

The Definitive Guide to Communication

Engaging Employees
in Benefits, Pay,
and Performance

Alison Davis
Jane Shannon

Praise for
The Definitive Guide to
HR Communication

“Davis and Shannon make a compelling case for the value of simple, straightforward, and effective HR communication—and provide valuable insight on how to make it happen in even the most complex organizations.”

—**Kevin Kelly**, 30+ years internal communications veteran

“*The Definitive Guide to HR Communication* is a terrific resource for HR professionals. The examples and illustrations reflect actual issues and challenges we face and are a good reminder of how easily we can disconnect with our audience. The tips, tools, and guidelines are clear and effective in demonstrating alternative approaches to generating employee interest and understanding. I enjoyed reading it, found it very helpful, and have already begun using some of the suggested methods.”

—**Diane F. Green**, Director of Staffing and Development,
Hollingsworth & Vose Company

“Don’t be misled by the title of this book. It doesn’t matter if you work in HR communications or not, you can learn from this well-written guide. In fact, even if you’re not particularly interested in communications, you’ll benefit from it . . . the book is *that* good.

“Here’s why: The authors use a combination of stories, solid writing, checklists, and examples to lead even the greenest communicator through the steps of communicating to an audience. Even if you’ve been in the communications business as long as I have (more than 30 years!), you can still learn—or relearn—a thing or two. The book is organized so you can find what you need and use what you find.

“The authors freely borrow from the best, including communications guru Don Ranly. And, one of their great ideas is to ‘Go Hollywood.’ This is a technique to distill your message into a bite-sized chunk for today’s busy workers. I tried it. It works. And, with a name like ‘Go Hollywood,’ the technique also is memorable.

“That’s just one of the easy-to-implement techniques in this book. There are many. I was just a few pages in when I found something solid I could use at work . . . right now. I continued to read, marked up the pages, turned down the corners, and went back to the book again and again.

“Invest in this book. Your boss will wonder how you got so smart overnight!”

—**Becky Healy**, Agency Communications Manager,
State Farm Insurance, and 2010-2011 President,
Council of Communication Management

“This book truly is a definitive guide to increasing employee engagement by helping people understand and appreciate their pay and benefits. Davis and Shannon’s book should be invaluable to a range of business professionals: 1) From students who are learning the basics of employee engagement and talent management, to 2) HR and communication professionals who design and explain pay and benefits to employees, to 3) Managers and executives who sign off on people management strategies.

“The book is built on the premise that great benefits must be understood and appreciated if they are to be of real value. Davis and Shannon’s book is all about helping organizations of every size get the most ‘bang’ for the expensive bucks they shell out on total rewards. The book starts with an analysis of how employees read and listen (or don’t) and progresses through an analysis of what it takes to communicate effectively, including developing strategies, messaging, and media.

“Davis and Shannon follow their own advice. Their prose is straightforward and makes it easy for the reader to pay attention. Their examples are meaningful and come from real companies that have struggled with HR communication; the authors explain how some have failed and others have succeeded brilliantly. Their advice is thoughtful and reflects years of practical experience designing and producing award-winning HR communications. There are no two communicators who know more about this subject than Davis and Shannon—who better to write the definitive guide?”

—**Kate Nelson**, Faculty, Fox School of Business, Temple University

“Alison and Jane have put together a must-have resource for any Human Resources leader or professional who is involved with preparing company-wide communication events, or for those who coach those who put on these kinds of events. Written in a clear, easy-to-read format, you will find practical steps, real life examples, and realistic suggestions that, if followed, will dramatically improve the success of your communication events. Take the time to digest this book, follow the advice, and you will see measurable improvement in an area that has been difficult to get right for many organizations. Well done, Alison and Jane.”

