

Hello, Council members.

Thank you for attending the Communications Leadership Council forum at Terranea Resort! We discussed many topics during our time together, from how to help executives find their voices to crisis communications case studies. Below is a summary of the topics we discussed, organized into categories for easier reading. (A list of tools mentioned is at the end.)

Thank you again for talking so openly about your jobs, challenges and successes. We hope to see you at the next event!

## **EXECUTIVE COMMUNICATION**

### **How did you find an executive's voice?**

- **Absorb everything they've ever done**—every speech, interview—to figure out how they think.
  - Caveat: Understanding someone's voice is easier if they already have one.
- **Interview them like a biographer.** Steer away from what they “should say” to sound smart or funny. Rather, articulate who they are and what they care about. Who was their favorite teacher? What makes them tick? Soul searching is more than wordsmithing.
- **Remember, you cannot create voice.** You can only help executives find theirs. You can't “give” an executive voice like you can give someone a flower or the flu. If your organization is asking you to do that, that's not a communication problem—it's a leadership problem.
- **Tie their voice to organizational values.** Most organizations understand the importance of narrative. The challenge is to sustain it. Tips:
  - **Be consistent.** Connect organizational values to every piece of communication, even if it doesn't seem important. There are moments that are obviously presidential—shareholder meetings or executive letters. But every CEO has comms opportunities that seem beneath the office. It's easy to drop the voice and narrative thread in those times. Don't! Done well, those opportunities can amplify your CEO's voice and keep the comms thread rooted in values.
  - **Be relentless in asking, “How is this tied to our values?” “What is the story?”** Tie those answers to your executive's message. In Sarada Peri's (former speechwriter for Barack Obama) case, she'd ask: “How was this a reflection of America?” President Obama's values and the values of America are ones we all share. That was a thread that was never dropped in presidential messaging.

### **Should our organization take a stand on social issues?**

- **It depends.** If the issue is tied to your values, then yes. If you build a consistent story in small ways over time, this will make sense to your audience when you take a stand on larger issues. Example: Nike. Otherwise it won't be believable, and the message will feel empty.

### **When is it appropriate for my CEO to use his or her voice?**

- **Be strategic.** Ask yourself: Is this something only they can say? If the answer is no, then ...
- **Delegate.** Look for opportunities to elevate other leaders and let them find their voice.

- **Don't overuse your CEO** or you'll dilute his or her significance. Resist the urge to deploy your CEO for every company event. Is there someone else who's a better messenger? For example, President Obama didn't need to talk about the details of a labor rule. That would dilute the brand of the presidency. The labor secretary should give the speech.

### How do you coax a CEO who doesn't want to loosen up and take off their jacket?

- **Play to your executive's strengths.** Don't make them roll up their sleeves if that's not part of their persona. Don't force them to inhabit a look or style that you think is town hall-ish. Create the space for them to succeed where they feel like themselves.

### Tips for writing and speaking with a strong voice:

- **Say one thing, honestly.** This will help avoid the Christmas tree problem—everyone involved wants to keep hanging ornaments until it topples over. A speech about everything is about nothing. Don't load it up so it ends up empty. What is the one central thing you want to do? If it doesn't fit, put it in a fact sheet and send it out later.
- **Use human English.** Don't retreat into generalities or jargon. Be clear and honest. Picture a ladder. At the top of ladder are values. "I'm going to make the world a better place." At the bottom are details (e.g., a shimmering dress). In the middle are "leveraging synergies." Good communication toggles between values, and details that support those values. Instead of talking about numbers, talk about people. Instead of talking about features, talk about benefits.
- **Tell a story.** Make your message a story. A story has structure, characters and conflict. Keep asserting corporate values. There is more utility in the story. Find places to tell those stories than simply repeating values.
- **Listen.** To be persuasive, you need to be persuadable. Be open to being wrong—your employees need to see that.

