

Insights and advice from
the 2017 Davis & Company
Internal
Communication
Planning Survey

Smart guide

Tackle your biggest internal communication planning challenges





Why communication planning matters

At Davis & Company, we've long realized the importance of planning. That's because we've learned that an **internal communication plan** is the best way to:

- ✓ **Go above and beyond** your current program
- ✓ **Stay on top** of your employee communication priorities throughout the year
- ✓ **Manage and measure** the effectiveness of your efforts
- ✓ **Elevate your role** as a trusted, strategic advisor



So, what's stopping communicators from creating and implementing strong plans? To find out, we conducted a survey to better understand your experience, including your biggest challenges.

This Smart guide explores what we learned and offers practical advice on how to leap over the obstacles and create your best plan ever.

What's inside

- ✓ Our survey results
- ✓ How to tackle your challenges
- ✓ What's in a plan
- ✓ Great planning resources
- ✓ About Davis & Company



Our survey results

We conducted a **survey of internal communicators** throughout the United States; 118 of you shared your perspectives about internal communication planning.

The good news is:

You plan

90% of you create employee communication plans as part of your job



You have the skills

82% of you feel confident about your planning experience/expertise

You include key components

Your internal communication plans:

- Make the most of existing channels (**93%**)
- Support business objectives (**91%**)
- Establish a timeline (**89%**)
- Articulate key messages (**85%**)
- Define stakeholders (**83%**)



But...you face several obstacles

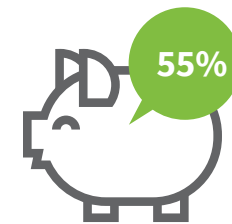
Only:

43% have enough time to plan



47% include measurement methods in your plan

50% propose out-of-the-box ideas in your plan



have the budget to execute your plan

Here's what you told us your **challenges** include:

Creating a plan

*"Having **enough time** to complete and socialize a plan prior to rollout"*

*"Knowing the right questions to ask when you **don't have a seat at the table**"*

*"Getting **buy-in from C-suite executives** to fund and implement the plan"*

Implementing a plan

*"Explaining that **communication plans save time and emotional turmoil** down the road"*

*"Dealing with **other priorities** that affect my ability to follow through with my defined plan"*

*"Operating with **a very small staff with limited resources** and time..."*



How to tackle your challenges

You shared your biggest internal communication planning obstacles with us. Now, we'll show you how to overcome them by addressing **the challenges of three typical communicators.** (Yes, these characters are fictional, but based on real people we know.) →



Our advice will cover **two key stages** of planning:

Creating a plan	Implementing a plan
1 Finding enough time to plan	4 Getting leader buy-in
2 Engaging stakeholders in the planning process	5 Managing priority shifts
3 Including out-of-the-box ideas	6 Measuring efforts



Rodrigo

Rodrigo is head of internal and external communication for a mid-sized, non-profit organization.



Simone

Simone is an employee communication manager for a major retailer with 4,000 stores across the U.S.



Kris

Kris is an internal communication specialist for a global medical devices company that employs over 10,000 people.

1

Creating a plan

Finding enough time to plan

The challenge

With both external and internal communication responsibilities, Rodrigo is a very busy guy. As the end of the year approaches, Rodrigo knows he needs to focus on creating his employee communication plan for the new year. He tries to find patches of time in his schedule for planning, but there just aren't enough hours in the day.

The solution

Taking a piecemeal approach to creating a plan just doesn't work. If Rodrigo is going to do this right, he needs to carve out a chunk of time for some deep strategic thinking. In fact, we've found that allocating dedicated time and, if possible, bringing colleagues together to collaborate, actually saves time—and improves the quality of your plan.

Rodrigo invites a few stakeholders and colleagues to a **four-hour session** devoted entirely to internal communication planning. To help attendees keep their heads in the game, he chooses a meeting location outside of headquarters (a satellite office).

To prepare for the meeting, Rodrigo does two things:

1. Assess the current program

Rodrigo reflects on what worked (and what didn't work) over the past year by looking at spot survey data, web and email metrics, and town hall feedback.

2. Consider what needs to change

Rodrigo uses his assessment of the current plan to start mapping out changes he needs to make to key components of his new plan.

