



## **STEP 1**

### ***EMPLOYEE CONFIDENTIAL QUESTIONNAIRE***

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#### **1.0 INTRODUCTION**

The purpose of this standard procedure is to describe the reasoning behind the distribution of a Confidential Questionnaire to your staff.

#### **2.0 PURPOSE AND SCOPE**

- 2.1 Employers have a different picture and perception of how employees perceive the company.
- 2.2 Employees are reluctant to inform the employer of the true perception of the company and their function in the company.
- 2.3 An employee is more likely to express true feelings to an independent third party than to the employer when the employee knows that the questionnaire and anything said is to be confidential and the employer will not know what is said by whom.
- 2.4 Employers need to know the employees' true feelings so they can make adjustments to policy and procedures to benefit everyone and increase likelihood of obtaining organizational objectives.
- 2.5 The consulting staff serves the third party purpose and will have the confidential questionnaire distributed to the employees. It will be explained to them that the answers will be confidential, and all responses will be reviewed for purposes of providing management with an executive summary.

#### **3.0 SUMMARY**

- 3.1 The employer needs to know how the organization is perceived in order to function more effectively in the community. Employers do not need employees saying things about the organization in public and creating a bad image, true or not.
- 3.2 Policy adjustments and procedures can not be made if the real "needs" are not known by management. Employee "confidential" questionnaires, when given by a third party, can make the difference in obtaining an objective point of view of the employee.



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### **Your Company**

**We are consultants with Crystal Clear Consulting, LLC. Our company is in business to assist medium and small businesses in improving net profits through more efficient operations. We are here to look at your company and determine what can be done to improve this organization. Your ideas and input are needed. We need to hear from you. By your helping us we can help you and your position here at your Company.**

Return this questionnaire directly to the Staff of the CCC Consulting team. Be as frank and open as possible in your answers. No one from your company will view the completed questionnaires: only the consulting team of CCC Consulting team will review them and keep them. If the space provided is not sufficient, feel free to use the “Extended information” text box at the end of the questionnaire.

***Thank you for your cooperation,  
Consulting Management Team***

Your name \_\_\_\_\_

Job Title or Main Function \_\_\_\_\_

1. Do you and your supervisor have complete agreement on the duties of your position?

Yes: \_\_\_\_\_ No: \_\_\_\_\_

2. Does your supervisor give you his/her opinion of your performance on a regular basis?

Yes: \_\_\_\_\_ No: \_\_\_\_\_

3. What (if any) is the procedure for addressing employee complaints and grievances?

\_\_\_\_\_



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4. Check the five conditions that best describe you in your present position:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> content              | <input type="checkbox"/> secretive        | <input type="checkbox"/> over-qualified |
| <input type="checkbox"/> not-qualified        | <input type="checkbox"/> hardworking      | <input type="checkbox"/> team player    |
| <input type="checkbox"/> dependable           | <input type="checkbox"/> want advancement | <input type="checkbox"/> lax            |
| <input type="checkbox"/> less than dependable | <input type="checkbox"/> decisive         | <input type="checkbox"/> underpaid      |
| <input type="checkbox"/> well-informed        | <input type="checkbox"/> confused         | <input type="checkbox"/> cooperative    |

5. Check the five conditions that best describe your supervisor:

- |   |                                       |                                      |
|---|---------------------------------------|--------------------------------------|
| <input type="checkbox"/> qualified            | <input type="checkbox"/> secretive    | <input type="checkbox"/> indifferent |
| <input type="checkbox"/> not-qualified        | <input type="checkbox"/> hardworking  | <input type="checkbox"/> team player |
| <input type="checkbox"/> dependable           | <input type="checkbox"/> appreciative | <input type="checkbox"/> lax         |
| <input type="checkbox"/> less than dependable | <input type="checkbox"/> decisive     | <input type="checkbox"/> demanding   |
| <input type="checkbox"/> well-informed        | <input type="checkbox"/> confused     | <input type="checkbox"/> cooperative |

6. What are three things you like most about your job?

- a.) \_\_\_\_\_
- b.) \_\_\_\_\_
- c.) \_\_\_\_\_



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7. What are three things you like least about your job?

a.) \_\_\_\_\_

b.) \_\_\_\_\_

c.) \_\_\_\_\_

8. If you were in complete charge, what is the first thing you would change?

\_\_\_\_\_

9. What do you see as the greatest hindrance from keeping you from doing a better job?

\_\_\_\_\_

10. What do you like best about your company? \_\_\_\_\_

\_\_\_\_\_

11. How do you feel about your future with this company? \_\_\_\_\_

\_\_\_\_\_

12. Are you kept “in the loop” on things concerning your company and job?

\_\_\_\_\_

13. Do you have enough authority to perform your job well?

\_\_\_\_\_

14. How do you feel about how your work is appreciated by your supervisor?

\_\_\_\_\_

15. How do you feel about your ability and capability currently being fully utilized?

\_\_\_\_\_



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16. How do you feel about being able to voice your opinion, your suggestions, or complaints to your supervisor? \_\_\_\_\_

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17. Are there any practices (supervisor or others) going on in the company which you think should definitely not go on?

