

## MODULE 5

### Transforming BEHAVIOUR



Change Lever 1:  
Communications & Engagement

## WHAT IS COVERED IN THIS MODULE?



Creating impactful and targeted comms and engagement content to ensure stakeholders receive the right information, at the right time, in the right way



Ensuring communications are an effective and consistent channel through which critical information and knowledge are reinforced



Addressing the needs of particular stakeholder populations through effective use of user journeys and/or personas

## WHAT ARE THE DEPENDENCIES?



Completion of a detailed Change Impact Assessment with proposed responses



Completed stakeholder assessment and proposed engagement approach



A clear view of critical programme milestones in order to inform comms planning

# The 4 fundamental change levers

Creating lasting change



Modules 5 – 7 will guide you through how to best utilise the change levers that you have at your disposal in order to bring about the transformation that you require. The decisions you take here will largely depend on the scope and scale of your programme, however, an understanding of the core change levers is critical for executing change effectively.

## CORE CHANGE LEVERS:



**1. Communications & engagement**

The focus of this module



**2. Training & learning**



**3. Leadership role modelling**



**4. Change Ambassadors**

# What is the purpose of comms and engagement?



Comms play a critical role in building commitment

The purpose of communications, commonly referred to as 'comms', is to engage people in the programme to either inform, educate, or direct them to a specific call to action. Comms activity is essentially about ensuring all internal and external stakeholders are engaged at the right time, with the right information, in the right cultural context, in order to support programme objectives.

## Approach

### To build and execute an effective comms plan you need to:

- **Understand your audience** – refer to your stakeholder assessment activity and consider both external and internal stakeholders
- **Create your core messages** – based on your programme vision, the case for change, and your change impact assessment. This messaging can help to form the basis of all comms content. You should aim for a list of 4-6 core messages which describe the value of the change, why it's needed, and how it will be implemented
- **Identify your primary channels and agree frequency** – you will need to speak with different stakeholders to identify which channels will be most effective for which groups and what timing considerations you may need to take into account
- **Agree accountabilities and governance** – for drafting, reviewing, approving and delivering comms
- **Create impactful comms content** – making use of multiple mediums, such as videos, interviews, newsletters, etc.
- **Set up an evaluation approach** – in order to monitor and review effectiveness of activities and amend plans as needed
- **Provide a means for two-way communication** – enable employees to provide feedback and ask questions
- **Identify senior leadership review opportunities** – you should seek senior-level input and buy-in for your comms plan once drafted and at regular intervals to ensure leaders are aligned with the approach and messaging
- **Create a summary and detailed view** – it is helpful to maintain both a 1-page summary view as well as a detailed version of your comms plan. The summary view can be shared with leadership as required to provide an update on comms

# Outcomes achieved through effective communications

Building understanding and commitment to the change



## Effective communications will:



### Build awareness, create commitment and drive action

Communication is as much about building understanding and commitment over time as it is about driving necessary action. Good communications ensure different stakeholders receive the information they need to know at the right time through channels and mediums that work for them in order to support lasting commitment to changes.



### Reinforce your programme vision and strategic objectives

Consistent communication helps to reinforce the overarching rationale for the change and the value expected from it.



### Help to build alignment amongst leaders

Leaders should be the 'face' of key communications since they have the greatest influence. When leaders are supporting the communications process, they are both demonstrating commitment to the change as well as strengthening their own cohesion as a group around important messaging.



### Create an opportunity for two-way communication

Good engagement is a two-way street. When programme messaging is clear and consistent and opportunities for stakeholder feedback are made available, stakeholders are more likely to feel at ease with sharing views and asking questions. Feedback enables you to further refine and tailor your approach to ensure it's landing effectively.

# Effective comms can make or break a change programme!



## Best practice principles

Comms are nearly always the first thing employees and stakeholders experience once a change programme begins. A badly worded email, inconsiderate timing, or poor use of channels can make a significant impact on engagement levels. It is, therefore, vital that you plan your communications efforts accordingly and refer to the information gained through your stakeholder assessment and change impact activities.



### Clear & concise

Avoid jargon and highly detailed explanations – you want to capture your audience early on with the most salient points.



### Leadership-led

Help leaders to effectively communicate often as a way of encouraging commitment in others.



### Cascaded through influential managers

Engage your middle-manager population as important voices of influence amongst employees in driving change on the ground.



