

Planning an effective internal communications strategy

7 templates for communications
and HR professionals

firstup

Impactful internal communications require strategic planning

An effective internal communications plan is vital to the success of your communications and your organization. Whether you're new to planning or just need to update your existing employee communications plan, a step-by-step approach can make the process more manageable—and the outcomes more successful.

We've got your back!



In this guide, we'll lay out a simple, actionable process you can use to plan, tailor, test, and optimize communications for every segment of your workforce. We've also included an internal communications template to help you jumpstart and refine your plan.

Manage and track your planning

We've assembled a handy five-step list to make getting started easier.



GOALS & KPIs

- Define your team's goals.
- Map those goals to your company's KPIs.
- Clearly state how you will measure your goals.



ASSESS YOUR AUDIENCE

- Segment your audience by interest, role, geography, etc.
- Study which content or formats work best.
- Determine if there are gaps you should fill.



TEST YOUR CONTENT

- Run experiments to test your ideas.
- Review your data—gauge employee response.
- Document any insights you gleaned.



PLAN YOUR CAMPAIGNS

- Think through the comms cadence and frequency.
- Plan for new formats like video or animated gifs.
- Match campaign ideas with target segments.



SET YOUR PLAN FOR MEASUREMENT

- Gather all your data and insights into one place.
- Schedule a team meeting to review them.
- Create a performance report you can share.

Establish your goals and KPIs

Today's superstar internal communications (IC) pros don't launch new programs or content without first mapping goals and developing a strategy to measure success with data and metrics.

If you're new to the goals/data/metrics trifecta, you're not alone. Firstup has helped many clients identify the right approach to reach the right groups of employees with the right content at the right time and place. Your data-driven strategy should also include a plan to measure your success so you can prove your value to the executive team and gain insights to help you build future IC campaigns.

Find out your company's strategic objectives or goals. Once you know your company's objectives, choose internal communications goals that support them. For example, if one of your company's priorities is to retain frontline employees, and HR is running a development initiative to help with that, you could make it a goal to raise awareness of the initiative and encourage employees to participate. Based on your goals, choose your Key Performance Indicators (KPIs), the measurements that indicate whether you've succeeded at each goal.

On the next page

WE'VE PROVIDED AN EASY-TO-USE TEMPLATE TO GUIDE YOUR GOAL SETTING.



Goals Setting Template

ORGANIZATION GOALS What are your company-wide objectives?

COMMUNICATION KPIs What is best for your department and organization?

COMMUNICATION CAMPAIGNS Add your **new** campaigns or activities.

GOALS Define what success looks like.

ACTIVITY #1 What are your upcoming / current communications activities?

CHANNELS What are the most effective channels for your campaign?

WHICH EMPLOYEES ARE AFFECTED? Groups you are trying to reach.

HOW WILL I KNOW IF IT IS SUCCESSFUL? Form success into a ratio.

WHAT TO MEASURE? Each channel uses different metrics.

WHEN TO MEASURE Create a cadence for your metrics.

Assess your audience

Understanding your employees by studying data about them takes the guesswork out of strategy building, and helps you deliver a seamless, tailored employee experience (much like a customer experience). In this digital age, the one-message-for-all model is no longer effective, so customizing your content to your viewers and readers is an absolute must.

Assessing your audience involves a few simple steps.

First, create employee personas and learn what different groups of workers value. Employee personas allow communicators and HR professionals to understand:

- What **employees are looking for** on a day-to-day basis
- What they need to **achieve their goals** and thrive
- How multiple groups or individuals are **different and similar**



Second, after you've created personas for all your target employee groups, study which communication format would work best for each group, such as video, engagement apps, email, etc. This will help you create a multi-channel approach that will connect with employees, no matter their geographic location or department.

Employee Persona Template

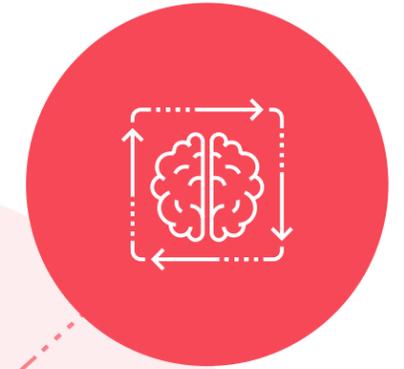
EMPLOYEE Name and Position

BACKGROUND / BIO

GOALS

CHALLENGES

SKILLS



This simple **employee persona template** can help you create archetypes for your audience makeup. **To fill it out**, choose an employee to represent each group within your workforce, then enter the available data about them into the template.

Test your employee communications plan

Improving internal communications requires some experimentation. That's why it makes sense to test your employee communications plans before you launch them. Tests will provide you with metrics, which you can track to see if your tests were successful. This insights-driven method will help you determine what's best for specific groups and help you achieve your goals.

To develop your testing, consider what content has worked in the past, and what hasn't. Based on that experience, brainstorm a list of experiments with your team; for example, perhaps you are considering using video content for the first time, or want to test how much engagement you get with list-style blog posts compared to your standard format.

Next, you'll need to come up with a hypothesis for each experiment; this should include your prediction, the metrics you'll use to test it, and any variables that could affect the test. For example, your hypothesis could be that blog posts with a number in the title will increase your number of views by up to five percent. In this case, number of views would be your metric, and the channels you share your post on would be your variables.

Finally, determine how long you will gather data—now you're ready to run your experiment. When the experiment is complete, note down the results and use them to decide which strategies and ideas you'll include in your communications.

