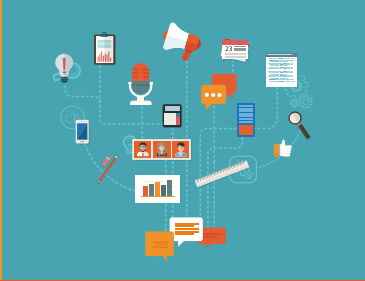




5 steps to a comprehensive internal communications audit



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Wondering how to create a benchmark for your communications? Need to prove your worth to leadership? Start here.

INTRODUCTION

Communications audits have been growing in popularity for years. New trends are emerging, though, to make them more relevant, from a demand for real numbers to the use of marketing-style personae.

“People are increasingly taking their time and doing them right because of the old adage, ‘Garbage in, garbage out,’” says **Katrina Gill**, measurement consultant of [Ragan Consulting Group](#).

A comprehensive audit takes an average of four months. Information gleaned from an audit can sharpen your focus, guarantee deeper message penetration, help make your case for a bigger budget, and reveal how to spend your time and energy most effectively.

STEP 1: EMPLOYEE SURVEYS

Surveys are useful because they provide data—and leaders like data. That doesn’t mean the survey has to be the first step, however.

Some organizations start their audits with focus groups (see below) to help determine the nature of the survey, Gill says. Whenever you begin surveying, make sure your employee sample is representative. Likewise, participant numbers should be high enough to support substantive conclusions.

“The more people you survey,” Gill says, “the lower your margin of error.”

Beware of off-the-shelf audits, she says. Customize the questions for your organization and the goals of your action plan. Look at your strengths and weaknesses and what you hope to do with the data. What changes are you hoping to make?

Write the questions precisely. A simple yes or no doesn’t always get you all the information you need. Instead, ask questions that lead to actionable intel:

- **If you have an agree/disagree statement—I understand the mission of the organization—allow participants to select options from a range: *Strongly agree, agree, not sure, disagree, or strongly disagree.***
- **Offer multiple-choice options: *How often should the email newsletter come out?***
- **Check interest in important communication venues: *How often do you attend town halls?***
- **Poll your managers: *How often do you meet with your direct reports to share information from the leadership meetings you attend?***



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To dig deeper, pursue a topic through a series of questions, as in the following:

- ***Are you aware of [initiative in question, such as a five-year plan]?***
- ***Do you understand this initiative?***
- ***Do you know what it means with regard to what you do every day?***
- ***Do you know how you'll measure the success of the plan?***

Respondents who answer “yes” tend to drop off over a series of questions, says **Jim Ylisela**, co-owner of [Ragan Consulting Group](#). “Generally, nobody has any clue as to what success looks like.”

In addition to the yearly audit, Ylisela says, organizations should conduct shorter, more frequent surveys of two sorts:

Pulse surveys are short polls to gauge the pulse of your organization. Communicators might ask those who attended a town hall three questions about it afterward. Or the team might ask people to weigh in on a redesign of the company magazine.

Employee experience surveys can be either written polls or in-person interviews checking in with employees along the life cycle of their employment. For example, HR might wish to find out how it could improve the onboarding process.

A lot can happen in a year, and it's helpful to gauge the mood using quarterly or monthly surveys to determine how well messages are received.

“Along the pipeline of the employee,” Ylisela says, “what is their experience and how can we improve what we do to make it better?”

STEP 2: FOCUS GROUPS

Developing the focus group

The survey might tell you what's happening—for example, that people aren't reading the company publication, Ylisela says. The “why” emerges through focus groups in which your employees gather to discuss your organization's communications.

Select participants randomly in order to pull in a range of opinions, Gill says. If you call for volunteers, you tend to get opinions only from outspoken colleagues.

If you are doing your audit internally, you will have to find the right person to lead the focus group. Ylisela suggests sending the newest comms staffer, who can shrug off any responsibility for the channels and messages to be critiqued.



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It is important to use an impartial third party to run the focus group. For those who can't hire a consultant, use external contacts, such as members of trade groups they're involved with, local civic organizations or Chamber of Commerce contacts.