### Consistent messaging

Keep reinforcing your core messages – don't underestimate how often people need to hear things before it sinks in!



### Transparent & timely

Communicate important decisions at the earliest opportunity. If there is nothing of note to tell people for a period, make them aware of this- don't leave a void.



### Channels that work

Use existing channels as far as possible since stakeholders are likely to already be paying attention to these.



### Focused on the audience

When writing content, stand in the shoes of your audience: what do they care about most? What details are not necessarily important now? What are their concerns?



### Impactful & innovative

Don't default to email for each communication – explore other mediums such as videos, demos, interviews and webinars to continuously engage stakeholders.

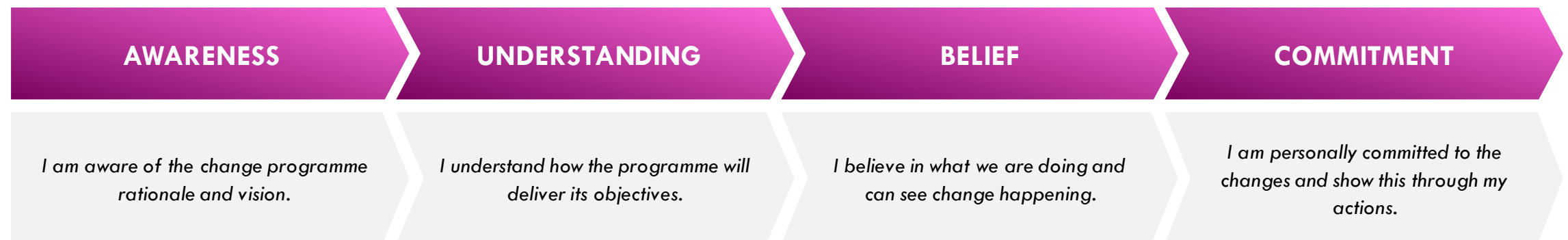
# Taking people on the journey

Create an experience through your communications and engagement activity



Before you begin to create your communications and engagement plan, spend some time thinking about the overarching journey that people will experience. What's the first step in the journey? How will you begin to engage employees, and what do you want them to think and feel?

In the example below you can see 4 stages of engagement which employees were taken through on a large-scale global transformation programme. Communications activities were carefully crafted to correspond to each stage in order to actively manage employee engagement levels according to programme timelines and progress.

