Now that we have explored the theory and concepts, this chapter outlines the main elements and steps for developing a strategic plan for internal communications and employee engagement within statistical organizations. Since no two statistical organizations are exactly the same, these guidelines should be adapted to suit the needs of individual institutions.

Note that strategic planning for internal communications and employee engagement is very similar to strategic planning for external communications. This chapter will draw on the Strategic Communications Framework for Statistical Institutions – Phase I and highlight primarily those areas in which internal communications planning differs from that of external communications.

In general, strategic planning is a present and future look at an organization and its related environment. It is the process of determining an organization’s long-term goals and then identifying the best approach for achieving those goals.

A high-level flow diagram for strategic planning is shown in Figure 5 below.

### 2.1. Situational analysis

Situational analysis provides information on the current environment within an organization. This information can then be used to design new communications and engagement objectives and strategies, or to modify existing ones.

The following steps should be considered when conducting situational analysis:

**Step 1 - Stakeholder identification**

Who are the organization’s primary internal stakeholders? For internal communications and employee engagement, stakeholder identification serves the same purpose as audience segmentation does for external communications. A list of key internal stakeholders might include:

- Executives and upper management
- Middle management
- Front-line supervisors
- Subject-matter experts (statisticians, economists, demographers, agronomists, etc.)
Information technology staff
Field staff (data collectors)
Support professionals (budget analysts, human resources specialists, communications experts)
Clerical staff

What is important in stakeholder identification is not documenting each occupational specialty, but rather sorting organizational levels and domains into groups with common interests in organizational activities, and who might respond to similar outreach or messaging initiatives.

Some questions to consider when engaged in stakeholder identification include:
- What are the members of the employee group interested in?
- What do they value?
- What motivates them?
- What are they skeptical of?
- What are they likely to pay attention to?
- What is common for them to ignore?
- What is credible to them?
- Are there further subgroups with different needs and points of view within the employee group?[1]

Step 2 - Stakeholder scanning
What is the existing relationship between employees and the organization at large?
- Do employees identify with the organization?
- Do they believe in the mission and values?
- Are they even aware of the mission and values?
- Do they trust leadership?
- Do they believe they are being informed of important decisions that affect their work lives?
- Do they feel they have a voice in organizational decision-making?

Some tools for stakeholder scanning include SWOT analysis, focus groups, surveys, and similar methods. Initial stakeholder scanning can be thought of as establishing a baseline. Ongoing assessment and monitoring (Chapter 6) continue this measurement work.

Step 3 - Review prior initiatives
What internal communications campaigns have been effective in the past, and for whom? Have conditions changed so that a similar approach might no longer be as useful, or are some worth repeating?

Step 4 - Review existing channels
Evaluate what methods have been used in the past to communicate with staff: organization-wide meetings, posters, newsletters, e-mail, videos, etc. Assess which have been the most effective for various employee groups, who is reading them, and what impact they may have had.

2.2 Mission and Vision
Organizational culture as well as mission, vision and values are explored in more detail in Chapter 3.

Mission, vision, and values statements are typically not intended only for internal communications and employee engagement. On the contrary, they serve an organization-wide purpose governing all aspects of the statistical enterprise. Nonetheless, mission, vision, and values statements are critical to motivating employees and aligning them with broader institutional objectives.

2.3 Goals, objectives and strategies
The terms “goal”, “objective”, and “strategy” are often used interchangeably, or to mean different levels of abstraction. For the purpose of this section:
- A goal is a broad primary outcome
- An objective is the approach you take to achieve a goal
- A strategy is a concrete step you take to achieve an objective

At the highest level of abstraction, goals define broad communication priorities that support the overall mission of the organization.

When defining goals, it is helpful to start with the organizational outcomes or business needs the internal communications plan is intended to support. The question to ask is “What will be different in the organization as a whole when we have successfully achieved our plans?”

Internal communications goals flow from these business needs. The question to ask is “What role can communications play to help achieve the organizational outcomes we desire?”

An example matrix of business needs and communications goals is shown in Table 1.

