NVESTIGATE

Investigation

01

Introduction

As Sherlock Holmes once said: 'You should never theorize before you have the facts'. He went on to say that 'you should not twist the facts to suit the theory, but instead twist the theory to suit the facts'. I don't know about you, but in my professional HR career I'm embarrassed to say that I've done just what detective Holmes said not to. Because of lack of time, money and/or pressures from the business, I've jumped into launching the communication campaign without taking the time to gather my facts. Sometimes I've been lucky and it has not caused problems, but other times unfortunately I've completed the campaign with some failures thinking 'if only':

- I had discussed and agreed the objectives with key business stakeholders;
- I had thought through how employees would have reacted to the messages;
- I had known about other HR and business initiatives taking place at the same time.

In this chapter I'd like you to wear the hat of a *detective*. The reason for selecting a detective is that they use a wide variety of techniques to conduct their investigation, catch the bad guy and ultimately solve the crime. We in HR can learn from these detectives and use similar investigative techniques to solve our crime and get the right result – or in our case, get the right answers to our questions and ultimately deliver an effective communications campaign.

In this chapter we will cover:

- How to ask questions.
- How to analyse data.
- How to create objectives.

How to ask questions

As any good detective would do, first you need to ask your business partners and employees questions in order to understand them, their needs and the overall situation. Think of any detective book or programme and there is always a scene of a detective interrogating witnesses, suspects etc, pulling out those key nuggets of information by which to solve the crime. Now I'm not suggesting that you use some of the interrogation techniques shown by some of my favourite detectives such as pounding your fists on the table or throwing chairs against the wall (although that could be interesting), but think about how these detectives effectively obtain the critical information and mirror these behaviours instead.

In this section we are going to address the following:

- Why ask questions?
- How to ask the 'right' questions.
- Who are the 'right' people to ask?

Why ask questions?

Mary Astor, a famous US actress, once said: 'Once you ask questions the innocence is gone'. I find this a great way to start out answering the question 'why', as it shows that by asking questions you are no longer innocent, as you have now gained knowledge and understanding. Here are some other key reasons for asking questions.

1. It defines success

I know it may seem obvious, but you have to have a purpose in order to determine if you have succeeded. As with objectives, which define your communications campaign, you need to make sure that when you finish your campaign it ticks all of the boxes for your audience. You can't gauge your success unless you know why and even how you're doing it.

Here's an example of what I mean from a recent cooking 'incident' at my house. I was very proud of myself, finding a new and exciting recipe for bolognese sauce. I spent an hour preparing it, and left it to cook for six hours in a slow cooker. When I served it to my audience (my husband and son) they were disappointed as they were expecting traditional bolognese sauce. If I had only asked them how they would feel about trying a new recipe, I could have saved myself time and money (as I had to throw most of the sauce away). Another reason for asking for their input is that they may have been more open to the idea of this new recipe, as they would have been a part of deciding to try it.

2. It assists with decision making

By asking questions you gain valuable information and insight into what your audience is looking for and expecting. This will greatly help you to make decisions before and during your communications campaign.

This is something I experienced when putting in place new benefit programmes at my company. We decided to conduct focus groups to not only find out which new benefits our employees would like to see put in place, but how they would like to hear about them. The employees in the focus groups completely surprised me by saying that for each new benefit they would like an e-mail to come from me to launch the scheme. The reason I was surprised was: (a) as I was new to the company I didn't think they knew who I was, and thus thought they would ignore my e-mails; and (b) with all the e-mails they already receive from the business, I thought they wouldn't want yet another one. I was completely wrong, as they said that everyone had heard of me. Rumours were out there that I was putting in place new benefits, so anything received from me would be seen as something positive and exciting. They also said that although they got a lot of e-mails, it was still the best way to communicate to them.

3. It takes away the 'if only'

As I said at the start of this chapter, the risk of not asking questions is that you get to the end of the project and ask yourself 'if only'. By asking questions you eliminate the use of these two little words.

An example of this is when we were introducing a new HR scheme. It should have been seen as something positive, as employees had been asking for it for quite some time. However, the project team got so focused on rolling it out that we didn't ask the rest of the HR team what they were working on. As it turned out, the compensation team were making a change to weekend pay at the same time, decreasing current rates. This was something that was being made for the right reasons, but employees would definitely see as a negative. By not asking the HR team the question about timing, what should have been a positive turned into a negative as employees thought that it was only being introduced to offset the negative change. 'If only' we had asked the question about what else was being rolled out to employees.

