The Communications Audit

NEVER MORE RELEVANT, NEVER MORE VALUABLE: VALUE PROPOSITION   •   OBJECTIVES   •   METHODOLOGY

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I. INTRODUCTION: THE VALUE PROPOSITION

The Communications Audit is a management tool that inventories, assesses the alignment and effectiveness of, and provides future direction for the communications initiatives of an organization. Communications audits have long been in use, but despite being a "traditional" tool, the value and benefits of such audits have never been greater.

Why?

- The proliferation of communications channels used by an organization –including digital, social, mobile, print, conference, and in-person interaction – inherently creates expanded challenges in managing, coordinating, and assuring continuity of content delivery and messaging across the multiple platforms in use.

- Not only are communications channels expanding, but so is the diversity of content, information, and messaging being delivered. External communications is inclusive of member information and education, advocacy and public policy messaging, collaboration with like-minded and shared-purpose organizations, messaging to the public and the media, philanthropy and fund-raising initiatives, and marketing efforts. Internal communications are required with the organization's board, leadership and committees, volunteers, and staff. Each of these internal and external communications initiatives will have unique objectives and requirements – but they must have a shared focus and cohesion as well.

- The expansion of both channel use and scope of content typically has resulted in both more individuals and, in fact more departments, within an organization being actively engaged in the communications process. This brings with it expanded expertise, energy, and broadened perspectives, but also increases the risk – especially when communications decisions must be made on an immediate, highly interactive basis with members – of an organization's collective communications drifting out of alignment unless the team is on the same page.

- When non-dues revenue growth is increasingly imperative, communications' indirect and direct (e.g., media operations) contributions to non-dues revenue must be a tangible contributor. Effective monetization and optimization of the revenues derived from business, advertising, and sponsorship partnerships must be built upon delivering value to partners while carefully calibrated and balanced against risks of diminishing the mission effectiveness of communications or infringing upon an organization's independence and trust among constituents.

- Strategically, cohesive and aligned communications and messaging are core and fundamental elements in an organization's

demonstration of its brand, its mission and attributes, and its value proposition to its membership and the broader constituency its serves. And never before have member and constituent expectations of active engagement, two-way interaction, and an active relationship with an organization been greater. The benefits of achieving those enhanced levels of engagement, relationship, and trust between an organization and its constituents – and among its constituents – are simply profound.

II. COMMUNICATIONS AUDIT OBJECTIVES

In summary, the key objectives of a communications audit include:

- Against the organization's enterprise-wide strategic plan or framework and its mission, ensure there is a full alignment of communications' strategy, goals, and operations toward achieving organizational objectives.

- Develop an inventory of the full range of communications channels, platforms, and programs utilized across the organization and complete an assessment of the purpose, benefits, cohesiveness, and effectiveness of each.

- Similarly, establish an inventory and enterprise-wide shared perspective regarding the range, purpose, and consistency of the specific messaging and content disseminated by the organization for multiple purposes.

- Explore and qualify external (member and constituent) and internal (leadership, staff) perspectives regarding the relevance and effectiveness of existing communications and messaging, its contributions toward meeting the defined organizational and communications strategic goals, and its effectiveness in serving member/constituent needs.

- Compare current communications initiatives and operations of the organization to best- and emerging practices utilized by similarly positioned organizations with the purpose of identifying opportunities to fully deploy relevant best practices.

- Define and develop clarity regarding the range, and the relative critical importance, of all served audiences – members, leadership, like-minded organizations, through-leaders, policy makers, the public, the media, strategic and business partners, et. al. – for the organization to effectively engage through communications.

- Commensurately, identify the information that will engage and be valuable and highly relevant to each of the above constituencies, as well as the messaging that needs to reach and impact the actions of these audiences to help move forward the mission and objectives of the organization.

- Built upon a matrix of critical served audiences, information and messaging needs and objectives, and best-practices communications, develop a fully integrated and effective communications strategy and tactical deployment.

- Confirm and quantify the role of communications (and especially media platforms) in support of non-dues revenue development, through use of best practices and monetization of content and platforms while protecting mission attributes. Define appropriate metrics not only for revenue production, but for financial margin expectations (e.g., a ratio of revenues versus operation expense) as a means to foster and ensure operational efficiency.

- Develop tangible, actionable – and scalable – recommendations and defined action steps to implement opportunities that will bring communications into alignment with the organization's mission and brand promise, and best engage and serve member and constituent needs.

III. AUDIT METHOLOGY

There are multiple methodologies that can achieve the objectives and benefits of a communications audit, and some customization of the process is both inevitable and appropriate based upon the size, complexity, and culture of an organization.

Communications audits can be and are performed either by internal staff, through retaining external assistance, or through combination of the two. It is our experience that best results are achieved via the latter collaborative approach, which ideally brings together the rich insights and sector familiarity of the internal team with the independent, unbiased perspectives and best-practices expertise of external professionals.

A fully engaged and collaborative team approach will likely yield the most comprehensive results and recommendations and builds – literally from the first days of the engagement – a basis of shared ownership that will foster full and enthusiastic "buy in" of the final recommendations as they are implemented.