- **Objectives:** Specific outcomes the plan should achieve
- **Strategies:** Methods or approaches for achieving objectives
- **Tactics:** Tools to use or actions to take
- **Timing:** Specific times/dates for completing tasks



The result

Rodrigo facilitates a very productive planning session and gets the feedback he needs to map out his annual communication plan.

2

Creating a plan

Engaging stakeholders in the planning process

The challenge

Simone knows that if she wants to create an internal communication plan that her company can stand behind, she needs input from key stakeholders. These are people who have a vested interest in the plan, such as HR, IT or regional store managers. But getting these stakeholders (with busy schedules) to the table can be tough.

The solution

There are three ways Simone can involve stakeholders in the planning process:

- 1. Research.** Invite stakeholders to participate in a 60-minute, web-based focus group to get their perspective on internal communication:
 - What's working?
 - What's not working?
 - What topics should we focus on?
 - What improvements would you like to see?
- 2. Brainstorming activity.** Ask stakeholders to join one part of the planning session, such as a one-hour exercise to identify key audiences and communication objectives.
- 3. Full participation.** Simone invites stakeholders to participate in the entire planning session—from deciding key objectives to mapping out a tactical calendar.



The result

Simone decides to ask stakeholders to join in a brainstorming activity at the beginning of the planning session. With stakeholders' help, she's able to map out her key audiences (who they are) and what they need most from internal communication.

3

Creating a plan

Including out-of-the-box ideas

The challenge

Kris is a pro at planning and leveraging existing channels to reach employees. But employees are getting tired of the “same old” and Kris is struggling to come up with exciting new ideas to include in his annual communication plan.

The solution

When you're stuck inside your own box, it's hard to break out of that box. Kris needs to recruit other people to bring fresh perspectives. So he invites eight colleagues in his communicators network to participate in an informal brainstorming session.

To get the creative juices flowing, Kris starts with a fun activity:

- ✓ First, he presents a scenario: If there were no limits, in terms of budget or resources, what is one new internal communication resource you'd like to see?
- ✓ Then, Kris asks each participant to create a poster, using magazine clippings, stickers and markers, that shows what the resource would look like.
- ✓ After 15 minutes, each employee shares his or her poster and discusses how the resource would work.
- ✓ Finally, the group votes on their three favorite ideas.



The result

After the session, Kris walks away with some great out-of-the-box ideas to “shake things up” in employee communication. He incorporates a few suggestions into his plan, and employees love the fresh approach.

4

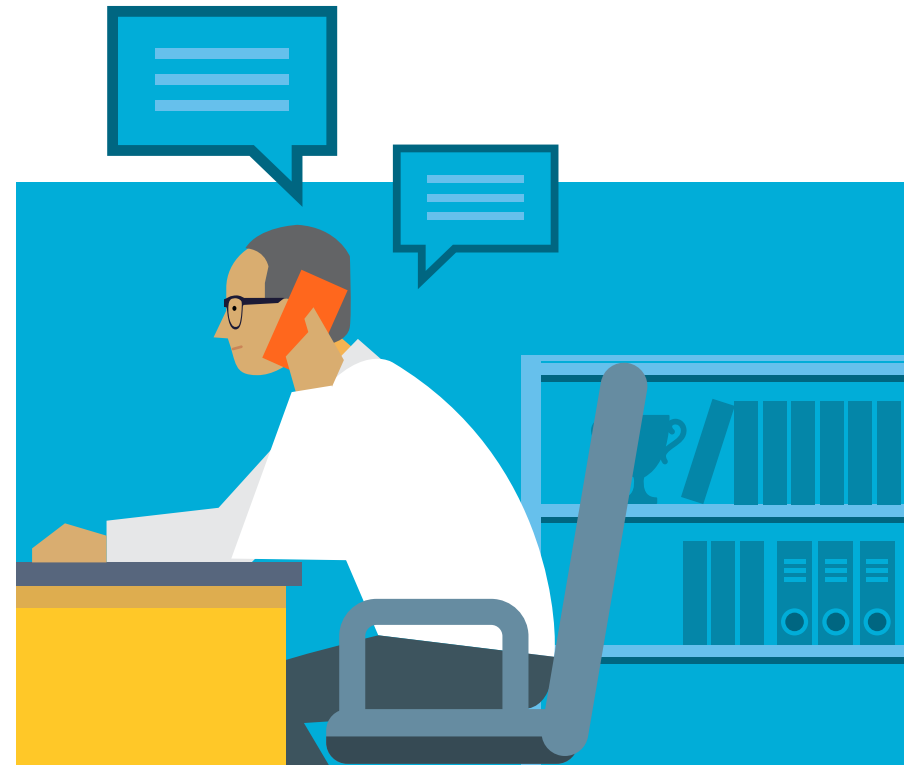
Implementing a plan Getting leader buy-in