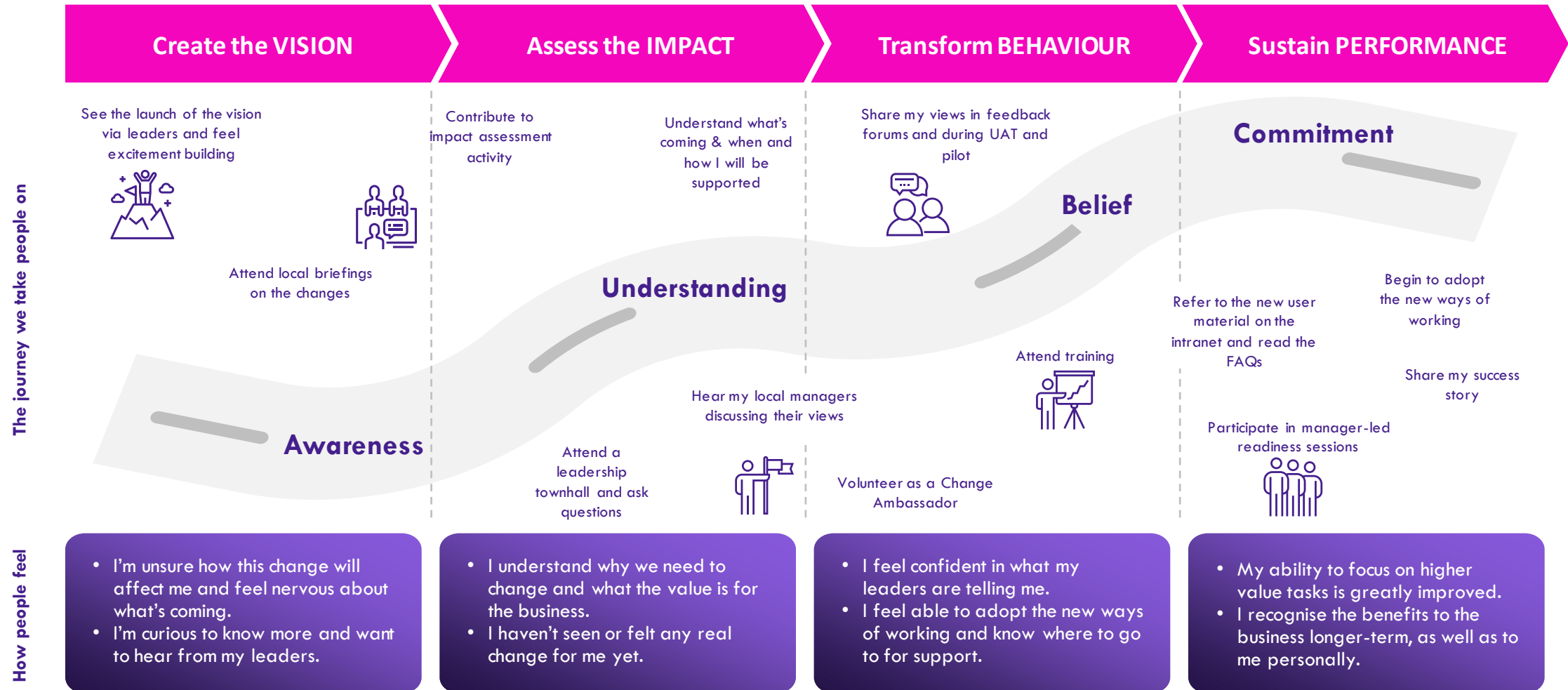


*Think about where employees/stakeholders need to be as your programme progresses*



# How will the change journey feel?

Targeted interventions enable people to move along the change curve



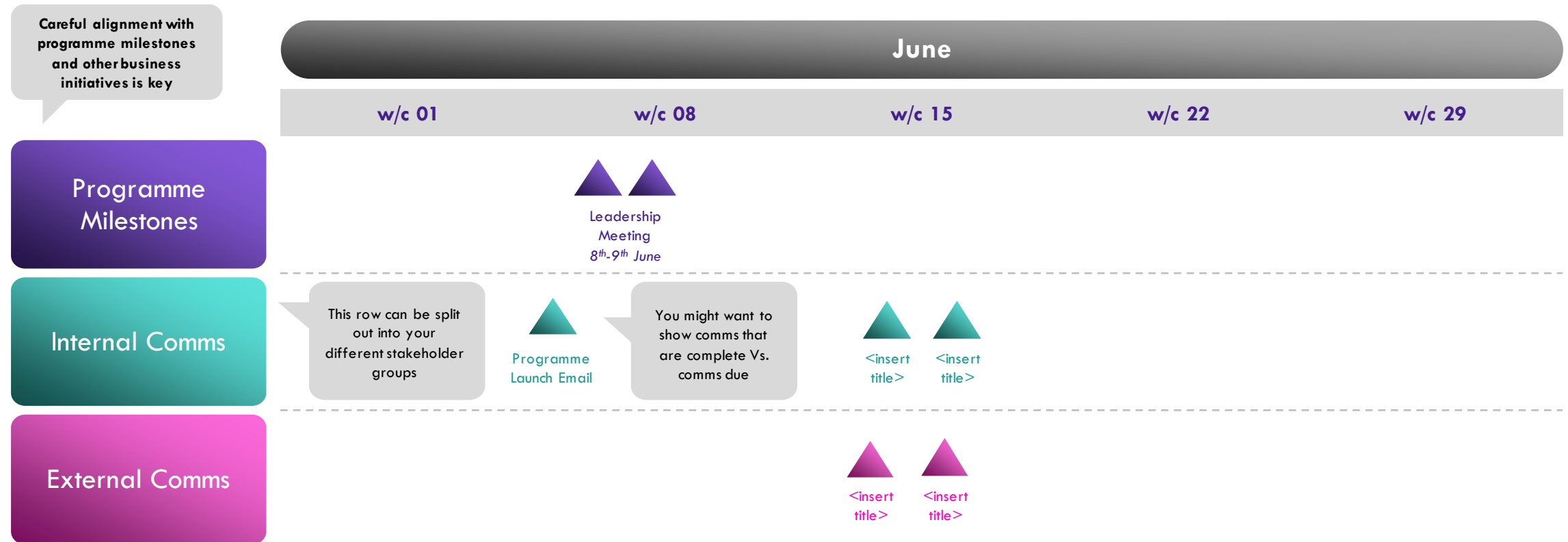


# Creating your comms plan

You should create a high-level and detailed version



Your communications plan should reside in Excel in order to properly manage and track what goes out, when and to which audiences (see the **Communications Plan Excel template**). However, it is also worthwhile creating a 1-pager 'zoom-in' view of the most important comms in plan which you can easily share with leaders and programme sponsors as per the example below. This might be created on a month by month basis if you have lots of communications, otherwise a quarterly view is recommended.



