

Hello Council members,

Thank you for attending the Communications Leadership Council's virtual retreat on March 25, 2021. Below is a summary of the topics we discussed during the retreat, organized into categories for easier reading.

As always, thank you for talking so openly about your jobs, challenges and successes. We are honored to have you as part of this community. Please reach out to us at [Councilconciierge@ragan.com](mailto:Councilconciierge@ragan.com), if we can be of help regarding retreat information or other content that could help you or your team.

### **Welcome, Introductions and Trends**

*Remarks by Diane Schwartz, Ragan Communication and Jim Ylisela, Ragan Consulting Group*

- Communication benchmark study data: 52% of respondents ranked their role performance as “excellent” or “above average” this year, which is 11 points higher than previous year. Why is that?
  - Communicators are trending higher amid the urgency of the past year. Your work during such an extended crisis has elevated the role of communicators and of the comms function
- “Finally, they realize what we do! And how useful we are!” Now, it’s time to secure your seat at the decision-making table.
- Senior leaders across industries are voluminously praising the work of communicators, which Ragan Consulting’s Jim Ylisela says he has not heard a lot of before. Comms folks are having more direct contact with leaders, and your efforts are being noticed.
- How do you keep the momentum going? During a crisis, what happens is you put all the ancillary stuff to the side and focus on what’s absolutely essential. How much backsliding will there be? Will communicators become order-takers again or remain as trusted advisors?
- Comms pros must do a better job of managing and setting expectations moving forward, and it’s crucial to remain close with senior leaders to ensure broader buy-in
- According to Ragan’s new benchmark report, the No. 1 constraint for communication success are those last-minute requests. To deal with that: Streamline and set up a better process to prioritize and vet (and reject or redirect) requests. There must be order to your job request system
- Vaccination comms: 42% of communicators still don’t know what they’re doing for employee vaccinations. There’s still lots of hesitancy about whether to mandate shots or even urge workers to get inoculated. How should we communicate this? Ylisela says to “Follow the science” and to lean on respected experts.
- DE&I: It’s a shared role within the organization. Communicators must do more to be part of DE&I solutions. We’re at a crossroads with this issue. Everyone jumped on board to voice “solidarity” in 2020, but we must turn empathy into action. Expressing feelings is easy; demonstrating good works is the bigger challenge. Comms must work with HR, leadership and mid-level managers to move the DE&I needle in 2021 and beyond.

## **Communications Team Structures for a High-Performing Organization**

*Presentation and Q&A with Hannah Cho, BMC Software*

- BMC was founded in 1980. The company named a new CEO in November 2019. In 2020, they acquired four other businesses and named several new execs in 2020. During that time, Hannah's team of communicators and marketers doubled. Oh, and COVID-19! How do you handle such profound change?
- BMC's first-year goals were to:
  - Turn siloes into team alignment
  - Shift from a reactive mindset toward more strategic program efforts
  - Go from activity-based KPIs to driving meaningful qualitative and quantitative impact
  - Go from individual results to collective success, and to shift from customized processes to standard processes and governance
- Cho's larger goals
  - For her team: Optimizing efficiency, alignment and consistency
  - For 2021: Revamping the intranet, placing added emphasis on CSR and DE&I, working more closely with senior leaders to connect more with employees in genuine ways. And also inspiring internal ambassadors
- Communicators must stay aligned with chief company objectives. Don't just react; be proactive about casting a vision and chart a course for where you plan to go
- Reinforce and validate your processes, and clarify all decisions to ensure your colleagues understand your reasoning
- When deciding on platforms and content, be present where your employees and customers are
- Communicators should line up with what the business is trying to accomplish.
- The pandemic has accelerated business change; communicators must keep up to avoid becoming relegated to "replaceable" status
- In 2021 and beyond, focus on evolving core values into a meaningful employee value proposition
- Also focus on quickly consolidating messaging to ensure consistency. That requires close collaboration with other departments.
- Communicators should actively become more well-rounded and learn how to do different kinds of messaging. Volunteer to help others with their messaging to learn (and to ensure consistency across the board)
- To track ROI, monitor qualitative measure likes attrition rates and employee sentiment. BMC uses an online learning system to gauge employee participation. Also look at metrics tied to long-term business impact, such as renewal rates and brand trust and reputation, employee performance, productivity and employee satisfaction. Focus on outcomes. Clearly state what you're going to be looking at and measuring—and make sure you understand which metrics matter to your execs