Ylisela says focus groups are a fine testing ground for "what if" questions: "What if we had this kind of channel? What if we went mobile?"

In Ylisela's experience, employees want communications to improve, and they are full of ideas. Still, he asks communicators to stay out of the room, in order to encourage honesty from participants.

As an icebreaker, Ylisela suggests that participants write down a word or phrase that sums up their feelings about the communications they receive. If wallflowers hang back, encourage participation by asking them direct questions.

Oh, and don't forget the snacks. We guarantee your attendance will increase.

A guaranteed way to increase attendance at focus groups:
Include snacks!

STEP 3: PERSONA STUDY

Persona studies allow you to observe employees in their natural work areas by shadowing them for a set period of time.

Writing personae

Marketing has long used audience personae—fictional representations of the ideal customer based on market research and real data about established customers.

In a new trend, communications audits are making use of them, too, Ylisela says. Communicators interview employees and categorize them based on their needs.

Personae could be differentiated generationally, such as millennials or baby boomers. They might center around job type or the organizational hierarchy.

One specific persona could be a millennial who works in IT, Ylisela says. Email is a foreign concept to this person.

"Developing these personae allows you to think about the different ways you communicate with the different audiences you have," he says.

Shadowing

Salespeople, flight attendants, factory mechanics and other scattered workforces have long been hard to reach. The problem of communicating with scattered workforces is only growing, however, as increasing numbers of associates work from home and other remote spaces.

Thus, Gill says, a new auditing trend has emerged: shadowing employees. Communicators visit their workplace, observing how they communicate and which channels work best for them. Workers on the go need communications to be concise, direct and quick.



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The idea is to observe how employees communicate in their natural work habitat. This is especially helpful to do when the employees don't work in an office or have easy access to computers. Gill advises exploring these areas:

When do they communicate? At the beginning of their shift? At the end? Throughout their day? Do they time set aside for communication?

How do they communicate? Do they access a computer at all? Do they have email? How much time do they have to read email? Do they see or talk to their manager? If so, how often? Are there formal meetings or is most of the communication informal? Which seems to work better? What other tools do they use to communicate—text, phone calls, word of mouth? Do they have enough time for communication or is it rushed? Is there time for questions?

Who communicates with them? Is it mainly their managers? Do they see or hear from senior leaders? Do they communicate with each other—or other departments?

Determine employees' communication habits

- When do they communicate?
- How do they communicate?
- Who communicates with them?
- What type of information matters most to them?
- Where do they communicate?

What type of information matters most to them? What engages them or makes them pay attention? What makes information valuable or useful to them?

Where do they communicate? In a breakroom? On a group computer or kiosk? Do they participate in employee huddles on the work floor?

"Then, in analyzing all of this information, what seems to work the best?" Gill says. "What doesn't seem to be working? Where are the gaps in communication? What are the main obstacles to communication and how can these be overcome? Are there ideas for new ways to communicate with these groups?"

Make sure you are prepared to listen to what employees have to say. "It has to be two-way, or it doesn't sink in to the person," Gill says.

The results of this study will produce profiles of your employee audiences to draw a much clearer picture of their communication habits and needs. This will be an essential piece in you crafting targeted, personalized content to your employees. A rising trend.

STEP 4: LEADERSHIP INTERVIEWS

Interviews with executives are an important part of improving internal communication. Ylisela says to pose this crucial, two-prong question: "Are you a good communicator, and what could you do better?"



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Poor questions tend to be those that ask about things that can't change or that amount to unreasonable requests. "Couldn't you solve this problem by giving everyone a raise?" isn't going to open up communication in your organization.

In such an assessment, two key questions are:

- **How are leaders communicating to managers?**
- **How are concerns being communicated back up the chain to senior leaders?**

A trend is to dig into the communication among middle managers, who are responsible for much of what moves up and down the chain of command.

Leaders should be asked: How are managers communicating to direct reports?

In many organizations, managerial messaging is the No. 1 problem in internal communication, Ylisela says. Thus, do an analysis of how leaders cascade information to the workforce.

