Smart guide

Tame the Wild West with guidelines

4 STEPS

to establish rules for your employee communication channels

DAVIS & COMPANY

Are your internal communication channels turning into the Wild West?

Managing internal communication can often feel like the Wild West—there are no clear rules and every topic is important. As a result, employees don't know what to expect and can't find relevant content—channels quickly turn into ghost towns.

But there's hope! As the sheriff in town, also known as the lead communicator, you can tame the Wild West by creating robust guidelines for your channels.

What are guidelines?

Guidelines are used to articulate the purpose of each channel, define best practices and processes, describe when channels are used, and set the rules for content development. This includes creating editorial and content principles for your communication vehicles, such as rules on:

- ✓ Tone
- ✓ Style
- ✓ Copy length

What's inside

In this guide, you'll learn how to create channel guidelines in just four easy steps:

Why do you need guidelines?

Information overload is a problem for employees and breaking through is more challenging than ever.

Guidelines help you manage communication, so it's aligned with leading communication practices, and employees' needs and preferences.

Creating ground rules will help:

You...	Content creators and/ or contributors ...	Employees...
• Manage time efficiently • Improve the quality of employee communication • Make communication more compelling for employees by prioritizing key topics and curating content • Manage communication requests • Become a strategic partner (instead of a service provider)	• Know what's expected of them • Create better communication • Meet employees' needs	• Understand the purpose of each channel • Receive relevant and timely information • Know how to find the information they need, when they need it

TIP

Collaborate with other communicators. If you work with other communicators or you're part of a communication network, involve them in the creation process. You'll have better commitment for using the guidelines across the organization. Think of them as deputies!

1 Set clear objectives

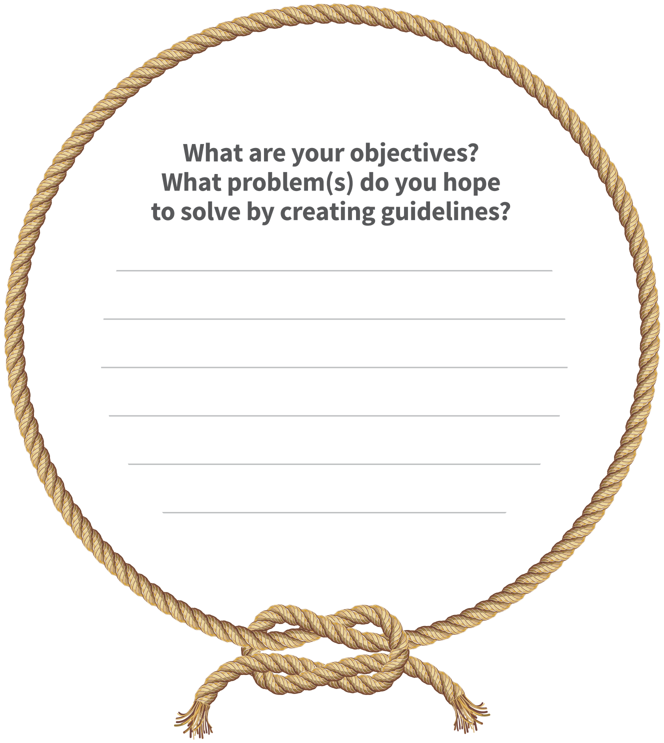
Every communication effort should start with the end in mind. Consider your objectives: What do you hope to accomplish by setting guidelines?

Here are three examples to kick-start your thinking:

1. Move to distributed content development, where colleagues (who may not be communicators) create content.
2. Develop a shared understanding of each channel's purpose and how content requests are managed.
3. Map the right channel(s) for specific content types.

TIP

Feeling nervous about developing guidelines for ALL of your channels? Start with one and learn from the experience. Then you'll be ready to take on the Wild West.



2 Assess satisfaction with your channels

Employees are your best gut check to understand if channels are working the way you intended. Their feedback and observations can help you set guidelines that will make a difference.

