



## **An 8-Step Process** **for Creating Effective Internal Communication Plans**

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Communication plans can be prepared for a variety of activities – internal and external. Interestingly, though, many companies overlook the value of creating formal communication plans to outline their overall internal communication objectives – and to provide a framework for activities, with measures to help determine whether the tactics used are really making a difference. While the types of plans may vary, the process steps are very much the same. In fact, developing a marketing plan really requires the same steps as developing a corporate communication plan, or a crisis management plan. Each plan will share certain common elements and the approach will be very similar to that described below:

- 1) Situation analysis/background
- 2) Quantifiable objectives/goals
- 3) Target audience(s)
- 4) Key messages
- 5) Strategies and tactics to meet objectives/goals
- 6) Responsibility/accountability for completing tactics
- 7) Budget (as appropriate)
- 8) Measurement

### **1) Situation analysis/background**

The situation analysis or background section of your communication plan should provide a high level overview of the situation or communication need with sufficient detail that someone not directly involved would understand the issue driving the need for communication and the desired outcome(s). This section should include any pertinent facts or data that would have an impact on the communication process – e.g. areas of particular sensitivity, any anticipated negative responses from specific audiences, details on how similar issues have been handled in the past and the results, etc.

This is the area of your communication plan where you would identify any key cross-departmental impacts or inputs necessary to successful implementation, or point to any areas of concern regarding the need for consistency between internal and external messages or between various target audience groups.

The situation analysis/background section should also briefly address the desired outcomes of the communication effort.

## 2) Quantifiable objectives/goals

The next step in developing your communication plan is to identify objective/goal statements that indicate the “end state” you hope to achieve. It’s critical that each of your objectives/goals has a specific, targeted “end point” or outcome. This both helps you determine the amount of resources that must be allocated to achieve the goal and also provides an indicator of success. A simple example will illustrate: Your best friend says that this year, she’d like to have more money. You hand her one dollar. She now has more money. Chances are, though, that’s not what she had in mind. When you’re setting goals, state what you **do** have in mind or you’re likely to underachieve.

Specific, quantifiable goals are critical. Simply wanting to “increase awareness” doesn’t provide enough specific direction to allocate resources – money and effort – appropriately. By how much? Your goals need to take into consideration where you are at today and where you would like to be (specifically!) so you can focus on closing that gap.

Your goal statements should be expressed in such a way that it is clear what the desired end result is. Following are some examples of poorly expressed goals and how they might be modified to provide better direction:

(Poor) “Increase awareness.” Not only is that statement not quantitative in terms of responding to the question of *how much* of an increase you looking for, but it also fails to identify among which audiences – *all* audiences, a specific geographic audience (e.g. employees at a certain branch location), a specific demographic market (e.g. new employees to the organization). It also fails to identify the timeframe in which you wish to achieve this goal. This month? This year? Next year?

(Better) “Ensure that all line level employees at the XYZ plant have heard about and understand the implications of the XYZ initiative by the end of the first quarter.”

(Poor) “Change negative perceptions that customers have about XYZ product.” Again, this statement is far too general to provide good direction for the organization. Which customers? What is meant by “negative perception”? What do you want to change those negative perceptions to? By when?

(Better) “Based on data from quarterly consumer preference research, achieve a 25 percent gain in perception of XYZ product as being “best” within its product category.” Now you know, specifically, what you hope to achieve through your communication efforts and what “success” will look like. Could you choose multiple customer segments? Certainly.

The point is that you should take the time to ensure that the goal statements you establish are actionable so that you, your communication colleagues throughout the organization and your leadership know when you have achieved success.

A helpful acronym that you can use to evaluate the appropriateness of your objective/goal statements is SMART. The **SMART** acronym is used to develop goals that are most likely to achieve results – goals that are **Specific, Measurable, Attainable, Realistic and Time Framed**.