4. It engages your audience

One of the key drivers of employee engagement is involvement in decision making. By asking your audience/employees questions, this is exactly what you are doing, making them a part of the solution. Going back to my cooking 'incident', had I involved my husband and/or son in selecting the recipe they most likely would have been satisfied with the meal. My mum used to tell me that I should involve my children in cooking meals for this very reason. They can't complain about the food if they helped make it, right?! Good advice that I should use in the workplace as well.

Another example of this was shared with me by Bill Tompkins, Head of Total Rewards for a $28 billion retail chain. They were communicating a massive change in their US healthcare plan, moving from one kind of a plan to another (traditional PPO plan to high deductible consumer directed plan). They included different segments of employees to help in creating the right messages so that they would resonate with each employee segment (ie executive, part-time logistics etc). This not only acted as a way to engage their employees, but led to them becoming stronger ambassadors for the change and gaining a stronger connection to the communications.

How to ask the 'right' questions

Asking the right questions is key to the success of designing an effective HR communications campaign. A quote by Albert Einstein explains this concept quite well: 'If I had an hour to solve a problem and my life depended on it, I would use the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than 5 minutes.' By asking insightful questions, or proper ones according to Einstein, you can challenge accepted models, turning the way you think of a situation or concept completely on its head.

A great example of this is the invention of the mobile phone. The story goes that Marty Cooper was tasked by his employer (Motorola) to develop the next generation of car phones. He accepted the challenge, but instead of jumping into the solution, asked himself and others on his team a very insightful question. Why is it that when we want to make a call we have to call from a physical place? By asking this question it changed the entire trajectory of his work, refocusing the team on separating the phone from the physical place. The result was that in 1973 Marty made the first mobile phone. It cost $4,000 and had a battery life of just 20 minutes, but it marked the beginning of the era of mobile phones. Now we may not be able to invent something as life-changing as a mobile phone, but we can still learn from what Marty did, and ask these 'right' or insightful questions.

So how do you ask the 'right' questions, keeping in mind that if you ask the wrong questions you will probably get the wrong answers? Here are some tips taken from my experiences, from leading experts as well as from interrogation techniques which detectives use.

Ask open-ended questions

A closed question usually receives a single word or a very short, factual answer. Open-ended questions, however, elicit longer answers. They usually begin with what, why or how, and provide an opportunity for the respondent to give information, opinions, feelings etc.

For example, what response do you get from your children when you ask them how school was? I don't get more than a grunt or a 'fine' if I'm lucky. If, however, I ask an open-ended question such as 'tell me about the activities you did at school' I have a much better chance of getting some real answers and information.

Ask probing questions

Probing questions are used in situations where you need to gain further clarification, or at times when you need another approach for drawing information from your respondents. An effective tool to use when probing is the '5 Whys' method, which was developed by Sakichi Toyoda in the 1930s. The simple technique helps you get to the root of thoughts, concerns and/or problems.

The 5 Whys is a simple tool to use. You simply ask the question 'why' until you feel comfortable that you have identified the root cause, can identify a solution, or you can go no further. You start with the problem, and then ask the question 'why' for each of the responses until you get to a specific answer, and can go no further. You may need to ask the question 'why' five times, or it could be more or less, depending on how long it takes you to get to this root cause. In the following example the problem is that the car will not start. Here are the questions which were asked to fully answer the question:

1. Why? The battery is dead.
2. Why? The alternative is not functioning.
3. Why? The alternator belt has broken.
4. Why? The belt was very old and had not been serviced.
5. Why? The car was not maintained according to the recommended service standards. STOP HERE: you have now reached the root cause, which was that the car was not maintained.

I'd like to make a point about the 5 Whys, as I think it is important. Whilst I agree that this is a great approach for identifying a root cause and a solution, something to highlight is that you want to balance this technique with respect for your audience. What I mean by this is that sometimes using the word 'why' may put people on the defensive, and could cause them to shut down. I'd suggest keeping this in mind, and should it do so, think of another way of asking the same question. For example, instead of asking 'why don't you like to receive text messages?' say something a bit softer such as 'what is it about text messages that you don't like?' Both of these act as probing questions and get the same result.

Ask leading questions

Leading questions are used when you want to lead people to an answer or your way of thinking, but you also want to make them feel that they are part of making the decision. They are also used when you want and/or need to close a conversation. Do take care when using these, as you don't want your respondents to feel as if they are being either manipulated or forced into a decision.

A way to use leading questions is to give people a choice between two options, both of which you would be happy with. You could say: 'Would you prefer that we send the new HR booklet to your home or drop it on your desk?' In this situation you are still gaining their opinion, but you are not opening it up to a discussion on an option such as putting it on the company intranet which you may not be considering.