Start with data you have, especially participation data. For example, do employees read posts on the intranet, attend the town hall or use social tools?

Low or no participation is a strong signal that your channels aren't meeting employees' needs. With that knowledge, you can dig into why.

Ask employees

Your go-to method to understand the *why* behind data is a focus group (or two). Focus groups are an efficient way to:

- ✓ **Understand employees' behaviors.** How do they use channels? What do they hope to find? Are they satisfied with each channel?
- ✓ **Assess the value channels provide.** Does each channel live up to its objective? For example, do articles on the intranet help employees stay up to date with what's happening across the organization?
- ✓ **Gather ideas for improvements.** How would employees improve channels? In our experience, their feedback is usually about content they hope to find and how the content is created (such as shorter, more approachable language, etc.).

How will you assess satisfaction with your channels?

TIP

Focus groups also present a unique opportunity to test new concepts and gauge interest.

3 Create rules for each channel

Now you're ready for the details. Put your sheriff badge on and define best practices for each channel across the following six attributes:

- ✓ **Purpose.** Define why this channel exists. What is its key role?
- ✓ **Audience(s).** Map the groups each channel targets: all employees, leaders, managers, subteams, etc.
- ✓ **Key content.** Describe the topics or content types that will be covered in each channel.
- ✓ **Frequency.** Set the publication schedule or consider if the channel is only used when needed.
- ✓ **Approval process.** Articulate the review process. Differentiate between those who check for accuracy and those who proof (grammar, sentence structure and typos).
- ✓ **Standards.** Create the rules for each channel: word count, length, format, use of visuals, etc.

Develop a set of communication standards that apply across all channels. Here are a few examples:

- ✓ **Short.** Stick to the word count. When it comes to any communication channel—email, intranet or even a newsletter—employees want to get through the content quickly.
- ✓ **Simple.** Use conversational language, a friendly tone without buzzwords and undefined acronyms. Strive for an seventh grade reading level.

- ✓ **Scannable.** Write visually and structure copy for easy reading on any device with:
  - Subheads
  - Callouts
  - Sidebars
  - Images
  - Bulleted or numbered lists
  - Infographics
  - Q&A
- ✓ **Relevant.** Think about your audience. Make sure you answer employees' biggest questions: "What does this mean to me?" and "What do I need to do?"

Create rules for each channel (continued)

All employee channel	Guidelines	Standards
Email	**Purpose:** Timely, action-oriented information needs to be shared quickly **Audience(s):** All employees or a targeted group **Key content:** HR programs, corporate initiatives **Frequency:** As needed (within two to five days of a required action) **Approval process:** Lead communicator to work with content contributor	**Word count:** 50 to 150 words **Length/format:** Body copy should be “information lite” with visuals and links to more details
Video	**Purpose:** Increase leader visibility, highlight key projects and/or contributors, provide brief updates from an expert **Audience(s):** All employees or a targeted group **Key content:** Build awareness of key topics **Frequency:** As needed **Approval process:** Lead communicator to work with content contributor	**Length:** No more than 30 to 90 seconds **Format:** Incorporate visuals and animated text (not just talking heads) and captions to keep the audience’s attention
Intranet homepage articles	**Purpose:** Highlight what is happening across the organization **Audience(s):** All employees **Key content:** Related to the organization’s or a business unit’s objectives, contributes to culture/sense of community, celebrates employees **Frequency:** Daily **Approval process:** Lead communicator to work with content contributor	**Word count:** 250 words **Format:** Incorporate visuals and include links to relevant sites

TIP

Create a channel strategy to make sure all of your channels complement each other. This allows you to stretch content across multiple channels. For example, one town hall recording can become a series of video clips, a listicle on the intranet homepage and a recap email.