# Communications and engagement ideas (1 of 2)

Use a mixture of channels for maximum impact



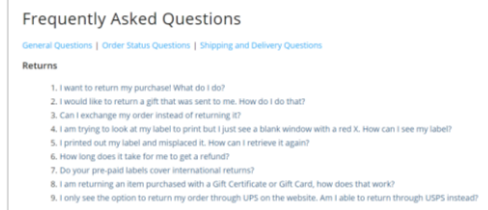
## Programme Narrative & Messaging

Document containing the core messaging for the programme to include within comms materials; example content areas below:



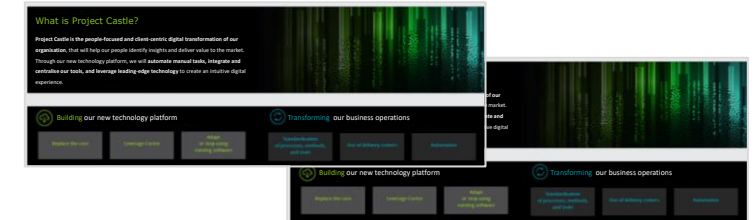
## FAQs

Collection of Frequently Asked Questions, usually segmented to address the needs of different audience groups. Use your *Change Champions* to help provide FAQs!



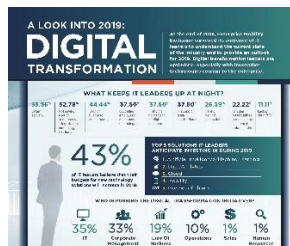
## Intranet Pages

Dedicated programme pages on the intranet, creating an effective one-stop-shop for communicating with stakeholders and keeping content up to date.



## Interactive Infographics

Engaging visual representations of information and data.



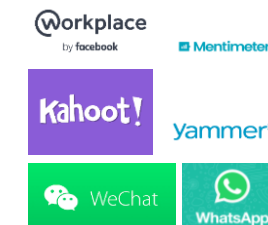
## Leadership Roadshows & Summits

Leadership presentations to a large audience face-to-face using influential leaders- making leaders more accessible.



## Social Media & Apps

Use of popular social media apps and other tools to create two-way interaction and sharing of ideas and experiences.



# Communications and engagement ideas (2 of 2)

Use a mixture of channels for maximum impact



## Virtual Reality

Computer generated simulations to help stakeholders immerse themselves in the future vision/environment.



## Podcasts & Interviews

Digital audio files of discussions or interviews, easily downloaded by stakeholders to listen to at their leisure.



## Animation, Videos & Demos

Animation or video recording articulating key aspects of the programme- opportunity to blend with leadership, employee or client interviews; live or pre-recorded demonstrations of key features of a new system or product.



## Success Stories

Personal stories of achievement and success linked to key programme milestones and activity.



## Newsletters

Collation of key news items issued periodically, such as: programme updates; recent achievements; upcoming milestones.



## Marketing Campaigns

An organised course of events and actions deliberately promoting a new product or new ways of working.