The challenge

Rodrigo has created what he thinks is an awesome internal communication plan. But he still has one major hurdle to overcome: getting the approval and support he needs from senior leaders.

The solution

Rodrigo knows that when a plan reflects the insight of leaders, they're more likely to support it. So, prior to creating his plan, Rodrigo talked to senior leaders to get their input.



Leader interviews	Description	What to ask
	<ul style="list-style-type: none"> • 45 minutes • One-on-one • 2 to 3 senior leaders • Phone or in-person 	When it comes to internal communication: <ul style="list-style-type: none"> • How will it make our company successful? • What's working? • What's not working? • What messages do employees need to know? • What improvements would you like to see?

When presenting his plan, Rodrigo **uses what he heard from leaders** to make the case for key strategies and tactics in his plan.

You said...	So, we will...
Leaders aren't visible enough outside of headquarters	Launch a CEO road show after each quarterly town hall to visit other locations and talk to employees
Managers aren't prepared to talk to employees about the new values	Create a communication toolkit for managers, including talking points, FAQs and core deck
The intranet isn't a useful tool for our employees	Host three employee focus groups to understand their needs and preferences for the intranet Leverage feedback to make improvements

The result

By connecting the dots between what leaders need and how the plan would support them, Rodrigo was able to get the buy-in needed. He was also able to make his case for getting additional support for managing the intranet and leader events.

5

Implementing a plan

Managing priority shifts

The challenge

It's mid-year and Simone is making great progress on implementing her communication plan. But ad hoc things always seem to pop up, like the launch of a new corporate initiative. She's concerned that these constant shifts in communication priorities may derail her current plan.

The solution

Instead of "blowing up" her plan each time something new pops up, Simone should determine how the new priority fits into her current plan. Then she can make adjustments to her plan instead of starting from scratch.

For example, HR asks Simone to help communicate significant health care changes to employees prior to open enrollment. So, Simone looks at her current plan and finds a way to leverage existing channels to prepare employees to make the best health care choices.

Existing channel	How to use it
Town halls (quarterly)	Invite an HR leader to provide an overview of health care changes and address employees' questions at the next town hall
Manager meetings (monthly)	Provide managers with a one-pager with talking points and FAQs that they need to communicate about the changes and answer questions
Intranet/e-newsletter	Draft a series of short articles to explain the changes and what employees need to do next



The result

Simone is able to make the most of existing channels in her plan to keep employees up-to-speed on changes to their health care options. She uses the same approach to manage other priorities that pop up throughout the year.