—**William G. Bliss**, President, Bliss & Associates Inc.,
and author, *Advisory Services to Cultivate
Exceptional Leadership*

THE DEFINITIVE GUIDE TO HR COMMUNICATION

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THE DEFINITIVE GUIDE TO HR COMMUNICATION

*Engaging Employees in
Benefits, Pay, and Performance*

Alison Davis and Jane Shannon

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*To my wonderful family, especially my husband
and kids (and their significant others). You make
me laugh and make all the hard work worthwhile.*

—Alison Davis

*To my son Lindsay, my daughter-in-law
Joanne, and my grandsons Nolan and
Dempsey Shannon. I love you guys!*

—Jane Shannon

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—Alison Davis

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—Jane Shannon

About the Authors

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For the past 25 years, Alison Davis has been CEO of Davis & Company (www.davisandco.com). This firm has helped such companies as BNY Mellon, Georgia-Pacific, IKEA, Johnson & Johnson, MasterCard, and Merck reach, engage, and motivate their employees.

Davis is coauthor of *Your Attention, Please* (Adams Business, 2006) and a weekly web log, “Insights,” at www.davisandco.com/blog. She frequently writes articles for leading business, communication, and HR publications and is a former online columnist for *The New York Times*.

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Shannon is author of *73 Ways to Improve Your Employee Communication Program* (Davis & Company, 2002), which consistently ranks at the top of Amazon's search term "employee communication." She has spoken at many communication conferences hosted by the Council of Communication Management and the International Association of Business Communicators.

Shannon is a member and former board member of CCM and is a former member of the IABC, where she earned local, regional, and international awards. Her work has been recognized with awards from the American Institute for Graphic Arts, the New York Art Directors, and the Philadelphia Art Directors. Her work also has been featured in *Graphis* and *Communication Arts*.

Shannon earned a bachelor of journalism, majoring in advertising, at the University of Missouri-Columbia, where she recently returned to teach as part of the School of Journalism Visiting Professor Program.

Introduction

Effective HR Communication: How to Get Employees to Pay Attention, Understand What's Changing, and Take Action

Your company makes a big investment in designing benefits, pay, and policies to attract and retain the best employees. That's why it's so frustrating when employees don't understand their benefits—or worse, don't appreciate what's available to them.

Employee confusion about key HR issues is all too common. In fact, most employees report that they are dissatisfied with communication about benefits and programs. For example, a 2007 Prudential study¹ found that only 35% of employees rate benefits communication as “highly effective.”

And there's a direct correlation between how well employees understand their benefits, pay, and policies and how much they value and use their benefits. So poor communication leads to low usage, and low usage leads to poor perception. For example, only 44% of employees in a 2009 MetLife study² reported being satisfied with their benefits.

This is obviously a problem. First, workers who aren't knowledgeable can't make smart decisions or take appropriate action. Second, the less they know about pay and benefits, the less satisfied they are.

The MetLife study discovered that 70% of employees who have a strong understanding are happy with those benefits, but when understanding is low, only 7% are satisfied.

What causes employee confusion? A big factor is **poor communication**. Most HR departments generate a steady flow of communication, but employees don't find it effective. In fact, only 33% of employees in the MetLife study strongly believed that current communications educated them effectively. What's even more surprising is that only 36% of *employers* think communication effectively educates workers.

“Help!” Cry HR Managers

HR managers know that communication is a big challenge. We've spent the past couple of years traveling around the country, talking with HR managers about communication issues. Here's what they tell us:

- “We have so much information to get out to employees regarding benefits and other HR-related services. We use e-mail, desk drop, posters, an intranet site, and mailings to homes. People don't have time to read it! Then they call with big issues.”
- “My biggest challenge is reaching employees who work out of town; they don't receive their mail for long periods of time and don't use computers.”
- “I struggle to boil things down to a level everyone can understand.”
- “It's so difficult to get the message across to people who won't read it. It's about benefits and they complain that it's too complicated. ‘Just tell me what to do,’ they say.”
- “I want to engage more employees in learning more about their benefits and attending annual open enrollment sessions. How do I increase participation in info sessions?”
- “How can I provide benefit information or instructions to a group of employees who vary widely in their level of understanding?”

- “It’s hard getting people to understand, not just listen—to get and keep their interest.”
- “I find that employees don’t read the materials. The information is too technical.”
- “I find myself answering the same benefit questions over and over. Aargh!”

