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Best practices, case studies and strategy

There are many simple and inexpensive ways to test messages before launching change initiatives

HOW BANK OF AMERICA TESTS ITS MESSAGES

At Bank of America, testing the impact of communications before and after delivery helps practitioners anticipate employee reaction to change campaigns. Here, Andy Szpekman shares some simple and inexpensive measurement ideas.

At Bank of America we measure change communication campaigns at three points in the cycle:

- Gathering input to formulate a communication strategy.
- Pilot testing deliverables before broad distribution.
- Gauging results when the campaign is over.

Gathering input

At the first stage of measurement, your goal is to understand your target audience's knowledge, attitudes and beliefs. Without this, it's tough to formulate an effective communication strategy. Focus groups work well for this type of measurement. Issues to explore are:

- **Knowledge of the current state:** How well does your audience understand what happens today? Is change likely to be a big deal or hardly noticeable?
- **Feelings about the current state:** Is your audience positive, neutral or negative about what they have now? How will they react to something new?
- **Advice on communicating the change:** What information would influence people's perceptions? What's the best way to deliver this information?

Pilot testing

A pilot test is simply a focus group designed to ensure messages hit their mark. Ask questions such as:

- Are the desired messages coming through?
- Are instructions and action items clear?

- What would make the communication more effective?
- Does the communication strike the right tone?
- Do messages make people feel the way you expected them to?

It's tempting to skip pilot testing – given time and budget constraints – but it's critical. Generally, the people who create and approve communication deliverables are staff employees and senior executives – people far removed from the information needs and workplace realities of the audience.

Testing messages with recipients can head off potential problems with a measurable financial impact. If employees are confused by an HR communication, for instance, they might call an HR call center. At Bank of America, such calls cost the company about US\$5 each. With more than 130,000 associates, confusing messages can create major costs.

If you don't have the budget for full-fledged focus groups, even an informal "hallway test" with a handful of people can yield rich insights, and costs nothing.

However you gather research, here's a few suggestions:

- Give participants the communication and instructions ahead of time. Ask them to note anything they find confusing.
- Don't reveal the desired messages, feelings or actions. Just ask participants how they feel about the message and what actions they believe are now required of them.
- Identify the root causes of feedback and generalize the findings. For example, if someone likes the call-outs and captions it might be because they usually skim corporate communications.

Gauging results

The key here is to focus on audience results (new behaviors, acquired knowledge, changed perceptions), not communication activities. What really matters is what happened or didn't happen as a result of communication.

Short telephone or Internet surveys are good for gauging results because they enable you to reach a broad representative sample. Below is a suggested approach.

- Plan a survey that takes less than five minutes to complete over the phone or Web, not more than seven questions.
- Draft clear and specific questions matched to your target audience's likely level of understanding about the topic.
- Hallway test your questions with a few people who had nothing to do with the communication campaign.
- Administer the survey.
- Correlate survey results with anecdotal evidence. Ask managers in the field what they have heard. Is their experience consistent with survey findings?
- Compare survey results to business outcomes. If the goal was to increase participation, did participation actually go up?

Measurement need not be elaborate or costly to offer significant value. If you get creative, you'll probably find ways to gather information through informal means or by tapping into existing surveys or programs. The results will help improve change messages.



Andy Szpekman is in charge of HR communications at Bank of America. He leads the corporate team responsible for internal and external communication concerning compensation, benefits, career and professional development, work force diversity and other HR issues.