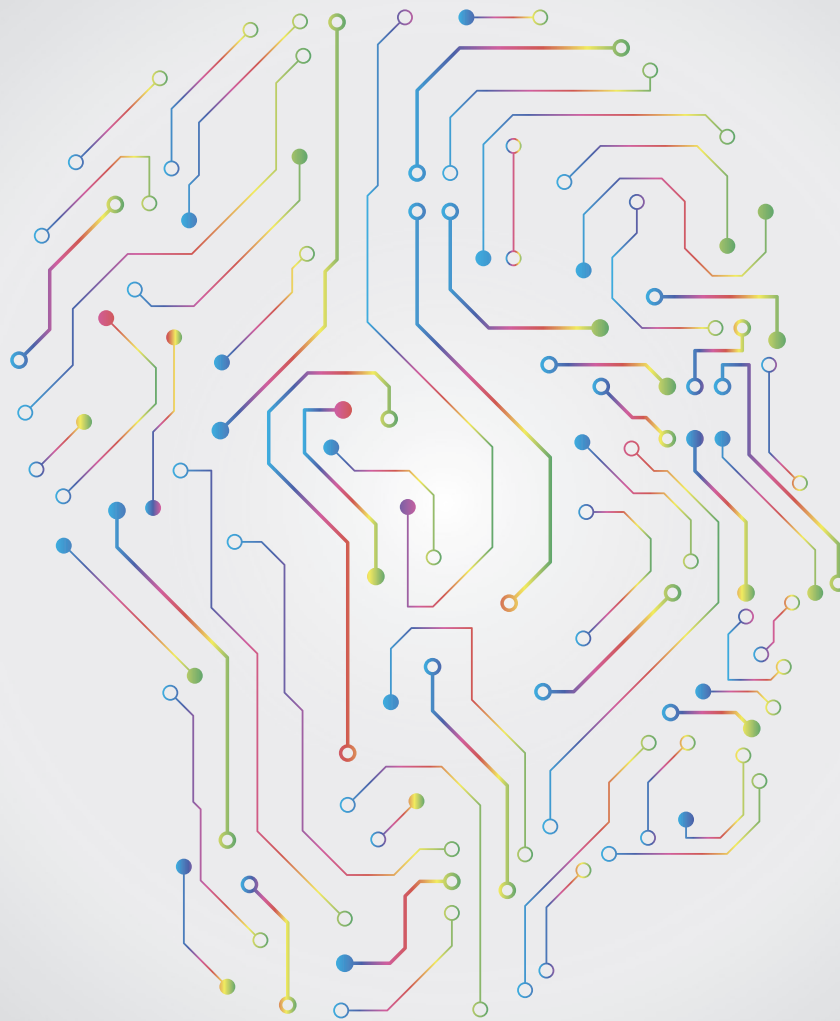


Internal Communications: Emerging Trends and the Use of Technology



Survey
Report **2014**



Newsweaver is delighted to have partnered with Melcrum on this survey focusing on the use of technology for Internal Communication. Those involved in the discipline, from consultants to communicators in global enterprises, are sure to find the results insightful. They provide a view into how technology is being used, what channels are most effective – and the challenges communicators are facing in accessing real-time measurement to evaluate the impact of communication strategies. For us, this insight is invaluable as part of our ongoing development of Newsweaver solutions designed to address challenges facing Internal Communication teams across all industries.

What's clear from these results is that Internal Communication is a maturing function. There is steady improvement seen in the function aligning their communication strategy with the organization's strategy, and a growing respect from senior leaders. These are important gains for communicators.

The results, however, also highlight the fact that communicators continue to struggle in measuring the value and impact of their communications. This must be solved if Internal Communication is to become an established, respected function, serving as a trusted advisor to stakeholders.

For Newsweaver, one of the most pertinent themes to emerge from this survey is around the email channel. Respondents consistently rated email as both highly used and highly effective, yet only 20% plan to invest any resources into the channel in the future. We are proud to be working with over four hundred customers who know that email is a highly effective channel. They are using our technology to send highly interactive communications, to segment and target content and are using metrics to help align their communication objectives with business growth.

Marie Moynihan

Marketing Manager
Newsweaver



Melcrum's quantitative and qualitative data reveals that in 2014 the coming of age of Internal Communication presents the following key challenges:

- Getting smarter at measuring, evaluating and reporting on the effectiveness of our strategies and activities;
- Transitioning our organizations into social businesses while taking our own communication processes and channels into the digital age; and
- Balancing these digital interactions with human ones by re-engaging managers and leaders to create meaning in an ever-changing, hyper-connected world.

This survey with Newsweaver supports these findings and highlights a particular one: despite the rise of social networks, email is still an active and essential push communication channel. But we need to get creative and selective in how we use it, because inbox clutter is a problem we can't ignore. Newsweaver is leading the way in helping some of Melcrum's members do this and we're pleased to be partnering with them to bring you these findings and connect you with their expertise in email communications.

Our joint goal is that the data you find here will help you understand the state of the profession, refine your strategies, select the right performance metrics and build stronger business cases.

Sona Hathi

Content & Research Manager
Melcrum

About the survey

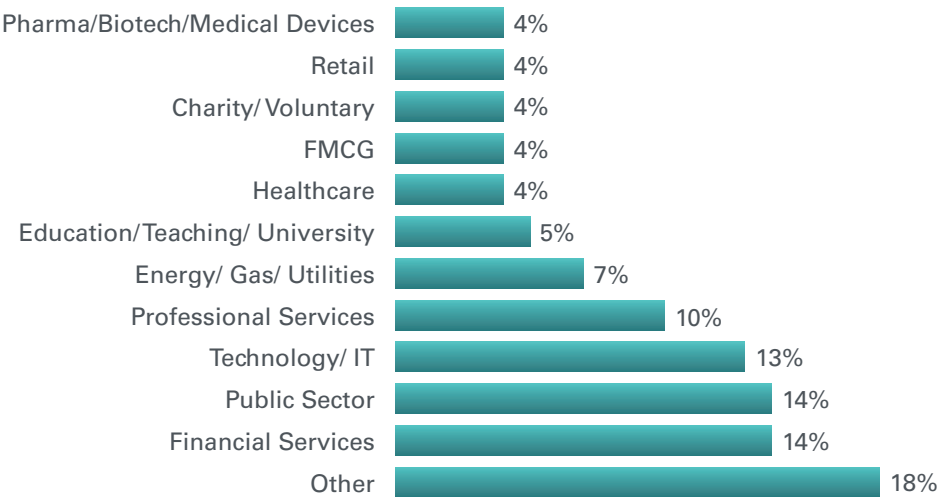
The Internal Communication and Technology Survey 2014 was conducted in partnership with Melcrum. Over five hundred respondents participated; located around the world, spread over twelve industries - and ranged from SMB to global enterprises. The results provide real insight into how internal communicators are using technology to create, implement and measure their employee communication strategies.

