

# Getting Started: Communication Measurement\*

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This "Getting Started on Communication Measurement" guide will help you understand three aspects of measuring the value of communication:

- ◆ **Why** measure.
- ◆ **What** to measure.
- ◆ **How** to measure.

## Contents

### Why You Should Measure

#### What You Can Measure

How to Set Measurable Objectives

What to Measure Against

#### How to Measure Communication Effectiveness

Ten Measurements You Can Conduct Right Now

How to Approach a Full-Scale "Communication Audit"

Planning task force

Individual interviews

Focus groups

Assessment of media effectiveness

Questionnaire surveys

Reporting results

When to Use Internal or External Resources

### Conclusion

### Appendix: Sample Measurement Case Studies

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For more information, see Angela's manual, *How to Measure Your Communication Programs*, available by calling +1 (714) 277-4130. It includes sample questions, worksheets, agendas, facilitator tips, invitation letters, report formats—everything you need to conduct or manage evaluations of your communications. Angela is CEO of Sinickas Communications, Inc. ([www.sinicom.com](http://www.sinicom.com)).

## Why You Should Measure

You will benefit in many ways from measuring the impact of your communications:

- You will be speaking the numbers language spoken by other members of the management team. You will have more credibility and a greater likelihood of being involved in strategic decision-making, rather than being asked only to publicize decisions already made.
- You will succeed in having more staff and financial resources available when you can show the measurable, bottom-line results of communication.
- Your own performance can be measured on something more concrete than if the president likes your writing style. And, if you are focusing many of your communications on helping the company meet its financial and other business objectives, measuring the impact of your communication contributions to these goals can open to you the same size of bonus opportunities line managers have.
- Your organization will benefit because you will be facilitating measurably effective, two-way communication that will help managers get their people to work together toward achieving well-understood company goals and encourage customers to engage more strongly with your brand. This is likely to increase employee and customer satisfaction and decrease costly turnover, under-productivity, labor unrest and customer loss.

## What You Can Measure

Many communicators focus on measuring the media we spend so much of our time producing. We evaluate the writing style, the graphic design, a presenter's speed of speaking—how well we have used a particular medium of communication. While measuring these aspects of communication technique can be helpful, measuring only media is like buying a used car because you like the paint color and the leather upholstery—without ever looking under the hood to see if it has an engine.

To know what to measure, you first need to know what you should be achieving in your communication job. The idea is to measure how well you're doing what you **should** be doing. Measure how well you're achieving your measurable objectives. So, here's a mini-lesson in the way I approach setting measurable objectives for corporate communication.

## ***How to Set Measurable Objectives***

Start with the premise that organizational communication exists solely to help an organization fulfill its mission and achieve its annual goals. (By the way, if you disagree with this basic premise, you may not have a very stable career in our field.) All major communication goals should be tied to achieving the organization's goals.

### **1. Discover your organization's goals.**

To know what you should be trying to accomplish, you must first know what your organization is trying to achieve. In some organizations, this may be difficult to track down because there may be no written mission statement, strategic plan or operating plan. At minimum, however, most companies have articulated some financial goals for the coming year on measures like:

- ◆ Revenue
- ◆ Expense containment
- ◆ Net operating income (profit)
- ◆ Return on net assets, return on sales, return on equity
- ◆ Economic value added
- ◆ Penetration of market or market share
- ◆ Share price or dividends
- ◆ Quality standards

The more company goals you can identify, and the more measurable they are, the easier it will be to go on to the next step.

### **2. Discover the goals for each major division, department or location your job is intended to support.**

For example, if your job is public relations, you should know the specific goals of the marketing department. If your job is employee communication, you should know the objectives of the

human resources (HR) department. Ideally, those departments' goals already should be tied to the organization's goals. Because these other departments are already measuring progress toward their goals, you just need to gain access to their goals and their progress over time in achieving them.

To better explain how communication should be tied to these goals, I'll use HR goals throughout the rest of this objective-setting section for continuity. Below are some typical HR goals that are tied to company goals of increasing revenue or reducing expenses:

- ◆ Recruit sales representatives with demonstrated success at selling in our industry.
- ◆ Develop an incentive plan that rewards behaviors that will increase profitable revenue.
- ◆ Train all customer service personnel to change the behaviors rated with unsatisfactory scores on our last customer satisfaction survey.
- ◆ Contain health care costs.
- ◆ Reduce costs due to accidents.
- ◆ Reduce the number and severity of wrongful termination lawsuits.
- ◆ Reduce voluntary employee turnover and sick days used.
- ◆ Encourage a certain number of employees to accept an early retirement package.

Most of these goals will have numeric targets established so that the HR department can be measured on, and held accountable for, achieving results.

### **3. Identify the measurable actions that need to be taken by employees, customers, shareholders and/or other audiences you communicate with for these goals to be met.**

This is the step most communicators often miss. We jump from a company goal to a media plan of key messages and mix of channels. Often we think our job is done if we simply communicate the goals to our audiences. We completely ignore the obvious—that goals are met only when real human beings do certain things in the right ways that will achieve the goals. We need to stop and identify what those are before we blindly recommend communication approaches that may or may not influence the right actions. This is especially important when executives bring us in to make people aware of certain messages—which may not actually help achieve their business goals.

For each specific organizational or departmental goal, work with other management team members to identify the behaviors or actions that your various audiences need to start doing, do more of, do less of, or stop doing if the goals are to be met. Many of these behaviors are already being measured by others in your organization. All you need to do is find out the starting levels of the behaviors and gain access to how those numbers change during the course of your communication campaign.

Be sure you are actually working with behaviors, not concepts. Real behaviors are actions that can be observed and counted. For example, trying to get managers to communicate better is not a behavior change. It's a concept. However, if instead your goals are to increase the frequency of team meetings, or the regularity of performance discussions, or writing emails with more specific subject lines, now you are working with measurable and observable behaviors. Also be sure the behaviors are specifically tied to different audience subgroups or stakeholders. For example, if your goal is just to increase sales, your communications will be very generic and not as likely to create behavior changes. Instead consider that three different stakeholder groups would actually have to demonstrate quite different behaviors in order to improve your sales results—and the messages they would need to see from you would be quite different:

- ◆ **Current customers:** You want them to do one or more of several different behaviors—buy more of the product they already buy from you and/or start buying other products you sell because they trust your brand.
- ◆ **Your competition's current customers:** You want them to stop buying from your competition and start buying from you.
- ◆ **Nobody's current customers:** There are people who do not yet know that they need a product like yours. You want them to start buying a particular product, and you want them to choose you as the vendor.