### How can I coach executives to bring financials to life?

- **Ask your executive: What's their purpose?** Is it to check a box that they shared numbers, or is it to get employees to understand something? Is there a way to do both?
- **Compromise.** The numbers don't have to be eliminated. One executive can present the numbers, and another can tell a story.
- **Distill your message into a language employees will understand.** Know your audience and talk to that audience. One organization illustrated this by using skis. Ski like this (parallel skis) and not like this (crossed skis). Employees may not know anything about finance, but they know they're not supposed to cross streams, or skis.
- **Survey employees.** One communications team revamped the town hall by incorporating more video and images, and fewer graphs and charts. It surveyed employees and let the positive feedback speak be the proof executives needed to see.
- **Turn the camera on them.** Get an executive to watch a video of their speech so they can see how they come across. That may prompt them to change gears. For example, after seeing himself on camera, one executive scaled back the number and amount of detail on his slides after he saw employees weren't listening.
- **Interview your execs.** One team interviews their executives and redesigns their presentation deck to better focus on what they want to say.

### How can I tell a story without using clichés and jargon?

- **Show, don't tell.** When explaining your value statement and strategic plan, ditch abstract words like “innovative.” If you're innovative, what does that look like? Tell a story that will make it obvious to everyone that it was innovative without having to spell it out. Strategic goals can get lost on people when abstractions are used.
- **Tell the story.** Give accolades and recognition to story tell. Share a success story in a department and highlight how that ties into the mission. “Here's what Frank did in his department. That's safety in action. Great job, Frank!”
- **Gather stories from employees.** If safety is a big initiative, ask team members to nominate others who have gone above and beyond the job. Not only are employees creating content for you, those stories are more interesting than “Here's a new safety initiative” message.

### How can I improve managerial communication?

- **Don't just tell them.** Let them know why the message is important.
- **Take on what HR usually does.** Give some onboarding duties to middle managers.
- **Ditch performance metrics.** One organization got rid of performance management metrics for middle managers in favor of conversations. It makes them accountable.

### How do you marry what employees want to hear with what execs want them to hear?

- **Conduct engagement surveys to discover what employees want to hear.** Leaders should use this information when they craft their messages.
- **Give employees a way to ask questions at town halls or similar events.** Enable them to text questions during an event, and ensure all of them get an answer—if not at the event, then in a follow-up video or blog post.
- **Send leaders into the field to hear directly from employees,** and then let the leaders decide what to do with that feedback.
- **Ensure that all communications connects back to your organization's strategy.**

## THE NEW PR & CONTENT IN A CHANGING MEDIA LANDSCAPE

### Which earned media channels are now paid?

- **Social media.** Organic growth isn't realistic. Most is now paid social.
  - Engagement on Facebook has decreased significantly. Some pay to boost posts. More engagement comes from Instagram. One organization posted a news release on its Instagram page and directed followers to swipe up, which drove views to the website.
- **Content.** Sponsored content is now a popular choice. For example, one organization pays for its content to appear in the San Francisco Chronicle's [Story Studio](#) as sponsored content.
  - A word of caution. You can tap vendors like [Bask](#) to push out your content. You may get a lot of impressions, but that doesn't equal engagement. One organization said results from a Bask-like vendor didn't measure up to those from a more traditional paid approach.

### What are some ideas if I can't afford paid media?

- **Tap brand journalism** for improved earned media. Reporters are picking up more brand journalism stories, especially in rural areas where reporters are short staffed. One health care organization has turned its brand journalism site into a marketing vehicle. At the end of article, there's a subtle plug for the organization if readers want to learn more. Those stories are driving people to physician pages and scheduling new appointments.
- **Pitch trend stories.** Reporters often can't write a story about you, but they can feature you in a trend story. Fresh data is always a hook.
  - Ask your customers what keeps them up at night. It's a great way to find trends and create content. It will help you become the expert around content that your audience wants to hear.