Key findings

- 70% of communicators state that their communication strategy is aligned with their business strategy.
- Only 16% are satisfied with their ability to measure the effectiveness of their internal communications. The most common real-time metrics available to communicators are content popularity, followed by opens and clicks – but both of these are available to less than half of communicators.
- Over 50% say their team leads the sourcing and implementation of new communication technologies in their organization.
- Less than half of respondents believe their team have the digital / technological skills necessary to do their jobs.
- The three most used channels are the intranet (93%), email (90%) and leadership communications (84%). The least used channel is the print newsletter, with over 50% saying they've stopped using or don't use them.
- Email is the most effective channel for communicators, followed by intranet, leadership communications and team / line manager briefings.
- 68% of respondents can communicate via email with at least 80% of their employees.
- 50-60% of respondents always use email for the tasks of: employee newsletters, change communications and HR/rewards/pension communications. Closer to 60% always use email for events, pulse surveys and leadership communications. Only 43% always use email to drive traffic to their Intranet.
- By a large margin, the two new communication technologies communicators plan to deploy over the next twelve months are internal social networking tools (46%) and intranets (45%).
- Over 60% plan to invest in improving internal social networking tools, followed by intranet (59%), video (56%) and measurement (55%). Only 22% plan to invest in improving email.
- 64% said employees have the ability to engage in two-way dialog with management.
- 61% said their organization allows employees to access company content via their own devices.
- 83% said they have not yet implemented a technology solution to communicate digitally with offline employees.
- The top two Key Performance Indicators are 'employee survey results', closely followed by 'none'.

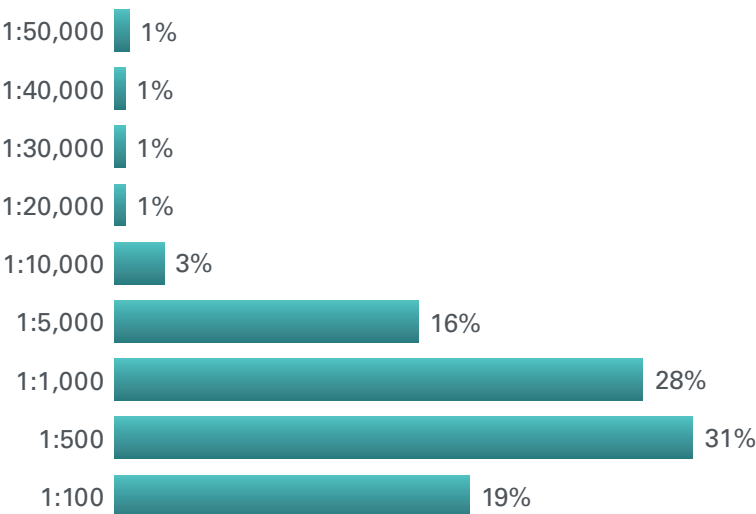
Q. Which of the following best describes the industry in which you operate?

Participation was spread evenly across business sectors, with a slightly bigger participation in IT, the public sector and financial services.



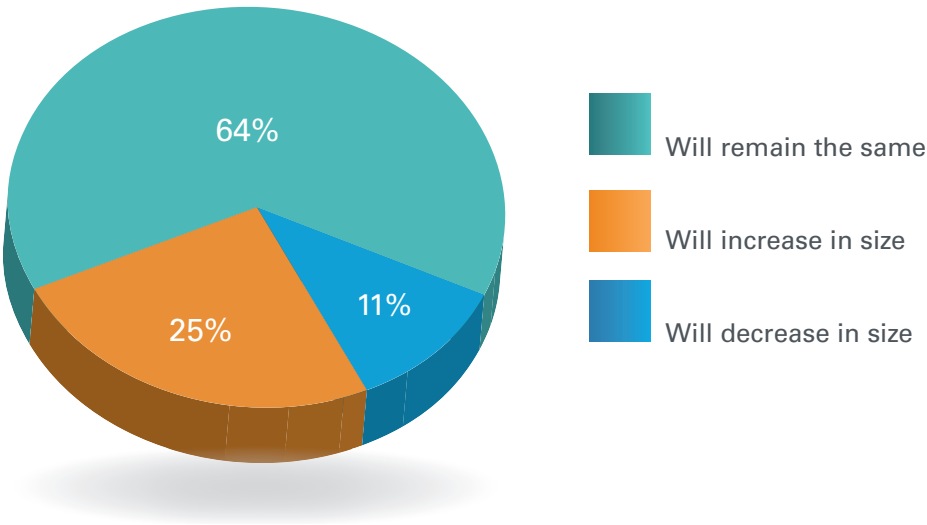
Q. From the options below, please select the nearest ratio of internal communicators to employees at your organization.

As with other surveys conducted in the Internal Communication space, the majority of Internal Communication teams work to a ratio of 1 per 500-1000 employees.



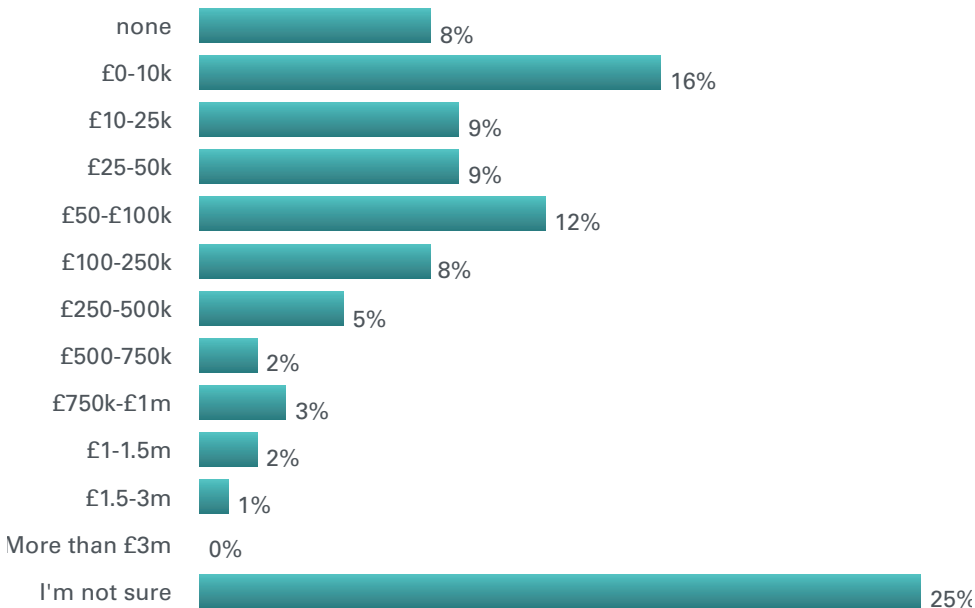
Q. What are your plans for staffing the Internal Communication function over the next year?