Be careful to make sure that the behaviors are “win-win” for both your audience and the company. If you set out to manipulate behavior that is not in the audience's best interest, your communications will fail and your credibility and ethics will be compromised.

To show you how this works, let's take the example from step 2 of reducing the cost of accidents. You might first want to break this goal into some separate goals; for example, there might be differences in actions for driving-related accidents versus manufacturing accidents. You may want to examine the actual accidents occurring during the past two years to identify where the most of the money was spent, for what types of accidents involving what kinds of employees. Once you've done that, you might be ready to identify some very specific desired employee actions like:

- ◆ Make sure employees backing trucks out of the garage use a spotter to direct them.
- ◆ Increase usage of the Employee Assistance Program by employees with drug and alcohol problems before they endanger themselves and their co-workers.
- ◆ Reduce the number of employees who seek an attorney's help in filing accident claims against the company because of the company's unresponsiveness.

For each of these identified actions, be as specific as you can. For example:

- ◆ Reduce garage accidents from 25 in one year to 12 the next and 0 the following year.
- ◆ Reduce the percentage of work-place accidents involving substance abuse from 75% to 50% this year.
- ◆ Of the employees who seek help through the Employee Assistance Program for substance abuse, increase the percentage who successfully complete treatment from 50% to 60% next year.
- ◆ Reduce the percentage of accidents involving an outside attorney representing your employees from 40% to 25% over the next two years.

**4. For each desired action, identify what your target audience needs to know and what it needs to believe before audience members are likely to take those actions.**

All too often, we as communicators focus too much on the facts we need to present to our audiences (education) and not nearly enough on the beliefs we should be encouraging (motivation). One healthcare organization succeeded in changing physicians' behavior as far as which brands of medications to prescribe through a combination of:

- ◆ Educating them about the appropriate drug formulary to select from (knowledge) and
- ◆ Motivating change through peer pressure (beliefs) after communicating a new group bonus that would be paid if non-approved drug prescriptions dropped to a certain level.

Continuing with the HR accident-related measurable actions we identified in step 3, here are some of the facts and beliefs we may need to be communicating—and measuring.

### IDENTIFYING KNOWLEDGE AND BELIEFS TO CHANGE BEHAVIORS: SAFETY EXAMPLE

DESIRED ACTION	KNOWLEDGE	BELIEFS
<b>Avoid having a garage accident</b>	How to back up safely; company requires use of a spotter; what a spotter is; company has a cash team award for having no garage accidents; targets and cash amount for team award	I may lose my job if I have another accident; my work team will hate me if I have an accident and lose us the team safety bonus; I have a right and obligation to the entire group to put peer pressure on co-workers who are acting in ways that threaten other team members' safety and the team's likelihood of winning a cash award payout
<b>Be sober while working</b>	Company policy requires sobriety on the job; being "high" causes accidents; company pays for Employee Assistance Plan visits and 80% of cost for inpatient substance abuse treatment	I have a substance abuse problem; an accident could happen to ME; I could be crippled for life; my co-driver will refuse to ride with me when I'm high; my boss may figure out why and fire me; some of my buddies have cleaned up their acts and now have great women in their lives; if my co-driver has a substance abuse problem, I have a personal responsibility to encourage him/her to seek treatment
<b>Don't hire an attorney</b>	Company policy says no need for third-party involvement; level of company and government benefits available; process to follow to claim benefits	My company HR rep really cares about me; the clinic they sent me to provides high-quality medical care; my rep tells me about all the benefits I've got coming before I even ask; my co-workers who used an attorney received only a fraction of the benefits awarded by the court

Once you identify these knowledge and belief messages, you need to do some research to quantify what their current levels are so you can set measurable objectives for them. For example:

- ◆ Have 75% of employees in the garage know, by December 31:
  - The maximum number of accidents that can occur for the team to receive its cash award.
  - The amount of the cash award possible.
- ◆ Have 75% of employees in the garage know, on any given day during the year:
  - How many accidents have occurred to-date, and what caused them.
  - The names of all teammates who have had an accident during the year to-date.
- ◆ Have 67% of garage employees agree or strongly agree with the following statement on the next employee attitude survey:
  - If I see a co-worker operating a vehicle in an unsafe manner, I feel it is my responsibility to encourage him or her to change that behavior.

**5. Identify the best media and timing to get each of the identified knowledge and belief messages to each audience subgroup.**

This is the communication campaign planning that most of us do regularly in our jobs. However, if we go through each of the preceding steps before we jump into this, we will probably do a better job in developing media solutions.

We can also set objectives for use of media and timing. For the safety example, we might set this objective:

- ◆ Update accident progress-report postings within three working days of each garage accident.

Media and timing objectives you can set for other aspects of your communication program include:

- ◆ Write at least 80% of articles in the print and electronic media at the grade 10 reading level (10 years of education), with no article to exceed grade 12.
- ◆ Have at least 50% of employees read the weekly newsletter.

- ◆ By the end of the year, have 75% of supervisors conduct work-group meetings at least monthly.
- ◆ Explicitly relate stories in the weekly newsletter to the company's five goals for the year, with each goal being mentioned at least once each month.
- ◆ Increase the credibility of senior management in our monthly question-and-answer All Hands meetings from 50% of employees finding them somewhat or very credible to 60% (using a post-meeting evaluation tool).
- ◆ Create name recognition of our soon-to-be released product among at least 25% of our targeted consumers by the time the product has been available for 12 months.

Now that we have set measurable objectives for each stage of communication planning and execution, we need to identify the standards against which we will measure.

### ***What to Measure Against***

There are several ways to approach measurement; not all are as appropriate as the others in every situation.

- ◆ You can measure results **before and after**. For example, measure a group of employees' knowledge of some key points immediately before and after they view a video in a group setting. On the external communication side, measure if there is a spike in sales of a consumer product starting immediately after heavy media coverage occurs.
- ◆ You can measure results (goals being met, purchasing patterns, employee behaviors, enrolment statistics) **here and there**. For example, test your communication campaign in only some locations to see if you find a strong pattern of more positive results in the locations where you communicated differently. Often, managers or executives in one or two locations will not use a full campaign that we have developed. This provides a built-in opportunity for measuring the relative value of different communication media in changing employee or customer actions. Plus, any time you obtain media coverage in only some markets, you can measure if sales of the products mentioned are higher in the markets with coverage than in the

markets without coverage. This provides real financial value for PR, as opposed to Advertising Value Equivalency, which does not.

