THE MANAGEMENT TOOLBOX FOR COMMUNICATORS

BICCC Breakfast Meeting

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COMMUNICATION MANAGEMENT TOOLS
Communication management tools can be defined as methods, procedures, concepts, and frameworks (thinking tools) for the analysis, planning, implementation and evaluation of communication activities in organisations, and for steering those processes.

**Benefits of using management tools**

- work more efficiently and effectively due to standardized processes
- support collaboration in and across functions and with agencies/service providers
- strengthen the trust of top management and (internal) clients in the problem solving competency
THE STARTING POINT: A SIMPLE OBSERVATION

Corporate communications research
- has created multiple theories, concepts and ideas
- but few of them have been broken down to applied tools for problem-solving
- very few tools have become popular and common knowledge, e.g. SWOT analysis, RepTrak

Management research
- rich tradition of teaching tools, working with tools in consultancies, reflecting the use of tools
- far more than 100 popular and well established management tools (e.g. Porter’s five forces, balanced scorecard, BCG matrix)
THE STARTING POINT: A SIMPLE OBSERVATION

Corporate communications research

Management research
A GLANCE INTO THE GERMAN INDUSTRY: FEW BEST PRACTICES

- Corporate communications departments use tools – but often under different names
- Company-specific toolboxes and a systematic documentation of tools are uncommon
- Few communication consultancies “invent” and sell their own tools

Example: Toolbox Communication Planning, Deutsche Telekom AG

Example: Toolbox Communication Management, Lautenbach Sass
OUR GOAL: LEARN MORE ABOUT THE USAGE OF TOOLS

First step:
Compilation of more than 60 tools from academic and professional literature
Systematization according to four management phases: analysis, planning, executing, evaluating

Second step:
Online survey among German communication managers about the usage of 32 selected tools
Case studies in 5 German companies
COMMUNICATION MANAGEMENT TOOLS

RESONANCE IN THE INDUSTRY: TOOLS ARE A HOT TOPIC

VERSCHMÄHTE TOOLBOX

Marie-Chr. Schindler @mcschindler · 3h
Danke @UniLeipzig und @lautenbachsas für diese interessante Erhebung zu Management-Tools für die Unternehmenskommunikation – Bedeutung, Nutzung und Erfahrungen.

Oliver Plauschinat @oplausch · 3h
Bekannte Tools in der Unternehmensmedienerformanceanalyse vs. unbekannte digitale Transformation bei den Tool-Gefängnisse Lautenbachsas

Management Tools for Communicators

Toolbox für PR-Manager

PR-Werkstatt

Evaluations Tools

Sophia C. Volk
SELECTED FINDINGS
OF THE SURVEY
ONLINE SURVEY: FIRST STUDY ON TOOLS IN COMMUNICATION

Key topics

• Knowledge and perceived relevancy of management tools
• Popularity, application and satisfaction of the most important tools for analysis, planning, execution and evaluation
• Drivers of tool usage (organization, demographics)

Method

• Data collection: online-survey, 5 weeks in early 2018
• Sample: \( n = 125 \) communicators responsible of a department's or agency's strategy, steering or controlling
• 41% Chief Communication Officers and 46% leaders of units, areas or teams; \( \bar{\Omega} 47 \) years old
**RELEVANCE: INCREASING COMPLEXITY LEADS TO GROWING IMPORTANCE OF TOOLS**

- **92.3%** Our communication tasks are becoming increasingly complex.
- **88.0%** Tools will gain in importance due to growing and more complex tasks.
- **72.1%** Communication management tools are used more intensively today than five years ago.
- **91.2%** Tools should be part of the knowledge and skills of communicators.

Zerfass, Volk, Lautenbach & Jakubowitz, 2018, p. 16
COMMUNICATION MANAGEMENT TOOLS

BENEFITS: TOOLS HELP TO IDENTIFY, SIMPLIFY AND SOLVE PROBLEMS

Communication management tools....