There is some optimism around staff growth, but as seen in other survey results, staffing will remain the same in 2014 for most Internal Communication departments.



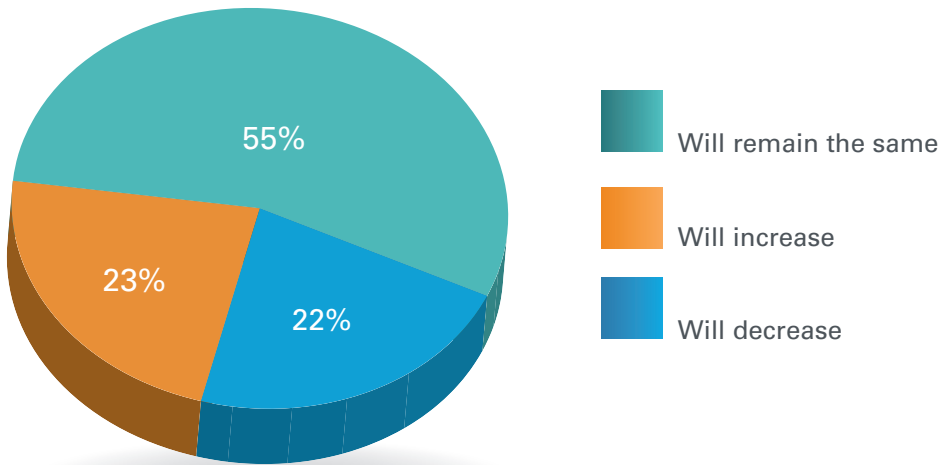
Q. Excluding people costs/salary for your staff, what is the budget allocated to your Internal Communication function?

25% of survey respondents were not sure what budget was allocated to Internal Communication. But of those that did, the biggest group, at 16%, stated £0 – £10,000, followed by 12% allocating between £50,000 – £100,000, and 11% allocated £250k+.



Q. Do you expect this budget to increase or decrease over the next year?

55% said their budget will stay the same over the next twelve months. There is clearly frustration with this, as over 50% of communicators said their organization is not investing enough in Internal Communication. This may be linked to the function's ability to demonstrate Return on Investment.



In this group of questions we looked at the technology and channels being used and levels of effectiveness. We also asked communicators where they plan to increase or decrease use, and where they'll be allocating resources over the next twelve months.

This series of statements provided insight into how the role of Internal Communication is evolving, including the use of technology.

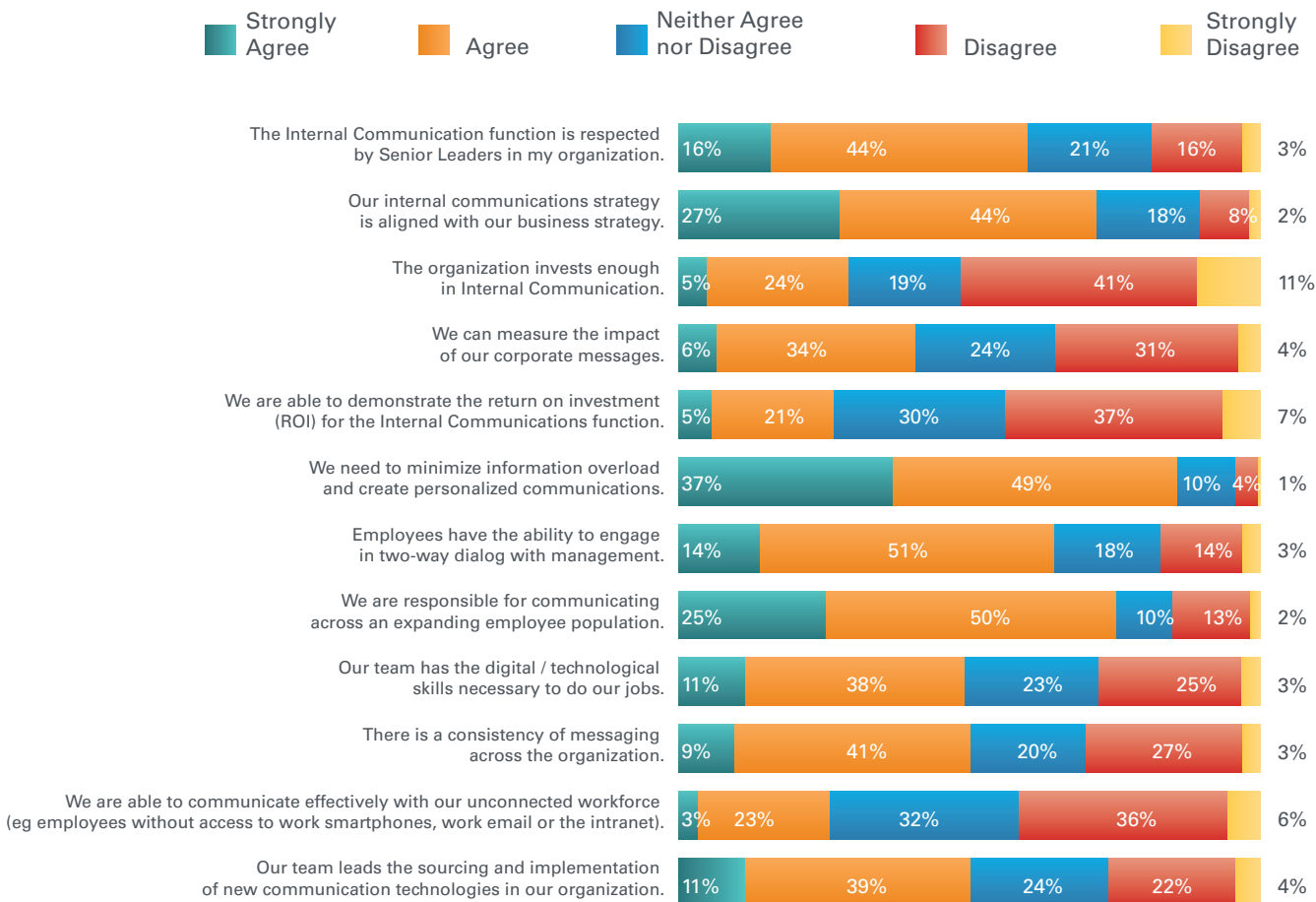
Clearly the function is maturing; with over 70% believing that their communication strategy is aligned to their organization's strategy. Perhaps as a result, the majority (60%) agree they have the respect of their senior leaders. Ten years ago this would not have been the response.