- ◆ You can measure **actual and ideal** communication. You can identify what your audience believes should be communicated and in what ways—then compare that against your current communications.

Going back to the five stages of planning/execution, we can gather measurements on each type of measurable objective we developed during the planning stage:

1. Organization's goals
2. Departmental or local goals
3. Actions taken by our audience
4. Knowledge and beliefs required before action can be taken
5. Effective use of media

So, if we create a matrix plotting the measurable objectives versus what we can measure against, we might come up with the following kinds of measurement "experiments."

### IDEAS FOR WHAT TO MEASURE

	BEFORE AND AFTER	HERE AND THERE	ACTUAL AND IDEAL
<b>Company and department goals</b>	<ul style="list-style-type: none"> <li>• Track the introduction of various new communications against the monthly changes in progress against the goals being communicated about</li> </ul>	<ul style="list-style-type: none"> <li>• Identify positive employee attitude survey results on communication issues by location or by division; then identify financial performance at the same locations or divisions to see if positive communication results track with positive financial results</li> </ul>	<ul style="list-style-type: none"> <li>• Before beginning a financial education campaign, identify what percentage of profit employees think the company should have and what they think the percentage actually is.</li> </ul>
<b>Audience actions</b>	<ul style="list-style-type: none"> <li>• Compare sales figures before and after introducing a new advertising or PR campaign; track sales frequently during the campaign to see which media have the greatest impact.</li> </ul>	<ul style="list-style-type: none"> <li>• Using Google Analytics, track if sales of a particular product are higher in the markets where you had more media coverage.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify the number of employees you wish would take a voluntary separation package and measure the number that actually do</li> </ul>

	<b>BEFORE AND AFTER</b>	<b>HERE AND THERE</b>	<b>ACTUAL AND IDEAL</b>
<b>Knowledge and beliefs</b>	<ul style="list-style-type: none"> <li>• Have participants in a webinar, staff meeting or All-Hands meeting fill out a knowledge-based quiz at the beginning and the end of the session.</li> </ul>	<ul style="list-style-type: none"> <li>• On a log sheet, write down the key messages in your news release that you want picked up in the media. From your clips, track which media have picked up each message and communicated it the way you wanted it publicized.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify customers' ideal characteristics for your product or service; identify how they rate your product or service on those criteria (can then do measurement to see if ratings improve after your campaign that promotes the ideal features).</li> <li>• On a log sheet that identifies the key corporate messages you should be sending through employee publications, measure the number of inches devoted to each key message over a year's period.</li> </ul>
<b>Media and timing</b>	<ul style="list-style-type: none"> <li>• Create log sheets to identify positive and negative aspects of communications like meetings, e-mail, voicemail, etc. Measure these media before training or communications are administered to improve usage of these media. Then measure again against the log sheets to see if improvements have occurred.</li> </ul>	<ul style="list-style-type: none"> <li>• Track distribution of various media to identify how long it takes for them to be reach front-line employees at different locations</li> </ul>	<ul style="list-style-type: none"> <li>• On a communication audit survey, ask your audience's current and preferred media for each key message you intend to be communicating.</li> <li>• On a customer communication survey, ask preferred frequency for various media and compare it against your actual.</li> </ul>

## How to Measure Communication Effectiveness

When most communicators think of measurement, the first thought is often a survey or a focus group. Yet, there are many other ways to measure that don't involve mobilizing large numbers of employees or customers. Many numbers have already been captured by organizations and simply need to be collected and collated meaningfully by you. Other numbers can be gathered with the simple use of a calculator.

Even communication mistakes can provide free opportunities for measurement. In two instances, multi-media campaigns had been developed to enroll employees in company savings plans that offered two significant advantages: employee contributions were sheltered from income taxes, and the company matched a portion of the employee's contributions. In one situation, employee

meetings with a video were conducted in some locations but not others. At the other company, only half the employees received a computerized statement that personalized the amount of tax savings and the company match based on an employee's own current pay level. At each company, the employees who did not receive either the video/meeting or the personalized statement participated in the plan in significantly lower numbers.

On the media relations side, any time we have our intended media messages picked up in only some markets but not others (normally seen as something of a failure), it actually provides an unintended pilot/control group situation where we can track if new leads or actual sales are different in those markets. So, even communication "mistakes" can provide measurable results showing the effectiveness of one approach over another. It just takes a measurement mindset to see the possibilities.

### ***Move From Broad to Narrow Measures***

To diagnose a company's current communication strengths and weaknesses, start with a broad analysis and then delve more deeply into the areas that seem to have the greatest potential impact on your success. This is more effective, and will cost much less, than simply starting with a standardized questionnaire that asks every possible question about communication that might apply to some company at some time—but not necessarily your own.

You can think of communication measurement like the process a doctor follows in trying to identify a diagnosis and treatment plan when you present a set of symptoms. The doctor asks about your medical history and does a hands-on physical exam. Only then may the doctor want to order a few lab tests or X rays—or exploratory surgery—to pinpoint an exact diagnosis out of the few possibilities narrowed down by the history and the physical.

Similarly, in managing a communication program, it is easy to look at a symptom and embark on a quick fix that might not have any effect on the underlying problem. When you're measuring the effectiveness of communication, you should start broadly and zoom in slowly, or you may leap to the wrong conclusions about the nature of the problem.

On the other hand, sometimes all you want to do is take your temperature. This section on “how to measure” starts with 10 temperature-taking, quick measurements. Then you’ll go through the steps of a more comprehensive approach to assessing your overall communication program, often called a communication “audit.”

### ***Ten Measurements You Can Conduct Right Now***

1. **Cost per audience member.** Add up the total budget for your communication program. Divide it by the number of audience members your communications reach. Compare this cost per audience member over the last few years. If you have been reducing costs, or keeping them under the rate of inflation, while improving communications, you have a success story. Compare your cost per audience member with numbers at other companies to provide a benchmark for your boss—as long as you count the costs only of the communication tactics being used at all comparator companies. (For example, one internal communication manager had the company’s employee engagement survey as part of her budget, while this is fairly rare; these surveys usually reside in the HR department’s budget.)
2. **Productivity.** Add up the total volume of communication you have produced in the last year in some standard fashion. For example, the number of 8½” x 11” page or screen equivalents you have published (periodicals, brochures, electronic newsletter “pages,” Business TV notices). Divide by the number of staff members creating the communication. Compare this productivity ratio with previous years to show how you are doing more with fewer people.
3. **Linking communication and profitability.** Take a new look at an existing employee survey report. Rank order different divisions, offices, plants, branches, etc. from those with the highest scores on communication effectiveness to the lowest. Ask your Finance Department to provide a similar list for you of those entities from most profitable to least profitable, using a percentage of revenue rather than absolute dollars. See if there is a correlation showing that successful locations are ones where good communication is occurring. On the external communication side, compare markets where you have had very high and very low media

coverage over a year's period, and compare that with reputation survey results and/or sales leads.