Create rules for each channel (continued)

All employee channel	Guidelines	Standards
E-digest (newsletter)	**Purpose:** Summarize highlights and push employees to the intranet **Audience(s):** All employees and customized by business unit **Key content:** Corporate key topics and selected business unit topics **Frequency:** Weekly **Approval process:** Lead communicator to work with content contributor	**Word count:** 30 to 50 words per highlight, five highlights maximum
Town hall	**Purpose:** Increase leader visibility, highlight key projects and/or contributors, engage employees **Audience(s):** All employees **Key content:** Report on progress with plan, celebrate teams/individuals and engage employees (get feedback, brainstorm, solve problems) **Frequency:** Quarterly **Approval process:** Lead communicator to work with senior leaders	**Length:** 60 minutes **Format:** Focus on one topic, moderated by a facilitator, up to 10 minutes for each presentation, standard 20-minute Q&A session

**What are your core channels?
What are the rules for each?**

4 Spread the word

Now that you have guidelines, it's time to build awareness and encourage adoption. Start by considering who you need to influence and how you'll bring them on board.

Examples of who to share the new guidelines with:

- ✓ Senior leaders
- ✓ Members of your team and other communicators who may not report to you
- ✓ Content contributors
- ✓ HR, IT and initiative leads
- ✓ Change management or project management office

Examples of how to encourage adoption:

- ✓ **Host a virtual training session.** Introduce the guidelines, provide examples and leave room for discussion. Review a scenario and ask attendees how the guidelines would apply.
- ✓ **Build tools.** Make adoption easy by providing checklists, one-page summaries and templates (see example below [on page 10]).
- ✓ **Run a brainstorm.** Collaborate with groups that have big communication needs, such as HR and IT. Develop additional guidelines for their unique channels or special topics.

TIP

Create templates to make it easy for others to follow the guidelines. Templates work like an instruction manual: Follow the step-by-step instructions and voila, you've followed the guidelines. Templates can also help you build consistency and efficiency when creating emails, social media posts, descriptions for newsletters and meeting agendas.

TIP

Share your templates on the intranet to make it easier for content contributors to access and follow.

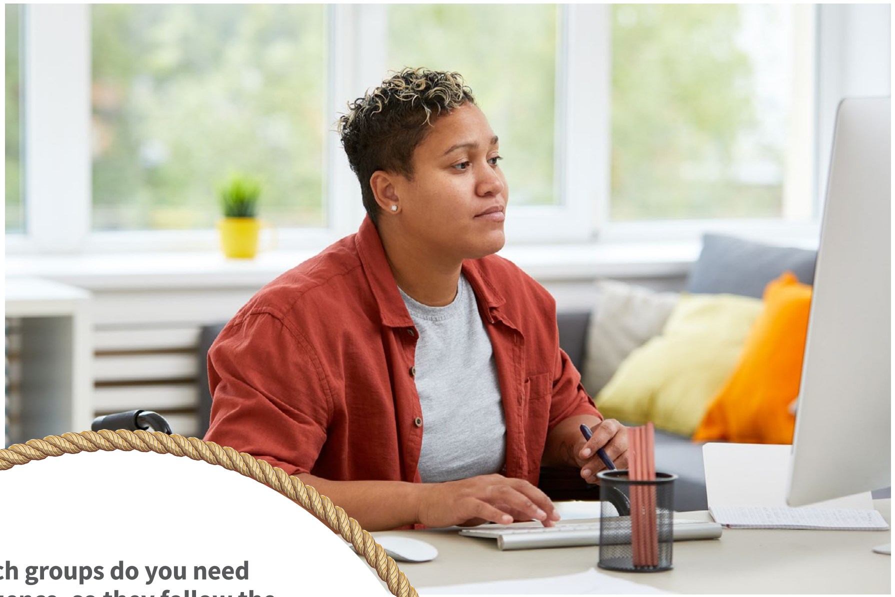
Here's an example of an intranet article template

Title/headline. Create media-quality headlines, eight words or fewer that pique the reader's interest, make the content of the article clear and describe the benefit of reading the article.