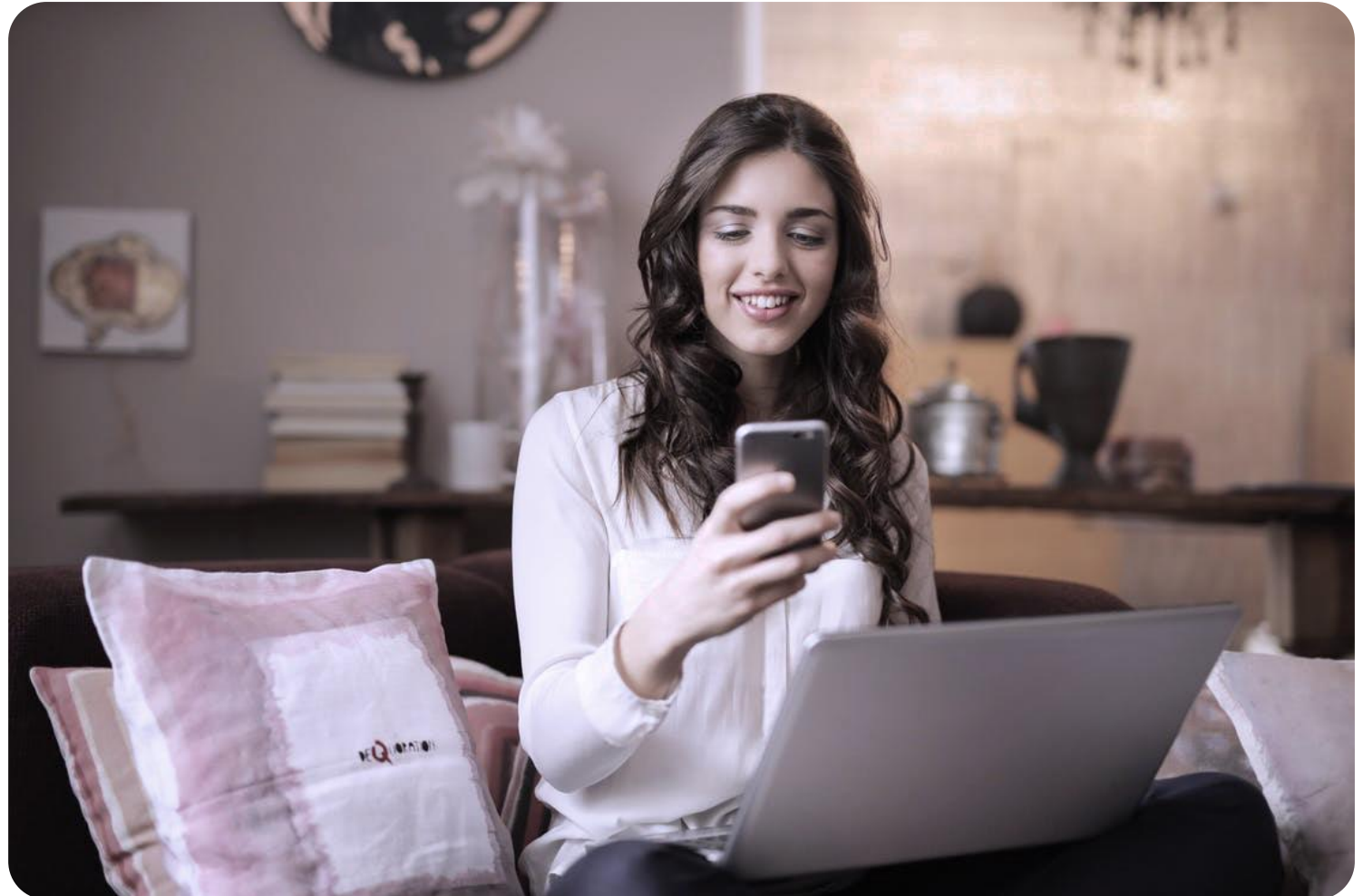
# Personas and User Journeys

To demonstrate the affects of new products or services



## What are they?

Personas and User Journeys are a commonly used human-computer interaction design tool to help technology designers understand who and how people will be affected by a new product or service. As well as feeding into design requirements, they also serve as a highly effective change management tool since they enable users (employees) to understand in detail how their experience, tasks and activities may change as a result of new technology.



# Personas

Fictional profiles or characters, based on real insight



## What is a persona?

- Personas are **fictional profiles or characters, based on real insight**, for impacted stakeholders of the change.
- They are based on factual evidence and reflect key characteristics and considerations to be addressed.
- They assist with identifying user needs and prioritising solutions and are usually supported by User Journeys which tell the story of a particular user group as they transition through the change journey.