But some of the challenges that come with that established position also emerge here. Only 40% are satisfied they can measure the impact of their corporate messages, and 26% feel they can demonstrate Return on Investment – these are low agree rates for such an established, mature function.

The positive news for communicators is the availability of digital mechanisms to achieve measurement of impact. Technology is the solution to most of the challenges brought up around the role, from achieving a wider reach through the organization, getting better data, to opening up two-way employee dialog with leaders.

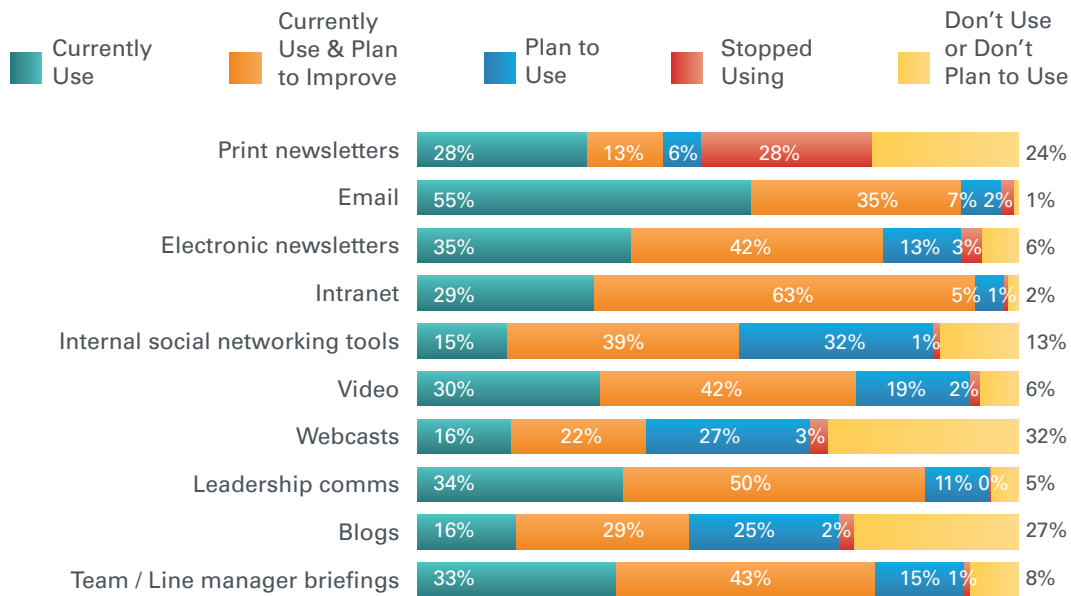
There are doubts around communication teams' having the digital skills necessary to do their jobs. As organizations continue to move deeper into the digital era, communicators do need new competencies. These include the ability to read analytics, as well as write compelling content for a variety of channels, including digital. Communicators also need to think about how they can become more agile – communicate in real-time, test and learn, and fail or succeed fast.

Q. To what extent do you agree with the following statements?



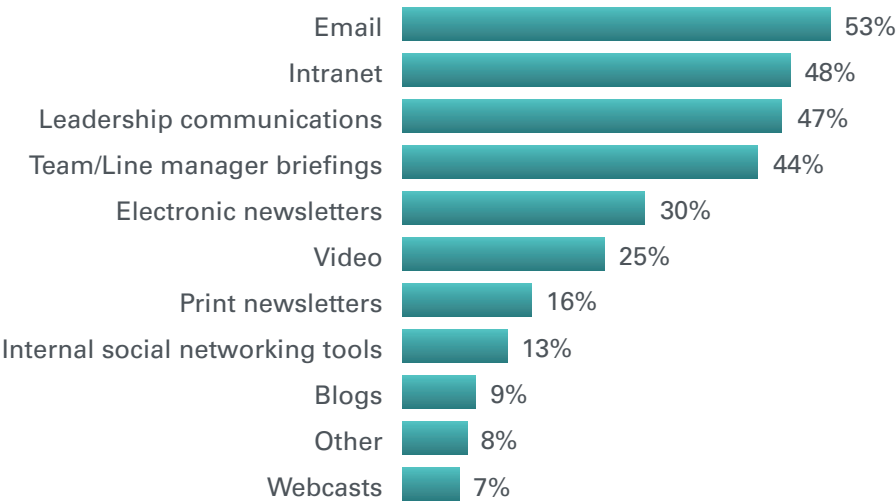
Q. Which of the following channels do you use, or plan to use, as part of your Internal Communication strategy?

The intranet and email remain the engines for driving internal communications. The big increase was in internal social networking tools. Compared to Melcrum's 2011 report, there's been a big shift from 'plan to use' to currently using. Is it surprising that the Intranet shows strongly as 'using and plan to improve'? There may have been predictions of the death of intranets, replaced by social platforms, but what is happening is organizations are starting to invest further in intranets, integrating their social tools and making them mobile to reach remote workers. While social is fundamental to the change in the way we are working, from hierarchical to collaborative, there are still those functional purposes that intranets need to fulfill, and communicators need to blend those social and traditional functions.