4. **Readability.** Calculate the reading grade level of your writing, or of the rewrites perpetrated by your reviewers, to demonstrate that the communications you produce are geared to the reading level of your target audience. Here's how to do it for English-language writing. (For readability formulas in other languages, conduct a search on Google.) Find several 100-word samples from different sections of each document. For each 100-word sample:
  - Count the average number of words per sentence (including the whole last sentence if it spills beyond the 100 words).
  - Count the number of words in your sample with three or more syllables. Do not include proper nouns, compound words made up of easy, short words (like "manpower" or words ending in "ed" or "es").
  - Add the results of the last two steps.
  - Multiply that sum by 0.4. That is the grade level of your writing sample.Note that Microsoft Word can calculate this for you as part of the Spelling-Grammar check. You just have to turn this feature on under the "Options" menu.

5. **Distribution.** For a document being distributed through e-mail, send it "receipt requested." Then track which individuals opened the e-mail on which dates. The overall trend results will provide a reality check for just how quickly these messages are read by what portion of your audience. The specific results will let you know which individuals you need to follow up with—especially if those individuals are supposed to be passing on the e-mail information to large numbers of other employees.

For print, video or face-to face communications, pick up the phone and call people at the bottom of the organization chart in each of your organization's locations to ask them when they received or heard a particular communication that should have reached them about a week earlier. (Do not call supervisors or managers. If they are part of the distribution chain, they may tell you they have distributed something that they have not.) For printed materials, ask employees how it was distributed: in a personal mailbox, in a box on the floor near the time clock, posted on a bulletin board, in a team meeting, etc. Keep track of the responses by

location. Repeat at least twice a year for each different medium you distribute: publications, webcasts, job postings, an e-mail from the company president, a poster. You will probably be unpleasantly surprised and need to take some strong actions.

Over time, you can show that you have improved the delivery system of information throughout the organization, not only for your own media, but for the president's missives as well.

6. **Intended audience penetration.** Create a matrix listing each element in your communication program down the left side and each audience subgroup across the top. Organize the subgroups in a meaningful sequence; for example, for internal audiences list them from groups of executives to line employees. Then put an X in each "cell" where a particular medium is intended to reach that subgroup. You may find that very few communications are sent to the majority of your employees, yet executives may have a misguided perception that everything they see or hear is also being seen and heard by the entire company.
  
7. **Media mix.** Using the same left-hand side of the matrix above, set up the columns as illustrated below. Use Xs in the columns that best describe the characteristics of each medium. The overall mix of your program should show balance within each category of criteria. If it doesn't, use this matrix to plan how you can add new media to your mix or change an existing medium to incorporate new characteristics.

TYPE OF MEDIUM				DIRECTION OF MEDIUM			SPEED/FREQUENCY OF MEDIUM			
Print	Face-to-face	Audio-visual	Electronic	Top-down	Upward	Horizontal	Same day	Within 1 week	From 1 week to 3 mos.	Over 3 months

8. **Content analysis.** Create a matrix that lists down the left-hand side the key content areas your communications should be addressing to support company objectives. For customer communication, this might be key features of your product or service. For employee communication, this could be your organization’s mission, its annual goals, its values and any other criteria your communications should be supporting, such as departments or locations that should be covered in line with their size. Across the top, list various communication media in your program. For a medium that has several editions each year, create a separate matrix using a column for each issue of the medium over the course of a year.

Using either a check mark or measuring actual column inches (or word counts for electronic channels), indicate to what extent each medium, or each issue of a medium, has covered each content area. If you see that over time some of those areas are not being covered, you can plan your content for future communications to fill the gaps.

9. **E-mail survey.** If you have a few questions you want answered about the effectiveness of a specific communication, put together a short, multiple-choice survey and distribute it to your audience through e-mail with a link to a survey site like SurveyMonkey (assuming your target audience is on e-mail). These surveys typically have high response rates if they are short. Just be sure you have asked someone experienced with surveys to peer review your questionnaire in advance to make sure the questions are phrased and formatted in a way to get you answers that will be meaningful.

10. **News release effectiveness.** For each release you issue, create a matrix with the key message points you want the media to pick up listed in the left column. List your target news outlets in the columns across the top. In the cells where the rows and columns meet, write in a “0” if the outlet did not pick up a particular key message, a “+1” if they picked it up correctly and a “-1” if they mentioned the message but got it wrong. Then:

- ◆ Add up the columns to see how well a particular news outlet is picking up your messages. Check to see if, over time, some media seem to be making consistent mistakes about your company; follow up with them.
- ◆ Add up the rows to see if some messages are consistently being skipped or garbled by many news outlets, which would indicate those sections need rewriting.

### ***How to Approach a Full-Scale "Communication Audit"***

The term "communication audit" generally refers to a series of steps that first broadly define the major areas of communication success and problems and, little by little, narrow down to finely tuned measurements of very actionable aspects of communication with the highest potential payoff for the company and its audiences.

Here is a quick overview of the sequential steps in the process to see how they fit together:

- ◆ A planning task force
- ◆ Individual interviews
- ◆ Focus groups
- ◆ Communication source analysis
- ◆ A survey

## **Planning Task Force**

A task force guides the communication audit and strategy-setting process. It is not a decision-making body, but an advisory group.

The task force for a communication audit should include no more than 12 people, including communication, marketing and HR professionals, as well as line employees representing various criteria of your work force for an internal communication audit (or customers and sales people representing your market segments for an external communication audit). They will guide the measurement and planning processes. This task force should represent a range of status, length of relationship with the organization and geography to get the best information put to use in the process and to maximize the buy-in across operational lines.

The task force meets initially to identify communication objectives that support the company's overall goals, key audiences, the information sources currently in use with each audience and the messages that should be communicated with each sub-audience. The task force members discuss their own evaluations of the effectiveness of the current sources in reaching the key audiences with the correct messages.

The task force helps to identify the best questions to be asked of the various audiences during upcoming steps of the audit: interviews, focus groups and surveys. They also are the first ones to hear the results of each step, providing counsel on how to share those results with executives, employees and/or external audiences.