### Do you have to rewrite what your PR firm writes?

Yes! Most communicators spot spelling errors, bad ledes and horrible headlines in press releases written by agencies. PR pros also often come to communicators to ask what to pitch! Their value appears to be their relationships/connections with reporters, aka the media list.

- The value and use of press releases have decreased. Some get more media response via Twitter than a press release. Twitter is being used to communicate with reporters, particularly with thought leadership.

## CHANGE MANAGEMENT COMMUNICATION

### How is change management structured?

- **HR owns change management.** Communicators only get pulled in when it's time to communicate, which makes it a challenge. Communicators then ask the questions employees will want to know. The earlier you're involved in the process, the better.
- **We have a dedicated change manager.** Some organizations have a staffer charged with this function.
- **Corporate communications owns it.**
- **A team approach.** Change advisors are assigned to projects and work closely with the communications staff. They don't move forward without working with a communications counterpart.
- **Departments own the change.** A project manager within a department will lead the change communication.
- **Outside consultants are used.** There's no change management function in house. Consultants are hired on a project by project basis as needed.

### What are some ways to communicate change?

- **Keep communication going after the change is enacted.** There is change long after the actual "change" occurs. Don't drop the communication ball.
- **Be strategically sound but tactically flexible.** Don't operate in a vacuum.

- **Understand who needs what and when.**
- **Be transparent.** If you're transparent, the change shouldn't feel like it's coming out of left field. Be consistently transparent in the good, bad and ugly.
- **Make sure it's relevant.** It's hard for employees to get behind a change if they believe it doesn't make sense for the organization.
- **Find and educate an executive sponsor.** Finding an executive to back a change is manageable. Getting them to champion a change is hard. Execs are quick to raise their hands, but they don't understand what visible active sponsorship means.
  - **Be selective.** Only call on an executive sponsor when you really need him or her. Don't go to well too many times.

#### How can I track and measure change management?

- **Send surveys to track change over time.** Employees at one organization take surveys about five times a year on average. The value is tracking change over time. Surveys can reveal that that not all change is difficult. Some changes are obvious. You make a change, fear the worst, and employees say, "okay."
- **Talk to employees—often.** Don't just do it when there's a town hall. Talk with different staffers monthly if possible. There's no replacement for face-to-face conversations.
- **Stress what's not changing.** For example, stress to employees that although the culture is changing, what's not changing are values. Also stress that change isn't negative. Organizations should change. It's natural for culture to change and evolve over time.

### CRISIS COMMUNICATION

#### How to evaluate the severity of a crisis:

- **Level one: serious**
  - A situation that requires a timely response but does not require your team to scramble.
  - Examples:
    - Your organization gets a bad Glassdoor review.
    - An executive says something inflammatory on Twitter.
- **Level two: exigent**
  - Examples:
    - Your organization is involved in an employee lawsuit.
    - A celebrity is upset with your organization.
- **Level three: critical**
  - Examples:
    - Your organization has a data breach.
    - Your organization is under a government investigation.
    - An accident with a serious injury occurs at your facility.
    - Anything negative that happens involving a minor.
- **Level four: business critical**
  - A situation that threatens physical, emotional or financial harm.
  - Example:

- An accident with multiple fatalities occurs at your facility or involves your organization.

#### How to prepare for a crisis:

- **Identify a crisis response team and define everyone's role.**
  - This team will likely involve legal, operations, communications, etc.
  - Decide who will write the press statement, who will notify employees, etc.
- **Define reporting and information logging practices.**
  - The more you can standardize, the more streamlined your crisis response will be.
  - Have a standardized information intake form.
  - Conduct support and communications training on what to include and how to include it.
- **Define decision makers for each crisis level.**
  - Level 1: support
  - Level 2: communications and senior leadership team
  - Level 3: communications, senior leadership team, legal—copy your CEO
  - Level 4: CEO
- **Define the internal communications strategy.**
  - The process to notify staff for each crisis level will be different for every organization; just make sure you have one.
  - You don't have to communicate in real time. Consider confidentiality and whether the news will unnecessarily keep people from doing their jobs.

