreement or variation
- Differences between leader-focused and colleague-focused items
- Differences between behaviors and desired experiences
- Changes across time, when previous data exists

- Response rates and missing-data patterns

For qualitative data, examine:

- Recurring behaviors and experiences
- Examples that appeared across multiple groups
- Areas of strong consistency
- Contradictions or meaningfully different experiences
- System conditions that appear to reinforce behavior
- Issues that may require immediate escalation
- Important perspectives that may be absent or underrepresented

For existing organizational data, examine:

- Patterns over time
- Differences across relevant groups
- Whether the data appears consistent with or contradictory to employee feedback
- The limitations of what the measure can reasonably tell you
- Whether collection practices are consistent enough to support comparison

2. Distinguish findings from interpretations

A finding describes what the evidence shows. An interpretation proposes what the evidence may mean.

For example:

- **Finding:** Employees in three operational teams report feeling substantially less safe asking for help than the organizational average.
- **Interpretation:** High workload and a norm of self-reliance may be discouraging help-seeking.
- **Further inquiry needed:** Explore whether leaders actively discourage requests for help, whether employees fear workload consequences for colleagues, and whether staffing levels make meaningful help unavailable.

Practitioners should label interpretations clearly and test them with people who understand the work rather than presenting assumptions as established fact. This can be done well in qualitative interviews or small groups.

3. Identify strengths as well as gaps

Assessment should also examine what is already working.

Strengths may include:

- Behaviors that are consistently demonstrated
- Teams creating desired experiences under challenging conditions
- Leadership practices that can be expanded
- Systems or rituals that reinforce the desired culture
- Employee-created practices that support trust, inclusion, learning, or collaboration

Strengths are not included to soften difficult findings. They provide useful evidence about what the organization can protect, replicate, or build upon.

4. Select a small number of priorities

Do not convert every low-scoring item or qualitative concern into a separate initiative.

Select a small number of priority behaviors and system conditions based on questions like:

- Which behaviors appear to have the greatest influence on desired employee experiences?
- Which issues are appearing across multiple forms of data?
- Which concerns involve meaningful risk or potential harm?
- Which priorities are strongly connected to organizational strategy?
- Which behaviors or conditions are reasonably changeable?
- Where is leadership commitment strongest?
- What can the organization realistically support without diluting effort?

For most organizations, two or three well-supported priorities will produce more progress than a long list of loosely owned commitments.

DATA ANALYSIS AND INTERPRETATION RED FLAGS

Interpret segmentation with care

Segmentation helps identify where different support, inquiry, or intervention may be needed. It should not be used to publicly rank teams, create shame, or encourage competition around culture scores.

Before drawing conclusions about differences:

- Confirm that the sample size is sufficient
- Avoid attributing the result automatically to the formal leader
- Protect groups small enough to be identifiable
- Ask whether the difference is practically—not only statistically—meaningful

When demographic differences appear, avoid explaining them without first engaging people who hold those lived experiences.

Do not confuse correlation with cause

Culture data often reveals relationships between variables. For example, teams reporting stronger "grit" may also report higher levels of overwork or burnout.

This does **not** mean one caused the other but may indicate a connection worth exploring.

Use language such as: "*appears related to*", "*may be contributing to*", "*is consistent with*", "*warrants further inquiry*", or "*may help explain*".

Avoid claiming causation unless the assessment design genuinely supports it.

Use AI cautiously and transparently

AI can help organize qualitative data, identify recurring language, suggest preliminary themes, and assist with analysis of open-ended responses. It should not determine what the data means or which issues matter most.

When using AI:

- Remove names and identifying details before uploading data
- Confirm that the platform's privacy and data-use terms are appropriate
- Do not enter confidential employee data into an unapproved public tool
- Use human reviewers to test all themes and conclusions
- Check whether minority perspectives have been overlooked
- Compare AI-generated themes with the original responses
- Be transparent about whether and how AI was used
- Follow organizational policies, contractual obligations, and legal requirements

CORE IDEA: Disciplined Sensemaking Matters More Than Certainty
Responsible interpretation helps the organization distinguish what it knows, what it believes may be happening, and what requires further inquiry. Because of the complex nature of humans and relationships, there is very little "ultimate certainty" in this work.