## **Leadership Perspective: A CEO's Trusted Partner**

*Fireside chat with Brian Parker, Navy Federal Credit Union and Mary McDuffie, CEO, Navy Federal Credit Union*

### **Work during COVID-19**

- Mary has a background of marketing & development with Navy Federal and understands the importance of communication. That was crucial in terms of figuring how to communicate to Navy Federal's 22,000+ employees and 10 million members
- Overseas branches in places like South Korea helped organization prep for COVID early – they saw need to involve communications team early on to manage anxiety
- Moved 85% of workforce to telework
- Navy Federal prioritized safety/health of team members (and their families). Some initial actions included closing certain branches, cutting back hours, etc.
- Comms made sure to focus on everything from social media to email so that comprehensive coverage was provided on every possible channel

### **Shifting think + the challenge of communicating**

- There was tremendous confusion initially surrounding what guidance to follow, how to prepare, etc. Navy Federal decided early on to follow CDC guidelines and realized they needed to empty building by 75% to meet safety standards they set for themselves
- The immediate goal became providing laptops, PPE equipment and other materials to their workforce. Staff working in branches were shifted into telework roles and other business units
  - Demand from members was higher than ever – half of Navy Federal's members are millennials and younger and needed extra assurance during these uncertain times
- Navy Federal has a high-touch culture as a service organization, which is tough to transfer to a virtual environment. Internal communications rocketed in importance during this time – that high-touch culture was suddenly manifested in their communications
  - Video became the next best option to in-person: weekly videos from business unit leaders, town halls and virtual coffee chats helped retain some of that high-tough culture
  - Email blasts on a weekly basis from business unit leaders with latest updates
- In times of uncertainty, you can't overcommunicate – repetition is good!

### **Moving forward**

- "Can't put genie back in the bottle" – after 1+ year of remote work, the goal became figuring out how to mold/adapt the good things that came from this experience
- From a business point of view, the past year has improved Navy Federal's understanding of the importance of communications to staff and members
  - Simplicity, consistency, and repetition: three tips for your communications
  - Keep advocating for yourself as communicators – if leaders aren't appreciating or recognizing your work, you should be making the case for yourself

## **Eureka: Measuring Communications & Uncovering Actionable Insights**

*Presentations and Q&As with Sarah Plaster, Aflac and John Cirone, Microsoft*

### **Key messages from Aflac**

- Let the Data Speak: “The way we spend our time defines who we are. It also communicates a message to those around us about what is important to us.”
- Focus not on things that are tactical and maybe don’t add value, but instead on the things that provide input and results. “We’re better able to prove our worth. The bottom line is that we measure it.”
- From that premise flow some principles:
  - Establish your fundamental “must haves” year in and year out. This allows you to set a baseline for new additions to what you measure, and also to see how you’re faring each year.
  - Establish the topics of particular importance for that year. In this case, it’s COVID-19.
  - Then determine a cadence and stick to it. In Aflac’s case, the cadence is to measure most things annually, but other things quarterly, with pulse surveys along the way to make sure the comms efforts are making progress.
- Once measurement results are available, they need to be analyzed. Look at the root cause of why results are what they are, and do something.
  - First is to analyze what you’re doing wrong. But if you’re doing something well, there’s no need to overanalyze.
    - When the pandemic hit last March, Aflac moved 98% of employees to remote work. The company did it in a week. The comms team was really focused on how to keep employees engaged. The president did a weekly email update. Now that’s shifted to every two weeks. If you’re doing it well, check in on it every once in a while – you may not need to change anything
- No bad thing gets better over time – the lesson is to make sure it gets addressed.
- Aflac has had monthly dashboards since April 2018 to measure and develop a shared objective for colleagues. Your dashboard should:
  - Continue to measure digital channel metrics.
  - Measure strategic campaigns.
  - Measure virtual events to establish baselines.
  - Put measures that help managers make decisions in an appendix.