Q. Of the channels you use which have been the most effective?
Please select your top three only.

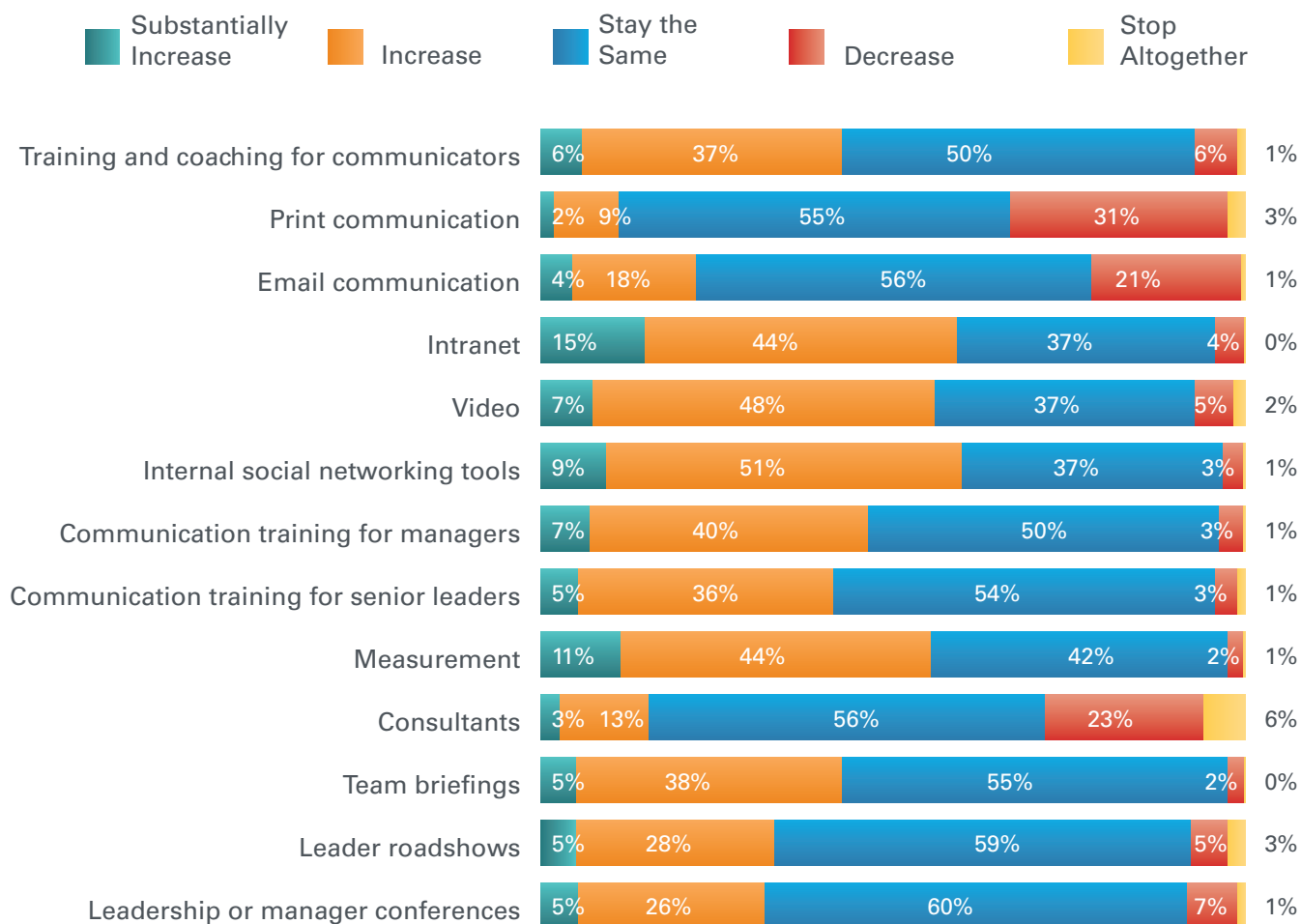
Despite the buzz and focus on social and video, four traditional channels are still the most effective, with email at the top, followed by intranet, leadership communications and team / line manager briefings. As digital becomes more embedded in Internal Communication functions, it's important to remember that face-to-face drives engagement in ways digital can't. Technology can connect different levels of the organization like never before, but teams need their managers to communicate with them in an engaging and meaningful way. The smartest organizations are investing in their mid-level managers, making sure they're fully equipped and engaged in the strategy themselves, before they try to engage their own teams.



Q. In the next 12 months how do you plan to allocate resources for the following activities?

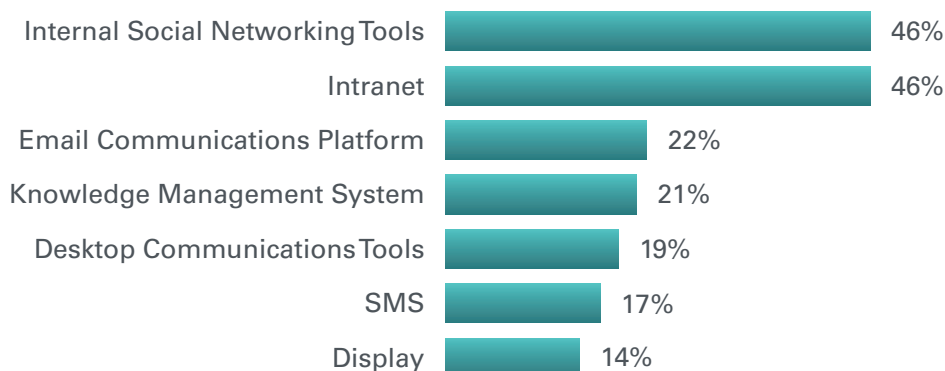
The top resource contenders are internal social networking tools (60%), intranet (59%) and measurement (55%).

At the other end of the spectrum is the lack of investment in one of the most widely used and most effective channels – email. Email has evolved into a sophisticated technology that dovetails all that the digital age has to offer, allowing communicators to send high impact, responsive design for mobiles, content targeting to decrease emails sent, embed social and rich content such as commenting and videos – and the all important real-time metrics dashboard. Email is an investment blind spot for communicators. It is recognized as the most effective channel, and improvements in this technology means communicators can address many crucial gaps in their capabilities (measurement, segmentation etc.). However, it is a very low priority for investment.



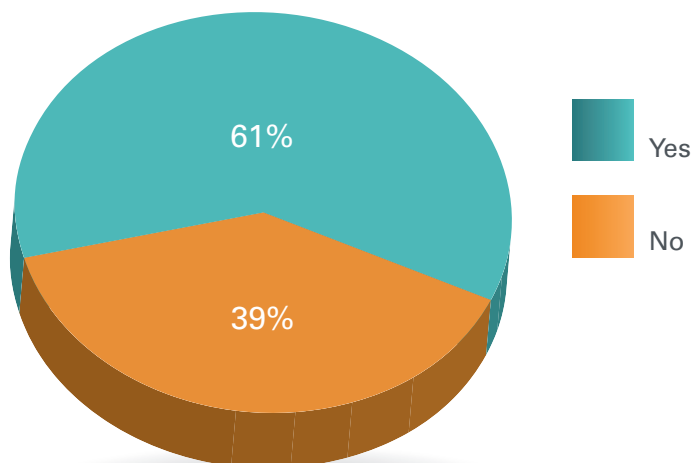
Q. What new communication technologies are you looking to deploy in the next 12 months?

It's not really a surprise, per earlier questions, that the biggest investments are going to be in internal social networking tools and intranet, with the most mentioned tools in both of those being Sharepoint and Yammer. This most likely reflects intranet providers evolving their technology and emulating what we're seeing in the external world - and what employees can do outside of the organization. Internal communicators and Enterprise Technology vendors want to bring that new functionality and capabilities inside the organization.