## **Individual Interviews with Senior Management and Other Key Staff**

Interviews provide you with qualitative findings; in other words, "soft" research. You will find out what the issues are and how well or badly the people you interview feel things are going. Some of the questions you ask should parallel questions you anticipate asking of other groups during the audit to provide a baseline for comparison, such as: "What types of business-related information do you think employees should know about." However, unless you use a

questionnaire during your discussion and interview virtually everyone in your target group, you will not have "hard" numbers to use for later comparison.

During these interviews, the types of questions asked can provide you with a better understanding of how communication could ideally be supporting the company's objectives and how current communication measures up to those standards. In addition, if task force discussion indicates certain potential problem areas, very focused questions can be asked to identify any problems in the way person-to-person communication works among your executives or the many individuals responsible for some aspect of communication. Two of these analyses are network analysis and decision-making analysis.

### **Focus Groups**

Focus groups are small-group discussions moderated by an objective facilitator to identify the range of issues on a topic, explore the reasons people think the way they do and pretest possible solutions. They provide qualitative, "soft" results. Of course, questionnaires used in the focus groups can provide some numbers for you, but only to capture the perceptions of the individuals who were in the focus groups. If you want results that can be projected to your entire audience, then you need to involve a large representative sample of the total population; at this point, you should be thinking about a survey rather than focus groups.

Each focus group should include individuals of similar status to help them be more comfortable and candid; for example, internal communication focus groups should be conducted separately for managers and non-managers. External focus groups should separate current customers from non-customers. Groups should be limited to 10-12 people to allow everyone a chance to participate. Each session should last 60 minutes to two hours, depending on the number of open-ended questions you want participants to discuss. Their answers to your questions should help you determine the exact questions that you need to ask on a survey, and the discussion should help you phrase the questions in ways that are most meaningful to your respondents.

### ***"Starch"-like Study Groups***

In addition to normal, broad-ranging focus groups, you can also conduct several study groups to analyze in detail some of your key communication vehicles. A technique similar to the Starch Test used in one-on-one interviews in advertising research can provide far more detailed information about a medium than a readership survey. The Starch Test asks readers to recall which ads they saw in a particular magazine (unaided recall). Then, using a sample of the magazine (aided recall), the Starch Test interviewer leads the reader through a number of ads asking if they now recall having seen certain ads and what was memorable about them.

To apply this to your publications or any other communications for which you can create hard copies to review in the focus group, you may convene a study group of audience members shortly after a print or electronic communication piece has been issued. An interviewer first asks "unaided" recall questions to see what the readers remember from the publication. Then the interviewer distributes copies of the publication to the group and asks them to go through it article by article and respond to "aided" recall questions. For example, which of the articles:

- ◆ They do not remember having seen before.
- ◆ They remember having seen but skipped—and why.
- ◆ They skimmed—and why they stopped.
- ◆ They read most of the article—and what kept them reading.

These results can show:

- ◆ Which types of articles are best read.
- ◆ Which design and editing techniques increase readership and recall.
- ◆ What prevents people from starting to read an item, or makes them stop midway.

Similarly, a webcast could be used as the subject of a “Starch Test” study group.

The study group could be conducted fairly informally, with discussion probing the questions identified above. In addition, a scoring sheet could be developed for participants to complete before the discussion identifying which articles and columns they skipped, skimmed or read.

You could also include rating categories for each article or segment in the publication/video to have the participants assess aspects such as clarity of writing, use of graphics and color, usefulness to the reader, length, etc.

### **Assessment of Effectiveness for Communication Sources**

A number of measures can be used to evaluate the effectiveness of the information sources currently available, such as content analysis, media analysis, log sheets for "in-box" analysis of e-mail, supervisor skill assessment, meeting assessment, website usage; etc.

#### ***Content Analysis***

A very simple measurement completely under a communicator's control is a content analysis. Start by creating a list of all the corporate messages your communications should be supporting: the key elements of your mission, your annual goals, your corporate values, specific new programs. Then examine each issue of every regular publication and measure the number of column inches or screen pages (including photos and headlines) that have addressed each key message. Your list might also measure if each division, location or product line is receiving an equivalent amount of space. Or you might add up the number of inches for reactive stories reporting on events versus proactive articles preparing people for change. Or you might count the number of times employees or customers are quoted in stories versus executives.

Looking back on the content distributed to date, you may be surprised that some objectives or programs have not been covered extensively enough to reinforce in your audience's minds their importance. This measurement also acts as a planning guide for future content to ensure you remain focused on communications that support your company's objectives.

A content analysis of a service company's mailings to its customers and prospects revealed the following unpleasant surprises to the publication's editor:

- ◆ More than 60% of the content was about a service area representing only 20% of the company's revenue base. None of its emerging services were covered at all.
- ◆ More than 90% of the content focused on reporting new legislative and regulatory issues clients should be aware of. Only 10% highlighted innovative ways the company had found to help its clients with these issues. This finding helped explain why a recent customer survey found that this company was rated well below its competitors for innovation.
- ◆ Even the informational reporting done in the publications, while accurate, was being distributed from one month to six months after the changes in Washington had occurred.

### *Information Source Analysis*

In many organizations, employees receive internal communications created by several departments independently of each other. Customers and news media may be receiving materials from different company departments or locations. These may often be redundant or, worse yet, in conflict with each other.

For an information source analysis, collect **all** the communications distributed to a particular audience during a year. Evaluate each item as if it were an entry in a communication contest, using at least two objective evaluators who had no hand in creating the materials. Score items numerically using the seven-point IABC Gold Quill evaluation scale for writing clarity, organization, brevity; effective use of graphics; consistency with corporate goals and with each other. A reading level test should also be applied (such as the Gunning-Meuller Fog Index<sup>TM</sup> or the Flesch Test). All scores should be entered on a spreadsheet, with the following additional information entered for each item:

- ◆ The date it was first issued.
- ◆ The category of communication it is (either by topic or by organizational group that created it).
- ◆ The frequency of the item (weekly, quarterly, annual, as needed).

Once all this information and the scores are entered on the spreadsheet, you can use the "sort" function on various rows and columns to see if you notice any trends.

For example, with an aerospace company, we discovered that the best-written materials were the ones introducing new programs; updates were poorly written. We discovered the materials created by one department in human resources were written at a reading level higher than even post-graduate fellows could easily understand.

We discovered for the service company mentioned earlier under "Content Analysis" that 40% of all communications came out during a single quarter, overwhelming the audience at some times of the year and ignoring them during other months. This was particularly disturbing since one of the goals for having a publications program was to keep the company's name in front of its customers and prospects on a regular basis.