C. Communicate Results with Transparency

Employees should hear about the purpose, process, timing, and commitments before data collection begins and should continue hearing from the organization as decisions are made.

Silence after an assessment is rarely experienced as neutral. Employees may conclude that leaders did not like the findings, that the results were ignored, or that the process was never intended to lead to change.

1. Prepare leaders to receive the results

Leaders should review and process findings before discussing them with employees. This preparation should not be used to develop rebuttals or explanations. It should help leaders respond with maturity and accountability.

Leaders may need support to:

- Manage defensiveness, shame, disappointment, or surprise
- Distinguish intent from impact
- Avoid challenging the credibility of employees' experiences
- Acknowledge limitations without dismissing the findings
- Own their role without accepting inappropriate blame for every condition
- Speak honestly about what they understand and what they still need to learn
- Avoid making promises they cannot keep

Employees are likely to judge the credibility of the process partly by how leaders respond when the results are uncomfortable.

2. Communicate at multiple levels

Most organizations will need more than one version of the results.

Possible audiences include governing bodies; executive or senior leaders; mid-level managers; individual teams or departments; the full employee population; and employee groups involved in deeper sensemaking or action planning.

The level of detail may differ, but the central story should remain consistent. Employees should not receive a highly polished message about strengths while leaders privately review serious gaps.

3. Use a clear communication formula

A practical formula is:

You told us...
We learned...
We are doing...
We will return by...

For example:

You told us that employees generally feel respected by their immediate colleagues, but many do not believe their input is invited early enough to influence decisions. We learned that this pattern is especially visible during cross-functional projects and organizational change. We are clarifying decision roles and introducing an early-input practice for major initiatives. We will return in six months with an update and a short pulse on whether employees are experiencing improvement.

This formula helps prevent leaders from reporting results without also naming responsibility, action, and timing.

4. Protect trust when serious concerns arise

Some findings may involve discrimination, harassment, retaliation, ethical violations, threats, safety issues, or other concerns that require a formal response. These matters should not be treated only as culture-development themes. They may need to be referred to the appropriate Human Resources, legal, compliance, safety, or investigative process.

When this occurs, the organization may be limited in what it can communicate publicly. Leaders should still provide as much procedural transparency as possible without violating privacy or compromising an investigation.

CORE IDEA: Thoughtful Transparency and Responsiveness Over Polish
Practitioners and leaders do not need to indicate that they have an immediate solution for every finding. They do need to demonstrate that they can hear difficult information, communicate what they understand, and explain what will happen next.

D. Repeat Portions of the Process at Intentional Intervals

Culture measurement is an ongoing cycle of seeing, making meaning, choosing, practicing, checking, learning, and adjusting. Different layers of the measurement system can be used at different intervals and for different purposes.

Recommended measurement rhythm

Cadence	Typical use
Baseline/Year 0	Conduct a deeper mixed-method assessment using the comprehensive survey, selected existing organizational data, qualitative inquiry, and observation where useful.
Quarterly or as needed	Use a short pulse to monitor three to five priority behaviors or experiences. Review a small number of relevant indicators and conduct targeted listening sessions only when results require explanation.
Annually	Complete an integrated culture review combining survey trends, group differences, qualitative themes, relevant organizational indicators, completed actions, and priorities for the next cycle.
Every two to five years	Revisit the desired-culture blueprint itself. Values may remain stable while priority behaviors and desired experiences evolve with strategy, workforce needs, and organizational context.

The exact rhythm should reflect the organization's size, pace of change, resources, and ability to respond. Be cautious of requesting more data than employees can reasonably offer and generating more data than you can reasonably attend to.

SECTION IV: CONCLUSION

Assessing baseline culture and measuring progress over time is complex, and learning in this relatively new field continues to evolve. The goal of the process is not to create certainty or simplicity, but to connect ongoing assessment to a clearly defined culture, help the organization see its reality more clearly through that lens, and focus continually on a few priority areas for improvement.

When the measurement process is tailored, mixed-method, transparent, and connected to visible action, it becomes more than evaluation. It becomes part of designing and nurturing an intentional culture.