Other key phrases to use when asking leading questions are 'what if' and/or 'how might I'. These could be helpful in trying to get more details from your respondents, leading them to provide the specifics which you require. For example, let's say you are rolling out a new HR programme and are not sure how much detail to provide (eg a high-level summary or a detailed letter). You could phrase the question as: 'What if we give you a high-level summary of the new HR programme; will this give you what you need?' or 'How might I provide the information to you on the new HR programme?' Both of these questions open the door for a conversation to provide you with information for your communications campaign.

Ask funnel questions

This technique is used when you need to uncover more details on a specific point. It is a common technique used by detectives when questioning witnesses. It has similarities to the 5 Whys, as it asks probing questions; however, it uses a funnel approach by applying different words to get to the solution.

For example, after you ask your leading question about where employees would like to receive the HR booklet, you find that half of them would not prefer the desk drop. This is your preferred option, so you want to understand exactly why they don't want this approach. You've asked the general question (first part of the funnel), but now you need to get more specific information to understand their hesitation and/or opposition. Here are some questions you may ask using the funnel approach:

How many of you have your own desk in the office? Response: Everyone
How many of you are at this desk every day? Response: Only half of respondents
Where are you when you are not at your office desk? Response: Work from home
When you work from home what happens to things left on your desk?
Response: Often it is thrown away.

From this you can now understand why half of them did not want the desk drop, as they were concerned that they would never receive the HR booklet. You can also see the detective-like persistence in questioning which was used.

Focus on a single attribute

According to Dr Andy Brown, CEO of Engage, it is critical when asking questions to focus on a single attribute. This helps in several ways. First, it helps keep respondents focused, rating one aspect of communication at a time. Second, it prevents you 'confounding' two findings. For example, if you ask a question 'To what extent do you agree that our communications around the new pension scheme were timely and open?' a respondent may believe the communications were done in a timely manner, but not that they were open and honest. So how could they answer the question without giving a false impression on one aspect of the data? Finally, it also makes it more straightforward to analyse your data when you are focusing on a single attribute, as there is no chance of confusing how respondents are rating the two attributes when you separate them out.

Begin with the end in mind

A key to asking the right question is to begin with the end in mind, focusing on what you need to know to achieve your objectives and gain clarity. For example, if an objective is to have high participation in your new employee ideas programme, you may want to ask questions such as:

- How do you like to receive instructions on new initiatives?
- How much detail do you like and/or require?
- Do you prefer written instructions, verbal or face-to-face?

By asking these questions you will be able to understand how to structure your communications so that your employees receive the appropriate instructions and details, and they are given in a medium which works best for them. Had you not done this they may not have had what they needed in order to participate in this new employee ideas programme.

In Table 1.1 I've provided you with some tangible questions which you may find helpful in your organization. I've listed the initial high-level question, and then some further additional questions which you may ask.

TABLE 1.1 The right questions

Initial question	Additional questions
What are the objectives of the communications campaign – why are you doing it?	• Do you want to increase participation in a plan? • Do you want to increase employee engagement? • Do you want employees to understand a change?
What else is going on in the business which will impact the communications campaign?	• Is there too much going on at the time of your campaign so that employees won't pay attention? • Is there something negative which has/will happen in the business which will disengage employees before you have had a chance to engage them?
How does your communications campaign link to the business and/or HR strategy?	• How can you show that what you are communicating aligns with other strategies to represent an overall picture and/or vision? • How can this bring more credibility and/or importance to your campaign?
What has been done in the past at your company which has worked and what has not worked?	• Why was it done this way? • How is your situation similar to the previous situation? • Why did it work or not work?
What has been done externally in the marketplace that you have heard of which has been successful?	• Why was it done this way? • Is my situation similar? • Will it work at my company?

Please note that this is not an exhaustive list, but is intended to further illustrate how to ask the right questions.

Who are the 'right' people to ask?

Just as important as asking the right questions is asking the right people. Going back to the 'if only' scenario, have you ever completed a communications campaign and thought: 'If only I had asked that employee group or that business leader, I would have done things differently'? This section addresses how to identify the 'right' people, thinking about who will provide you with the most robust thoughts and data. Think like a detective again, asking yourself 'who can provide the best clues to help me solve the case?'

Here are a few hints to help you select the right people.

Respondents should represent your audience

Your aim in capturing data is to have it reflect your entire audience, reflecting your organization's demographics. Use your employee data to help you understand your demographic groups, and use this when developing focus groups, interviews, surveys etc. Ask yourself: 'Do I have an adequate representation of all ages, genders, job functions, locations etc?' Make sure you have the right coverage to properly understand any similarities and/or differences between these groups.

