Smart guide

How to conduct an internal communication audit

Use this approach to assess the current state and decide how to make improvements

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Is it time for an audit?

The word "audit" usually conjures images of not-so-friendly tax accountants with calculators at the ready. But in the employee communication world, an audit isn't scary at all—it's a useful process to analyze how communication is performing.

Just as you visit the doctor for an annual(ish) physical or take your car for regular maintenance, it's a good practice to pause and understand how well your communication system is meeting its objectives.

Employee communication audits typically use several research methods to develop a clear picture of strengths and opportunities. Since audits are more comprehensive than one-off research projects (such as a stand-alone survey), you know it's time to invest when you need to:

- See the big picture of how communication is experienced across the company— especially when the communication function is decentralized
- Understand how to make immediate improvements to your communication program
- Build evidence to make the case for major changes, such as introducing new apps or other technology tools, implementing a leader communication program or centralizing channels

I completed an audit last year, should I do it again this year?

Every two to three years is the ideal schedule, since audits require significant resources to design and deliver several research tools. Remember: an audit doesn't stop you from ongoing efforts to measure the effectiveness of your internal communication program.

Smart guide
How to measure employee communication
4 ways to demonstrate the impact of your work

What's inside

Four-step audit process

Follow this four-step process to plan and manage your next audit:

1 **Set objectives**

2 **Determine scope and research methods**

3 **Conduct research**

4 **Analyze data and develop recommendations**

Audit research methods

- Survey
- Focus groups and/or interviews
- Channel assessment
- Site visits
- Observation
- Benchmark study

Four-step audit process

① Set objectives

A key component of setting audit objectives is your thesis: the main idea you want to explore. For example, perhaps you:

- Have a hunch that newsletters are proliferating and you need data to make the case for consolidation and streamlining
- Want to modernize your communication *system*: the communication tools you use and how they work together
- Want to spend less time managing *news* and focus resources on communication activities that bring more value to the business

Objectives should also reflect how the audit results will be used: Do you need to influence an extended team that doesn't report to you or do you want to make changes to communication channels you manage?

When you understand where you'll focus and how you'll use the data, start drafting objectives. Two or three are all you need. And remember to keep them specific and realistic.

Examples of research objectives for audits

- Assess the effectiveness of core communication channels
- Map the current employee experience with corporate and business unit communication channels, and define the ideal state
- Gather business topics that interest employees and understand how they prefer to learn about them

② Determine scope and research methods

Audits run the gamut from **simple studies** (such as using two research methods) to **comprehensive assessments** (four to five research methods used around the globe).

After you've set objectives, there are several factors that will influence the scope of your audit. Use our decision tool (below) to determine the number of research methods you'll employ:

Scope decisions	
Answer each question by placing an X on the corresponding scale. If most of your Xs fall to the left, use one to two research methods. But if most are to the right, use three or more.	Fewer research methods ←————————————————→ More research methods

Speed
How quickly do you need to complete the audit? Hint: More research methods=more time

I have a short window. ←————————————————→ I can take the time I need.

Budget/resources
Will you have budget and/or resources?

I'll do everything on my own. ←————————————————→ I can hire resources and/or ask colleagues to help.

Participation
Is there appetite to provide time for employees to participate, such as complete a survey or attend a focus group?

I can only get a bit of employees' time. ←————————————————→ Asking employees to participate is not a problem.

Recommendations
How will you use the results?

I'm the only one who will use the results. ←————————————————→ I need to influence senior leaders and/or a group of stakeholders.

Four-step audit process (continued)

Now you're ready to select your research methods. Here's an at-a-glance view of methods and purpose:

Research methods at a glance

Research method	Approach/purpose
Survey	Ask employees to evaluate their communication experience, including satisfaction with channels and knowledge of key topics
Focus groups and/or interviews	Invite employees and stakeholders to review their needs and preferences, explain how they participate in communication and share their ideas for improvement
Channel assessment	Assess communication channels against leading practices
Site visits	Review workplace communication (posters, signage and bulletin boards) to determine effectiveness, such as grade level of writing, focus on employees and transparency
Observation	Understand how employees use communication tools, for example: Do they pick up the printed newsletter? What happens when they walk by the digital display? How do they navigate the intranet when they need to find specific information?
Benchmark study	Compare your employee communication program with the approach of companies you admire

Four-step audit process (continued)

③ Conduct research

Don't underestimate the time it will take to plan logistics and conduct the research. A focused study should only take two to five weeks, while a comprehensive audit could take up to six months.