- 79.0% facilitate a structured recognition of problems
- 79.0% enable a routinized processing of problems
- 69.4% help to simplify complex problems
- 62.6% help to accelerate decision-making processes
- 68.5% enable efficient solution finding

Zerfass, Volk, Lautenbach & Jakubowitz, 2018, p. 19
DIFFERENCES: AGENCIES ARE AHEAD IN COMPETENT USE

- **I learned about tools in detail in my studies or in further education**
  - Agencies: 25.4%
  - Corporations: 25.6%

- **I learned about tools in detail during the course of my professional practice**
  - Agencies: 81.4%
  - Corporations: 63.2%

- **In our department tools are systematically documented**
  - Agencies: 47.3%
  - Corporations: 41.9%

- **The staff in our department can use tools competently**
  - Agencies: 72.2%
  - Corporations: 39.5%

*n = 241 Communication responsibles in charge of steering within Germany.*
COMMUNICATION MANAGEMENT TOOLS

POPULARITY: THE MOST WIDELY USED TOOLS

1. Editorial plan 94.4%
2. Topic planning 94.4%
3. Media response analysis 92.8%
4. Budget planning 92.0%
5. SWOT analysis 90.4%
6. Communication checklist 88.0%
7. Benchmarking 84.8%
8. Communication briefing 84.0%
9. Mission statement 81.6%
10. Portfolio of instruments 81.6%

Zerfass, Volk, Lautenbach & Jakubowitz, 2018, p. 23
HOW MANY OF THESE TOOLS DOES YOUR ORGANIZATION CURRENTLY USE?
COMMUNICATION MANAGEMENT TOOLS

UNPOPULARITY: THE LEAST KNOWN TOOLS

1. Communication touchpoint analysis: 28.0%
2. Communication scrum: 26.4%
3. Flowcharts and swim lanes: 20.8%
4. Target radar: 19.2%
5. Topics pyramid: 19.2%
6. House of communication targets: 17.6%
7. Persona analysis: 16.8%
8. Brand steering wheel: 16.0%
9. Scenario technique & forecasting: 14.4%
10. Budget analysis: 11.2%

Zerfass, Volk, Lautenbach & Jakubowitz, 2018, p. 24
**TOP 12: TOOLS WITH THE HIGHEST LEVEL OF SATISFACTION**

1. **Communication touchpoint analysis**  
   - Satisfaction: 73%  
   - Use: 38%

2. **SWOT analysis**  
   - Satisfaction: 68%  
   - Use: 90%

3. **Benchmarking**  
   - Satisfaction: 64%  
   - Use: 85%

4. **Reputation analysis**  
   - Satisfaction: 75%  
   - Use: 71%

5. **Media response analysis**  
   - Satisfaction: 71%  
   - Use: 93%

6. **Brand assessment**  
   - Satisfaction: 71%  
   - Use: 60%

7. **Mission statement**  
   - Satisfaction: 77%  
   - Use: 82%

8. **Topic planning**  
   - Satisfaction: 76%  
   - Use: 94%

9. **House of communication targets**  
   - Satisfaction: 74%  
   - Use: 53%

10. **Communication briefing**  
    - Satisfaction: 83%  
    - Use: 84%

11. **Communication checklist**  
    - Satisfaction: 81%  
    - Use: 88%

12. **Editorial plan**  
    - Satisfaction: 78%  
    - Use: 94%

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Zerfass, Volk, Lautenbach & Jakubowitz, 2018, p. 25
COMMUNICATION MANAGEMENT TOOLS

SATISFACTION: TRADITIONAL, SIMPLE TOOLS ARE AHEAD

Use

100%
75%
65%
50%

Satisfaction

2.5
3.5
3.9
4.5
5.0

SWOT analysis
Budget planning
Portfolio planning
Benchmarking
Report analysis
Big data & social media analytics
Stakeholder map
Reputation management
Process analysis
Persona analysis
Budget analysis
Outsourcing / Make-or-buy decision
Scorecards
Scenario techniques
Communication touchpoint analysis
Flow charts & swim lanes

Media response analysis
Topic planning
Editorial plan
Communication checklist
Communication briefing
Mission statement
Reputation analysis
Positioning matrix
Brand assessment
Sentiment tracking
Dashboards
Brand steering wheel
Topics pyramid
Target radar
Communication scum

Analysis tool
Planning tool
Implementation tool
Evaluation tool

Zerfass, Volk, Lautenbach & Jakubowitz, 2018, p. 26
SUCCESS DRIVERS: FACTORS INFLUENCING TOOL USAGE

21 tools out of the 32 tools surveyed have already been used in an average communication department.