Should you be conducting research by an all employee survey, check your responses by demographic groups, ensuring that the results reflect these groups. If not, go back and target specific groups to capture this missing data. It is important to note that if this is not done, your data may be unbalanced and/or biased.

Don't let just anyone participate

It is important to take the time to think about who will add the most value to your investigation. This is not necessarily who will be the easiest to include, either logistically or emotionally, but those that meet your definition of being the 'right' people.

As an example, I was conducting focus groups with employees about the launch of a new HR programme. For reasons of time and money I was being asked to conduct focus groups only in London, as this was where I was based. I pushed back to say that although our London offices were the largest, meeting with employees in some of the more remote and smaller offices would provide a wider range of opinions. By doing this we were able to understand some of the communication challenges and obstacles in smaller offices, and thus structured our communication campaigns in a different and more effective manner.

Consider your leadership team

I've learned from experience the importance of questioning some or all of my leadership team as part of the investigation phase. This is immensely helpful in gaining their perspective and co-operation. Their perspective is helpful for as leaders they often have a valuable and different perspective to you. Their co-operation is also helpful, as they can become ambassadors of change, which was a term I used earlier on in the chapter.

Two other important reasons for involving your leadership team are to get their buy-in and to add credibility to your campaign. Regarding buy-in, if they feel a part of the decisions, you have a better chance of them supporting them and co-operating. Regarding credibility, being able to cite that your leadership team has been questioned in developing your communications campaign will bring a lot of creditability to you and your campaign.

Consider who can/will derail the campaign

According to Dictionary.com, the word derail means to 'cause to fail or become deflected from a purpose' or to 'reduce or delay the chances for success'. Have you ever come across someone who has done this to one of your communication campaigns? I did very early on in my career, and for this reason I always consider these people during the investigation phase of my communications campaign.

An example of this was a campaign where we were rolling out a new HR programme, one where employees needed to actively sign up to participate. A critical part of the campaign was where we had HR team members make a presentation to employees across all our locations, explaining how great this new programme was. Little did I know that one of the team members was not in support of the programme. When we looked at the enrolment statistics we clearly saw the correlation between lack of enrolment and this person's presentations. Had we questioned this person up-front we could have understood why they were not supportive, and adapted how we communicated the benefits to them and to others who thought in a similar way. Alternatively we could have removed them from our presentation team.

Think about your invitations

This final point wraps up the topic of selecting the right people with the step of determining how to handle your invitations. It is important to think up-front about how you are going to invite these important people to provide answers to your questions. The reason it is important is that as you've identified that you need their assistance, you want to ensure their participation or you are back to not having the right information and answers to your questions.

When you send out your invitations, whether it be to a survey, focus group or just an informal chat, you will need to think about how you will explain the reasons for asking for their participation. You need to decide how you will explain the 'whys': why you are doing this and why you are asking the questions. It has been proven that the more open and honest you are, the better chance you have at gaining participation. However, based on your programme/campaign, you need to decide what you can and cannot say up-front, and the pros and cons of an open and honest approach. My suggestion is to start out aiming to be open and honest, and if you find that it will not work, then adjust your approach.

Besides determining what you should and should not say in your invitations, it is also important to determine who the invitations should come from. Should they come from you, from your boss, for a business leader? Ask yourself which name will give the credibility to the communication so that it will be read and actioned. A name can make a big difference, so I would suggest speaking with a variety of stakeholders to gain their perspective on which name will work best.

These hints will help you identify the 'right' people, helping you 'solve the crime' or more importantly for us in HR, achieve a successful communications campaign. They will also allow us to see things through multiple lenses. According to Lesley Alexander, Managing Director of Ferrier Pearce: 'We all come to a situation with our own experience and biases, so it's useful to have other people's perspective in order to get a richer picture.' She reminded me of the existence of the four versions/accounts of a religious story. They all tell us the same story, but do so from different viewpoints and to different audiences. Together they give us a fuller and more comprehensive picture of the events. It's this fuller story that we aim for in talking to the right people, ensuring that we've considered and addressed everything as we develop our communications campaign.

How to analyse data

Fantastic, we've asked the 'right questions' to the 'right people' and now we have the 'right data'. Now what do we do? What you do with this data is absolutely critical to the investigation process, or you end up with data but no answers to your questions. Think of yourself again as a detective solving a crime, picture how they build a story-board of the crime with their data, helping them eliminate suspects and ultimately find the culprit. Put your data up on a white board (real or hypothetical) and start drawing conclusions. Use the data to draw pictures of what your business leaders are asking for, HR business partners are observing and/or employees are asking for.

