

# Driving Employee Engagement with Terryberry's Survey Solution

With Dan Norris, VP of Talent Development  
3-Billion-Dollar Heavy Equipment Company

---

Listen to employees and drive  
business strategy with Be Heard's  
engagement surveys and analytics.



800.253.0882  
[www.terryberry.com](http://www.terryberry.com)

**terryberry**  
Engage · Reward · Succeed

# Engagement Surveys

## CASE STUDY

A 3-billion-dollar heavy equipment company sought an efficient solution to measure and enhance employee engagement across its vast operations. Partnering with Terryberry, they streamlined hundreds of hours of survey processing, gaining valuable insights into employee engagement that reinforced their values-driven culture.

Headquartered in San Antonio, Texas, this century-old industry leader was founded on Values-Based Leadership®, a model referenced in Kenneth Blanchard's Managing by Values. Their strong focus on integrity and cultivating long-term relationships has set them apart within the heavy equipment network.



***Terryberry helps us show our employees that we care, that their work has purpose, and that they're not just another cog in the machine.***

Dan Norris, VP of Talent Development  
\$3-Billion Heavy Equipment Company

## Who is Terryberry?



### Surveys

An employee engagement survey solution so powerful it's like having an in-house analytics team.



### Recognition

When employees feel appreciated, they become engaged with their work.



### Wellness

Enrich your company's culture with wellness programs that motivate, empower, and engage.



### Rewards

Employee rewards and recognition solutions for every need.



### Custom Awards

Milestone and incentive awards custom designed for your organization.

# Engagement Surveys

## CASE STUDY

### The Challenge: Maintaining a Values-Based Culture

Dan Norris, VP of Talent Development, has been with the company for 25 years. Before discovering Terryberry's survey solution Be Heard (previously Workify), he struggled to find an engagement survey tool that offered what they needed and aligned with their values. Norris emphasized the challenge of scaling culture across their growing organization. "As soon as you hire one new person, your culture is at risk," he remarked. With over 100 locations, maintaining their distinct culture required constant attention and adaptation.

#### Client's Core Values

**Ethical**

**Success**

**Excellence**

**Commitment**

**Dynamic**

### The Pitfalls of Homegrown Systems

The client's homegrown survey system struggled to keep pace with the company's expansion. Norris, who describes himself as "a people person, not a data guy," recalls spending days manually coding survey data at his kitchen table. This labor-intensive process was prone to unconscious bias and technical limitations. The system felt like it was being held together by "twine, duct tape, and a piece of chewing gum."

# Engagement Surveys

## CASE STUDY

### Key Challenges Before Be Heard:

- Significant delays in processing, hindering timely action on feedback.
- Difficulty spotting trends over time, especially across workforce segments
- Lack of benchmarking capabilities.
- Only aggregate data was available; lacked insights for diverse workforces.
- Inability to nuance data by role & business unit.

For blue-collar employees working in the Texas heat, actionable feedback was essential. Yet the lag in processing meant important improvements were delayed.

### Terryberry's Efficient, Detailed, and Ethical Solution

Terryberry's survey solution, Be Heard, offered a new process uniquely tailored to the client's needs:

Survey processing time was reduced from weeks and months to hours.

Detailed analytics broke down data by job categories, strategic business units, and eNPS scores, offering insights

previously unavailable with their old system.

Heatmaps allowed management to easily spot trends at all levels of the organization and address concerns promptly.

The solution enabled comparisons to industry benchmarks while ensuring anonymity and ethical data handling.

# Engagement Surveys

## CASE STUDY



**Terryberry  
was the only  
solutions  
provider we  
talked to that  
listened to us...  
*competitors  
didn't even  
come close.***

### Impact: Turning Data into Action

#### 1. Enhanced Leadership Effectiveness

Before Terryberry's Be Heard solution, Norris and his team spent weeks manually processing survey data in Excel, struggling to break down feedback by role and department. Other solutions offering only aggregate data couldn't provide the detailed insights needed for strategic decision-making.

"By getting all the time back from Terryberry, I can coach more. I can be surgical with my development," Norris explains. The platform enables leadership to hold managers accountable for engagement data, making meetings and coaching sessions more productive. Time

saved is now invested in leadership development and swift issue resolution, allowing the company to maintain its values-based culture across its expanding operations.

#### 2. Policy Overhaul & Employee-Centered Changes

Be Heard provided unprecedented visibility into the employee experience, enabling the company's leadership to make impactful, data-driven decisions. This newfound insight led to significant policy changes, directly addressing employee concerns and reinforcing the company's commitment to its values-based culture.

# Engagement Surveys

## CASE STUDY

For example, feedback about family leave policies resulted in expanding child-bonding leave to fathers. Additionally, an overtime policy that inadvertently penalized employees who took PTO was corrected.

By swiftly addressing these issues, the company not only avoided the potential erosion of their strong culture but also strengthened employee trust and loyalty.

### **3. Scalable Cultural Management Across 100+ Locations**

The client's growth from 6 to over 100 locations challenged their ability to maintain a consistent culture.



**Thanks to the time we save with Be Heard, I can coach more effectively & be surgical with my team's development. It allows me to be much more purposeful in how I dedicate resources.**

Be Heard's heat maps and trend analysis tools became crucial, allowing leadership to spot and address issues early.

Be Heard also enabled quick responses to identified needs, such as implementing missing training opportunities or addressing low engagement at specific locations.

Despite expansion, the company maintains a personal approach. Every site receives an annual in-person visit from leadership where executives present engagement data. This practice ensures employees feel heard and valued, fostering unity and cultural consistency across all locations.



# Engagement Surveys

## CASE STUDY

### 4. Cross-Functional Benefits and Broader HR Adoption

Terryberry's Be Heard solution has become a game-changer for the company's HR initiatives. Beyond engagement surveys, it now drives new hire, exit, and pulse surveys, offering a 360-degree view of the employee experience.

Be Heard's extensive data capabilities empower HR to make compelling cases for resources and enhance communication with stakeholders.

Recently, the client has added Terryberry's social recognition software, Be Recognized. This solution offers an employee social media experience with peer-to-peer recognition, custom milestone awards, and a diverse rewards catalog including merchandise, event tickets, and travel options.



**The heatmaps allow us to identify & address disparities in employee experiences across different shops. We can now ask the right questions and take action where it's needed most.**

This comprehensive approach has transformed the company's ability to understand, appreciate, and respond to employee needs, creating a more engaged and satisfied workforce across all functions.

# Engagement Surveys

## CASE STUDY

### Powering Progress for Generations to Come

This partnership with Terryberry has gone beyond improving survey processes—it has empowered the company to uphold its deeply rooted values across the vast Texas landscape and every level of its organization. As the company expands, their commitment to Values-Based Leadership® remains unwavering.

Using Terryberry's end-to-end engagement platform, the company is now creating personalized experiences that span from surveys to recognition and rewards. The platform automates everything from onboarding to service awards and birthdays, ensuring no special occasion is overlooked. With custom recognition experiences that reflect their unique culture, Terryberry handles the details, allowing the client to focus on nurturing their workforce and driving the business forward.



**To retain employees for 10, 20, or 30 years, you need to listen to them. Terryberry gives us the tools to do that.**

This partnership streamlines HR processes and reinforces the company's values with every celebration, cementing their reputation as the gold standard for employee engagement in the heavy equipment industry for generations to come.