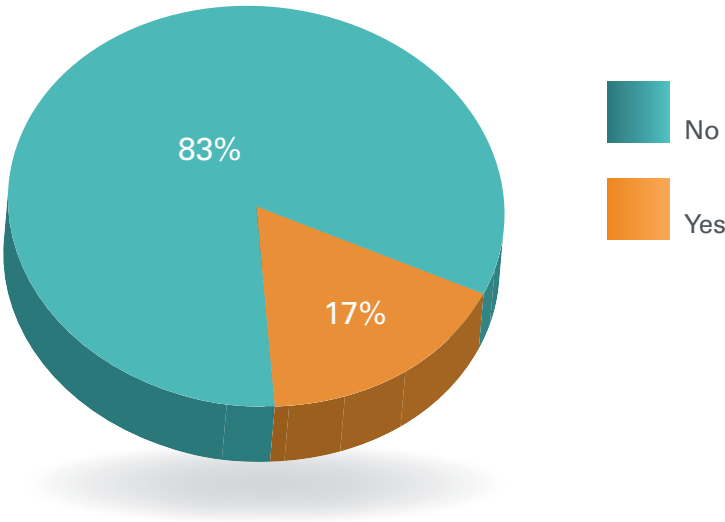
Q. Do you allow employees to access company content via their own device?

In this report, 61% of communicators said their organization allows employees to access company content via their own devices. This is an interesting benchmark for communicators to share if their organization doesn't allow "Bring Your Own Device" - they're now in the minority.



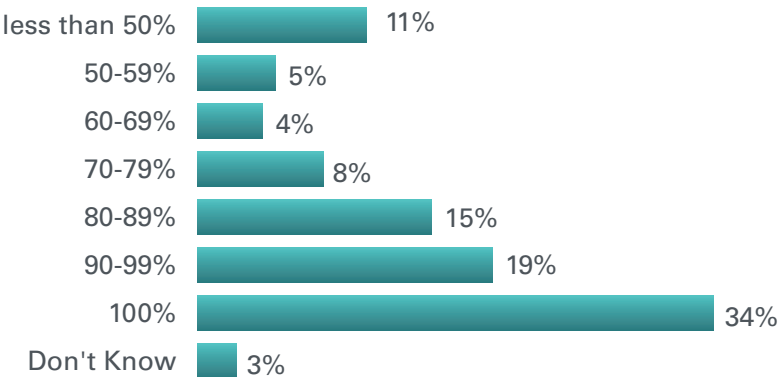
Q. Have you implemented a technology solution to communicate digitally with offline workers?

83% say they have not yet implemented a technology solution to communicate digitally with offline employees. Clearly, this is an area communicators need help with finding solutions that allow them to reach their unconnected employees.



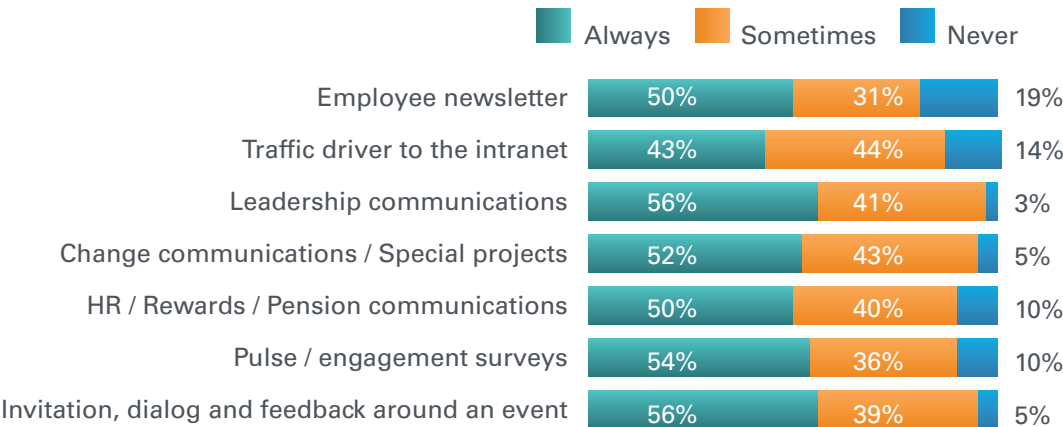
Q. What percentage of your employees can you communicate with via email?

68% of respondents can communicate with at least 80% of their employees, which is most likely another reason why the email communication channel rates highly as a channel used by Internal Communication teams to ensure their message is pushed out to their employees.



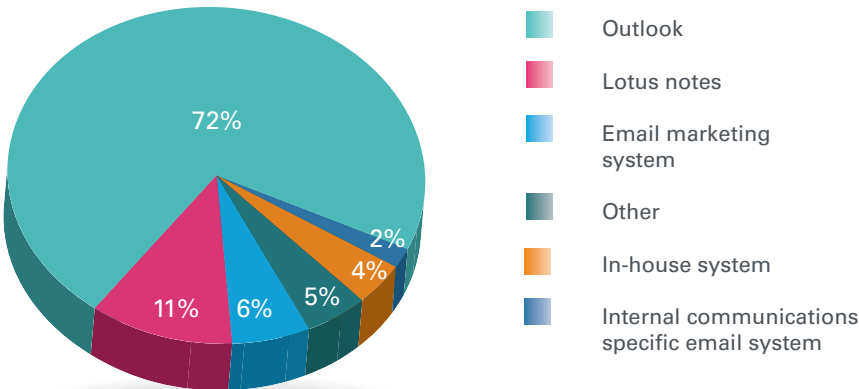
Q. How often do you use email for the following tasks within your organization?

50-60% always use email to send employee newsletters, change communications, HR/reward/pension communications, driving events and pulse surveys. Email is the technology used to drive most communication strategies, yet less than 50% always use email as traffic drivers to the Intranet. This is a missed opportunity, as email can help drive adoption and increase traffic to the intranet.



Q. What technology do you use to deploy your all-employees corporate email communications?

72% of respondents use only desktop software such as Outlook (72%) and Lotus Notes (11%) to deploy their employee communications. Communicators are missing out on having optimum results, highlighting why 'email metrics' are the most desired metrics mentioned by respondents in this survey. Using technology such as Newsweaver, communicators increase the sophistication of their email communications, having the ability to segment and target content, plus measure the results and prove their business value.