Table 1. Business needs and communications goals
<table>
<thead>
<tr>
<th>Business need</th>
<th>Internal communications goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve customer service</td>
<td>Enhance employee engagement</td>
</tr>
<tr>
<td>Ensure risks are identified and problems caught early</td>
<td>Build a culture of open communication</td>
</tr>
<tr>
<td>Measure an ever-changing economy</td>
<td>Encourage innovation and creativity</td>
</tr>
<tr>
<td>Change institutional governance structures</td>
<td>Facilitate the adoption of new processes and compliance with new policies</td>
</tr>
</tbody>
</table>

Objectives break goals down into actionable components. They identify separate initiatives that, together, fulfill the goals.

A central component of developing objectives is composing key messages. A clear, concise, and effective message platform is the cornerstone of any successful communications program.

Key messages are the most explicit tool an organization has to shape and reinforce its brand. In the context of internal communications within a statistical organization, key messages must provide a narrative framework that expresses what the organization does, what principles lie underneath that work, what value the organization brings to its employees, and – perhaps most important in this setting – how employees contribute to the success of the organization. Effective messages must be concise, relevant to the audience, compelling, and memorable[2]. Internal key messages must also be credible to their audience, which, in this case, is highly knowledgeable and discriminating.

Key messages become the source of all further communication activities. Internal messaging must also be compatible with external messaging, since employees consume both.

In addition to key messages, statistical organizations must develop a consistent approach to conveying these messages. Together, the messages and their delivery comprise a message platform. This is one of the activities that takes place during strategy creation.

Strategies are concrete action steps or tasks an organization takes to achieve an objective. Strategies need to be SMART:

- **Specific** – what are we going to do for whom?
- **Measurable** – is it quantifiable and can we measure it?
- **Attainable** – can we get it done within the time frame and with the resources we have?
- **Relevant** – will this strategy have an effect on the desired objective?
- **Time bound** – when will this be accomplished?

Strategy development targets actions to specific audiences or stakeholder groups. Some questions to address when determining target audiences include:

- How will a proposed communication address the interests and concerns of this audience?
- What does the team want this audience to do, think, feel, or believe as a result of the communication?
- What are the most important points the audience should retain?
- What level and frequency of communication is needed?
- What kinds of media does this audience consume at work?
- Whose messages will this audience pay attention to?
- Will support from any audience member be required to communicate the message?
- Are there constraints of geography, time zones, work shifts, culture, or technology that need to be addressed for this audience?

Any given key message and surrounding communication can likely be delivered through multiple media or channels. These might include:

- Organization-wide meetings (potentially streamed to regional locations)
- Work group meetings
- E-mail
- Intranet
- Wiki
- Newsletters
- Posters
- Videos

Channel selection should be based upon the media which are most suitable for any given communication priority. Each channel offers specific advantages and drawbacks, and not every channel will be fit for purpose. Some strategies will benefit from using multiple, mutually reinforcing channels and higher message repetition. An effective content strategy maps out the right mix of channels to reach the identified audiences.

Note that, since effective internal communications is not exclusively a top-down activity through which leadership conveys information to subordinates, care should be taken to facilitate bottom-up and peer-to-peer interaction. This might include leaving ample time for question and answer sessions at all meetings, an electronic mailbox for employee comments and suggestions, a facility for employee-posted content on the organization’s intranet or wiki, etc. To be credible in the long term, employee feedback must be taken seriously and integrated into organizational planning.

A communications calendar can be useful for planning several products in combination.

### 2.4 Performance measures

All communication activities should be measured and evaluated to assess whether they achieve the communication objectives and strategies. Done effectively, measurement enables iterative progress in communications planning. It presents opportunities for continuous improvement and helps organizations develop an understanding of the impact of communications activities.
Baseline research conducted during the situational analysis phase is central to understanding audiences’ priorities and values. Evaluation throughout implementation is central to understanding whether the audiences’ priorities and values have changed, that is, whether the communications activities are making a difference.

Since situations change over time, objectives and strategies may need to change as well. Properly planned and executed, performance measurement and evaluation can help an organization identify unexpected events, opportunities and threats that affect its work, and make adjustments in time to take advantage of critical moments.

Performance measures, assessment, and monitoring are treated in more detail in chapter 6.

2.5 Action plan

The action plan pulls everything together into a single document with the background (situational analysis, mission, and vision), the overall strategic direction (goals), intermediate actionable components (objectives), and detailed implementation steps (strategies), all bound together with measurement and evaluation indicators.