### ***Measuring E-Mail***

Much of the communication used to share information these days comes in the form of e-mails. And, in the last few years, many companies also issue smart phones or other hand-held, electronic work devices that have the capacity to receive written messages.

Because these media have a capability for mass distribution lists, they are frequently misused with too many people being included in the distribution lists on topics that often should have been communicated through different channels. And, as with print distribution, just because someone sent it doesn't mean anyone at the other end received the intended message.

Even when the messages sent out are received by the intended recipients, all too often the channels used are not appropriate for the content. While a chosen method may be convenient to a sender, it may not be the best method for the receiver—such as being notified of a pay increase by e-mail or a layoff by voicemail.

First you need to identify the general strengths and weaknesses of the medium in question through interviews and focus groups. Then create a log sheet with those criteria. Next evaluate each item in the category you are assessing against each of the criteria. For some media, you may

be doing the evaluation; for others, you may have the receiver of the medium do his or her own evaluations. Finally, add up all the check marks for each criterion. You may find how frequently:

- ◆ E-mails are too long and rambling, with the action required unclear to the reader.
- ◆ Voicemail is being used inappropriately for subjects that should be documented on paper or in person.
- ◆ Meetings don't start on time or have all required members in attendance.

By quantifying these characteristics, you can then re-measure after initiating changes in communication to see if you have made a difference.

### ***Measuring Managers as a Communication Medium***

Face-to-face communication is beginning to have more of a role in the job descriptions of corporate communicators. While interpersonal communication should never be expected to be replacement for electronic, print and audiovisual media, every communication campaign should consider how the chain of command will be used in the most complementary way to communicate various messages.

The content that supervisors and managers should talk about can be determined from a pattern analysis measurement in an employee questionnaire (covered later in this Guide). But the other component of face-to-face communication is the medium itself: How good are supervisors and managers at the variety of communication skills that are expected of them? There are ways of measuring those skills and behaviors. And assessment is a first step to increasing the effectiveness of the management ranks as carriers of information up, down and across the organization.

If supervisors are expected to communicate well and frequently in your organization, measuring their current effectiveness can be helpful to your training department and to senior management in determining funding and scheduling priorities. It is clearly of great help to the individual supervisors. This type of survey is even more useful when a group of employees completes the

survey regarding their own managers by name, so the results are specific to an individual's training needs, yet the overall results can be combined for an organizational assessment.

This process works best if it begins at the top, with the executive staff first assessing the CEO, who feeds back to the respondents what he or she learned from the results. Then these executives' direct reports complete the surveys about the executives, who positively feed back the results to their staffs.

When the assessment cascades downward, each new group of evaluators feels safe in being candid and in having their own direct reports evaluate them because they have already experienced the benefits of providing that type of information to their own bosses in a safe environment.

There are two key measurement decisions to make if you want to measure supervisory communication effectiveness:

- ◆ **Will the evaluation be absolute or relative?** An *absolute* evaluation asks you to rate communication skills on a scale from “Excellent” to “Poor.” It lets you know how good “good” is and how bad “bad” is—and how much different measures improve after corrections have been made. Using a *relative* evaluation, respondents rank order the skills from most to least effectively used by their managers. So, if 10 skills are listed, even a strong communicator will have one skill ranked at the bottom, one at the top, and eight in between. Similarly, an ineffective communicator will receive a top ranking for some aspect of communication skills. The relative evaluation is safer when each manager is being identified individually—it's still disturbing enough to encourage and pinpoint areas for change, yet not threatening enough to prevent employees from filling out the surveys.
  
- ◆ **Will supervisors and managers be asked to evaluate themselves** as well as be evaluated by their subordinates? Comparing the results of how managers think they communicate against how their subordinates rate them often highlights very interesting and surprising discrepancies.

## Questionnaires

Receiving responses on a standardized questionnaire from a statistically random sample of your audience—or your total population—is the only way to obtain "hard" numbers that you can use as base lines. This quantitative research provides you with numbers that, theoretically, would be nearly the same if you conducted the same survey with a different random sample or the entire population you're surveying.

Questionnaires are the most complicated measurement tool and the most difficult to use well. The likelihood of successful surveying will be greater if you:

- ◆ First get an up-front commitment from top management to share the results with the population being surveyed.
- ◆ Begin by identifying the types of results needed and design questions that can provide those kinds of answers.
- ◆ Design a survey using information from interview and focus group steps for the content areas.
- ◆ Pretest questions after carefully constructing wording and the formatting to make sure people's responses mean the same things you're going to interpret them to mean.

One useful combination of questions is known as a "pattern analysis." It identifies the ways critical business subjects are being communicated currently and how your audience would find that information better communicated.

In essence, during earlier executive interviews and audience focus groups, you identify from 10 to 20 strategically important and "communication-sensitive" subjects for your company and its employees. (This technique can easily be adapted in a shorter format for an external audience survey. However, for the remainder of this section, I'll use an employee audience for illustration purposes since more messages and media are typically present internally than with external audiences.)

For each subject, you will determine on the survey:

1. How **interested** your audience members are in learning about it.
2. How well **informed** they currently believe they are.
3. What their **current sources** of information are.
4. What their **preferred sources** are.

Participants should be allowed to respond with up to two sources of information for questions 3 and 4. Why? Because in some situations, they may want to tell you their preferred source is their supervisor—period—in a one-on-one format. For other subjects, they might prefer to first read about a topic and then discuss it with their supervisor. If they could choose only one source on your questionnaire, which would they select—a written source or their supervisor? How would you interpret their answers? Better information for planning purposes will come if you let people pick their top two current and preferred sources.

### ***Identify the Right Subjects***

You start with a list of subjects that are critically important to the success of your organization and your employees. The initial list in your own first draft should come from both the written plans and objectives of your company, as well as the subjects you have been communicating heavily that may relate to goals already met or well in hand. The list can be added to and refined as you interact with a task force, executives and employees in the course of full-scale communication audit. Your main problems before the survey goes into final form will be to pare the list down to a manageable length and to phrase the subjects in a way that makes clear what you are really asking about.

Make sure the subjects employees are interested in are represented in this list, or they may stop filling out the survey. Worse yet, employees may provide that information in write-in responses, and you won't be able to quantify the extent of their needs and preferred solutions.

### *Identify All Information Sources*

Just as important as having a good list of subjects is having a complete list of current and potential sources of information. If you don't include a particular source on your survey, you won't be able to capture information about it. Worse yet, you may draw conclusions about a preferred source of information for a subject when, in fact, the true preferred source is one that you neglected to offer as a choice on the survey. That is one reason that you should conduct focus groups before your survey is final: to identify all possible sources of information, both currently available and those that you are considering starting in the future, such as social media. At one company, focus groups said the phone directory was a major source of information on several subjects because it included sections of narrative information in addition to the listing of names, numbers and emails.

