



b-Heard Survey Data Fields: Purpose, Minimisation and Retention

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→ Introduction

At Best Companies, our purpose is simple: to help make the world a better workplace. We believe that when employees feel heard, valued and engaged, they are more likely to feel happy at work, contribute meaningfully and support the success of the organisation.

This resource is intended to help organisations understand why certain employee data fields are requested, how those fields support survey delivery and reporting, and how this aligns with data minimisation. It should be read alongside the relevant Terms of Service, privacy information and any service-specific guidance provided during the survey set-up process

→ Why Work With Us?

Our workplace and managerial insight services help you understand employee engagement in a clear, practical and meaningful way. We help you interpret the results, identify where engagement is strongest, and understand where further focus or support may be needed.

Over time, this insight can support better conversations, more focused action planning and a stronger understanding of what helps your people and organisation thrive. Organisations with high levels of employee engagement are often better placed to retain talent, attract new people and create a positive workplace culture.

Where organisations choose to take part in accreditation or recognition services, Best Companies uses the survey data in line with our methodology to evaluate your organisation for Best Companies accreditation and The Best Companies to Work For Lists.

→ Data Protection Legislation

We recognise and are committed to the GDPR principles of data protection. This document has been created to aid organisations in meeting with the Data Minimisation principle and demonstrate they are only sharing what is required for the provision of the services.

The fields requested will depend on the services purchased, the reporting outputs required and whether the organisation is participating in accreditation or recognition services. Mandatory fields are required for all survey types. Optional fields should only be provided where they are relevant to the reporting package purchased or the insight the organisation expects to receive.

We also apply a variety of technical and organisational measures to protect the personal data shared with us. These measures are designed to support secure handling, appropriate access, data minimisation and privacy by design throughout the survey process. For further information, please see our article: [Data Protection by Design and Default](#).

→ Information flow

All Best Companies employee engagement services start with the b-Heard survey. The information flow below explains how personal data is collected, used, accessed, reported, retained and deleted as part of the service. The exact flow will depend on the services purchased, the employee population included, the reporting fields selected and whether the organisation has chosen to take part in accreditation or recognition services.

The organisation prepares the employee upload data needed to administer the survey, align survey invitations to the correct individuals and support the agreed reporting outputs. This may include contact details, unique identifiers and relevant demographic or organisational reporting fields. The organisation should only provide data that is necessary and proportionate for the services it has purchased and the reporting it expects to receive.

The organisation's project manager uploads the personal data to the Best Companies Dashboard. Best Companies uses the uploaded data to configure the survey, issue electronic invitations, apply the agreed reporting structure and, where relevant, set up access to the appropriate insight tools or dashboards.

Employees complete and submit their survey responses online directly to Best Companies. From the point Best Companies receives the first survey response, Best Companies acts as a separate controller for those survey responses. Survey responses do not become part of the organisation's own dataset. This separation supports responder confidentiality and helps employees answer honestly.

Best Companies analyses survey responses using its academically developed methodology. The system looks for patterns, connections and correlations between employee responses and the demographic or reporting fields supplied by the organisation. Reporting is then produced to help the organisation understand engagement themes, areas of strength, areas requiring attention and opportunities for improvement.

To support high quality and meaningful reporting, the upload data should be accurate and complete enough to ensure the survey is delivered to the correct individuals and that agreed demographic or organisational reporting can be produced. Where the organisation has purchased the Workplace Insight Tool or Elevate, additional insight and layering may be applied to help identify areas of focus across the organisation and highlight where employees are engaged.

Survey administration using the organisation-provided upload data is carried out by Best Companies as a data processor on behalf of the organisation. The organisation remains the controller for the employee upload data it provides. Best Companies acts as a separate controller

for survey responses once they are submitted, and for statistical analysis, benchmarking, accreditation assessment and compatible research purposes. Survey responses are not returned to the organisation as identifiable responses. Best Companies also provides layered privacy information, including privacy information on its website, survey communications and just-in-time notices within the survey journey.