- A *specific* goal is one that clearly identifies an end point. “Raise positive employee perception about our products” is not a specific goal. “Raise employee perceptions about product X from \_\_\_\_ to \_\_\_\_ by year end” is. Be specific by stating *exactly* what it is you wish to achieve.
- A *measurable* goal provides a way for you to know if you have hit your target. Employee satisfaction scores, for example, that clearly specify the level of increase desired, are measurable.
- Goals need to be *attainable*. Suppose you indicate that you wish to influence all employees to agree that an impending merger is a benefit to them and the organization by year end. That’s specific. It’s measurable. But, in an environment where employees are concerned about job security and resistant to change of any kind, 100 percent acceptance is probably not attainable.
- Even if your goal is attainable, it may not be *realistic*. For example, suppose your goal is to train your sales staff on a new product management software program in three months, but you’re also introducing several new products during that timeframe and increasing sales goals among this same group. This would not be a realistic goal.
- Finally, goals need to be *time framed*. *When* will you achieve the goal? This week? Three months? One year? Longer?

The development of goals/objectives is a process that involves discussion and careful consideration of the multiple impacts that affect your activities. It can be frustrating to realize that a legitimate goal cannot be achieved because of internal constraints on resources – budget, staff, etc., in spite of an obvious need, but if that is the reality of the environment in which you operate, those factors need to be taken into consideration.

### 3) Target audience(s)

Given the goals you’ve identified, what target audience(s) will you need to impact to achieve those goals? Remember that your challenge will be finding a balance between exerting more effort than is required to communicate to various audiences and not exerting enough effort to impact the appropriate audiences.

A good starting point in identifying target audiences is to consider the various stakeholders that the message impacts. For instance, a communication plan about a plant closing would impact a variety of constituencies both internal and external:

- Managers/supervisors

- Employees at the plant
- Employees at large
- Senior leaders
- Community leaders
- Local media (and potentially regional or national media)
- Board members
- Customers

Each of these segments could, potentially, be broken down even further. When considering how narrowly to define your target audience, consider:

1) Are there different key messages that will need to be delivered to each group? For example, employees at the plant will have different questions/concerns than employees in other parts of the organization. But individual parts of the organization at large may not have different communication needs and they might be considered as a single audience.

2) Are there specific requirements based on the relationship between your organization and the audience? For example, certain large customers may require a personal visit or call, while other customer segments could be appropriately communicated with through a letter or email announcement.

Another consideration when identifying target audience segments is the order in which they need to be communicated with. The above list was not presented in any particular order:

- Managers/supervisors (3)
- Employees at the plant (4)
- Senior leaders (2)
- Employees at large (5)
- Community leaders (6)
- Local media (and potentially regional or national media) (7/8)
- Board members (1)
- Customers (7/8)

The list might be reordered from first group to contact to last group to contact, as indicated by the numbers in parentheses above.

Or, it might be ordered in some other manner. The order will depend on the individual needs/issues that each segment represents, legal requirements (publicly held companies must communicate certain messages publicly before sharing with internal staff), and practical concerns (certain customers may be difficult to reach, an in-person meeting might be preferred but not possible given time or budget constraints).

#### **4) Key messages**

Each identified target audience has different communication needs. The content, order and number of key messages is likely to vary by group. In general, the fewer and more specific

your key messages can be, the better. Three key messages are a good number to aim for – more than that will broaden your focus and minimize the impact of your communication. Each of these messages may also have additional sub-messages or support points that should also be documented to help ensure consistency and to avoid missing a critical point when communicating with various audiences.

Some key messages related to specific HR communication needs could be:

#### ***Introducing a new benefit plan***

- Our company will be introducing a new benefit plan designed to decrease costs and increase coverage options.
- The benefit plan changes will be primarily administrative – employees will be only minimally impacted by these changes.
- This change is part of our ongoing objective of providing competitive benefits that meet employee needs.

#### ***Restructuring a division***

- After six weeks of study and discussion between all affected leaders and staff, the marketing division is announcing a major restructuring.
- This restructuring is designed to provide better, more accessible service to internal stakeholders.
- While reporting structures will change, there will be no layoffs or movements into lower job grades as part of this restructuring.

### **5) Strategies and tactics to meet objectives/goals**

Objectives/goals identify the end points you hope to achieve. But you need to go beyond these broad objectives to identify specifically *how* you will achieve those end points. This involves developing strategies and tactics.

