Your essential audit checklist

You know the value of measurement and assessment, but doing a full communications audit never seems to reach the top of your to-do list. Something always gets in the way – leadership buy-in, budget, time – another project or a can't-miss deadline.

Most communicators we meet have a pretty good notion of what's working, what isn't and what can get better. But without the evidence an audit provides, you can't make your strongest argument for change or establish the benchmark you need to gauge your progress.

So let's get auditing! Use this checklist to perform a communications assessment that will yield measurable, actionable results.

1. Make the business case.

Leaders love data and analysis, but you have to make an effective argument for time and resources.

- ☐ **What will the audit reveal?** Develop a thesis that resonates with leaders. How will the audit help our business do its business better?
- ☐ **What's the ROI?** Audits cost money, whether done with in-house resources, outside vendors or a combination of the two. What will we save, in unnecessary costs, or in resources spent more productively? What is the value of a better informed and more engaged employee?
- ☐ **How will the audit answer** the two questions that keep leaders up at night: How can I retain the talent we have? And how can I recruit new talent to our enterprise?

2. Conduct a survey.

Not an employee engagement survey but a communications survey that will produce the quantitative data you need to argue for change. Good response rates range from 20% to 25%. To boost participation, offer incentives, such as gift cards, or a drawing. Employ managers and other influencers to urge employees to take part.

- ☐ **What do you want to learn most?** You can't ask everything, so decide what's most important. What's working – and not working – about your communications channels? Are leaders connecting with employees on the big picture? Are managers moving communications up and down the org chart?
- ☐ **At the end of the survey, ask** some basic demographic questions that will allow further analysis, such as job category, location and years of service.
- ☐ **Write survey questions that are concise,** conversational and jargon-free. Address only one item in each question.
- ☐ **Test the survey with members** of your team to make final changes. Your survey should take no longer than five or six minutes to complete.

- ☐ **Improve open rates** by sending the survey by email from the CEO or a senior leader. Schedule at least two reminders, with a final "last call" email that emphasizes when the survey will close.
- ☐ **Analyze your results.** Look for gaps and trends. Compare results by demographic groups. Write a report summarizing findings and your recommendations for change.

3. Focus groups.

Focus groups are conversations where you gather "color" and pose the "why" and "what if" questions you can't ask in the survey. Focus groups give you examples and real comments to provide support – or contrast – to your survey findings.

- ☐ **Identify the employee job types** in your organization (remote, night shift, managers, non-desk, administrative, etc.).
- ☐ **Build focus groups** that ensure a representative sample of employees. Don't include employees' supervisors in the session; hold separate focus groups with managers.
- ☐ **If possible, identify a moderator** outside the communications team. Record the sessions to capture verbatim (but anonymous) quotes.
- ☐ **Work with HR** to randomly select 10 to 15 employees for each focus group. (For example, choose every 10th name.) To get 12, invite 24.
- ☐ **Send a meeting invitation** to participants for a 45- to 60-minute focus group. (Be sure to keep it consistent for each one.)
- ☐ **Write a focus group discussion guide** to be used for all employee focus groups. Write a separate but complementary guide for managers.
- ☐ **Compile a focus group report**, including themes that emerged from the findings and verbatim (anonymous) quotes to illustrate them.

4. Leadership interviews.

One-on-one interviews can help you gauge how leaders' views on communications differ from or match those of employees. This is an essential piece of the audit you shouldn't overlook.

- ☐ **If possible, do one-on-ones** with C-suiters. If time is an issue, do a small focus group with the senior leadership team
- ☐ **Create an interview guide** that asks some provocative questions. One of our faves: "What can you do to be a better communicator?"
- ☐ **Schedule interviews** for 30 to 45 minutes. Record them if possible.
- ☐ **Write a report** based on the themes that emerged, along with verbatim (anonymous) quotes.

5. Content and channel analysis.

Based on what you've learned, it's time to take a hard look at the communication you're delivering. How can you improve engagement with your channels?

- ☐ **Assess your content.** Are you providing the information employees need? Is your storytelling relevant and compelling? Do your headlines and images attract attention?
- ☐ **Are your channels** getting the job done? Are employees clicking through on your enewsletter, accessing content on your intranet and watching your videos?
- ☐ **Are you sending the right** content through the right channel to the right audience?
- ☐ **What needs to change?** What needs an upgrade? What can you stop doing?

Can you do it yourself?

Of course you can. Just keep in mind our Audit Rule of Thumb: The closer (and more personal) you get, the harder it is to go it alone:

- Surveys (1 to everyone) are largely impersonal and come by way of email.
- Focus groups (1 to 12) are more intimate. Be aware of how your own relationships in the company can affect what employees are willing to tell you.
- Leadership interviews (1 to 1) can be tough. It can be intimidating to ask hard questions to the boss.
- Content and channel analysis (you to you). It's very difficult to objectively evaluate your own work.

We'd love to help you with your next communications audit. To learn more, contact Kristin Hart at Kristin.hart@raganconsulting.com.