Here are the steps involved in analysing data effectively.

1. Have an adequate sample size

Before we begin talking about analysing the data, I want to point out the obvious, which is that before we can analyse data we need to have an adequate sample size. Larger sample sizes lead to increased precision and statistically more accurate data. So if you don't have enough data, go back and find a way to obtain more data. The way you do this depends on what method(s) you've used to collect the data. For example, if you haven't had enough respondents to an employee survey, think about a way to coax them to participate. If you don't have enough data from one particular office, consider going there in person and conducting a focus group to obtain this data. Think of what businesses do to get you to complete a survey: they offer you a chance to win a prize. Will this work at your organization?

Here's a joke which addresses the topic of adequate sample size which you may enjoy:

> Three professors (a physicist, a chemist, and a statistician) are called in to see their dean. Just as they arrive the dean is called out of his office, leaving the three professors left in his office. The professors see that there is a fire in the wastebasket.
>
> The physicist says: 'I know what to do! We must cool down the materials until their temperature is lower than the ignition temperature and then the fire will go out.'
>
> The chemist says: 'No, I know what to do. We must cut off the supply of oxygen so that the fire will go out because of a lack of one of the reactants.'
>
> While the physicist and chemist debate which method they should use they are surprised and alarmed to see the statistician running around the room starting other fires. They both scream: 'What are you doing?'
>
> The statistician replies: 'Trying to get an adequate sample size.'

I'd like you to picture the statistician running around starting fires the next time you have collected your data. Ask yourself, would he or she be doing this with my data or do I have enough?

2. Carefully review your data

Once you have adequate sample sizes of your data, the first thing to do is to carefully review what you have. Read it once, twice, however many times it takes for you to feel familiar with what you have captured. Take notes throughout this step so that you have what you need to progress to the next step. The important point here is to not skip this step, for if you are not comfortable with your data you will end up either making incorrect assumptions or having to revisit your data over and over again. This is not only frustrating but adds valuable time to your campaign.

3. Organize your data

After you've reviewed the data and feel comfortable with it, the next step is to organize your data. This involves putting the data into manageable groups or sections. The way that statisticians do this is by developing a set of codes. This is helpful as it collapses data to create categories for more efficient analysis, leading you to the next step of looking for how patterns occur.

From a technical perspective, coding data makes it easier for you to sort and analyse the data in spreadsheets. Here's a tip I've learned the hard way: think of how you will code your data up-front so that you only have to code once. Have a discussion with your team, and agree this before you begin the work. It's no fun, and a waste of time, to have to go back and code for a second or third time.

In the example in Table 1.2 I've created codes to be used to review data collected from an employee survey. The questions asked to employees in the survey were about how much they currently know about the pension scheme, and how much they want to know.

TABLE 1.2 Codes for reviewing data

Category	Codes	
Age group	18–25 years old = A 26–35 years old = B 36–45 years old = C	46–55 years old = D Over 56 years old = E
Current knowledge of pensions	No knowledge = 1 A little knowledge = 2	Adequate knowledge = 3 In-depth knowledge = 4
Requested knowledge of pensions	Nothing more = 1 Basic information = 2	In-depth information = 3

TABLE 1.3 Results of data review

Age category	Average Score	
	Current knowledge of pensions	Requested knowledge of pensions
A	1	1
B	2	2
C	2	3
D	3	3
E	4	2

From these codes the data was organized and reviewed as shown in Table 1.3.

4. Look for common themes, patterns and/or relationships

Now it's time to step back from the detailed data and look for common themes, patterns and/or relationships that emerge from your data. Statisticians call this 'thematic analysis', and it emphasizes pinpointing, examining and recording patterns or themes within data.

Using the example, once you organize your data you can pull some themes or patterns such as:

- The younger employees (categories A and B) know little about pensions, but aren't interested in learning more. For this group you may want to communicate the basics on pensions so that they become more aware to make the smart short-term decisions about contributions.
- The middle-aged employees (categories C and D) know more about pensions, but as they are getting closer to retirement age they want to know more about this topic. For this group you may want to provide more in-depth communication material.
- The employees nearing retirement (category E) know a lot about pensions and don't feel that they need to know much more about this topic. For this group you may want to give the basics on pensions as a refresher, and then more details on what they need to know as they near retirement and start taking from their pension scheme.