### **Key messages from Microsoft**

- Communications effectiveness over the last eight years has shifted from things like external media coverage, analyst reports and the stock price to internal communications, such as communications from the CEO, from group leaders, and from frontline managers.
- Cirone’s department has a vast communications operation, with 702 members representing various divisions of a sprawling company.
  - Of those 702 people, 90% are working on employee comms and the others are doing classic executive communications in support of their division leaders. “I try and look for areas of commonality, and find ways to support folks in these roles,” Cirone says. “Now, the big question for me is how to measure the impact of this function. I don’t have the answer. This is where we are in our journey.”
- There are four focused areas of exec and corporate communications, including:
  - Building confidence in the mission and strategy.

- Accelerating culture awareness and adoption.
- Celebrating employee pride and encouraging evangelism.
- Defining and support a new way of working.
- Microsoft has an internal communications group called GEEC that collaborates on an array of comms initiatives, including overseeing the employee listening ecosystem. The listening ecosystem includes both active components like pulse surveys, onboarding surveys and the like. GEEC also listens using passive tools such as social-media sentiment, website data, video views and others.
  - Microsoft uses [OrgVitality](#) for survey assembly.
- GEEC creates products based on the insights it gleans. Many of those products take the form of weekly newsletters, including news summaries, social media reports, employee-signals reports, key summaries and reports from the CEO's town hall meetings.
- More insights are produced through daily pulse surveys, though Cirone stresses that GEEC uses sophisticated air traffic control to ensure that employees don't get survey fatigue.

### Which Personality Tendency Makes the Best Communicator?

*Gretchen Rubin, New York Times bestselling author*

#### **A closer look at The Four Tendencies**

- The four tendencies help people define themselves according to one of four personality styles. Knowing which personality type we are helps us respond to both internal and external expectations, and by doing so, reduces cognitive dissonance, and in the case of professional communicators, makes them better at their work.
  - Outer expectations represent what others expect of us. It could be work deadlines, it could be helping out a friend, or even maintaining certain standards of behavior.
  - Inner expectations are what we expect of ourselves. This could be keeping a New Year's resolution, or hitting a career milestone, or having a nice vacation house.
- How people respond to these expectations defines which of the four tendencies they fall into:
  - **Upholders.** These are people for whom discipline is their freedom.
    - They like lists. They like setting goals, even daily ones, and hitting them. Upholders readily meet outer and inner expectations. The love calendars.
    - It can be hard for them to be comfortable if something is ambiguous. "If you are an upholder you have to keep in mind your inner expectations," Rubin says. But upholders can seem a little cold. Things that come so easily to them don't come so easily to others.
  - **Questioners.** Questioners push back against anything they perceive as arbitrary.
    - The focus on justifications. They do everything based on their inner standards of expectations. For outer expectations, they say, "I'll comply if you convince me why," Rubin says. "That's their motto."
    - But Questioners can sometimes have analysis paralysis. They can't exit the spiral of research, Rubin says.
  - **Obligers.** Obligers readily meet their external expectations, but sometimes struggle with the internal ones.
    - Their motto might be, "You can count on me, and I'm counting on you to count on me," Rubin says. But if they try to meet an inner expectation, it has to have an outer form of accountability attached. Obligers are the ones who can learn

- the most about themselves from learning about their tendency. Obligers, Rubin says, are the largest tendency, both for men and women.
- People who work with Obligers need to understand their tendency. “The one thing that really does show up is Obliger rebellion in the workplace,” Rubin says. “It can be small—I’m not going to answer your emails. Or it can be: I quit.”
  - If they feel unheard, ignored, exploited, or taken advantage of, it can be explosive. Rubin’s advice is to head that off and not let it build to where the person rebels. Because these are generally people who go the extra mile.
  - **Rebels.** Rebels do what they want to do what they want to do it, in their own way. Their motto is “You can’t make me, and neither can I.”
    - There is tremendous power in the Rebel tendency. And yet, if there is someone who resists everything you ask, it can be hard to deal with. What do you do?
    - Rubin says one way to deal with Rebels is to appeal to the identity itself. You are an artist, you are a boss, you are a responsible parent. “You can say, when you don’t come to the staff meeting, it makes people feel like you don’t care what we have to say,” Rubin suggests. “You can tell the rebel the consequences of their reaction or inaction, and then you let them decide.”
    - When you see a rebel paired up, it is almost with an Obliger.
  - Knowing our tendency, says Rubin (who defines herself as an Upholder), can help us set up situations in the ways that make it more likely that we’ll achieve our aims. We can make better decisions, meet deadlines, meet our promises to ourselves, suffer less stress, and engage more deeply with others. Just as important, knowing other people’s tendencies helps us to work with them more effectively.