Why Don’t Employees Pay Attention?

In a way, confusion about HR programs is surprising: Since employees care deeply about these issues, you’d think they’d work hard to understand them. For example, in the MetLife study, employees say the most important factors affecting their loyalty to the company are

- Salary/wages (83% of employees agreed)
- Health benefits (75%)
- Retirement benefits (72%)

In fact, these priorities rank higher than advancement opportunities (57%) and company culture (50%).

In the past, employees would pay attention to any HR communication that came their way. Even if the communication was long, dense, and difficult to understand—for instance, a Summary Plan Description—employees would do the heavy lifting to make sense of it.

But times have changed. Benefits, pay, and retirement programs are more complex than ever before. And employees today simply don’t have the time to hack their way through a thicket of information—even when the topic matters to them. They’re quick to press the Delete key or file a message for future consideration or simply let it fall to the bottom of the pile. They wait until a deadline is looming—or until an issue is so urgent that it can’t be ignored—before they read the message.

A number of factors can cause a breakdown in communication:

- **Information overload.** Workers are overwhelmed. For instance, the research firm Basex³ estimates that 28%—more

than one-fourth—of an average knowledge worker's day is taken up by managing unnecessary e-mail and instant messages. Another firm, RescueTime, calculates that a worker who sits at a computer all day turns to his e-mail program more than 50 times and uses instant messaging 77 times.

- **Complexity.** HR information used to be simple. There was one healthcare plan, one company-paid retirement program, and a few job-related policies. But today choices abound. Complexity is the order of the day. It's no wonder that 55% of U.S. healthcare plan members don't fully understand critical details about their insurance coverage, according to a 2008 study by J.D. Power and Associates.⁴
- **Employee attitudes.** In a business environment where layoffs occur often, it's no surprise that employees don't have the same sense of loyalty and connection to their companies as they used to. So they view any "corporate communication" not with enthusiasm, but with caution at best or skepticism and distrust at worst.
- **HR's reputation.** In many companies, employees have had negative experiences with HR—and with HR communication. For example, in focus groups we've conducted, we've heard employees give feedback like this:
 - "HR doesn't respect my time."
 - "HR communication includes way too much jargon."
 - "HR isn't interested in me; it's all about pleasing senior management and cutting costs."
 - "Here comes another takeaway."

What's Wrong with This Picture?

Created (or at least approved) by subject-matter experts, HR communication often offers technical information in a dense and thorny presentation—a veritable maze of information. And when it's vetted by lawyers, you'll find caveats and disclaimers that create another barrier to understanding.

Perhaps even worse, most communication seems designed to appeal to management by using language and tone more suited to the corner office than to the cubicles where most employees work. As a result, employees tell us that too often they find communication confusing, inconvenient, irrelevant, and just plain annoying. They also say they're unclear about what action to take and how to get their questions answered.

A Fresh Approach

It doesn't have to be this way. We've discovered that communication can meet all its obligations (to lawyers, the government, and company management) while appealing to employees. From decades of experience, we've developed a communication approach that interests employees, persuades them of the value of a program or policy, and helps them decide on the course of action that is best for them (and their company).

Our approach is simple: **treat employees as customers** of HR benefits and services. We use the same strategies, tools, and care your company uses to sell your products or services to your customers. We learn all we can about employees (age, years of service, education, job family, location, salary, and more), and we learn from employees themselves how, when, where, and from whom they like to receive information. We determine the specific information that employees need and when they need it. Then we package the information for them in ways that make it easy for them to understand and make good decisions in a timely way.

Here's an example of what we mean:

BEFORE**Here's what the client wrote:**

In line with our company's increasing decentralization, enhanced processes and tools to support mobility are expected to increase staffing flexibility and improve opportunities for career growth. These enhancements include identifying staff members who are ready for mobility, providing greater transparency on opportunities and options for mobility and offering improved benefits for temporary assignments.