Because your final list of sources will likely be long, it will help your respondents complete the survey if you categorize types of information sources. Also try to avoid using this long list twice in your survey, on separate pages or screens for current and preferred sources. It makes the survey seem longer, and respondents who are not careful may think you erroneously asked the same set of questions twice. If possible, put the section on current and preferred information sources all on one page or screen.

Your final list should also include some media that may not be available currently, but whose possible usefulness you would like to test.

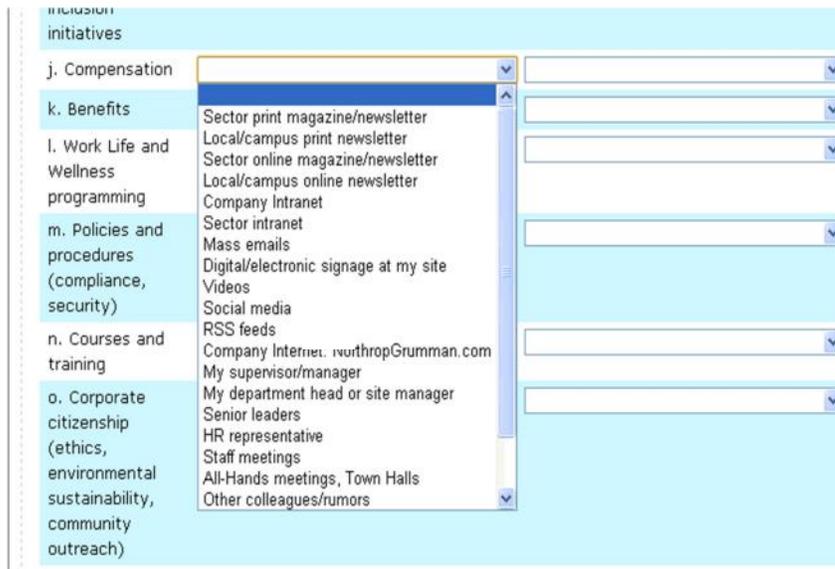
**Questionnaire Template for Pattern Analysis**

Here's a template for setting up questionnaire sections to gather pattern analysis information on a paper survey. For online surveys, drop-down menus work even better.

**PATTERN ANALYSIS QUESTION TEMPLATE**

SUBJECTS	HOW INTERESTED I AM					HOW WELL INFORMED I AM				
	Not At All			Very Interested		Not At All			Very Well Informed	
1. The company's strategy	1	2	3	4	5	1	2	3	4	5
2. How the company is doing financially	1	2	3	4	5	1	2	3	4	5

SUBJECTS	CURRENT INFORMATION SOURCES (choose up to 2 from drop-down list below)	PREFERRED INFORMATION SOURCES (choose up to 2 from drop-down list below)
1. The company's strategy	_____	_____
2. How the company is doing financially	_____	_____



## *Communication Climate Questions*

Communication climate questions often appear as part of a general employee engagement or customer opinion survey. They can be useful as thermometers, barometers and rainfall gauges—*but they won't help change the weather*—whereas a communication pattern analysis does result automatically in a blueprint for change.

Communication climate questions can provide interesting comparisons, however, if you see that certain parallel data are occurring between key climate questions and questions whose answers provide more specific guidance on what to do to improve your results. For example, you may find that subgroups of employees who are more satisfied with communication overall are the same people who tend to receive more information from their supervisors or who attend staff meetings. In that case, you could suggest a solution that if the company wants to improve employees' satisfaction with communication, they have all supervisors conduct regular staff meetings. (Be careful to note that these data would not be showing cause and effect, just parallel occurrences.) Then when you re-measure later, you can see if satisfaction does improve. Measuring only satisfaction with communication will not provide you with many clues on **how** to better satisfy your audience's communication needs.

Some of the communication climate topics that are often measured include:

- ◆ Overall satisfaction with communication
- ◆ Sufficient opportunities for upward information flow
- ◆ Several aspects of downward information flow
  - Frequency
  - Timeliness
  - Volume of information by type of channel
  - Accuracy
  - Openness
  - Consistency among channels
- ◆ Horizontal information flow
  - Communication within my department or work group

- Communication between departments
- Communications between plants, branches, regions

### ***Knowledge Test***

The final result of the communication process should be that an audience has internalized the same message that the sender intended to send. The simplest way of measuring the ultimate effectiveness of the communication process is to ask audience members for the answers to factual, multiple-choice or open-ended questions on issues that management believes each person should understand. This will tell you once and for all if your audience "got it."

The results are useful in several ways. First, management is often surprised to discover how little employees know about the company or customers know about the products. This discovery often underscores the need for better communication and directs it to the right subjects.

Second, the same questions can be asked after a targeted communication campaign to see if knowledge has improved. If it has, communication has been measurably effective.

Third, these results can be compared with data from the communication pattern analysis. It is not uncommon for employees to believe they are very well informed on a subject, when in reality they are far off the mark. If people think they already know something, they are not likely to want to read more about it, and they will skip over it in a publication or not take a link to another part of your website. If they don't *really* know it, the communicator's first job will be to raise the audience's interest in the subject before trying to do any education.

### **Reporting Results**

Unless you get a commitment upfront to report the findings of any surveys administered to employees, you shouldn't bother to draft a questionnaire. Results of surveys and other research need to be reported to various audiences at different levels of detail:

- ◆ Employees need the highlights, although not always actual numbers.
- ◆ Executives need the highlights, with numbers, and detail on the findings that support recommendations that need their approval.
- ◆ You and other communicators need a lot of detail so you can go back to the report over time whenever you begin strategizing a communication campaign or changing the communication infrastructure.

Reports should include the following sections:

- ◆ Methodology, how and when the research was conducted.
- ◆ Executive summary.
- ◆ Analysis, including at least three sections: communication climate, communication media and subjects to be communicated. In a final report at the end of a multi-stage research process, combine the findings from all stages of your research on various topics. For example, in a section about communication media, you should have a subsection on each key current or proposed medium. Within the subsection, put together everything you learned about it from executive interviews, focus groups, pattern analysis, content analysis, etc.
- ◆ Recommendations, sorted by the individual or group who can act on the recommendations, and sorted by priority for implementation.
- ◆ Appendix, including a copy of all research instruments.