Personal data is retained or deleted in line with the Terms of Service and agreed retention arrangements. Once personal identifiers are deleted, remaining survey response data may be retained as statistical or anonymised data where individuals are no longer identifiable. This supports continued employee engagement research, methodology development, benchmarking and aggregated insight, while limiting identifiability as far as reasonably possible.

As the data controller you will need to consider the minimum fields of data required for the processing. We make this easy for you with our employee upload document. Where you have invested in Workplace Insight Pro and/or People Leader Index data in Elevate we recommend providing the optional fields based on the higher level of data insight reporting you have purchased. This ensures the reporting is accurate, reliable and complete enough to form part of the evidence base for the organisation's people strategy and related decision making across different areas of the organisation.

Depending on the level of data that you have purchased, or where you have chosen not to supply some demographic(s) in advance, we will ask those questions directly from the employee as part of the survey. The questions are optional however; we have found that not pre-populating these fields can lead to inaccuracies in the reporting data.

We would encourage consideration of pre-populating as many of the relevant demographic fields as possible. Pre-population saves time for employees completing the survey and supports high quality, meaningful reporting by reducing the risk of inaccuracies. Any information shared by the employer will not be asked again to be completed by the employee on an electronic survey.

For an organisation to be considered for a Best Companies Accolade, we require the personal data to be shared of all eligible employees. For a full organisation survey, this allows us to ensure all employees have had the opportunity to respond to a survey. This is to ensure fair processing in competition, and that organisations do not restrict or favour survey allocation to those employees that may answer more favourably.

→ Privacy Notice

Our privacy notice details how we use personal data. <https://www.b.co.uk/privacy-notice/>. This is communicated to employees using a multi-layer approach. We ask organisations to assist with the delivery of this information and recommend it is shared when announcing participation in the b-Heard survey. This helps employees recognise Best Companies and understand how their data will be processed. Best Companies becomes a separate data controller of the responses it receives from

survey respondents. This supports confidence that employees can respond honestly and that responses reported back to the organisation will be anonymous.

The table below explains why each field is requested. Mandatory means the field is required for all survey types. Optional means the field is only required where it supports the services purchased, reporting outputs selected or agreed insight requirements. Optional demographic fields will only be used for reporting where the relevant reporting package has been purchased, and sufficient responses have been received.

→ Data Fields

The fields of data required to be shared are:

Field	Purpose
First Name (Mandatory)	Used to address the b-Heard survey personally, help employees recognise the email as genuine, confirm it has been sent to the correct person, and support identification for data subject requests, repeat surveys or reporting changes. Our research has shown there is a greater response when the survey is a personal invite.
Surname (Mandatory)	Used alongside first name to help distinguish between employees with the same first name and support accurate identification.
Employee Reference (Mandatory)	Used as a unique identifier for each employee. This supports quality checks, such as identifying duplicate records, distinguishing between individuals with the same name, supporting data restructuring, and enabling correlation reporting where the same identifier is supplied each year. Where the organisation changes its structure, using a consistent identifier can help previous and current survey results be compared more accurately.
Survey Type Required (Mandatory)	Determines which survey type is required for each employee and enables Best Companies to deliver the correct b-Heard survey.
Email Address (Mandatory)	Required to deliver the b-Heard survey electronically. Where Elevate has been purchased, it enables managers to access the Elevate portal.
Eligible for Accreditation (Mandatory)	Used to determine whether an employee meets the eligibility criteria for their responses to be included for accreditation and recognition.
Workplace Postcode (Mandatory)	Used to provide response rate reporting by UK region while the survey is live, once more than three responses have been received. Where accreditation has been selected, this field is also used to place the company regionally for lists, where published. This should be the reporting office location and not the employee's home address.
Reporting Manager (Mandatory)	Allows response rate reporting by line manager during the live survey and supports generation of the People Leader Index Score for managers with access to the Elevate platform.
Employment Group (Mandatory)	Required to provide data reporting by different areas of the business and to allow response rate reporting for each area during the live survey.