AFTER**Here's our edit:****Helping you build your career**

We're helping you build your career—while we're helping the company meet customer needs—with new ways to work, including temporary assignments, that will

- Identify when you're ready to move into a new job
- Communicate clearly and quickly your opportunities and options when you relocate
- Provide improved benefits when you take a temporary assignment

When what you write (see BEFORE) sits there like a block of gray granite, it's hard to read, whether it's on the screen or in print. When the language isn't conversational—doesn't talk directly to the reader—it's harder to figure out “what it means to me” as the reader. Effective HR communication, on the other hand, makes information accessible, easy to understand, and useful.

As a result, employees know what they can expect from the company, and they know what the company expects of them.

When you create effective HR communication, you

- Help employees take advantage of all the benefits and programs the company offers
- Make it easy for employees to understand and use benefits and programs effectively
- Answer most of the questions employees have about company benefits, programs, and policies

How This Book Can Help

This book shows you how to communicate differently and more effectively. Even if you're already doing a great job, we can help you improve.

First, we provide practical tips on how to take communication from boring to compelling. Then we give you advice on how to communicate in these common situations:

- Recruiting
- Orientation
- Policies
- Benefits
- Compensation
- Performance Management
- Saving for Retirement
- Leaving the Company

Along the way, we do the following:

- Supply evidence that will impress senior managers and convince them that you need to change your approach to engage employees successfully.
- Provide an approach that you can use every time you craft a brochure, web page, electronic newsletter, or even a brief e-mail.
- Give specific techniques for how to communicate in a more accessible way, including breaking your points into digestible chunks; signaling what is ahead in your text (with packaging devices such as subheads); and giving your audience all kinds of other tools—such as charts, checklists, and captions—that allow skimming and scanning.
- Show examples of good communication (and explain why it works) and bad (and offer advice on how to make it much better).
- Practice what we preach by demonstrating our strategies and techniques throughout the book.

We also bring in examples from real companies to make the business case that demonstrates how to communicate more effectively. As a result, you'll learn how to

- Communicate faster, more efficiently, and more effectively.
- Help employees take advantage of all the benefits the company offers.
- Make it easy for employees to understand and use benefits effectively.
- Answer most of the questions employees have.

Doing It Right Means a Better Bottom Line

What's in it for your company if you read this book and follow the advice presented here?

The bottom line is simply this: **Good HR communication helps contribute to employee productivity, which in turn boosts your company's profitability.** There's a good reason to turn the page.

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1

Know Your Employees

In this chapter, you learn

- *Why it's important to know your "employee audience"*
- *What demographics can reveal about employees*
- *How to learn more through focus groups and other qualitative research*

If you were to enroll in a college course on marketing, the very first rule you'd learn is this: "Know your audience." That's because the most effective way to reach people—and to motivate them to take action—is to understand who they are and what they need.

This may sound basic, but assessing employees is a step that's often skipped in HR communication. We plunge into creating communication without thinking about the people we're creating it for. Even worse, we assume that employees are just like us, taking for granted that the ways *we* like communicating will work equally well for employees in a variety of jobs, geographies, and functions.

Like many assumptions, this one is dangerous. It leads to these kinds of communication mistakes:

- Using terms such as "competencies" and "salary structure" that make perfect sense to HR experts but that mean nothing to employees.
- Telling the entire history of how a program was developed, when employees just want to know what's changed and what they need to do about it.

- Failing to make connections or put topics in context. You know that “compensation” consists of different elements such as base pay, bonuses, and stock options, but employees may not understand that the individual pieces add up to something called “compensation.”

“People only understand things in terms of their experience, which means that you must get within their experience.”

—Saul D. Alinsky, *Rules for Radicals: A Pragmatic Primer for Realistic Radicals*¹

How can you make sure you truly know your employee audience? We recommend that you start by analyzing your **employee demographics** and then conducting **qualitative research**—such as focus groups—to explore communication needs and preferences. This chapter shows you how.

What Demographics Can Reveal About Employees

Back when we started our careers (a long, long time ago), the subject of demographics rarely came up, mostly because there was very little to talk about. After all, the employees at most U.S. companies were mostly homogenous: mostly male, mostly white, mostly all from the same region, with similar backgrounds, accents, values, and aspirations.