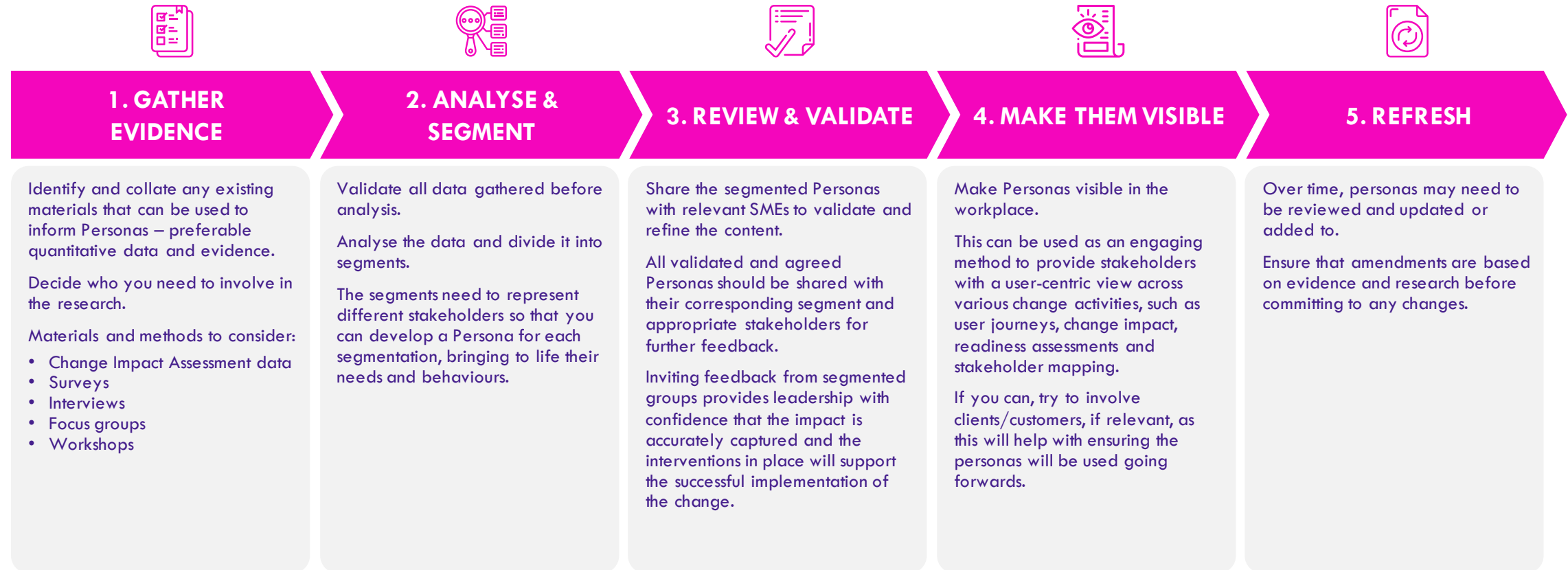
## What are the benefits of using them?

- ✓ Provides greater understanding of specific user needs and behaviours
- ✓ Shifts focus away from generic or abstract demographics towards the needs of real people
- ✓ Helps to paint a picture of key stakeholders involved in the change for the entire team
- ✓ Provides a range of different perspectives on an experience, allowing change teams to engage the different interest-groups that exist
- ✓ Enables you to create a tailored change experience and mitigate resistance to change



# How do you create Personas?

Make them believable and visible



## Common Challenges...

- **Assuming user needs are already adequately understood:** validating and challenging assumptions ensure design work is based on hard evidence
- **Push back due to time constraints:** research does take time, but so does designing and implementing solutions that don't meet the needs of users. Effective personas can reduce the risk of later roadblocks.

# Example Personas


## Insurance customer examples



NAME

Sarah, Looking For Guidance

MARKET SIZE

 70 %


TYPE

Self-Service

**Background**

Sarah has some experience with life insurance, but doesn't really feel comfortable making purchase decision on her own. She's looking for an expert who could guide her through the process.

Sarah would like to have someone she could trust and call personally anytime she has questions.



**Motivations**

- Feeling not alone, but the part of the team who wants her to succeed
- Explanations in simple words, without professional terminology
- Transparency and user stories, helping to build trust

**Pain points**

- Pressure (needs to make a decision fast, but is not sure which option to select)
- Professional terminology and jargon
- Security/trust issues
- Overwhelmed by numerous offerings

**Strategy**

**Content:**


- Collect success stories from other clients like Sarah in order to build trust and show her what other people tend to pick.
- Use language that is easy to understand, get rid of professional terminology and jargon
- Overall tone of voice: warmth, letting Sarah know we are here to help.

**Functionality:**


- Simple calculators
- "Call or request a call" function
- Live chat on the website

**Highlights**


Desire to be in control

low  high

Expertise in insurance

low  high


Need in human warmth

low  high

NAME

Zachary, Autonomous Explorer

MARKET SIZE

 30 %


TYPE

Self-Service

**Background**

Zachary is more than comfortable with exploring insurance options and making purchase decision on his own. He might have some experience or not - the key point is his confidence in his ability to learn and decide on a policy himself.