One common way that statisticians conduct thematic analysis is through regression analysis. Regression analysis is a statistical process for estimating and understanding the relationships between variables. For example, as shown above we could use regression analysis to plot the relationship between employee age and knowledge of pensions. We could similarly use this analysis to plot the relationship between employee age and preference in communication medium used. This is helpful when you have a lot of data, and thus you need a statistical tool to assist you with the complex and labour-intensive analysis.

Another thing to keep in mind, according to Dr Andy Brown, CEO of Engage, is not to assume a correlation between data. There may be another confounding factor. For example, if you look at a data set which shows a strong correlation between ice cream sales and homicide rates, you may be making a very false assumption in concluding that the sale of ice cream causes murders. There is, more likely, a third confounding factor, hot weather. We know that a rise in temperatures tends to lead to a rise in the sales of ice cream. Hotter weather conditions are also known to coincide with a rise in homicide rates (*The Examiner,* 2013). In this instance, the relationship between ice cream sales and homicide rates is a simple, statistical coincidence and not a valid correlation.

To pull apart relationships in data properly, there are a couple of ways you can ensure that you are looking at real causation. For example, let's say you are assessing if an increase in senior leadership communications is helping to improve confidence in the future of the business amongst employees. You will need to apply some of these approaches.

5. Use data which is longitudinal

Use longitudinal data, which is data which has been observed over a period of data, to assess how data and relationships change over the long term. By using this longitudinal data you can observe whether spikes in one particular variable can be seen to have a strong relationship with another over time, regardless of a third confounding factor.

6. Use smarter analytics

Use statistical modelling tools such as regression analysis to help you assess the impact of one variable on an outcome while controlling for other variables (eg the overall buoyancy of the economy).

7. Control for potentially confounding factors

Build into your data set any other variables which could be causing 'white noise', meaning there is no correlation in the data, and is just a confounding factor. A confounding factor was explained previously with the example showing that although there was an apparent relationship between an increase in ice cream sales and homicide rates, this was merely a coincidence and was indeed caused by a confounding factor (hot weather). You should try to build in background factors which could be affecting your communications outcomes so as to control for their impact. For instance, if you feel the general performance of a business unit may be affecting how well some of your key messages are landing in those units (eg better performing units are responding more proactively to messages about change), then try to build in an indicator of business performance into your data set. This will help to control for any potentially confounding factors.

8. Write your report

After the data has been analysed and themes, patterns and relationships have been established, the next step is to write your final data/observations report. The goal of this report is to convey the complicated data into a meaningful and actionable story. It is important to create this report so that you have a written record to have signed off on, but also to refer to throughout the communications campaign. A suggestion is to make it clear, concise and straightforward. By doing so you will have a better chance for your report to be read and understood. Another suggestion is to have the end in sight, meaning: what do you want the reaction to be to the report? For example, what if you want the report to act as a way for the leadership team to understand the need for and thus sign off on expenses related to a new company intranet site? If this is your objective then you need to make sure that the data strongly and clearly displays this.

This section has focused on how to analyse the data and information you have collected during the investigation phase. By using the tips I've suggested and considering the steps in doing so, you will ensure that the data has been turned from numbers and words into meaningful and useful information by which to create your communication campaign objectives.

How to create objectives

I was taught early on in my career to visualize the end when beginning a project in order to achieve success, looking for the ROI (return on investment) for the business. When pitching projects to business leaders this has been critical, as they don't want to spend the time and money on something that will be of no value to the business. This can be directly financial (eg saving the company money by employees joining a salary sacrifice benefit scheme) or indirectly financial (eg increasing the employee engagement score by engaging employees, thus increasing productivity, through a new recognition scheme).

This 'visualization of the end' relates directly to creating objectives, something which is critical to do before you kick off the project. In this section we are going to address the following:

- Why do we need objectives?
- Creating 'good' objectives.
- Gaining agreement on objectives.

Why do we need objectives?

An objective can be defined as something that one's efforts or actions are intended to attain or accomplish. It gives you and your communications campaign a purpose, goal or target. Here are some reasons why it is critical to have these objectives at the beginning of your campaign.

1. Gives you focus

According to Donald Trump, a famous US business magnate worth $4.1 billion (2015): 'What matters is where you want to go. Focus in the right direction!' This focus is key, for if you use your objectives as the focus or centre of your efforts, you have a better chance of achieving them. Without these objectives you will most likely go in the wrong direction, wasting valuable time and efforts doing so, and ultimately not achieving success.

One way to create this focus for you and your project team is to create a one-page document listing the objectives which you have agreed. Give this to the team to hang by their desk, on their computer, wherever it will best be seen. This creates a visual focus in addition to a mental focus, better setting your campaign up for success.