Now let's experiment!

ON THE NEXT PAGE USE THE TEMPLATE FOR TRACKING YOUR EXPERIMENTS AND RESULTS.



Experiments Tracker Template

EXPERIMENT LOG	HYPOTHESIS				OUTCOME
Description	Status	Metric	Variables	Prediction	Results

Plan your initiatives and programs

Internal communications programs and campaigns involve lots of moving parts, and you'll need to stay organized.

First, think through your workplace communications cadence and frequency. Incorporate new formats like animated gifs and video (which have a three-times higher click-through rate than written content), and then match initiatives with target segments.



Create a calendar for scheduling programs and campaigns throughout the year; this will help you align around your organizational objectives and corporate calendar so you can target key events like town halls and quarterly meetings.

Based on your calendar, break down individual deliverables and assign team members; periodically, check their status to stay on schedule with your planned release dates.

Program & Campaign Planning

Create an internal communications calendar to plan your cadence throughout the year.

**THIS TWO-PART TEMPLATE CAN HELP YOU
CREATE YOUR BROADER PLAN AND ITEMIZE KEY
CAMPAIGN DELIVERABLES.**

COMMUNICATION TYPE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Employee Survey												
Town Hall Meetings												
Birthday / Anniversary Recognition												
Mobile Content												
Team Huddles												
Digital Signage												
Other												

DELIVERABLE / VEHICLE	OWNER / SENDER	DUE DATE	RELEASE DATE	STATUS

Set your plan for measurement

As you select the best channels for your programs, choose the right metrics to measure their efficacy. For example, if you're publishing content on your company's employee app, you'll track post engagement, shares, and impressions.

Collect your data and insights into one place, and review regularly (weekly, monthly, or quarterly). When you present results to stakeholders, use the power of storytelling to give context to your data; this will help you prove your team's value.

1
**TO START
SET GOALS AND KPIS**

Always set your goals and KPIs when you start a project. Then you know what success looks like. Choose the right channels and vehicles for your initiatives, and determine what can and can't be measured via that channel.

2
SEGMENT YOUR AUDIENCE

Segment your audience and create targeted, personalized content. Employees are informed and activated when they receive relevant content and information, and our **survey** found that targeted content had higher engagement than other forms of communications.

5
REPEAT

Measurement is not a one-and-done process. It is a continuous series of checks and balances to make sure you're on the right path to improvement. And don't be afraid to make mistakes—that's how you learn and improve on your important work.

4
**CREATE REPORTS & SHARE WITH
TEAM MEMBERS & LEADERS**

Collectively learn from your content's performance, and decide together on the best plans of action. Look back on your goals and objectives, and prioritize what's next. Without these metrics, you're in the dark.

3
**MEASURE DAILY, WEEKLY,
REAL-TIME IF POSSIBLE**

As you gather your data, you'll capture insights from them. This is where a data analyst could help you understand the insights and turn them into a story, so people will better understand your results and action plans.

Measuring internal communications is a learning process that is always changing. What works today might not work tomorrow.

Metrics Tracker

Use this simple template to determine and track your metrics.

CHANNELS	MONTHS			Q1
What channels are you planning on using?	MO 1	MO 2	MO 3	Results



REMEMBER, YOUR COMMUNICATIONS CHANNEL AND VEHICLES DETERMINE HOW YOU'LL MEASURE—BECAUSE EACH CHANNEL IS MEASURED DIFFERENTLY.

For example, emails use metrics like open rates, click through-rates, and unsubscribe rates. If you're using your branded communications app to send content, your metrics would be content engagement measured with likes, comments, and shares.

Putting it all together

Knowing where to start with your communications can be a challenge. We're here to help and give you some direction.

This is a game changer!



On the next page, we've put together a sample internal communications plan so you can see how all the parts of the planning process come together.

Sample Internal Communications Plan

TEAM GOALS

- Convert earnings reports to video.
- Translate content for the French and German employees.
- Focus on optimizing content for mobile.

COMPANY KPIs

- Increase overall employee understanding of business.
- Align international offices with company goals.
- Increase employee engagement by 30% over 12 months.

EXPERIMENTS

- See if more people will watch the CEO holiday video if he films and publishes from Tahiti.
- Publish product team training across all channels (versus email only) to increase response rates.
- Test push notifications for holiday party reminders.

CAMPAIGNS

- New Year's message: CEO video.
- February product launch: Q&A with the product team.
- March Town Hall: Develop mobile agenda and update outreach strategy.

OFFICE

PRIMARY ROLE

COMM PREFERENCES

France	R&D, manufacturing	Hearing from CEO, video content
Germany	EMEA sales	Product launches, business goals, mobile content
U.S.	HQ, varying age ranges	Employee recognition, UGC, email

MEASUREMENT: PERFORMANCE REPORT

ENGAGEMENT	METRIC
Top performing content	# of interactions
Top channels	Type (likes, shares, comments)
Best-performing content	Most active employees, by segment

About Firstup

Firstup is redefining the digital employee experience to put people first and lift companies up. We make communication solutions that build authentic engagement and create two-way conversation between employees and companies. Our powerful orchestration engine connects every worker, everywhere, on any device with personalized information that helps them do their best work. That's why 40% of Fortune 100 companies like Amazon, ABInBev, Ford and Pfizer have chosen us to power their frontline, simplify their digital workplace and unlock the potential of their workforces.

LEARN MORE AT [FIRSTUP.IO](https://firstup.io)