Zachary might have some questions during the process, but in general he prefers to find answers himself.



**Motivations**

- Feeling capable of making the best purchase decision
- Ability to model and analyze options and compare pros and cons

**Pain points**

- Lack of information or hard to find answers to his questions
- Dislikes personal communication
- Security/trust issues

**Strategy**

**Content:**


- Comparison and analytics articles
- Testimonials
- Encourage exploration
- Showcase company expertise
- Overall tone of voice: letting Zachary know we support is available, but he's in charge.

**Functionality:**


- Comparison tool
- "Call or request a call" function
- Live chat on the website
- Modeling tool ("what if...")

**Highlights**


Desire to be in control

low  high

Expertise in insurance

low  high

Need in human warmth

low  high

It can be useful to create primary and secondary Personas to provide a broader understanding of stakeholder needs

- **Primary** personas are often target segments, highlighting the different needs of **those impacted most** by the change
- **Secondary** personas are **less-directly impacted** by the change, but will often have a role-based part to play



# User Journeys

Telling a story based on the target experience



## What is a user journey?

- **User journeys are communication tools.** They tell a the story in an engaging way, based upon the existing or target experience of an individual.
- They describe a series of steps representing the 'journey' a person goes on. This could be highlighting the transition from 'now' until changes have been implemented.

## The three common types of User Journey:

- 1** **'As-is' user journeys visualise the existing experience**, painting a picture of why change is needed based upon experiences.
- 2** **'To-be' user journeys visualise the future experience** – these can be used to validate ideas for upcoming changes, or to create a common understanding of what the future will look like.
- 3** **'Transition' journeys demonstrate what a user may experience as changes are being implemented**, highlighting key change points, emotions, touchpoints or interactions between different stakeholders.

## What are the benefits of using them?

- ✓ **Emphasises the person, not the process**
- ✓ **Creates deep awareness of stakeholder needs, perceptions and experiences before, during or after the change journey**
- ✓ **'As-is' journeys can change perceptions and highlight previously unseen effects on stakeholders**
- ✓ **'To-be' journeys can be used to validate ideas and build buy-in, reducing resistance to change**
- ✓ **Provides input for key change activities, such as training content or communications materials**
- ✓ **Helps build a common understanding of the impacts of changes across the programme team**

# How do you create User Journeys?

Select the right type for high impact on your programme



**Set clear objectives** for the journey you are trying to create.



**Consider what journey you are focusing on and why:** is it the 'as is', 'to-be', or transition journey? Previous research, or 'self-made' journeys created by stakeholders add weight to the story.



**Work with clients**, and SMEs, if needed, to engage them in the creation process.



**Think about the structure in terms of** touchpoints and interactions between stakeholders.



**Shift your mind-set** towards the impacted stakeholder. Envision yourself in the role of the persona to build empathy as if you were going through the change.