Our rule of thumb: the more people you need to influence; the more time you'll need to gather the right data. For example, if focus groups are part of your audit and you need to influence a leadership team, you'll want to ensure you have complete representation across the organization. But if you intend to use the data only for yourself and your team, two focus groups will probably do the trick.

Every research method you employ for your audit needs prep work, so you stay focused and ask consistent questions throughout your research.

Four-step audit process (continued)

Here's a quick guide to the implementation steps for each research method:

Implementation steps

Research method					
Survey	**Focus groups and/or interviews**	**Channel assessment**	**Site visits**	**Observation**	**Benchmark study**
Purpose					
With your objectives in mind, consider what you want to achieve with each research method—the purpose of each. For example, you may use site visits to identify best practices with bulletin boards, as well as missing information. Then follow up with focus groups to gather employees' ideas to make site communication (including bulletin boards) more effective.					
Approach					
Decide if you'll run a pulse survey (5 to 7 questions) or something more comprehensive.	Determine if you'll moderate focus groups, interviews or a combination. Create a discussion guide that includes the questions you'll ask consistently across your sessions.	Determine the criteria you'll use to assess channels; for example, use of visuals, grade level of writing and relevance to employees.	Select the areas you want to visit at each site and what you want to assess, such as bulletin boards.	Determine your priorities, such as how employees interact with digital displays or how employees move in high traffic areas.	Identify the key factors to compare and the types of companies you'll target, such as those that are of similar size or structure,.
Key logistics					
• Decide if you'll run a sample (a representative group of employees) or census (everyone) survey. Select the survey tool, for example, SurveyMonkey. • Determine how to handle employees who don't have internet access. • Develop your questions.	• Decide if you'll conduct in-person or web-based focus groups, or a combination. • Determine how many sessions you'll run. • For focus groups, randomly select participants and manage the invitation process.	Select the channels you want to assess and gather examples.	Determine the sites you'll visit and the areas of focus at each site.	Consider how many observation studies you need to conduct and where; for example, key sites only?	Identify the companies you want to compare your communication practices with.

Four-step audit process (continued)

(4) ## Analyze data and develop recommendations

One of the biggest challenges with an audit project is to connect the dots between all the research methods used. Since a comprehensive audit will generate loads of data, we like using the power of a group to help with analysis and recommendations.

Here's a simple process:

- Start with developing separate reports for each piece of research. For example, you may have a focus group report and a channel assessment report.
- Then review all your findings (the separate reports) to find common themes and insights. A group meeting with those who fielded the research is a good way to do this. You can also leverage this team to develop recommendations.
- Prepare a final report that summarizes the research approach, key findings for the audit overall, data summaries for each of the research methods and recommendations/next steps. Return to your objectives; they're a good clue about what should be included in the key findings.

Analyzing qualitative data

Need help analyzing qualitative data from an open-ended question in a survey or a focus group/interview? Check out Chapter 11 (Analyzing the findings) in *How to conduct employee focus groups*.

Four-step audit process (continued)

An example: how one company developed key findings

Here's an example of how we worked with the communication team of a manufacturer/retailer to analyze and package results. For this project, the audit included: benchmarking interviews (with communicators in similar industries), focus groups, a survey and store visits.

To develop the key findings we identified main reporting buckets based on the audit objectives. We made our way through the results of each research method and mapped data to each bucket.

Then it was time to dump each bucket to see what we had. If a data point didn't contribute to the story or a key finding for that area, we discarded it. But, if we felt it was important, we held it for the final page of the report: out-of-scope findings.

Here's a view of the key findings section of the report:

IV. Key findings
Best practices in retail communication

- Use a variety of communication channels to deliver employee-focused content, including face-to-face, print, digital and video
- Messages are simple and concise to improve readability
- Senior leaders are frequently visible and accessible across their organizations—"top to bottom"
- Employee and business success is communicated and celebrated
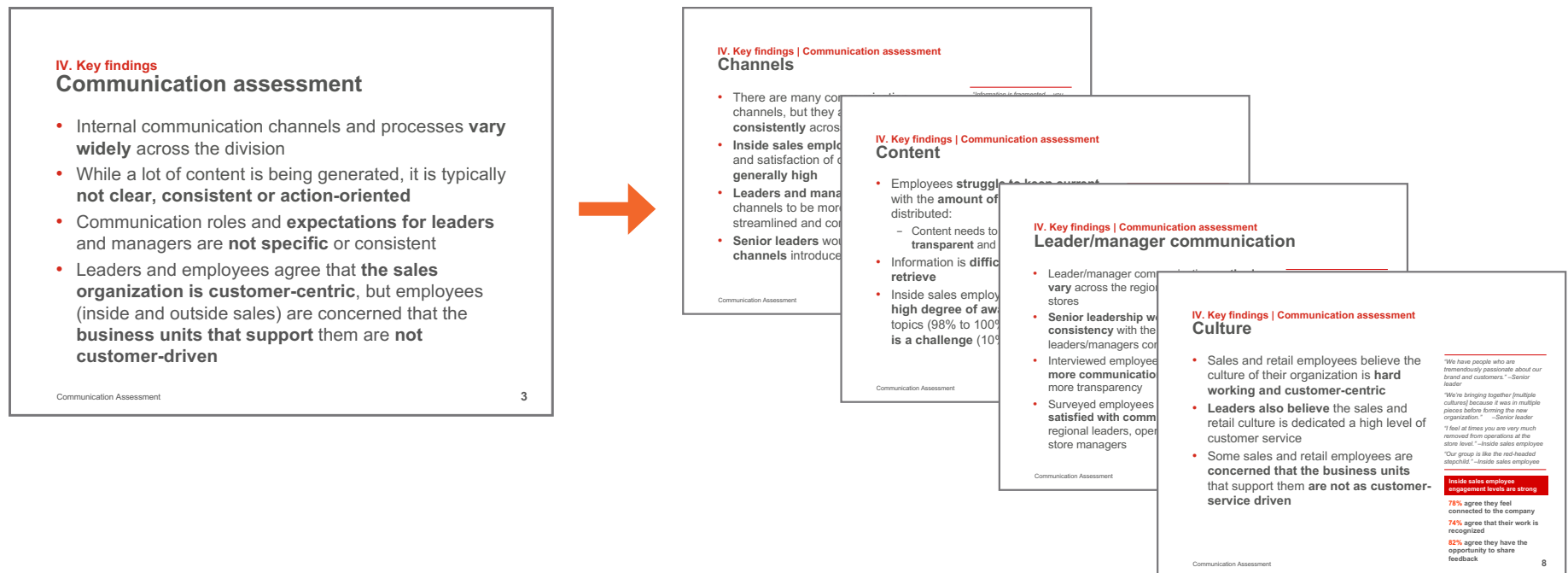- Headcount allocated to retail communication

Retailer 1
- CEO and senior leaders visit stores often
- Employees have direct access to call/email CEO and senior leaders
- Senior leaders publish a bi-monthly video message

Retailer 2
- Communication philosophy is to deliver concise and simple messages
- Employees receive quarterly newsletter in their home mailbox
- Plan to eliminate email and use store-specific portals
- District and regional managers have scheduled, consistent store visits

Communication Assessment   2

IV. Key findings
Communication assessment

- Internal communication channels and processes **vary widely** across the division
- While a lot of content is being generated, it is typically **not clear, consistent or action-oriented**
- Communication roles and **expectations for leaders** and managers are **not specific** or consistent
- Leaders and employees agree that **the sales organization is customer-centric**, but employees (inside and outside sales) are concerned that the **business units that support** them are **not customer-driven**

Communication Assessment   3

IV. Key findings | Communication assessment
Channels

- There are many communication channels, but they a[re] consistently acros[s]
- **Inside sales emplo[yees]** and satisfaction of [...] generally high
- **Leaders and mana[gers]** channels to be mor[e] streamlined and co[...]
- **Senior leaders wo[...]** channels introduce[d]

Communication Assessment

IV. Key findings | Communication assessment
Content

- Employees **struggle to keep current** with the **amount of** [...] distributed:
    - Content needs to [...] **transparent** and [...]
- Information is **diffic[ult]** **retrieve**
- Inside sales emplo[yees] **high degree of awa[reness]** topics (98% to 100%[...] **is a challenge** (10%[...]
- Interviewed employee[s] **more communicatio[n]** more transparency
- Surveyed employees **satisfied with comm[unication]** regional leaders, ope[n] store managers