As stated, adjustments to any standard methodology are beneficial to match the specific culture and requirements of an organization, but the following methodology and process steps provide a solid framework in undertaking a successful communications audit:

1. Confirmation of Project Scope and Team Definition

Following the decision to proceed with a communication audit, identifying and developing the project team and confirming the scope and purpose of the initiative with that team sets a foundation of shared purpose and clarity of goals. As stated, we have found a mix of internal stakeholders and external expertise will achieve best results.

The nature and size of the internal team is one of the variables that will be impacted by organizational size, complexity, and culture. Ideally, the team should include a level of representation among all key stakeholders – organizational leadership, communications management, marketing, public affairs, advocacy, media operations, membership, et. al. But the core group must also be focused and manageable in size.

This process must also respect

that staff in a nonprofit is typically busy and the project needs to be structured to not overly pull participants away from their regular responsibilities. Use of external professionals also significantly helps in reducing the time that internal staff must expend on the project. In many cases, a "two-tiered" approach is effective, where a team of all key stakeholders (including representation from volunteer leadership or committees) is engaged at key start/midpoint/ completion checkpoints, but that a majority of the intermediate work is performed by the external professionals working closely with a small group of core internal stakeholders, typically from leadership, communications, and marketing.

This first process step, in concert with the discovery phase (see below) also provides an initial platform to discuss and reaffirm the strategy, mission, and goals of the organization and the role of communications in achieving desired enterprise-wide outcomes. In truth, that critical discussion is an ongoing one throughout most of the audit process.

2. Discovery

The discovery phase is multi-faceted and valuable in informing and providing a foundation for the entire audit process. One component is taking a full "inventory" of the range of communications programs, channels, and tools currently employed by the organization. This would typically include digital, print, social, event, and personal interaction channels and be inclusive of communications initiatives that originate in

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support of member and consistent communications, marketing, public affairs, advocacy, fund-raising, public interaction, media relations, et. al. This step provides a basis not only to understand and essentially catalog the individual initiatives (and their purpose and desired outcomes) but to initially assess their integration and whether they are cohesive and consistent in the manner used and in message.

The discovery phase also typically includes use of several means to gain insights, from both external and internal sources, in regards to how existing communications are received, perceived, and responded to by the targeted audiences. Naturally, existing qualitative and quantitative member perceptions and needs research and other forms of perception research are utilized at this point and, if there are gaps in such validated research, such can be identified early in the process.

One-on-one interviews with stakeholders have proven to be invaluable as a discovery component, not only to gain insights into the communications tools currently employed (and hear informed perceptions of their effectiveness), but also to confirm communications alignment (or lack thereof) to the organization's strategic plan/ framework and mission. This step also tends to reveal whether or not organizational strategy itself is understood and consistently interpreted by stakeholders across the organization. These interviews should be highly inclusive across stakeholder groups, including leadership, volunteers, internal staff and, on a selective basis, representative of members and other stakeholders. Incorporating

this latter step into an existing event, such as the organization's annual meeting, is a time and highly cost effective means to obtain valuable feedback from members and partners.

3. Best-Practices Benchmarking

This step provides the opportunity to benchmark the organization's communications and messaging activities against, and in comparison to, strategic, operational, and financial best practices identified from across the nonprofit sector. The process explores communications' use of channels and platforms, messaging approaches, operational, structural, and staffing approaches and also uses revenue and contribution metrics in comparison to similar leadership organizations.

While the benchmarking process provides what is effectively a " report card" of current communications programs, the optimal value of best practices benchmarking is that it helps identify both gaps and overlaps and brings into focus prospective improvements to channel and platform use, messaging, and operational efficiencies applicable to future communications initiatives.

4. Strategic Alignment, Constituent Ranking, Desired Impacts

With this step, the process transitions from assessment of existing communications status to increasingly looking forward. Building upon knowledge and understanding gained in the prior steps, this phase explores what an optimal alignment of communications to enterprise strategy looks like, helps to

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cohesively (and from an enterprise wide perspective) define the relative importance of the multiple constituencies the organization serves and/or needs to engage, and qualifies the desired impacts and outcomes to be achieved through communication and engagement with each key constituency.

By asking the inter-linked questions (and cataloging the results) "Who are our constituencies (members, thought-leaders, policy-makers, regulators, strategic partners, funding sources, the public, media, business partners, et. al.) to be engaged?" – and "what specific outcomes do we wish to achieve with each group through communications (e.g., increased membership engagement, participation, and satisfaction, education and information to advance the field or for member self improvement, enhanced public awareness, influencing policy decisions, expanded product sales, event registrations, or funding, etc.), a clear connection between communications and organizational purposes emerges.

Given that any organization has a finite amount of resources, this step is also invaluable in establishing priorities among audiences served and desired outcomes. It is not usual that an organization discovers that its communications resources and energies are not calibrated to the relative value that each constituency represents.