### **Member in the Hot Seat: Vaccines and Return to the Workplace**

*Presentation and Q&A with Michael Waterman, CHG Healthcare Services*

[CHG’s Return to Office video](#)

Waterman shared his experience with CHG, a health care staffing company. “Our work is directly connected to people working in the pandemic,” he says. “We’re also a company that takes culture seriously—so we were a little freaked out when we went 100% remote.”

CHG made the decision not to close down its large office buildings, but is committed to the office and the value of in-person connection. But how are they charting the return to the workplace?

Start with some principles:

- **Safety.** Empower employees to feel safe and do what they need to do to feel safe.
- **Voluntary.** Employees can choose to stay remote or to start coming into the office.
- **Flexible.** Employees can try a day in the office, make changes as they find what works best for them.
- **Not every WFH experience is equal.** Waterman says the team chose to highlight how those who have really struggled during remote work are being offered the opportunity to return to the office rather than touting the org benefits of employees being back in the office.

### **How is the return to work being communicated?**

- **Exec video.** Waterman says that CHG's CEO was on screen every day during pandemic, then a few times a month, and now has a video chat every month, 15 to 20 mins, where he brings a guest on and talks about a big initiative.
- **FAQ and video page.** People want to explore what it might be like to go back to the office and so they use the video and web page to understand what it might look like ask, "Is this for me?" This page gets regularly updated because the information changes all the time.

### **What's open now?**

- Waterman says that CHG has four large offices that have opened in locations like Salt Lake City, Utah Florida, North Carolina and Connecticut. To prepared to open these spaces the team:
  - Had Zoom meetings with local leaders in largest offices. Waterman says having regional leaders involved was key.
  - Reinforce answers about safety, facilities and IT support.
  - The team also produced a video that covered the experience a worker might expect when returning to the office. The video was created by CHG's inhouse video team (an investment that Waterman highly recommends) and can be viewed on the CLC portal.

### **The return to work and "hoteling desks"**

- CHG has changed how desk assignments work with only small numbers of employees returning to the office so far (less than 10%). Instead of having "your desk," those who come to the office are assigned a desk for the day, which can be kept distant and regularly disinfected.
- This comes with challenges. Hoteling is working because not so many are coming back yet, Waterman explains. Long-term, he says CHG is committed to getting people back together with their teams once there is a high enough rate of vaccinations.

### **Speaking of vaccinations...**

- How is CHG encouraging employees to get vaccinated against COVID-19? "There is no right answer," Waterman says. "You just have to say we are going to do this or this."
- To that end, CHG has decided it will encourage but not require employees to get vaccinated. One of the ways we will incent people to participate, Waterman says, is through the health care program which rewards employees with points when they take preventative health care steps (a dentist visit results in a point; enough points eventually leads to a discount on health care premiums). Waterman says a COVID-19 vaccines will offer employees 2 points, an added incentive he hopes will make an important point to workers.
- "We also created COVID PTO policy," he says. If people get sick or have to take care of sick people with COVID-19, they don't have to use PTO. Also taking time off to get a vaccine, you don't have to use PTO.
- What about the desk situation when some employees get a vaccine and others decline? "We don't plan to have hoteling desks for non-vaccinated people and team desks for vaccinated people, we don't want to 'other' them," Waterman, admitting the whole enterprise is "tricky."

### **A COVID-19 vaccine is a personal choice, but it affects other people**

- Our fundamental value is to put people first, Waterman says about vaccine comms, but integrity and ethics is also foundational.