Obviously, the workforce has changed. For example, in the United States, the newest generation entering the employment market, the Millennials (born between 1980 and 2000), represents a much more diverse group than the previous two generations. Some 40% of Millennials are black, Latino, or Asian, compared with a total of 25% in both of the previous two generations (Generation X and the baby boomers).

This is just one reason why it's become so crucial to conduct an analysis of your workforce demographics periodically.

dem-o-graph-ics

The characteristics of human populations and population segments, especially when used to identify consumer markets: *The demographics of the Southwest indicate a growing population of older consumers.*

—Houghton Mifflin dictionary

What You Can Learn from Demographics

Demographics offer a way to distinguish and describe characteristics of a population to determine what sets that segment apart. Although not a foolproof predictor, demographics are so valuable that it's surprising that HR professionals don't always have employee information at their fingertips. Everyone typically knows how many employees work at their company, but you also need to know other important facts about your employees:

Key employee demographics:

- **Where** are your employees located?
- What is the average length of **employee service**?
- How are your employees divided in terms of **age**? **Male/female ratio**? **Ethnic mix**? **Educational level**?
- What is the median **salary** for all employees? What are the salary ranges for different job families, businesses, and locations?
- How many employees fall into each **pay/job grade** or **job/functional category**?
- Which primary **languages** do your employees speak? For what percentage of your employee audience is English a second language?

- How many employees support **dependents**? On average, how many dependents do they have?
- How many employees have **computers** at work, easy access to the company intranet, and e-mail accounts?
- Can employees take time at work to **attend meetings about HR programs**, services, and products? Do meetings need to be held before or after work or at lunchtime? Do employees need to be paid overtime to attend these meetings?
- What percentage of your employee population belongs to a **union**? How many unions are represented at your workplace?
- How many employees are also **customers** of your company? How many are also shareholders in your company?

Your employee demographics will give you valuable insights into almost every aspect of communication, especially the following:

- **What** to communicate (content) and what examples will resonate with your audience.
- **How** to communicate (for example, print, electronic, or face-to-face).
- **When** and **where** to communicate.

For example, your company's medical plan enrollments will show you what percentage of your population has children. This is important to know when you're communicating about many topics, such as medical benefits, life insurance, savings, time off, and flexible work arrangements. Understanding how many employees have families also helps you know when to communicate. For example, meetings before or after work may be difficult for some employees to attend.

"Demographics explain about two-thirds of everything."

—David K. Foot, professor of economics at the University of Toronto and author of *Boom, Bust & Echo: Profiting from the Demographic Shift in the 21st Century*²

Learning from Key Facts

Here’s an example of how a demographic analysis can create insights about how to make communication more effective. (This is based on an actual company, but some of the facts have been changed to protect confidential information.)

At a global healthcare company, the Benefits and Compensation group asked the Payroll department to provide a demographic report (which in this company was called a “headcount report”) on employees.

Here is what Payroll provided:

Global employees	25,164
U.S. employees	13,043
Exempt U.S.	9,133
Exempt non-U.S.	7,782
Nonexempt U.S.	3,910
Nonexempt non-U.S.	4,339
Employees in corporate	322
Division 1	1,550
Division 2	1,716
Division 3	21,576
U.S. employees earning less than \$70,000	7,229

This data is hardly exhaustive, but the Benefits and Compensation manager still learned a few things from these demographics:

- Nearly half the employees work outside the United States. That means it’s likely that a portion of these employees speak English as a second language (or don’t speak English at all); therefore, communication needs to be simple, and some messages may need to be translated.

continued

- A small percentage of employees (1.2%) work in corporate headquarters. There's often an inclination to design communication to appeal to internal clients at corporate (including senior management), but doing so may mean it doesn't meet the needs of the majority of employees.
- Since Division 3 is disproportionately large, it may get the lion's share of attention. But the communication needs of employees in the other two divisions must be considered as well.
- There's a bit of interesting information about income (55% of U.S. employees earn less than \$70,000), which may be useful in thinking about communicating compensation and certain benefits. It may be even more helpful to obtain a more comprehensive breakdown of income levels, if Payroll has the data available.