5. Content, Information, and Messaging Requirements

Closely interwoven with constituency ranking and outcomes definition is the issue of what specific content and, information is sought by, instructive to, and relevant for each

defined constituency – and what messaging and content will be effective in achieving the desired outcomes identified. Areas of exploration include:

- What specific content, messages, and information, data, and insights will most attract, inform, and engage the targeted key constituencies?

- As constituents potentially look to the organization for news, policy or advocacy perspectives, professional or personal advancement insights, sector, marketing, technology expertise, or emerging research findings, how do we prioritize and balance the range of content delivered?

- What is the proper level of content depth and complexity that will be relevant to and best serve the information needs of constituent groups?

- What editorial and graphic styles assure that messaging and content is accessible and is consistent with the organization's brand attributes and visual identity?

6. Channel Deployment and Integration

Having defined audiences, strategic purpose/desired outcomes, and content/messaging imperatives, the next step addresses how (through what channels and platforms) do we reach our audiences, engage and inform them, and create impact.

Use of a "Channel-Neutral Paradigm" represents a proven strategy to achieve enhanced constituent engagement and impact, effective and efficient content delivery, and optimization of communications/

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media revenue contribution.

By working within the platform-neutral concept, the project team can address inter-linked questions including:

• What strategic channel deployments (including digital, social, print, event, personal interaction, et. al.) will most effectively deliver content and messaging that will engage and impact specific constituent groups?

• How do we effectively integrate digital, social, mobile, print, and event-based content and messaging to maximize audience engagement and the tangible values we deliver, but minimize redundancies, overlaps, and the risks of "over communicating?" (In fact, today there is as great risk of over communication, with a result that the target audiences tune out all our messaging, including what is vitally important).

• What opportunities exist to build a communications/media platform of monetized and integrated marketing solutions for advertisers, sponsors, and business partners, to fully support marketing and fund-raising initiatives, and to optimally contribute toward non-dues revenue goals?

While steps 4-5-6 can be achieved through various approaches, we have found significant value and insights result from including one or more workshop sessions among key stakeholders around these three inter-related topics.

From methodology steps 4-5-6, a communications matrix –

defining the range and importance of constituencies, desired outcomes, content and messaging requirements, and optimal channel deployments – results.

It is a core value of the overall audit process – and, for that matter, such a matrix represents a fundamental component of a comprehensive communications strategic plan.

7. Strategic and Operational Recommendations

No matter how comprehensive and insightful a communications audit is, its value will only be realized through the implementation of resulting strategic and tactical recommendations.

The end deliverable of a communications audit should be recommendations that are actionable (and scalable to existing realities such as budget considerations and staff resources) and should include implementation timeline guidance.

Recommends should include (but not be limited to) the actions required to:

• Effectively introduce and socialize the findings of the audit across the organization (including board, leadership, committees, and stakeholders), establish a process for feedback, and for refinements and approvals.

• Ensure alignment of communications' strategy, goals, and operations toward achieving organizational strategy, mission, and objectives.

• Introduce identified communications best- and

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emerging practices not yet employed by the organization.

- Deploy the insights gained and strategies established regarding constituent priorities, the appropriate scope of content and message, and integrated channel uses to achieve the specific communications outcomes that were defined during the process.

- While protecting comm-unications' contributions to mission and organizational independence and trust, employ appropriate communications and media platforms in a manner to tangibly contribute toward non-dues revenue and operate with a favorable (as compared to best practices) revenue to expense ratios.

- Ensure that communications goals, methods, and expectations are understood and adopted across the organization and among all key stakeholders in a manner that optimizes cohesive communications, messaging, and the consistent application of the organization's brand.

IV. CONCLUSION

When the full benefits of a comm-unications audit are achieved, the process reflects an extraordinary value proposition and a sound invest in time and expense, not only for a communications team, but for an entire organization. As alluded to earlier in this paper, key findings and components of the recommended audit process are, in fact, core components of communication strategic plan. Translation of audit findings into a formal three- to five-year organizational communication strategic plan can be a further valuable and seamless initiative that will deliver powerful benefits dividends to the organization. ■

About the Author

Gary Dolzall is Chief Communications Officer of OrgCentric. With expertise in strategic planning, integrated communications solutions, messaging, and media-based revenue development, he has served a variety of leading member organizations, associations, advocacy groups, institutions, and other nonprofit organizations. Among those engagements, Gary has assisted a number of nonprofits both in constructed communications strategic plans and conducting highly effective communications audits. Gary was an early and successful practitioner of integrated media; as a Publisher he developed a co-branded digital + print platform ranking among the top 10 U.S. media-based brands in audience size. He is a graduate of the Indiana University School of Journalism and a member of ASAE.

About OrgCentric

OrgCentric delivers best-practices expertise and tangible results across three inter-related disciplines: strategy, branding, and communications. Our capabilities include strategic planning, branding and visual identity development, communications audits, messaging strategy, media (digital, social, mobile, print, and event) integration and monetization, web and interactive design, and marketing systems development. The OrgCentric team of 13 professionals has assisted more than 200 organizations and will represent an effective, collaborative resource to help you meet your organizational objectives. OrgCentric exclusively serves nonprofit organizations and is a joint venture of the IridiumGroup and McGill + Partners.

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