Communication Assessment

IV. Key findings | Communication assessment
Leader/manager communication

- Leader/manager commu[nication] **vary** across the regi[on] stores
- **Senior leadership w[...]** **consistency** with the [...] leaders/managers co[...]
- Interviewed employe[...] **more communicatio[n]** **more transparency**
- Surveyed employees **satisfied with comm[...]** regional leaders, ope[n]

Communication Assessment

IV. Key findings | Communication assessment
Culture

- Sales and retail employees believe the culture of their organization is **hard working and customer-centric**
- **Leaders also believe** the sales and retail culture is dedicated a high level of customer service
- Some sales and retail employees are **concerned that the business units** that support them **are not as customer-service driven**

"We have people who are tremendously passionate about our brand and customers." –Senior leader

"We're bringing together [multiple cultures] because it was in multiple pieces before forming the new organization." –Senior leader

"I feel at times you are very much removed from operations at the store level." –Inside sales employee

"Our group is like the red-headed stepchild." –Inside sales employee

Inside sales employee engagement levels are strong

78% agree they feel connected to the company

74% agree that their work is recognized

82% agree they have the opportunity to share feedback

Communication Assessment   8

Case study 1

A simple study

The communication team at this industrial services company knocked on our door to uncover the story behind troubling intranet metrics.

Situation

Every week, the team published a round-up of top intranet stories—an email push to employees. The team was concerned that after the summary was sent, there wasn't an uptick in article views on the intranet. Members of the team told us, "Something must be wrong with our news digest."

Research methods and scope

Since the team wanted to make changes quickly, we used a simple approach:

- A pulse survey (eight questions) to assess the effectiveness of the weekly email digest
- Two web-based focus groups to dig into the survey results and ask employees for their ideas

Case study 1 (continued)

Recommendations and next steps

In the survey, employees gave the digest high ratings—they said it:

- Is easy to understand and timely
- Helps them know what's happening across the company
- Covers topics of interest

The two focus groups provided insight into article views on the intranet. We learned that employees get what they need from the digest and don't feel compelled to learn more by clicking. Employees also told us that the digest's format—image, title and short description—is the perfect amount of information because it's aligned with the time they have available.

Across both research methods, employees provided ideas to take the digest to the next level. For example, employees suggested several ways to increase relevancy—ensuring content is focused on what they need.

In a follow-up workshop with the communication team, we reviewed the results and decided to focus on:

- Improving the content mix (for example, more stories about the industry and business units/regions)
- Decreasing word counts (from 500 to 150/200), so less time could be spent drafting articles

Feedback from employees about the digest

"I tend to read the short summaries and if I'm interested in a topic, I will click the link to read more."

"With so many initiatives underway, it does a good job of keeping employees informed."

"I read the digest whenever it comes out to stay up to date on company information."

Ideas from employees to improve the digest

"I'd like to see more general industry news outside our company. What's going on with technology, customers or competitors?"

"Provide articles about the various branches of the company, not just the home office."

"I would like to see more personal articles like the one about employees volunteering at a food bank."

"More success stories about product innovation or recognize a team that helps make our company a better place to work."

Case study 2

A comprehensive audit

Here's the story of a corporate communication team that conducted a comprehensive audit. The result (spoiler alert!): The data convinced a group of loosely connected stakeholders to make major changes to the way the company communicated with employees.

Situation

The corporate communication team at an industrial manufacturer was concerned that employees were being bombarded with communication from multiple sources. Members of the team had a theory that newsletters had exploded and they needed to influence other communicators (who did not report to the corporate team) that it would be more efficient and effective to develop a centralized, coordinated approach.

Objective

The team developed a simple objective for the audit: "Evaluate the current state of internal communication and create a vision for the future."

And agreed on several strategies to support the main objective:

- Identify corporate and business unit operational needs and communication objectives
- Assess effectiveness of existing corporate internal communications tools
- Map the current employee communication experience and define the ideal state
- Determine which topics interest employees and how they want to learn about them

Case study 2 (continued)

Research methods and scope

This organization's approach is a good example of how audits typically incorporate several research methods. For this audit, the team included:

- **Channel assessment:** catalogue the channels employees receive and assess their effectiveness
- **Interviews:** understand the communication process and issues from the stakeholder point of view
- **Focus groups:** talk to employees about their knowledge of key topics, their experience with communication and their ideas for improvement
- **Site visits:** document employees' communication environment at key sites

Given the global scale of this company and the goal of influencing a large group of colleagues, the communication team decided it needed representation across the organization. Here's a summary of the research tactics that were completed:

- Catalogued 97 channels from 17 business units and developed an impact grid to show what the average employee receives
- Conducted 21 interviews with Strategic Council members (a leadership group) and several senior communicators
- Conducted 28 in-person and four web-based focus groups, with a total of 370 employees around the world (multiple languages)
- Performed 14 site visits around the world

Feedback from employees

"I tend to look at things that are relevant to improving my work."