#### What are some crisis communications best practices?

- **Identify types of crises and develop a plan for each.** Ex: Internal, external and reputational crises
- **Always be transparent.** Begin by saying, "Here's what we know." This might put you at odds with your General Counsel, but your job is to be transparent. When you stay silent, people bang down your door for information or start rumors that are often much worse than the truth.
- **Be honest.** Everyone has cameras these days. If you tell employees/the media that something happened but your response isn't what witnesses' iPhone video shows, you're in big trouble. Remember,
- **Understand the difference between a crisis plan and a crisis communications plan.** A crisis plan explains what to do during say, a hurricane. A crisis communications plan explains who talks to the press, who tells employees, etc.
- **Make judgement calls like a human.** Even though we try to standardize components of crisis communication to help us respond as fast and well as possible, communications is not formulaic. It's an emotional business, we must account for that.
- **Remember: Everyone with a Twitter account is a reporter.** Assume that anything you communicate internally will be shared externally.
- **Control the narrative.** Ex: If a high-profile executive is exiting, focus on the incoming person rather than the reason the former executive was ousted.
- **Remind everyone in your organization once a quarter not to do stupid things.** If you can prevent even one person from doing something that will cause a crisis, that's a win.

## VIDEO

### What are keys to video success?

- **The video must be tied to strategy.** Ask the person requesting video what they want to accomplish. There's nothing strategic about "doing more video." Just because you put something on video doesn't mean employees will watch. You, not them, are the expert. You get to decide if video is the right fit.
- **Solve a problem.** If you shoot a video, try not to do one-offs, but get multiple uses out of one shoot.
- **Have a communication plan.** How will employees find and watch the video?
- **Be clear on objective** and include a simple CTA if appropriate.
- **Connection.** Make sure there is one.
- **Emotion.** Stay away from cheesy music. Include pregnant pauses in edits if they're connected to the content (i.e., in dramatic or emotional storytelling).
- **Show don't tell.**
- **It must be authentic and organic.** Think YouTube and less polished corporate video.
- **Own the energy** you're bringing into a room. Be an active listener during the interview. The more engaged you are, the better your interview will be.

### How can I warm up my nervous executive before a video shoot?

- **Put something in their hands.** If your speaker fidgets, give them something to hold that's out of frame, like a water bottle. Or ask them to stand if they're moving around in their chair.
- **Use an iPhone.** This is less intimidating than a camera crew, especially for introverts.
- **Build a rapport.** Ideally this should happen before you shoot a video. Learn about him and her and build a rapport before turning a camera on.

### What are some video ideas to humanize my executive?

- **Challenge videos.** Ask employees for CEO challenges. "I challenge him or her to tap dance, play roller derby, etc." Set up those challenges at different office locations and film them. Have the employee interview the CEO and record the challenge on an iPhone. Don't share employee questions with the CEO in advance. This makes it authentic and fun. It also makes the CEO relatable. Hey look, he can juggle and swing dance! Promote the video in your newsletter and push employees to the intranet to watch.
- **Ditch the script.** Interview your executive instead of them reading a prepared script. If you're in a different location as your CEO, you can Skype them and have a crew film the interview.
- **Consider a "story slam."** Go visit different office locations, or rent out a space like a comedy bar, set up a video camera, and record executives doing a five-minute "story slam." These are personal stories about them—what challenged them, who their hero is, etc. Shoot 10 videos per event and spread them out so you get 10 weeks of content. Video can help you get a bang for your buck.