Four Key Demographics to Explore

Are you ready to take a closer look at your company's employee demographics? Since most of us have limited time and budgets, we can't consider every detail. But you should think about four critical categories: geography, years of service, age, and salary.

Geography

Even in this age where electronic communication breaks down boundaries, geography still matters. Where a person lives and works rates as an important part of his or her identity.

Gather the following demographic data on geography:

- Your organization's geographic scope: Pinpoint all the locations on a map of the country or the globe, and see how your organization is distributed.
- The number of employees who work at headquarters and other major locations.
- Remote locations: how many employees work at small facilities.

- Field employees (such as sales representatives), work-from-home employees, and client-located employees.

Years of Service

How long employees stay with an organization has both practical and cultural implications. A stable employee population has a long memory, which can be a positive (strong company heritage) or a negative (still seething over something that happened years ago). By contrast, if turnover is high, employees need to ramp up quickly on procedures and culture, and this information needs to be refreshed frequently.

Gather the following demographic data on tenure:

Length of Service	Percentage of Employees
Less than 1 year	
1 to 3 years	
3+ to 10 years	
10+ to 20 years	
20+ years	

The 401(k) Challenge

A potential client once asked us for recommendations on how the company (a warehouse-type retail operation) could get higher participation in its 401(k) savings plan.

After asking a few questions about employee demographics, we learned that most of the company’s employees were young, received minimum wage, and didn’t stay with the company for the required one year of service needed to be able to participate in the 401(k) plan.

With demographics like that, it would take a lot more than a memorable communications campaign to boost participation numbers. Automatic enrollment at date of hire (plus some kind of company

match) could raise the percentage of participating employees—but to what avail if most were leaving before a single year of employment?

This is also a great example of a “communication challenge” that actually is a problem that communications probably can’t fix. Before launching into any new programs to increase 401(k) participation, this company needs to find out why employees are leaving before completing a year of service, and what, if anything, the company can do to reverse this trend.

Age

Here’s a demographic term for you: “generational cohort.” This is “the aggregation of individuals who experience the same event within the same time interval.” Sociologists and marketers use terms such as “baby boomers” and “Gen Xers” to describe groups of people bound together by broad shared experience.

This is important for two reasons:

1. Our attitudes are informed by how old we are and by the generation in which we grew up, including the movies we saw, the music we listened to, and the world events we witnessed.
2. How people experience communication continues to be influenced by age.

For example, many baby boomers who remember where they were when President Kennedy was shot vividly recall all those workdays before computers and e-mail (the days of the printed memo). Many still aren’t completely comfortable with the latest in technology. Workers younger than 40 grew up using technology, and most master new channels with ease.

Gather the following demographic data on age:

Birth Years	Generational Cohort
Before 1945	Seniors (also known as the Greatest Generation and the Silent Generation)
1946 to 1964	Baby boomers
1965 to 1980	Generation X
1980 to 2000	Millennials

Salary

Along with geography, age, and years of service, salary also ranks as an important demographic, especially when you’re communicating about any financially based plans, such as savings plans, retirement plans, or stock purchase plans.

You’ll want to show examples of how these plans would work for people earning at various salary levels. It’s a good rule of thumb to show examples beginning with a number less than the low end of your company’s salary ranges and then include numbers that can easily be multiplied for your top earners. There’s no need to reinforce pay differences between lower-level workers and executives. You should show how everyone, no matter what his or her salary is, can participate in savings and other financial plans.

Gather the following demographic data on salary:

- Percentage of workers paid by the hour. Depending on your company, you may have different levels of hourly workers. For example, retail employees are often paid near minimum wage, so their pay is much lower than experienced hourly workers at a unionized manufacturing plant.
- Percentage of exempt salaried workers.
- Employees in various nonexempt bands, from new hires to executives.