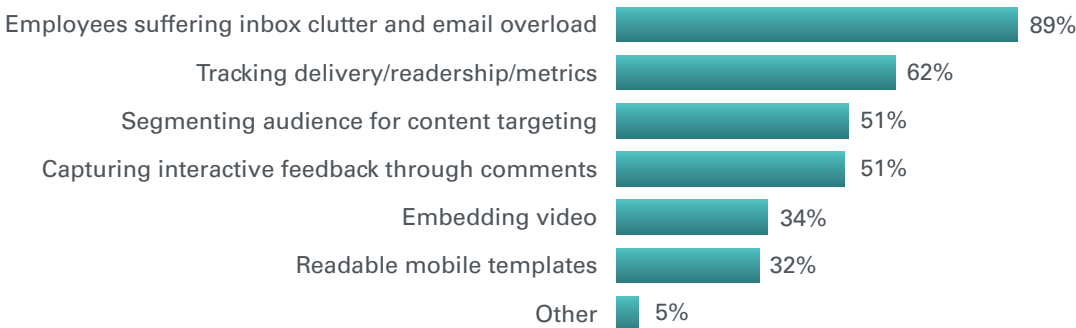


Q. What challenges do you face with email?

Organizations should review the effectiveness of their email channel on two levels. First, there should be a company wide adherence to best practice. All-employee emails, excessive CCs and reply-to-all, plus the misuse of email for collaboration, document transfer and storage, leads to information overload and inbox clutter. Organizations need to address this specifically to educate and improve the use of email in the workplace.

The second level is to make use of the email technology available today. By using this technology communicators can increase the relevance and impact of their communications, in turn increasing results.

Once the technology is being used, Internal Communication teams should take a cue from their Marketing co-workers. This means moving away from a one-to-all tactic, and taking a sophisticated approach to communication. Internal Communication teams should implement a content marketing strategy, one that uses data to segment and send timely, targeted, relevant emails – the right information, to the right employee at the right time. In addition, they can use these email communications to drive adoption and traffic to their other channel strategies, including social and Intranet.

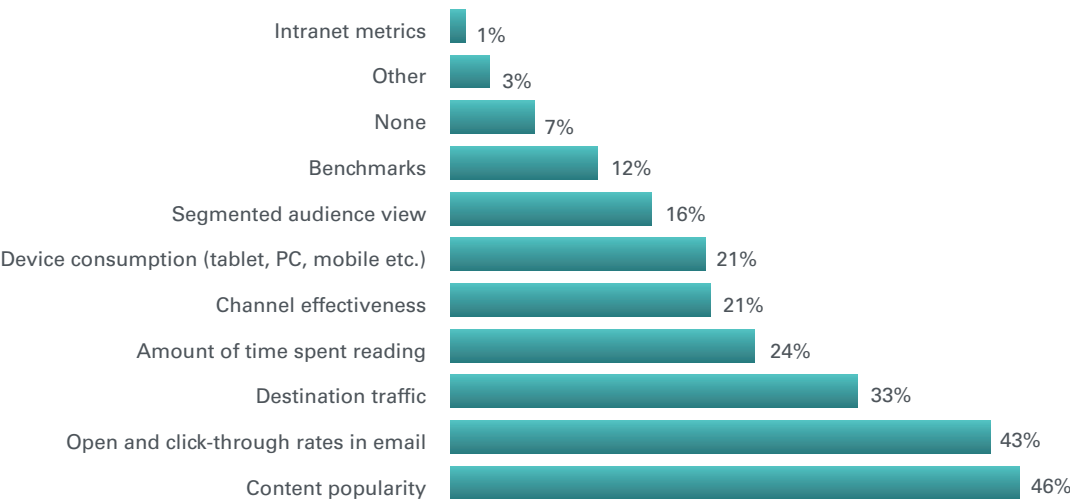


Measurement is essential to proving business value of Internal Communication. In this section of the survey we looked at how satisfied internal communicators are with their ability to measure effectiveness, what metrics they have – and what metrics they’d like to have to measure impact.

Q. What Internal Communication metrics are available to you in real time?

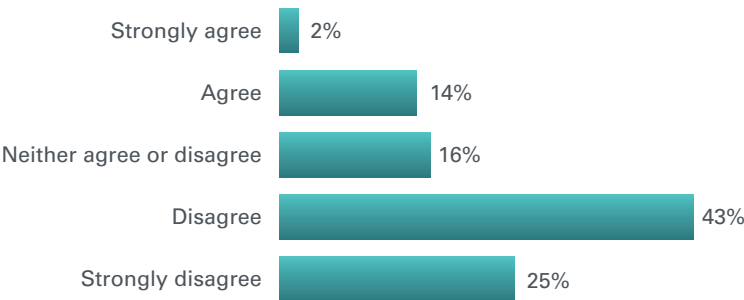
This question was asked to get an understanding of what metrics internal communicators do have access to immediately, without having to wait for IT, or other departments to help them source and collate data. We’re essentially asking if their team has a scorecard, which instantly tells them what employees are talking about, what they are reading, and how effective it has been.

Over 47% of respondents skipped this question. This indicates the lack of access to measurement. The small percentage of those that can access data on a real-time basis indicated ‘content popularity’, followed by ‘open and click-through rates’ as the metrics most available to them in real time.



Q. Please state whether you agree with the following sentence: I am satisfied with my ability to measure the effectiveness of our Internal Communications.