Job Grade / Level (Mandatory)	Required to provide data reporting by responsibility level within the organisation and to allow response rate reporting for each level while the survey is live.
Date of Birth (Optional)	Used to provide additional demographic reporting where the relevant reporting package has been purchased. This will be converted into a banding after reporting has been released, and the individual entry deleted in line with data minimisation. Allows response rate reporting by age banding during the live survey.
Start Date (Optional)	Used to provide additional demographic reporting by length of service where the relevant reporting package has been purchased. This will be converted into a banding after reporting has been released, and the individual entry deleted in line with data minimisation. Allows response rate reporting by length of service banding during the live survey.
Contracted Weekly Hours (Optional)	Used to provide additional demographic reporting by working hours where the relevant reporting package has been purchased. This will be converted into a banding after reporting has been released, and the individual entry deleted in line with data minimisation. Allows response rate reporting by Contracted hours banding during the live survey.
Annual Salary (Optional)	Used to provide additional demographic reporting where the relevant reporting package has been purchased and sufficient responses have been received. Allows response rate reporting by annual salary banding during the survey live.
Sex (Optional)	Used to provide additional demographic reporting where the relevant reporting package has been purchased and sufficient responses have been received. Allows response rate by sex during survey live.
Working From Home (Optional)	Used to provide additional demographic reporting by working arrangement where the relevant reporting package has been purchased and sufficient responses have been received.
Reason for Not Surveying (Mandatory where 'None' is selected for Survey Type Required)	Required for individuals on the payroll who do not need to receive a survey, such as the CEO or employees on long-term sickness absence of more than four weeks. This ensures surveys are not sent incorrectly and supports fair processing and consistency for Best Companies accolades.

→ Optional Demographics

Optional demographic fields will be presented to employees as part of the survey, where not provided in advance by the organisation. Employees are not required to answer these questions and can choose to skip them or select "prefer not to say".

Providing relevant demographic information in advance is necessary to ensure the reporting is accurate, reliable and sufficiently complete to inform the organisation's people strategy and related decision-making. It also reduces the number of questions employees are asked during the survey, as information already supplied by the organisation does not need to be requested again. Where this information is not provided in advance, employees will be asked to provide it directly as part of the survey. These questions are optional, and employees may choose to skip them or select "prefer

not to say" where available. This may result in incomplete or inconsistent demographic data, which can affect the accuracy and reliability of the reporting provided.

→ Retention

In summary, personal identifiers may be retained for up to three years after the end of the subscription term, unless the employer asks for anonymisation sooner. Once anonymisation has been completed, it cannot be reversed.

Best Companies retains the minimum amount of personal data needed to provide the services and support meaningful reporting. Personal identifiers may be retained for up to three years following the end of the subscription term, unless anonymisation is requested sooner by the employer.

This retention period helps protect the organisation's investment in the survey and insight services. For example, if your organisation changes its structure, we may be able to restructure previously supplied data so that current and previous survey results can be compared more accurately.

This can be particularly useful where an organisation wants to understand the impact of a restructure or compare engagement results against a new reporting structure. If you do not want personal identifiers to be retained for this period, you can ask us in writing to anonymise the personal data earlier. To ensure fairness and transparency for employees, we will not extend the retention period beyond the stated timeframe.

Once personal identifiers have been removed, the remaining survey responses, demographic groupings and statistical results are no longer treated as personal data where individuals are no longer identifiable. We may retain this anonymised information for continued research into employee engagement, including identifying trends, informing conclusions and supporting better workplace insight. Once anonymisation has been completed, it cannot be reversed.

→ Further Information

Should you have any questions about this resource or require further information about our wider security, data protection and compliance practices, please view our Trust Centre or contact us directly at support@b.co.uk.