- That built in company culture is already paying dividends when it comes to mask policy. “When we ask people to wear a mask, we haven’t had anyone push back,” Waterman says.
- When it comes to vaccines, he says CHG will not be “vaccine monitors,” but will also expect people to try and do the right thing on an individual basis. For example, team leads should balance concerns and vaccinations on a case-by-case basis.
- Won’t that lead to some uncomfortable conversations?
  - Undoubtedly. “We are all going to work through really complicated interpersonal dynamics in the next few months,” Waterman says. He and his team hope that the company culture that they have built over time will be enough to cushion the unavoidable shocks—but there are no guarantees.

#### **On the hybrid work model, what about the return to the workplace?**

- It’s a question that is being weighed by top leaders at CHG at this very moment.
- Waterman says that the message so far has been: “If it works for you, it works for your team, it works for CHG, then it works.”
- We don’t anticipate that we are overtly messaging the return to work until the fall, he adds. The coming months will be a time to test things out, allow employees to discover what works for them, and move on from there. “We are unlikely to say, ‘Wednesday is the day everyone has to be back,’” he says.

#### **Do you plan to ask people about vaccination?**

- Waterman says: “In my experience, most of it is self-reported. A couple of people on my team have said they are not willing to get the vaccine. Others are sharing that they are getting the vaccine.”
- Vaccine reporting is still under discussion, too. “The employee relations team is still feeling out those details.”

#### **Workshop & Exercise: Insights on Strengths from Stories**

*Interactive exercise and presentation with Mary Olson-Menzel and Mel Shahbazian, MVP/Spark InSight*

#### **“High, Low, Weirdo” exercise**

- Three things to write down
  - *High*: Think of the high moment for you over the past year – something even if it wasn’t celebrated
    - *Examples from members*: Promoting their team, moving into a new home, getting a new job, becoming a grandparent, celebrating an anniversary with their company, spending time at beach and exercising with Peloton
  - *Low*: Conversely, what was a low moment for you? This is a chance to be vulnerable about what you’ve experienced over the past year
    - *Examples from members*: Breaking down on the phone with their manager, losing a loved one to COVID-19 and receiving negative feedback on team deliverables
  - *Weirdo*: And finally, what was a surprising moment over the past year? A fluke moment, a left turn, etc.

- *Examples from members:* Discovering a love meditation, participating in dance offs in the kitchen with spouse, teaching self to skateboard and learning to speak out during meetings

### **Where to take this exercise**

- *Reviews:* Bring this process into your monthly reviews. It's so easily comprehensible: you can learn what team members are excelling at and what they're struggling with. A quick improvised prompt can be more truthful and exposing than a formal, rigid review
- *Meeting openers:* Open your meeting with this round-robin exercise to help get people comfortable
- *Market research:* Use this to learn more about your employees. Similarly, organizations can bring it to their clients to better understand their needs
  - You can even draw the high, low and weirdo moments at your next virtual meeting – can really lighten the mood in a quick and easy way

### **Connecting to Purpose During Each Step of Change Management**

*Presentation and Q&A with Carmella Melton, Blue Cross NC*

Melton shared that Blue Cross Blue Shield North Carolina is a company with an 87-year history, based in N.C. and part of the BCBS network. She says 98% of workforce is remote and will stay remote until October.

But the company has faced other big changes besides COVID-19. The organizations underwent a sudden CEO change and the new leader was brought on just days after the death of George Floyd as the organizations' first ever African-American CEO.

Melton went on to share how "purpose" helped BCBS for North Carolina navigate the change it faced. "It's important to always think through the purpose of our function, but also the purpose of the larger organization and the work it does," Melton says.

Melton shares the values that the org released in 2018 to simplify and ground employees:

- **"People first"**
- **"Every customer matters"**
- **"Think data"**
- **"Innovate to elevate"**
- **"Show grit"**

Melton says the team was intentional in connecting the internal brand position to our external brand position, "living fearless." The effort led to the sentiment: "Our employees provide the fearless to allow our customers to live fearless."