"I'd like to see continued improvements to the intranet and the ability to subscribe to relevant information."

"We need to know the future strategy of the company and the future strategy of this facility."

"I'm interested in getting a summary of new products and how could you apply this information to the way you're doing your job."

Case study 2 (continued)

Recommendations and next steps

The corporate communication team invited an extended group of communicators to review the results of the audit and develop actions. This collaboration was completed in two meetings:

I. During the first meeting, results from each of the research methods were shared and the entire group brainstormed next steps. Here are a few examples of changes identified during the session:

- Define the communication system: objectives for corporate and business units, annual planning process, and standards and guidelines
- Collapse corporate and business unit channels (especially newsletters) and update style
- Develop an Internal Communication network
- Create a leader and manager communication program
- Build knowledge of the corporate strategy

II. The second meeting was devoted to prioritizing recommendations and developing a high-level vision for each. The team also spent time on its most challenging priority: collapsing corporate and business unit newsletters into one solution.

Wow, that sounds like a lot of work!

Remember, not every audit needs to be as big as our second case study. Take a first step by trying one of the research methods, such as reviewing a main channel.

Here's an example

Gather all articles published on the intranet during the past six months and group them by topic. Where are you spending your energy? How are the topics aligned with business objectives? Do you have too many articles about one topic and not enough about others? How do your findings compare with page views? Then brainstorm changes. How could you change your editorial mix?
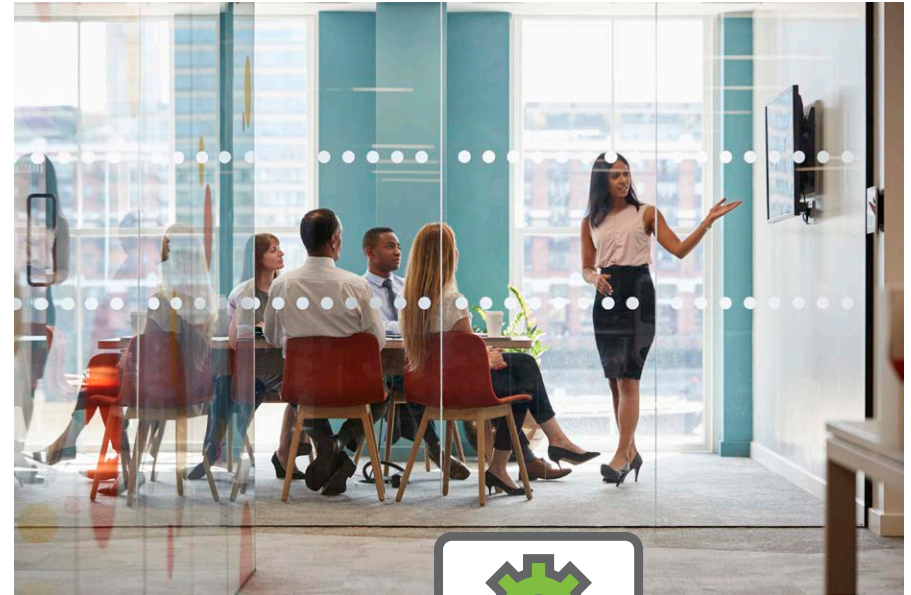
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We can help you to:

- Complete an audit of your employee communication program
- Assess the effectiveness of a communication channel
- Gather employee feedback and ideas to create better communication plans
- Demonstrate the impact of employee communication
- Review the results of your research and determine next steps

5 things to know about us

Global. We've created communication programs that reach employees across the world, in nearly every continent (but not, we admit, Antarctica).

Experienced. We have decades of experience in communicating change, initiatives, HR programs and policies, and many other topics.

Collaborative. Our favorite way of working is to meet with our clients and put our heads together.

Client-focused. Our mission is to help you solve your problems. To set you up for success. To make sure you get the recognition you deserve. (We think you get the picture.)

Acclaimed. We've won hundreds of awards and routinely earn the praise of clients and colleagues.

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