Too often, the information people need does not flow through. "What we generally find is it's a trickle," Ylisela says. "Things get stuck, and where they get stuck most is in the middle, with managers."

If possible, communicators should not interview their own leaders, but use outsider consultants who aren't intimidated by the bigwigs. When interviewing leaders, ask what kind of training they need. How can we remove logjams blocking the flow of information? How do we increase accountability for getting information to the level we want it?

Ylisela's top recommendation? Get out and walk around the office more often. Establish a routine of visiting departments, walking the halls or hosting a coffee hour to hear what's going on.

He recalls telling one room of senior leaders, "You guys could walk down the hall, and no one would know who you are. And that's not good."

STEP 5: CHANNEL ANALYSIS

Too often, Ylisela says, communication departments are channel-focused rather than message-focused. Communicators spend their time determining how to fill the intranet or the newsletter, rather than creating a message and then deciding on a vehicle to deliver it.

Communicators analyzing their channels should pay attention to an emerging trend: the single newsroom. Under this approach, content is created by a central group so there is consistency of message no matter who is distributing it—internal comms, PR, public affairs, marketing, investor relations.

This approach prevents duplicated effort, and it helps a good story find its way to multiple audiences. "We only have to do it once," Ylisela says, "and everybody knows what it is, and who is doing it, and when it is due."



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Examine all your channels, and ask these questions:

- **How can we have more integration between internal and external messaging?**
- **Which channels work, and which are no longer useful?**
- **Are we putting the right content in the right channels?**
- **Does our content have a similar voice and tone?**
- **How does our writing style stack up to best practices?**
- **Is there a mix of content like infographics, videos, photos, long form articles, etc.?**

The is to get a handle on what you're producing now, and how might that need to change? What do you need to add, most important, what should you stop doing?

THE END GAME

There's a final step to an audit. All the knowledge, information and data you've gathered serve little purpose if you don't use them to better your communications.

Correctly done, an audit provides not only a new strategic and tactical roadmap, but also a to-do list of changes, Ylisela says.

What do you want to improve based on what you have learned? What are the best practices in the industry, and how should you use them in your own organization?

To give yourself a path forward, divide your to-do list into three categories:

Quick fixes. These are matters you have total control over. To make such changes, you needn't seek permission from the bosses, nor must you collaborate with another department. For example, you can start writing better headlines today.

Short-term improvements. Such changes can be made in the near future but require collaboration extending beyond your team. You might, for example, work to produce better town halls or train your managers to make them better communicators.

Long-term changes. These are major interdepartmental changes that must be budgeted and planned for the future. For example, you could include overhauling the intranet, or introducing mobile communications into the mix, or internal social media. These are greater changes that require more-extensive planning.

"The end game," Gill says, "is better and more streamlined communication, with a clear separation between need-to-know information and everything else."

That's a result every team can rally around.



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Katrina Gill



An affiliate consultant with Ragan Consulting Group, Katrina has 20 years of diverse research experience, from the planning and development of projects through the presentation of results and recommendations for action. She is an experienced manager of both qualitative and quantitative research projects in many fields, ranging from employee to consumer research. She is a formally trained focus group moderator and in-depth interviewer. Katrina is formally educated in research methodology and has completed post-graduate study on a doctoral track in clinical psychology at the University of Missouri.

Jim Ylisela



Co-founder of Ragan Consulting Group, Jim is a corporate communications expert and award-winning veteran Chicago journalist. He brings more than 30 years of experience in writing, editing, communications research and consulting. Ylisela has conducted internal and external communications audits for a variety of industries, including health care, universities, utilities, financial institutions and government agencies. He works with communicators to upgrade communications channels, revamp communications strategies, organize and train writers and editors and restore reporting (creative storytelling) to internal and external communications.

Sharpen Your Focus Prove Your Value

Make your messaging more effective through a communication audit.

Email Kristin Hart at kristin.hart@raganconsulting.com to set up a chat with Katrina or Jim.

Or call Kristin at 312-960-4405. Or visit www.raganconsulting.com.