A Detailed Profile

At a telecommunications company, we worked with HR and employee communication teams to develop a comprehensive analysis of employee demographics by division. Here’s an overview of the data:

Division	Consumer	Business	Network
Number of Employees	3,100	1,500	8,600
Geography	18 locations 65% of employees are in OH, MI, MN	23 locations 70% of employees are in KS, NE, MN	19 locations 47% of employees are in OH and MN
Jobs/Levels	15% exempt 75% nonexempt 10% union 67% in customer-facing jobs	53% exempt 47% nonexempt 72% in customer-facing jobs	20% exempt 17% nonexempt 63% union 61% in customer-facing jobs
Average Age	37	44	49
Average Length of Service	7 years	12 years	22 years
Gender	58% male, 42% female	36% male, 64% female	79% male, 21% female

Since this data is more complete, it offers a number of insights:

- Employees in the Network division are older, have the longest length of service in the company, belong to a union, and are predominantly male. These guys are likely to prefer print communication over electronic channels.
- The Business division is a different story: It is mostly exempt employees, and mostly female. These employees use a computer every day for work but may have limited time while on the job to pay attention to HR communication, since they’re interacting with customers.

- In all three divisions, in fact, the majority of employees are customer-facing. This limits the amount of time they can spend on communication.
- Geography is a factor: Employees are spread out across many different locations throughout the Midwest. That makes face-to-face communication challenging, but it can be worth the investment if the issues are important enough.

Use Focus Groups to Explore Needs and Preferences

As you can tell, we're big fans of demographics, agreeing with David Foot that they explain "two-thirds of everything." But to really get inside the minds of employees, you need to go further and talk to them. The best way to do so is to conduct focus groups.

Why focus groups? This proven research method—widely practiced by marketers, scientists, and other professionals since the 1920s—can help you do the following:

- Explore an issue.
- Test a concept.
- Follow up on the launch of a program to see how well it was understood or received.
- Find out why employees answered a survey in a certain way.

Focus groups are a form of qualitative research that explores an issue in depth, allowing people to express their opinions and engage in dialog. Unlike quantitative research (such as surveys), qualitative research does not provide statistical data. Yet qualitative research is considered a scientifically valid tool that yields valuable insights into what people perceive and believe.

In addition to focus groups, types of qualitative research include one-on-one interviews (often used when the topic is personal or sensitive, or when it's logistically difficult to bring people together) and

user testing (observing a person while he or she completes a task, such as visiting a website or completing a form).

Focus groups are ideal when you need to explore a topic in an open-ended way, since you can dive deeper and ask follow-up questions. If you need to ask, “Why is this true?” or “What does this mean?”, focus groups are the right research method.

Although focus groups can seem deceptively simple to manage—“All you need to do is gather employees in a conference room and start talking, right?”—experts know that this research method is more complicated than meets the eye. That’s why HR professionals often turn to research firms or external moderators to assist with focus group studies.

Guidelines for Conducting Focus Groups

If you decide to manage your own focus groups, several good books provide how-to information:

The Focus Group Kit by David L. Morgan and Richard A. Krueger (Sage Publications, 1997)

How to Conduct Employee Focus Groups by Joe DeLuccia, Kimberly Gavan, and David Pitre (Davis & Company, 2009)

Moderating Focus Groups: A Practical Guide for Group Facilitation by Dr. Thomas L. Greenbaum (Sage Publications, 1999)

We can’t give you a complete recipe for conducting focus groups. But we believe three factors will help you plan a focus group study: set objectives, develop a discussion guide, and choose participants.

Set Objectives

Your first step is to set objectives, which articulate—in a disciplined, focused way—what you’re trying to learn as a result of your focus group research. Objectives provide a framework to answer the

question: What am I willing and able to change as a result of this research?

Setting objectives begins with creating a thesis, a statement that summarizes what you're trying to accomplish.

The thesis can be expressed as statement ("Employees seem to be just going through the motions in the performance management system, instead of participating fully.") or as a question ("How will employees react to the new retirement program?"). In either case, the thesis articulates the core reason you're engaging in focus groups.

After you've nailed down the thesis, use it to create no more than three objectives.