2. Resolves issues

Having objectives gives your communications campaign a direction. What happens, however, if in the middle of the campaign an issue occurs which challenges and/or alters your direction? Having objectives can assist with this, as it takes away subjectivity from the situation, focusing you and your team on where you want to get to, helping you find another route.

For example, a company was introducing a new employee recognition programme, and had determined that one of their objectives was to deliver it in a way which supported two-way communication. They decided this as they were concerned that the new programme would be challenging for their employees to understand and thus utilize fully. When the company intranet site they had agreed on was delayed due to programming challenges, they were faced with a decision as to what to do in its place. By re-visiting their objective of two-way communication the team was able to resolve the issue and come up with another solution which supported this two-way communication. Had they not agreed this objective they may have selected something which would not have fully resolved the issue, for example selecting a one-way communication approach.

3. Gains agreement from the beginning

Just as critical as creating objectives is gaining agreement of them from the beginning. We want to make sure that what we deliver through our communications campaign delivers ROI to the business. By having agreed objectives we ensure that we are all heading down the same path together, working towards goals that we all agree are those which should be achieved.

Using the previous example when the communications campaign had challenges which impacted the company's ability to launch the campaign, what would have happened if they had not agreed objectives? They may not have been able to quickly and effectively resolve the issues and the situation.

4. Enables flexibility

It may seem a bit strange to list flexibility under objectives, as you would expect/hope that once you develop your objectives they do not change. However, you need to be agile and prepared to change direction in a communications campaign, and by having a starting point of agreed objectives, you can better do this.

Using the employee recognition programme example again, what would have happened if the only two-way communication they could deliver in a month to replace the company intranet site was webinars? Yes, this is two-way communications in that it allows questions and answers, but what if the team felt that it wouldn't fully meet their objective of providing comprehensive information? They may need to flex their two-way communication objective to include one-way communication in the shape of an information document to cover the details which would have been included on the company intranet site. By doing this they are flexing their original objective, but doing so in a way that does not compromise the effectiveness of the communications campaign.

5. Defines success

This was listed as a reason to ask questions, and similarly it is a reason to create objectives. As the saying goes, if you don't have a destination, how do you know if you have arrived? By having objectives you will be able to define and measure your success, celebrating these achievements along the way. I will go into further detail on measuring success in Chapter 6 (Testing), which will explain how to test and measure against your objectives and determine the overall ROI.

Creating 'good' objectives

For a detective it is quite simple to set objectives, as it is to solve a crime quickly and find the criminal. But for us in HR it isn't as straightforward. We need to use the specific data we've uncovered in the data analysis phase, and use this to develop our communications campaign objectives.

One of the most common approaches for setting objectives is the SMART approach. This approach assists us in setting what I've called 'good' objectives, which are ones that will ensure we can deliver an effective communications campaign. As the saying goes: 'If you can visualize it then you can achieve it' – which is what setting 'good' objectives is all about. They help you visualize the end of your journey, so that you know where you are going and are on the same route.

Many of us in HR are familiar with the SMART approach for setting objectives, as we use it in our performance management systems. It is an approach that has been around for a long time, first mentioned in 1981 in a paper by George Doran. Since then it has been used by others, and in fact the words associated with the letters vary slightly, depending upon who you talk to or what you read. That being said, all parties agree at a high level that well-written objectives help you reach your ultimate goal.

As there are many books on this topic, for the purpose of this section I am going to explain the SMART approach at a very high level. Should you wish to get more details, you can easily find more details on this topic in other material/publications.

The SMART approach to setting objectives is summarized in Table 1.4.

TABLE 1.4 The SMART approach to setting objectives

Letter/Word	Explanation
S = Specific	Should be specific rather than general goals, ones which are specific, clear and unambiguous. They should answer some or all of the five 'W' questions: ● What – what do I want to accomplish through my communications? ● Why – why am I doing this, what is my purpose of my communications? ● Who – who needs to be involved? ● Where – where is it be located (eg intranet, social media page)? ● Which – which are the requirements and constraints?
M = Measurable	Should contain criteria for measuring progress towards your objectives, and be quantifiable (eg a number, percentage etc).
A = Achievable or Actionable	Should be achievable or attainable, not something which is too far-reaching or difficult to attain. This does not mean that they should not be stretching goals, but ones which can be attained and actioned given the necessary resources and timelines.
R = Relevant	Should be relevant, eg related to other business and/or HR goals. This not only ensures that it fits in with more strategic objectives, but also ensures you will receive necessary support and resources.
T = Time-bound	Should answer the question 'when'. Deadlines are put in place so that the team focuses on the completion of tasks and objectives.