Strategies are broad statements of activity. Tactics are more specific statements of activity that are actionable. When identifying strategies and tactics, it's important to be realistic. There are probably a wide array of activities that you *could* undertake to achieve your objectives, but those activities may be hampered by budget and staff resources. You may wish to start this process by brainstorming all of the various activities that you might undertake and then go back to review these activities and prioritize them based both on the potential for having the most impact and the availability of resources to accomplish the tasks.

Some strategies and tactics related to specific HR communication needs could be:

#### ***Introducing a new benefit plan***

*Strategy:* Ensure acceptance and understanding among staff of the benefit plan changes.

*Tactics:*

- Survey staff to determine current level of acceptance/understanding.

- Identify gaps between current and desired state.
- Hold town hall meetings.
- Distributed brochure/newsletter updates outlining changes to plan.
- Send mailing with specific details to employee homes.
- Survey staff to determine whether acceptance/understanding has been positively impacted.

### ***Restructuring a division***

*Strategy:* Minimize employee departures related to concerns over restructuring.

*Tactics:*

- Establish schedule of one-on-one meetings between supervisors/managers and all staff within the division.
- Identify areas of concern and misconception.
- Schedule regular town hall meetings to provide opportunity for Q/A during restructuring.
- Create online newsletter for impacted staff to keep them informed of restructuring efforts.

## **6) Responsibility/accountability for completing tactics**

Having a plan is a good first step. Assigning accountability for the accomplishment of that plan is critical. Unless specific areas of the organization – and individuals within those areas – recognize that they are being held responsible and accountable for completing specific tactics that drive your ability to achieve your strategies and objectives, you will not achieve your desired results.

Assigning responsibility involves more than simply putting department or individual names in your plan. You need to ensure that you have buy-in and commitment from the departments and individuals you have listed. This may involve discussion at the senior management level of the organization and negotiation between organizational leaders to gain agreement on where the company's efforts should be focused. It should also involve, of course, conversation with the departments and individuals named to ensure that they understand the expectation, realize the impact their involvement has on the achievement of the plan objectives and are personally committed to helping to achieve those objectives.

## **7) Budget**

In addition to identifying the people resources needed to achieve your communication plan objectives, you may also need to address the budget resources needed. While some communication plans will require no additional budget and can be accomplished with existing staff within standard work hours, other plans will require additional staff (overtime efforts, freelancers or consultants) or the development of communication materials (newsletters, web content, video, mailings, etc.). All of these costs should be documented in the communication plan to provide an overview of the total cost for the communication effort and to provide anyone who is in a position to approve/dismiss the plan with a clear idea of the resources required to achieve the identified results.

Receiving approval for your communication plan budget will be based primarily on your ability to justify the expenditures that you're requesting. That means doing your homework in terms of providing background information that may include details on the outcomes of previous efforts, the impact to the organization of *not* achieving success and the actual costs of the various communication activities you are proposing.

## 8) Measurement

A communication plan should be a "living document" and an opportunity for organizational learning. When you develop a plan you should also identify specific ways in which you'll determine the effectiveness of your activities – your ROI (return on investment).

To be effective, communication needs to be part of a carefully considered process, focused on achieving clearly identified, *measurable* results. It is not difficult to communicate effectively, but it does take some thought, a clear focus on objectives, an understanding of the tools available to communicate your messages and a strong partnership between you and your internal customer.

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### **ABOUT LINDA POPHAL**

Linda Pophal is owner/CEO of Strategic Communications, LLC, a Wisconsin-based marketing and communication firm. As a communication professional, Pophal has managed all aspects of corporate and marketing communication including employee communication, public relations, advertising, market research and brand management. As a trainer and university instructor, Pophal has developed and delivered training programs for national and local audiences on all aspects of communication management and employee relations. Pophal is a prolific writer of business management and marketing articles for both general and trade publications and is the author of several books, including *The Essentials of Corporate Communications and PR* (Harvard Business School Press, 2006) and *Marketing With the End In Mind* (IABC, 2005).

**Strategic Communications, LLC**, helps businesses apply strategy to address communication challenges, specializing in strategic communication planning and implementation for brand management, community, customer, employee, marketing and media relations activities. Working with businesses, large and small, Strategic Communications has developed a reputation for tying tactics to strategies and measurable results based on each client's unique goals and objectives.