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18. Any additional comments you would like to make regarding your company?

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Extended information (optional)



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#### **II. WHAT REQUIREMENTS ARE THERE FOR YOUR POSITION**

A. Education:	
B. Experience:	
C. Skills:	
D. Physical:	
E. Mental:	

### **MOTIVATORS**

Please review this list of topics and rank them in the order of their importance to you, number one being the most important and number 14 being the least.

- |                                    |                                   |
|------------------------------------|-----------------------------------|
| ___ Working Conditions             | ___ Pay                           |
| ___ Earned recognition             | ___ Peer and group relationships  |
| ___ Friendliness of the supervisor | ___ Importance and responsibility |
| ___ Job security                   | ___ Opportunity for advancement   |
| ___ Status                         | ___ Opportunity for growth        |
| ___ Company policies and rules     | ___ Interest in work itself       |
| ___ Fairness                       | ___ Sense of achievement          |



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Extended information (optional)



# FUNCTIONAL ORGANIZATION AREAS OF MANAGEMENT

Please indicate which of the functional items you do

EXECUTIVE			
	Business planning	Company Image	Marketing Strategy
	Budget planning	Legal Compliance	Professional Relations
	Company Standards	Company Vision	Disciplinary Policy
	Compensation Standards	Capital Expenditures	Human Resource Policy
	Pricing Strategy	Expansion Planning	Facilities Planning
		Company Goals and Obj	Budget Approval
			Regulatory Compliance
			Safety Compliance
			Company Mission
			Contract Approval
			Sources of Financing
			Fleet & Equ Requirement

Please sign here

ACCOUNTING	CLERICAL	PURCHASING	OPERATIONS	MAINTENANCE	MARKETING	HUMAN RESOURCES		
A/P	Phone Reception	Vendor Contact	Scheduling	Preventive Maintenance	Marketing Plan	Regulatory Compliance		
A/R	Office Reception	Vendor Files	Staffing	Remedial Maintenance	New Business	Recruitment		
General Ledger	Message Delivery	Purchasing Policies	Safety	Regulatory Compliance	Client Services	Benefits Policies		
Cash Management	Mail Distribution	Supply Negotiations	Quality Control	Quality Control	Advertising	Employee Policies		
Budgeting	Filing	Needs Forecasting	Training	Safety Practices	Training	Staffing		
Payroll/Commissions	Office Supplies	Inventory Control	Asset Security	Equipment	User Conferences	Worker's Comp		
Tax Management	Printed Supplies	Quality Control	Supervision	Trucks	Competitor Intelligence	U.I.C.		
Accounting Syst. Integrity	Office Equipment	Inventory Adjustments	Facilities Maintenance	Building	Demographics	Wage & Salary Struc.		
Insurance	Secretarial work/typing	Shipping Services	Cost Control	Tools	Devel. Opportunities	Disciplinary Action		
Collections	Agenda	Receiving/Inspection	Clerical Services	Grounds	<b>SALES</b>	Insurance (Co-pay)		
Remittances		Minimize Supply Cost	Secretarial Services			Internal Communication		
Acting Data Processing	<b>CREDIT / A/R</b>	Potential Suppliers	Productivity		Phone Orders	Employee Concerns		
Banking		P.D. Compliance	Budget Compliance		Quote Preparation	Personnel Files		
Financial Reporting		Credit Information	Seasonality	Inventory		Develop New Accounts	Morale	
Management Reports		Credit Approval	Price Competition	Employee Morale		Follow-up Sales Leads	Termination	
Inventory Verification		Credit Units		Regulatory Compliance		Outside Prospecting	<b>PERSONNEL</b>	
Payroll Taxes		Mail Distribution		Policy Enforcement		Competitor Knowledge		Employee Records
Bank Reconciliation		Filing		Security		Sales/Service Contact		Incident Records
Income Taxes		Office Supplies		Employee Evaluations		Market Trends		Licenses/Certification
Sales Tax		Printed Supplies		Operations Standards		Customer Development		Personnel Issues
Cash Disbursements		Office Equipment				Customer Follow-up		Vacation
Petty Cash	Data Entry				Customer Service	Absences		
	Secretarial work/typing				Pricing Compliance	Employee Benefits		
	Agenda				Order Entry	Payroll Processing		
					Forecasting	Training		
					Quote Achievement	Employee Handbook		
					Customer Profile	Insurance		
						Policy & Procedures		
						Employee Evaluations		