### **How were the values communicated?**

- Shared videos
- Put the fearless motto on the wall

- Put it on T-shirts employees wear. (Melton says BCBS employees love a good T-shirt).
- Highlight at “Spirit Week” (annual week-long event to celebrate company, culture and people).
- Include on “The Zone,” BCBS’ internal intranet site.

Navigating changes, tap into channels you have, Melton says. Some channels:

- **Townhalls.** During COVID-19, these company meetings have moved 100% virtual, and on Microsoft Teams. They are now every 6-8 weeks to help bridge gap with loss of in-person connection.
- **Yammer.** This is Melton’s favorite channel because of the opportunity for two-way dialogue.
- **A monthly headline news show.**
- **Executive video.** BCBS of NC’s CEO is sharing a video called The Scoop every three weeks or so.

We’ve really leaned into opportunities for employees to connect and talk with the CEO, Melton adds, and the format is non-moderated, offering top-of-mind discussions.

### Non-COVID change

BCBS had to navigate three specific bits of change that were not COVID-19 related:

1. **Sept 2019 – CEO departure.** It was unexpected and traumatic for the organization, Melton says. The COO became the interim CEO and heightened feelings had to be navigated.
2. **June 2020—In the midst of COVID-19, and following death of George Floyd, a new CEO is announced.** The team needed to facilitate connection while employees are in a remote environment.
3. **Ongoing—A new CEO means organizational transformation.** Melton says that process is happening right now and is ongoing.

Keep your guiding intentions in mind when going through change, Melton advises. **She breaks it down into managing what you want employees to**

- **Know**
- **Feel**
- **Believe**
- **Do**

“We want our employees to realize we have a greater purpose ...and to feel that they make a difference... and believe that they are part of something bigger... and reimagine the possibilities on the other side of a change we will get through together,” Melton says.

This approach helped when addressing things like DE&I in the national reckoning that occurred in 2020. “We tied in our greater purpose to our DEI objectives and that has fueled our ability to walk the talk on those issues,” Melton says.

However, the team thought things could still be simplified. That’s how it came up with its “purpose statement”: **“We won’t stop until health care is better for all.”**

### What’s helping to navigate ongoing change?

- Leadership being vulnerable, being present, being accessible.
- Open and transparent communication. Using all the available channels to connect with our workforce.

- Bringing purpose to life through activations. Work that we do matters to people.
- Reinforce purpose through concrete actions on behalf of the organization.

### **Did your channels exist before your change and how did they evolve?**

- The base of the channels was there but they were modified, Melton says. For example, BCBS had Tunde leadership coffee and conversations but she reimagined the channel to offer exposure and connection with the new CEO, Tunde, in a remote environment. "It's not scripted; he doesn't have talking points," Melton says. The flavor existed before, but this version has been made bespoke for the new CEO.

### **On clarity in language...**

- "To be clear is to be kind," Melton says.
- You can have too many statements, and part of BCBS' focus was to become more direct and focused with corporate statements. "If you can't remember it, then we may not need to have it as a corporate statement," Melton says.

### **Yammer**

- To get Yammer buy in, the BCBS team integrated with other channels or had specific engagement efforts where the team drove people to Yammer and over time the platform became ingrained in the way people communicate.
- It's also a primary leadership channel, Melton says. "Some of the serious announcements about CEO departure, we did on Yammer," Melton says, and that created a way to have dialogue around difficulty news.
- That's not to say that it has been easy to get everyone using Yammer. "Some top leaders have not been for it," Melton admits. She says that BCBS has come a long way and our culture has evolved and I'm fortunate to work for a top HR officer that advocates for it.
- And the CEO sees it and said in a recent session, "Yammer is the best thing since sliced bread."

### **Wrap Up: Key Things Learned by Council members**

- "Our role is so much more important today than ever"
- "Build my listening networks"
- "I need to figure out Comms ROI"
- "Be fearless!"
- "Life's short. We must be much more bold."
- "Being clear is being kind."
- "High Low weirdo."
- "Roll out Yammer."
- "Consistency, simplicity and repetition."
- "Clear and concise comms is more important now than ever."
- "The importance of Communications and the messaging to our teams and customers."
- "It's an imperfect journey. Trying is key."