## MEASUREMENT

### How do you determine what to measure?

- **Measure things that drive your communications or organizational strategy.** Identify what your team is trying to accomplish and what the best tactic is to get there.
- **Have clear priorities.** You can do anything, but not everything. Identify your team's goals, and then prioritize time and resources on those goals.
- **Know the difference between proving a platform works and proving your work affected strategy.** Getting significant views on a video proves that video is a good communications channel, but it doesn't prove that employees understand the organization's strategy or goals.

### What are the keys to a successful measurement strategy?

- **Find the right tool** to bring multiple platforms together.
- **Collaborate with other departments.** You'll find that there are many people within your organization who already have the tools, resources or knowledge you're looking for.
- **Ensure the measurement strategy revolves around your communications and organization's goals.**

## INTRANETS

### How do you drive employees to the intranet?

- **Ensure it pops up** when employees open their browsers or their computers.
- **Make the intranet the hub** they have to visit to access the tools they need.
- **Make it the go-to search function** for people and resources in your organization. Consider employing a Google Analytics expert to ensure all relevant content appears at the top of search results.
- **Feature compelling content.**
- **Eliminate any superfluous content or features.** People won't use the intranet if it's cluttered, difficult to navigate or has outdated content. Identify owners for each section of the intranet, and meet with them regularly to make sure they are removing outdated material.

### What is the future of intranets?

- **No intranet at all:** Use other tools that employees are already using, like Google Drive and Hangouts, or Slack. Tell stories on microsites.
- **The hub model:** Make your intranet the place that directs employees where to go for the tools/information they need. Say your file storage is on Google Drive, collaboration is on Yammer and other information is on microsites. Your intranet is like the train station that employees must visit to be transported to these other sites.

### Why use microsites?

- **The user experience is better** on a microsite than your intranet.

- **You can bypass IT.** If the IT team is too busy to update the intranet, then create your own platform.

#### **What type of content would a microsite feature?**

- How your organization makes money
- Your organization's history
- Your organization's structure
- Explanations of how your organization's products work
- Tips for leaders on how to successfully lead their teams

#### **SOCIAL MEDIA (INTERNAL AND EXTERNAL)**

##### **How do you get leaders involved on social media?**

- **Make it as easy as possible for them to engage.** Ex: Write discussion questions for your CEO to post to internal channels, like Yammer.
- **Give them their own social media channels.** Ex: If you have leaders who travel often, start an Instagram profile for them to post pictures of their travels.
- **Let them pursue what interests them most.** Ex: If you have a leader who wants to blog or likes to create videos, help them play to those strengths.
- **Share stories about leaders who are engaging and seeing success because of it.**

##### **Where does external social media sit in your organization?**

- **Marketing**
  - Results from the upcoming Council benchmark survey say that 42 percent of social media teams report to marketing.
  - One organization has a social media team that reports to marketing with a dotted line to communications.
  - Another organization has paid social media reporting to marketing and earned social media reporting to communications.

##### **What's the key to collaborating with marketing on external social media when they don't want to?**

- **Have weekly meetings** with marketing so you know what they're posting, and vice versa.

#### **TOOLS**

- **Collaboration/social network:**
  - Private Facebook group for employees
  - [Trello](#)
  - [Slack](#)
  - [Structural](#)
  - [Workplace by Facebook](#)
  - [Yammer](#)

- **Culture:**
  - [Blind](#)
  - [Fishbowl](#)
  - [Glassdoor](#)
- **Email:**
  - [Poppulo](#)
- **Employee apps:**
  - [Bonfyre](#)
  - [Dynamic Signal](#)
  - [Social Chorus](#)
- **Intranets:**
  - [Adobe Experience Manager](#)
  - [CommuniFire](#)
  - [Jive](#)
  - [LumApps](#)
  - [Unily](#)
- **Measurement:**
  - [Beyond Soft](#) (IT/data consulting company)
  - [Power BI](#)
  - [Tableau](#)
- **SMS/text:**
  - [Roost](#)
  - [Text Magic](#)
- **Video:**
  - [Brightcove](#)
  - [Blue Jeans](#) (video conferencing)