To illustrate SMART objectives, I've listed below some examples from various HR communication campaigns:

- Increase percentage of employees inputting their goals into the performance management system from 75 per cent to 95 per cent of employees. *Note:* This gives the team a specific and measurable objective. My only question would be whether it is achievable to increase from 75 per cent to 95 per cent, but you and your project team would be able to answer this question.

- Develop an intranet site to be available at the start of the performance management cycle (1 December) which contains critical resources and links to the process actions. *Note*: This gives the team a specific timeline as an objective as well as specifics as to what needs to be put onto the intranet.
- Create a multifaceted communications campaign to support the re-launch of the employee recognition scheme for 1 January. Campaign should reflect the needs of the key business areas and employee demographics of the company. *Note*: This is a good starting point as it is specific and relevant; however, it needs more details. These could be added once the data has been collected and analysed and multifacets have been determined.

Gaining agreement on objectives

As stated previously, one of the key reasons we create objectives is to align expectations from the beginning. Expectations can only be aligned, however, if we gain agreement on our objectives up-front. By doing this we can ensure that we are not only walking down the same 'path' together, but doing so at the same time and pace.

I can't tell you exactly how to gain this agreement, as it will be done differently at each company. What I can do is provide you with the following guidelines on gaining this critical agreement:

- *Follow your company's governance structure, working within these guidelines*: Your aim, as with the questioning step, is to ask the 'right' people. Use your company's governance structure to do this, going to those people who are delegated as decision makers. It is also best to ask your campaign sponsor if in this instance there is anyone else that needs to be consulted for agreement. It's always better to involve too many people than too few.
- *Provide decision makers with enough details*: In the previous section we discussed creating data reports. You and your team will need to decide if these reports provide decision makers with enough detail to make their decisions. You will need to balance providing too little data with too much, with the key being getting this balance right. The last thing you want to happen once objectives have been agreed and the campaign kicked off is to have a decision maker come back and challenge and/or change them.

- *Give yourself adequate time*: Take it from me, it always takes longer than anticipated to get time scheduled with decision makers, and to conduct these meetings. Keep this in mind, giving yourself adequate time to complete these conversations. You may even need to have two meetings with key stakeholders based on how many questions and/or information is requested.
- *Be prepared for changes and having to go back to the drawing board*: Related to the guideline above about time, you need to be prepared for challenges and changes made by decision makers. This sometimes means adjusting an objective, but at times it can mean going back to the drawing board, and re-working one or more objectives. Whilst this may seem like a derailer of the campaign, look at it as an opportunity to get things right from the beginning.
- *Put it in writing*: It is important to document the conversations you have with your decision makers so that you have a record of these conversations. This will not only provide the details for your reference throughout the project, but add clarity should questions arise at a later date. I would suggest that, besides filing these conversation notes in your campaign file, you send a copy to your decision makers. By doing this they will also have a record of the conversation and agreements made.

Conclusion

To conclude this chapter I'm going to go back to where I started, with Sherlock Holmes' advice to make sure that you collect all of the facts. I've watched enough detective shows and read enough mystery novels to agree with Mr Holmes on this. How many times on these shows or in these books do the characters jump to conclusions and point the finger at the wrong suspect? Just the other day on one of my shows they almost put the wrong person in jail for a crime he didn't commit, only realizing that he was innocent because he had an allergy to the perfume which was worn by the person who was murdered.

Be bold and be brave, and get out there and ask the 'right' questions to the 'right' people. Think of your favourite detective, and their attitude of never giving up, and collect and revisit your data until you believe that it gives you exactly what you want. Use this to create the 'right' objectives for your campaign and for your company, and you will be setting your communications campaign up for success.

Top tips on investigation

- Take the time for investigation, remembering that you can't 'solve the crime' without the facts.
- Cultivate an eye for detail, asking the right questions to the right people.
- Look, listen and smell the 'crime scene', making sure you haven't missed any important clues.
- Be objective and analytical, using data to help you reach your conclusions.
- Revisit the 'crime scene', going back and checking and re-checking your facts and the data.
- Develop robust objectives that are clear, achieveable and deliver ROI to the business.

Skills for being an effective investigator

- Have an inquisitive personality, thinking and acting like a detective.
- Be open-minded, not jumping or making assumptions.
- Have a forensic approach to data, being able to collect, analyse and make conclusions from data.
- Be resilient and persistent in the face of barriers.

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