Deck. Use a one-sentence summary (up to 12 words) to accompany your enticing headline to give a bit more detail.

Body. 250 words or fewer

- Make it relevant to your audience.
- Get to the main point fast.
- List actions, if any.
- Answer the 5 W's (who, what, where, when, why) and H (how).
- Focus on one or two key messages.
- Keep paragraphs to three to four sentences.
- Use headings and bullets to break up information.
- Avoid corporate jargon.
- Spell out acronyms/initialisms on first reference.



Which groups do you need to influence, so they follow the guidelines? How will you bring them up to speed and make it easy for them to follow the rules?

BONUS

How two organizations developed guidelines

CASE STUDY #1
Focusing on a piece of a bigger issue

Challenge

The communication lead at a manufacturing company wanted to reduce the number of all-employee emails. And with the recent launch of a new intranet, she knew that channel could be part of the solution.

The lead communicator formed a team that decided to focus on HR and IT communication—specifically organizational announcements and IT alerts (both delivered as broadcast emails to all employees). By exploring these two topics, the team planned to address:

- ✓ **Volume.** Too many emails that were often repetitive.
- ✓ **Relevance.** Employees receive information that doesn't apply and/or miss issues that are important to them, since each email is treated as having the same importance.
- ✓ **Consistency.** Lack of a consistent approach, such as when/how a people announcement is sent, what it includes and who approves it.

Objectives

For those who send communication:

- ✓ Understand the process for people announcements and IT alerts, and the guidelines for emails and intranet posts.
- ✓ Know how to use the tools to create and deliver targeted emails and/or posts on the intranet.

For those who receive communication:

- ✓ Don't feel overwhelmed with people announcements and IT alerts, and know where to find them.
- ✓ Get emails that are relevant to their job, location and department, etc.

Solution

The team created a streamlined approach for people announcements and IT alerts that reduced email volume, while putting details in the right place at the right time. One of the team's key strategies was creating a tiered system: defining clear rules when a people announcement/IT alert would warrant a broadcast email and how all communication would be filed and tagged on the intranet.

The team also worked on:

- ✓ Defined workflows (system) for people announcements and IT alerts, including a distributed model for content creation and management
- ✓ Clear guidelines for email and intranet posts, including standards for translation into core languages

CASE STUDY #2
Implementing a comprehensive approach

Challenge

After a new president was named at a division of a leading pharmaceutical company, the internal communication team wanted to strengthen its program. A key part of the initiative was to revamp channels to be more efficient and effective.

Objectives

The team developed a broad set of objectives:

- ✓ Develop a clear process to manage requests for emails, intranet articles and time on town hall agendas.
- ✓ Create a shared understanding of communication rules within Internal Communication and with content contributors.
- ✓ Provide a consistent communication experience for employees that eliminates overlap, repetition and overload.
- ✓ Enable the internal communication team to be strategic advisors, rather than order takers.

Solution

A key strategy to help the team refresh its programs was developing robust channel standards. In keeping with the culture of the company, the standards were as detailed and thorough as a policy document, including:

- ✓ Roles and responsibilities
- ✓ Details of channels, including ownership and role of each channel, appropriate content for each and distribution
- ✓ Templates and best practice examples for articles, emails, organizational announcements and event invitations

The team also introduced the guidelines to key stakeholders:

- ✓ Content owners
- ✓ Communicators from other parts of the company
- ✓ Initiative leaders

As a result, the internal communication team was able to spend its time on value-added strategic work instead of fielding ad hoc requests for all-employee emails or homepage articles.

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 your internal communication channels to the next level

We can help you create and implement channel guidelines by:

- Setting clear objectives
- Assessing satisfaction with your channels
- Creating rules for each channel
- Spreading the word and building awareness
- Encouraging key stakeholders to adhere to your new guidelines

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.