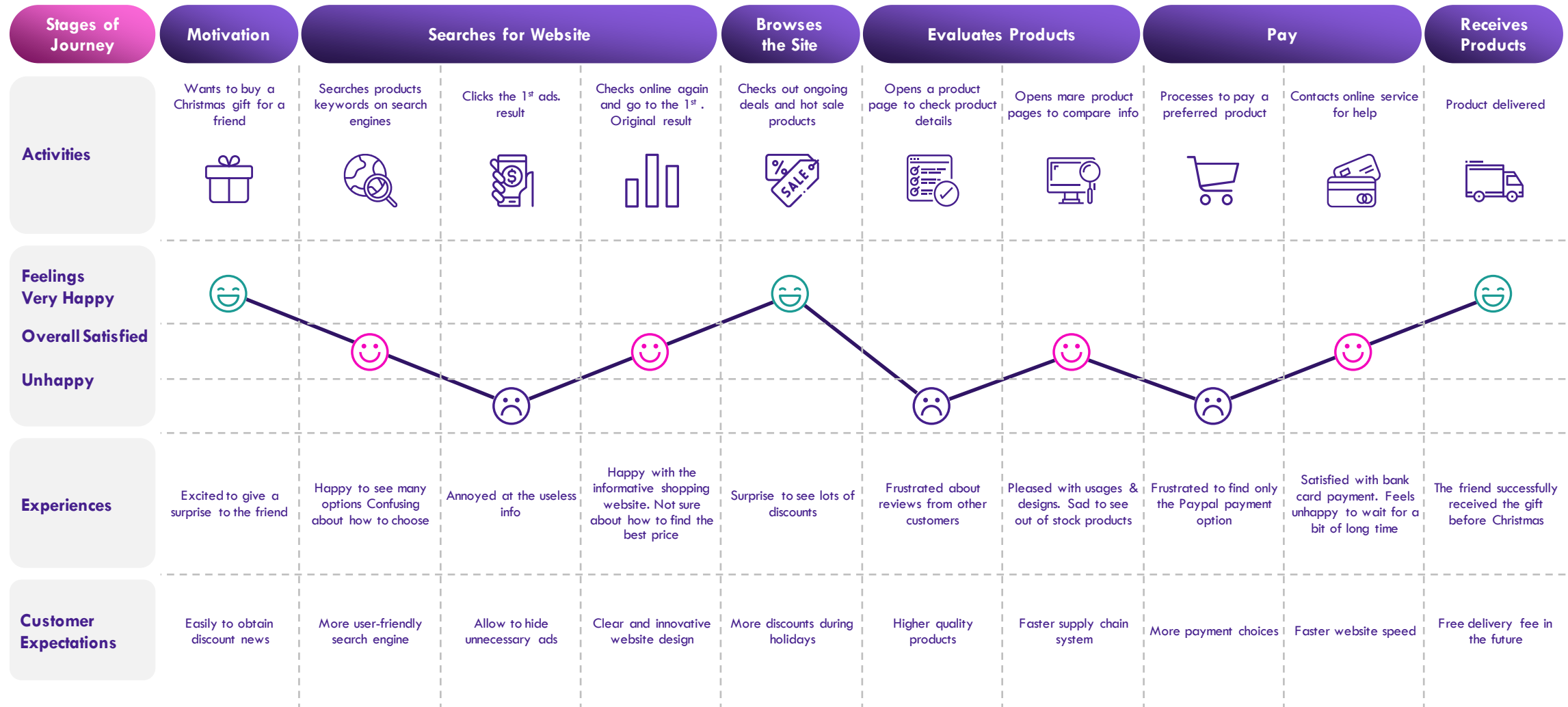
**Consider the highest impact elements** and ensure these are highlighted along the journey.

## Common Challenges...

- **Understanding the difference between a process and a journey:** remind stakeholders of the value in experience, not process. Process maps are useful, but they don't bring to life the real human experience which people can relate to.
- **Avoid tons of detail:** it can be tempting to go into lots of detail, but keep in mind that your journeys need to be visual and easily digestible. Focus on the crucial elements only.
- **Select the most valuable journey to focus on:** you don't need to map out every possible scenario. Spend some time understanding which experiences are going to produce the most value and which will engage the broadest audience when presented via a User Journey.

# Example User Journeys

## Online consumer journey



# Templates available for this module



We have provided you with a ready-to-use communications plan template which can be found on the training and resources member page.

Available as an Excel template



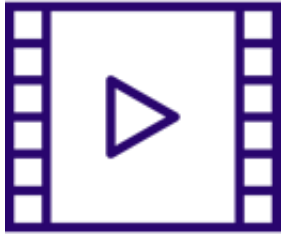
Update these stakeholders groups so that they are relevant for you

<insert organisation/programme name> Internal Communications Plan

#	Topic	Name of Communication	Key message	Format (think DIGITAL)	Country				Business Function				Grade			Frequency	Complexity	Planned start date	Planned close date	Se	
					Australia	Asia & Pacific	Europe	UK	USA & Canada	Accounting	Sales	Manufacturing	HR	Legal	Snr. Management						Managers
1	EXAMPLE Zoom	Introduce Zoom platform for video conferences and upcoming training events	Zoom now available to all teams. Include benefits for personal use and testimonials. List upcoming training events.	Email	X	X	X	X	X	X	X	X	X	X	X	X	One off	Medium	03/08/2021	03/08/2021	John
2																					
3																					
4																					
5																					
6																					



## Explainer video 5: Transforming behaviour – Change Level 1 – Communications & engagement



You may now watch **Explainer Video 5: Transforming behaviour – Change Level 1 – Communications and engagement** (16:17 min) for further explanation of this module's content. You will find all explainer videos on the training and resources member page.