Moderate positive correlation between average number of tools and:

- Company revenue and size \( (r = 0.363, p < 0.01) \)
- Size of the communication department \( (r = 0.342) \)
- Job experience \( (r = 0.223) \) and regular attendance of management trainings
- Perceived benefit for accelerating decision processes \( (r = 0.220) \) and efficient solutions \( (r = 0.299) \)

Zerfass, Volk, Lautenbach & Jakubowitz, 2018, pp. 35-36
TOOLS WITH HIGH SATISFACTION, BUT LITTLE SPREAD
HOUSE OF COMMUNICATION TARGETS

Planning tool

✓ Provides a template for deriving comm goals from corporate goals and differentiating them depending on target groups

✓ Helps to demonstrate alignment of comm goals with corporate strategy

Zerfaß & Volk, 2019
TARGET RADAR

Execution tool

✓ Facilitates the continuous monitoring of project outcomes with regard to the pursued communication goals and invested resources

✓ Helps to adjust resources (if needed) for projects influenced by changes, especially in agile teams

Zerfaß & Volk, 2019
9 KEY LEARNINGS FROM THE CASE STUDIES
“If the only tool you have is a hammer, (it is tempting) to treat everything as if it were a nail.”


The Psychology of Science.
New York, NY: Harper & Row (p. 15)
There is no “one right method” – selecting the right tools requires thorough research, weighting strengths and weaknesses, exchanging experiences with other tool users and considering the particularities of your company. Beware of elusive fashion waves.

Quick and simple solutions are not always effective. The lower the effort, the greater the risk of dissatisfaction. With scarce time resources, it is better to select a only few management tools and then use them purposefully.

The right combination of tools is the key to success. An average toolbox comprises about 15 to 21 tools. Smaller project toolboxes and situation-specific toolboxes can be used for recurring tasks, such as crisis communication or content management.
Tools must be adapted to existing processes and systems in the company – not the other way around. They provide generic templates and schemes. Do not implement them strictly according to textbook descriptions. Tools should also allow for unconventional solutions.

Systematic documentation of tools is mandatory – e.g. in guidelines, manuals, toolkits or handbooks, made available in intranets. Tool knowledge must be codified and passed on to new employees or service providers without loss of information.

Tools must be evaluated on a regular basis and updated again and again, as factors influencing their appropriateness and performance are constantly changing. If tools do not support desired ends satisfactorily, abolish them.
CASE STUDIES: 9 KEY INSIGHTS

7. A solid understanding of business fundamentals is necessary for the correct usage of management tools and increases the satisfaction with tools. Therefore, regular attendance of management trainings and education is a must.

8. A toolbox signals rationality and fosters the continuous development and professionalisation of corporate communications. Active support of top management should be ensured – this will promote acceptance as a business partner.

9. Satisfaction with tools varies between countries. This offers opportunities for internationally operating communication departments: new tools can be tested in pilot projects in one country and then implemented globally.
BUILD A TOOLBOX TAILORED TO YOUR COMPANIES’ NEEDS
NEED FOR ACTION: BUILD YOUR OWN TOOLBOX

Two approaches:
- company-specific (master) toolbox: for the analysis, planning, execution, and evaluation
- project/situation-specific toolbox: crisis or content management

It is not too complicated
- numerous established methods and templates already exist – they are easy to use and often freely available
- external help by consultants to implement tools is recommended
- ready-to-use guidebooks exist especially for tools originally from management, marketing, IT, human resources, etc.

Examples: Volk et al., 2017, pp. 37-38, Deutsche Telekom AG
COMMUNICATION MANAGEMENT TOOLS

FIVE STEPS: QUESTIONS TO ASK YOURSELF

**Status quo:** Which tools are currently used in your department? How many? Are some of the tools also used in other departments? How do you document and train tools?

**Systematization:** Which analysis / planning / execution / evaluation tools are used? Do you have enough tools for every management phase – or not?

**Self reflection:** Do you use ‘the right tools’? Do all employees know how to use them? Do the tools help to simplify, accelerate, structure decision making – or not? Are the tools compatible with each other? Which tools help to convince top managers best?

**Search:** Which new tools could help you to further improve? Which of these tools are well-documented and easy to implement yourself?

**Selection:** Which tools have the best cost-benefit-ratio? Does the tool fit to your needs and culture? Which technical/structural conditions need to be set up? Which methodological know-how is required? Who is responsible?
READ MORE

Introduction to the most important 44 tools
(coming in July, only German)

Overview of tools + Full study report
(available online in English)

Free Download:
www.bit.ly/tools-cc
THANK YOU!

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REFERENCES