Reports should be as readable as any other writing you do. Use a combination of narrative, tables of summarized numbers and graphics (bar charts, pie charts, etc.) to appeal to all types of readers.

## ***When to Use Internal or External Resources***

In deciding whether to conduct some research yourself or to hire an outside consultant, determine whether the research step requires either objectivity or expert, specialized knowledge. If so, you should get help either from an outside consultant or others within your organization. For example, a training department could probably facilitate focus groups and a market research department or organizational development executive could help design, administer and analyze a questionnaire. If you do need to work with an outside consultant and budgets are tight, partner together to hand off only those elements of the research that require outside help.

## **Conclusion**

Most communication departments spend nearly all their time and energy executing communications. Relatively little is spent on planning and almost none on research before developing a plan or measurement to see how well the plan is working.

Communicators should take half an hour before embarking on a new communication project to answer the question: “How will I know if this project is a success?” Discussing the possible answers with other communicators and your internal/external communication client will clarify the true purpose of the communication. Then you can set meaningful and measurable objectives, and you can quantify some baseline measurements of the situation you’re trying to change *before* you issue the communications. Invariably, starting with research upfront will change some anticipated element of the communication for the better.

As for those communicators who say they don’t have time to conduct measurements, they somehow find the time to fix the communication mistakes that could have been avoided with upfront research and more targeted objectives.

Remember: You can only manage what you can measure!

## **APPENDIX: Sample Measurement Case Studies**

### ***Communication Pattern Questions***

We asked communication pattern questions on a survey at a division of Kaiser Permanente (KP), a large U.S. health maintenance organization (HMO). We learned during focus groups that employees wanted more information about the range of patient services offered within KP. We included this subject on the survey even though top management initially said that employees didn't need to know about it.

Coincidentally, just weeks before we presented the survey findings to the executives, they learned that KP had lost a significant amount of revenue during the preceding fiscal year because their own patients were being sent to competitors' facilities for certain tests and procedures that could have been performed at nearby Kaiser facilities. One of our presentation slides showed the executives:

- ◆ There was a relatively large employee information gap (interest level minus perceived knowledge level) on this subject.
- ◆ The current main source of information on this subject was a quarterly publication written for patients, which highlighted primarily new or unusual services.
- ◆ The preferred source of information was a searchable directory.

A directory was being planned even before we left the room. Executives saw a clear relationship between communication and revenue.

## ***Knowledge Questions***

One weakness of the pattern analysis is that we are measuring peoples' perceptions of knowledge, not true knowledge. For example, at a large aerospace company in California, more than 90% of surveyed employees said they understood the concept of total compensation. Yet, when we examined communication materials about benefits and compensation distributed to employees during the preceding year, we found four completely different definitions of the term. Employees could not possibly have understood correctly what had never been communicated consistently.

Executives typically overestimate the knowledge employees have about basic company facts. By asking direct questions about these facts, you can provide your executives with highly useful, if sometimes disconcerting, communication measurements.

For example, HMSS, a home infusion therapy company, had lost several million dollars over a period of two years. Because it was privately held, no company-wide financial numbers were shared outside the executive suite. The president asked me to help him develop a presentation to show branch managers new tracking measurements for various elements of revenue and expenses so they would better support the next round of layoffs and other cost controls. Nowhere in his presentation did he mention that the company had lost several million dollars over two years.

When I suggested it, he said all the managers already knew about the loss, and he didn't want to insult their intelligence. Because I frequently spoke with the managers and seriously doubted they knew the company's bottom line, I asked him to humor me. I suggested that before beginning his presentation, he ask each manager to write on a piece of paper, anonymously, the dollar profit to the nearest million that the company had either made or lost in the past year.

The result? He was appalled that not one of the 23 managers guessed a loss of any size. The estimates of profit ranged from a low of \$1 million to a high of \$15 million. No wonder they had

not been supporting corporate initiatives that they thought were intended to create larger profits rather than to keep the business alive.

At a sister subsidiary of this company, Westec Security, we were about to launch a financial education campaign. Our goal was to increase profitability from 6.5% to 12% over two years. We worried that employees would be upset we wanted to improve profitability while they were asking for larger pay increases and newer equipment. As a result, our initial draft of communication materials was drafted defensively. Fortunately, our communicator in that unit asked about 100 employees over the course of a week, while just running into them in meetings, hallways, the cafeteria and the parking lot:

- ◆ What percentage profit did they think the company was earning?
- ◆ What percentage did they think it *should* be earning?

Because we were a private company, profits had never been published. The most frequent guess from employees was 15%—for both questions. Although the number of survey participants was too low to be statistically reliable, the findings were overwhelmingly consistent. These results turned around the entire tone of the presentation and encouraged management to provide even more numbers. Two years after the quarterly meetings began, two measurements had improved steadily: more employees know the profit percentage, and the company's profitability had increased.

### ***Distribution Questions***

Too often, we communicators want to forget about our work products as soon as we hand them off to the distribution system. But communication doesn't begin until our audience receives our message and understands it correctly. And, if we measure the distribution of a communication at all, it is typically through a survey that we include in the communication medium itself. That means we are asking only the people who already received the publication if they received it.

At Kaiser Permanente, we asked distribution questions about a number of media in a survey that was distributed separately from regular communications. Kaiser had been producing an award-winning quarterly video magazine program for the past five years. It was distributed to managers to show in staff meetings.

We discovered that 54% of all employees had never seen the program. Focus groups with managers identified that they thought the programs were wonderful; they simply didn't have enough time in staff meetings to show them. They had "more important things to talk about." These findings completely redirected the efforts of the video department to produce single-topic programs on the subjects that were being discussed in meetings. This one change saved Kaiser about \$100,000 a year because they no longer needed to hire free-lance videographers to do local feature stories at each facility for the magazine.

It is worth asking distribution questions informally on a regular basis to avoid surprises such as this. At HMSS, we regularly called random employees in each branch to see if they had received that week's newsletter. Often, we would discover that a personnel change had resulted in a distribution problem. A new manager would receive the master newsletter by email and not know that he or she was supposed to photocopy and distribute it to employees.

Even worse was a regular occurrence in one of the regions of LifeFleet, the largest private ambulance company in the U.S. at the time.. One regional vice president regularly refused to pass on corporate-wide emails he didn't want his employees to know about. He purposely suppressed a candid email from the corporate CEO discussing how the company had barely broken even the past year and what measures management was taking to increase revenues and watch costs. This announcement had been intended to prepare employees for a layoff. When the layoff occurred, this manager's employees took it much worse than their colleagues in other locations because they believed the company was still as profitable as it had been in past years.