Executive Compensation

An HR team created the following research thesis: "We suspect that leaders don't understand how compensation works. Is that true, and, if so, how does that lack of understanding affect leaders' perception of the pay system?"

The team then developed these objectives for a focus group study:

- Determine how well leaders understand the compensation program overall.
- Assess the perceived value of specific components.
- Test and validate new plan concepts.

Develop a Discussion Guide

As soon as your objectives are set, you're ready to develop a discussion guide, which is the term used by researchers to describe the document—part script, part outline—that the focus group moderator uses to facilitate the session.

To create a discussion guide, think about the two or three main things you want to learn. For example, if your thesis involves finding out what employees think about a change to disability plans, you could explore these categories:

- Employees' understanding of the current plans
- Their reaction to planned changes
- How they would like to learn about changes

Once you have your main categories, think about the key questions for each category that will help your moderator discuss the issue with participants. Avoid the temptation to create a long list of questions. The idea is to give the moderator a sense of structure, not to script every word he or she will say.

Sample Discussion Guide

The following is an example of a simple discussion guide used in a one-hour focus group designed to explore how employees were perceiving the current HR program.

Study Objectives:

Inquire about HR communication needs and preferences, find out how employees are using the HR website, and get employee reaction to recent communication regarding the new benefits plan.

Discussion Outline:

A. Introduction/manage expectations

- Explain why the focus group is being held, along with ground rules for participation and what to expect.

B. HR information needs and preferences

- How do you currently get information about benefits and other HR programs and policies?
- Do you feel well-informed about your benefits?
- What would you like more information about?

C. Use of HR website

- Do you currently use the company's HR website?
- What do you use it for?
- Do you find the information useful?
- What, if anything, would you change about the site?

D. Reaction to recent HR communication

- Did you receive the recent message from HR about the new medical plan?
- What was your reaction to the message?
- How did it make you feel?
- What, if anything, would you change about similar messages in the future?

E. Close

- Thank you/next steps.

Choose Participants

Most focus studies involve a limited number of participants. For example, even a large study might engage fewer than 100 people from an overall workforce of 10,000 employees. Because the sample is so small, it's critical to be smart about how participants are selected and to work hard to encourage selected employees to participate.

The best way to select participants is to use a method called “purposely selected” sampling. This consists of deciding on your criteria and then finding people who meet these criteria. This is different from the random sampling used for surveys, and it's a far cry from the casual way in which focus groups are often put together—inviting only people you know.

For example, if your thesis is “How do employees regard the current benefits program?”, your sample would be benefits-eligible employees. You then can decide if you'd like to segment subgroups. When Alison's firm conducted focus groups to gather feedback on an executive pay program, the sample was all executives, but participants were grouped by level: junior and intermediate executives into one set of focus groups, and senior executives into another.

Guidance on Selecting Participants

Using your demographic data as a foundation, answer these questions to jump-start your thinking about who should participate:

- How is your employee population structured? What are the main demographic groups? Do you need to segregate various sets of employees (manager/nonmanager, bands/levels, or new employees versus long-timers)?
- Where are your major locations? Should your sample reflect important differences between locations? For instance, do you have large facilities and small ones, locations in the United States and in other countries, warehouses versus retail establishments?
- What groups will your company management expect to see represented in order for them to feel comfortable about what you learn in the focus groups? Asking this question can potentially direct you to include a small but important employee group in your research.

First decide on criteria, and then find people who meet those criteria.

Checklist for Knowing Your Employees

- ✓ Consider who's in your employee audience before beginning any communication program.
- ✓ Gather data on where your employees work to understand their geographic demographics.
- ✓ Use data about length of service to influence the depth of information you provide.
- ✓ Understand how “generational cohorts” shape how employees think, behave, and prefer to receive communication.
- ✓ Compile salary data to inform communication, especially about pay, savings, retirement, stock, and other financially based programs.
- ✓ Use focus groups or other qualitative research methods to explore employee attitudes, experiences, and preferences.
- ✓ Before conducting focus groups, be clear on the objectives of your research to ensure that your study is structured to achieve those objectives.

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