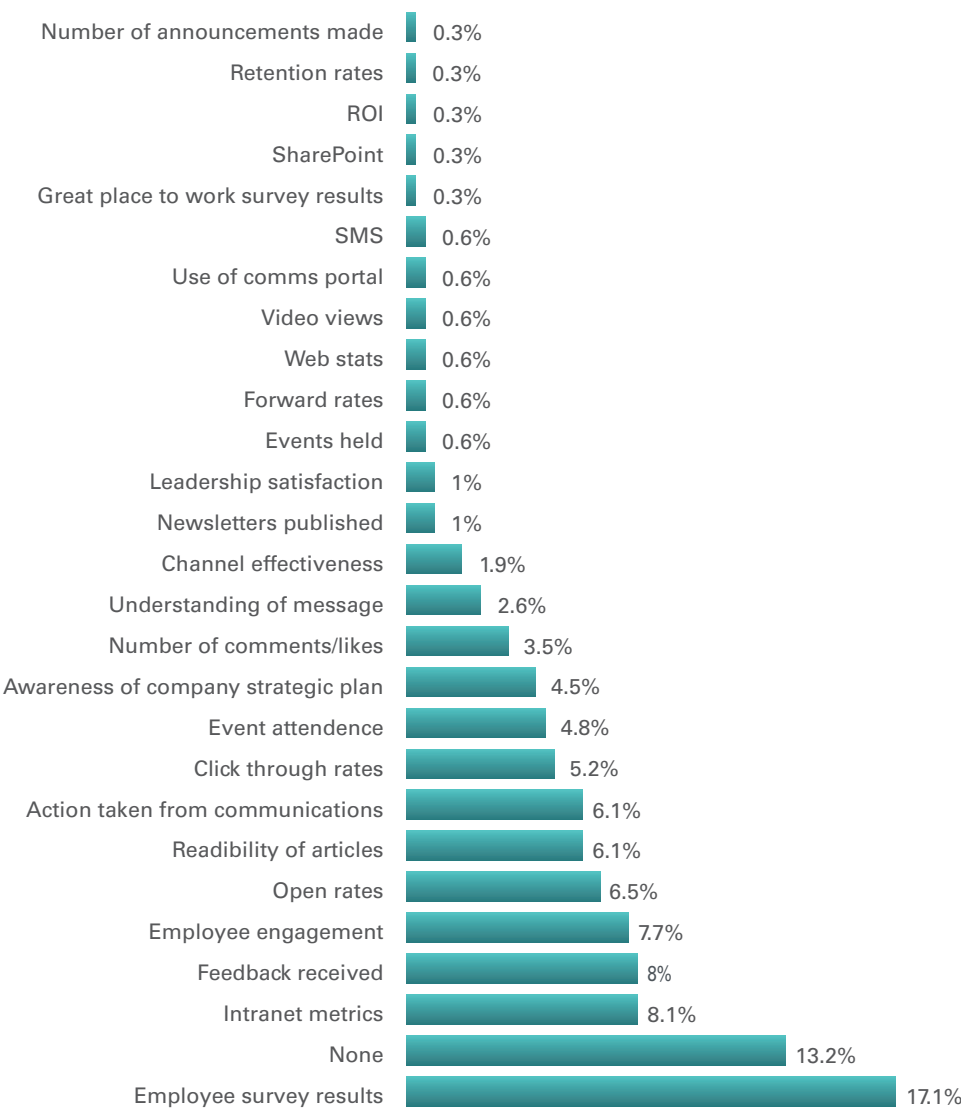
With the recognition and increasing maturity of this function comes a level of expectation from the rest of the business that you can prove what Internal Communication is doing and prove its value. The function needs to demonstrate that investments made in the intranet, training, collaboration and social are all producing some sort of return. 68% of respondents are not satisfied with their ability to measure the effectiveness of their Internal Communication. This dissatisfaction reflects increased expectation in the business, and portrays that not having metrics just isn't good enough. Organizations expect mature functions like HR, Marketing, PR, IT and now Internal Communications, to be able to demonstrate and measure their return on investment.



Q. What are the main KPIs of success for Internal Communications in your organization?

‘Employee survey results’ and ‘none’ were listed as the top Key Performance Indicators (KPIs) for internal communicators. However, employee satisfaction or engagement is linked to many other factors as well as communication and as such is an imperfect KPI for Internal Communication. Unless organizations are doing a survey that specifically measures or benchmarks the effectiveness of your employee communications, they will only have a partial picture.

Communicators will get the investment and staff they need, when they can show the value of what they’re contributing to the business. Measurement should be at the top of the agenda for 2014, and over half of respondents did say they are going to allocate increased resources to measurement over the next twelve months.

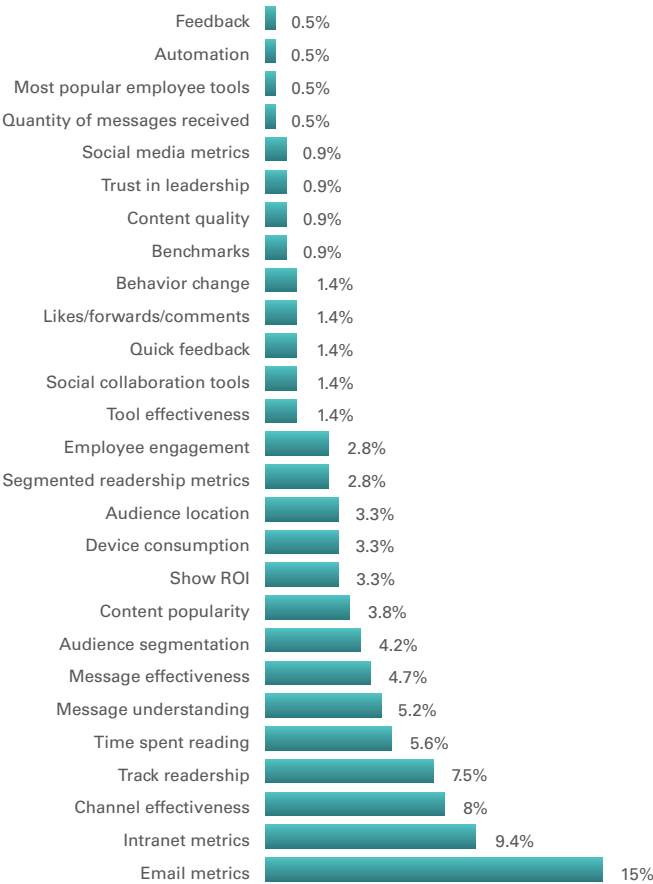


Q. What metrics for Internal Communication would you like to have that are not currently available?

This was an open-ended question, allowing respondents to list what they would like in a dashboard of metrics. Email and intranet metrics were the most in demand metrics, which makes sense, as these are the two most popular channels - and should be the most measurable. ‘Effectiveness’ occurs through many of the metrics mentioned - communicators want to really understand every aspect of engagement. As a group, the metrics show that internal communicators understand what types of measurements they should be able to have as part of demonstrating the value of their function.

While benchmarks may be lower in the list, this is an interesting one for the function to look at going forward. When Internal Communication teams start thinking about their ability to measure, or begin to measure their communications, benchmarks are often their first port of call. “Where are we now, what’s important for the business, and what can we realistically achieve?” are good first questions to ask. They’ll help teams get into a “mindset of measurement” by monitoring progress and improving on existing metrics.

Industry benchmarks certainly have a place in measurement strategies and KPIs, but leading companies like Shell are starting inside before going outside. In Melcrum’s study on Internal Communication they provided insight into Shell, who have created a Content Engagement Index. This is an algorithm that measures how engaging and effective their digital content is. The index makes for a powerful internal benchmark that they would now like to take out to the industry.



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Cut through inbox clutter and grab your audience's attention with memorable messages that are on-brand and viewable on any device. Newsweaver allows you to keep their attention with stylish embedded images and videos.

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Monitor email performance so you can shape your content strategy with powerful insights into content popularity and engagement. Boost your credibility with powerful intelligence that proves ROI and drives real organizational change.

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Newsweaver Internal Connect is packed with social features that allow you start conversations across your organization. Give employees the ability to comment, rate and like content, and participate in surveys and polls; while gathering valuable intelligence with every communication sent.

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