6

Implementing a plan Measuring efforts

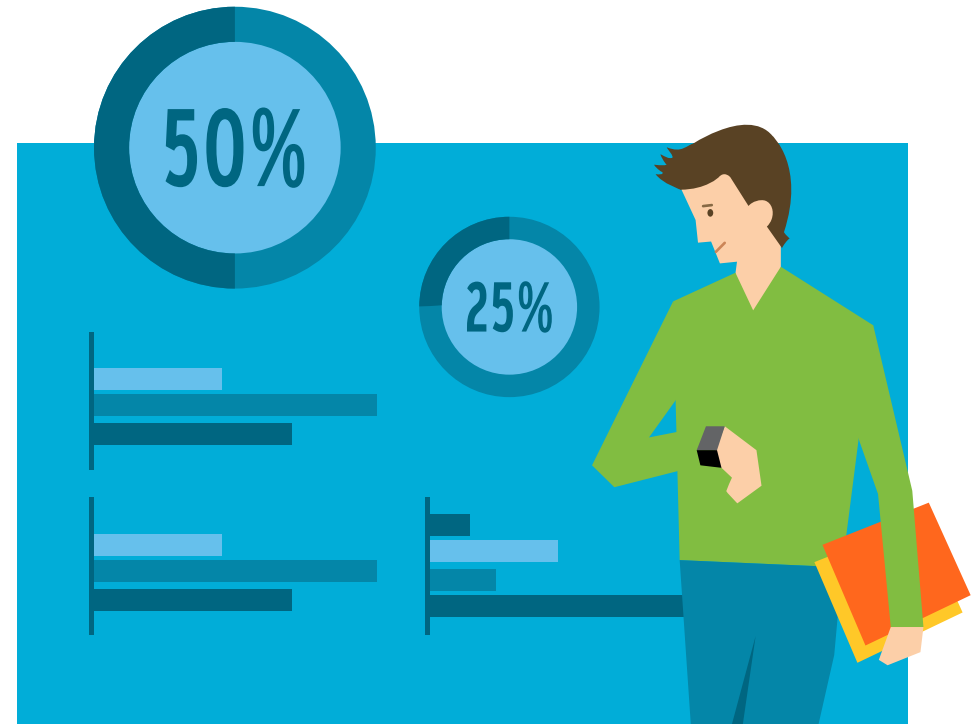
The challenge

To ensure his internal communication plan is meeting employees' needs, Kris knows he should have a good measurement strategy. But keeping tabs on the effectiveness of his efforts throughout the year seems a bit daunting. Where should he start?

The solution

Kris needs to analyze his key tactics and finds a way to build measurement opportunities into these activities.

Activity	How to measure
Intranet and e-newsletter	Kris works with IT to set up monthly intranet reports, including number of employee site visits and which articles are most popular. IT also helps him track how many "opens" the monthly e-newsletter gets, as well as what articles they're clicking.
Town halls	After each town hall, Kris distributes a short, five-question survey to gauge employees' understanding of key topics and suggestions for improving future town halls. Kris also documents any questions asked during the Q&A to determine communication gaps.
Open enrollment	Often a communication plan is designed to encourage a behavior or action, such as enrolling in a health plan. So, Kris works with HR to set a goal (90% will enroll by the end of the month) and track progress.



The result

When his boss asks how employees are responding to internal communication, Kris has some real data to back up his efforts. Employee feedback also helps Kris to make informed tweaks to the plan, such as removing communication channels that are no longer effective.



What's in a plan

Whether you're creating a year-long plan for your company or a short-term plan focused on a specific initiative, you should include these seven key components:

1. Situation analysis	A summary of a situation—a snapshot that conveys what's going on at that moment in time
2. Stakeholders/audience	Individuals or groups you want to reach
3. Objectives	Specific outcomes you want to achieve; what you want employees to know, believe or do
4. Strategies	Methods or approaches for achieving your objectives
5. Tactics/timeline	Tools you'll use or actions you'll take and specific times/dates for completing tasks
6. Key messages	Captures the story you need to tell
7. Measurement	A description of how metrics will be used to demonstrate effectiveness

Great planning resources

Davis & Company has some great internal communication planning advice and resources to help you tackle your biggest challenges. Take a look at these:

Smart tips

- ✓ [Create a winning employee communication plan](#)
- ✓ [Get a head start on next year's communication plan](#)
- ✓ [Make the case for improving employee communication](#)

Blogs

- ✓ [Keep your internal communication plan relevant](#)
- ✓ [What you can learn about internal communication planning from this book about marketing](#)

Workshops

We can design and facilitate a customized in-person (or web-based) workshop to help you conquer planning. [Learn more.](#)

The leaders in internal communication

We're Davis & Company, the employee communication experts. Since 1984, leading organizations have depended on us to reach, engage and motivate their employees. Our strategic mindset, creative spirit and practical know-how can solve your toughest communication challenges. Give us a call. We'd love to help.

To schedule a consultation, contact [Vaishali Benner](#) or call 1-877-399-5100.

Take internal communication planning to the next level

We can help you:

- Think like a strategic advisor
- Define your key message platform
- Develop an annual communication plan
- Build an all-star internal communication team
- Increase your knowledge

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.