

# **DEFENSE BUSINESS BOARD**

Talent Management, Culture, & Diversity Advisory Subcommittee

**DBB FY24-04** 

# Communicating in Large Organizations

# September 10, 2024

An independent study assessing the Department of Defense's (DoD) capability to carry out enterprise-wide internal communications, best practices from private industry, and offering recommendations for DoD improvement.

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# **Executive Summary**

In 2023, the Edelman Trust Barometer clocked that respondents answered that "my employer" is 25 points more trusted than government or elected officials. Edelman's CEO summed it up by stating that "Business is the sole institution seen as competent and ethical." While some of this tracks to the perception of government officials, the effort that Fortune 500 companies have put into internal communications and relationship building has set a standard; they are often known to promote policies and practices providing transparency, feedback, teamwork, technological integration, and cross-departmental understanding. A healthy corporate culture is not built overnight and requires strong leadership to communicate core values consistently and to inspire intentional engagement with the mission.

Multiple DBB interviewees in the private sector have also lamented that communicating in large organizations is no easy feat. Internal communications have recently come to the fore by way of COVID-19, which was a wake-up call to many in the C Suite when faced with the task of keeping newly remote workforces engaged and informed constantly. Many organizations had to handle that seemingly new task on a global scale, in multiple languages, and through different brand identities and cultures.

The threats corporate entities face daily, competition from new entrants and emerging technologies, are similar to those the United States confronts in current conflicts such as in Ukraine and the Middle East and competition with its adversaries, requiring an ability for organizational senior leadership the ability to quickly and clearly communicate to lead the total force with agility, regardless of their global dispersion.

Whether corporate or governmental, effective internal communications are absolutely critical during times of crisis and transformation, when faced with significant change or upheaval, clear and consistent messaging is crucial to maintaining stability and driving success. Robust employee communication and engagement strategies help to maximize performance, foster a positive and unified culture, and enhance recruitment, retention, and productivity. By keeping employees informed and aligned, organizations can boost economy, efficiency, and effectiveness, and drive innovation. In times of crisis and transformation, internal communications can make the difference between success and failure. While there is no "silver bullet" to internal communications, private industry has largely made a significant transition to multi-channel communications, meeting employees where they are, and dedicated internal communications teams and strategies along with tools to measure output, input, and effectiveness.

While the Department's trust in decentralized decision-making and communications within the enterprise has served the warfighter well and has demonstrated local leadership's agility to respond to challenges quickly and in changing contexts, enabling warfighters to maintain an advantage, the fragmented and decentralized communications have proven ineffective in connecting the warfighter to enterprise-wide transformation efforts.

When communication fails, so do projects, objectives, and campaigns. Initiatives take too long and too much money, producing a culture that "waits it out" for the next administration or appointee to reset priorities. In short, "hope" that each level of the hierarchy and local decision-maker will accurately convey messages from DoD leadership makes for a terrible communication strategy.



DoD's practice of communicating has been one of sending mass emails with attached memorandums to try to reach the entire enterprise, including the Services, Defense Agencies Field Activities (DAFAs), and the chain of command to reach frontline workers through supervisors. A DBB interviewee, with both DoD and private-sector experience, likened this process to "the world's largest game of Telephone."

Further, there has been little to no audio-visual communication from the Secretary of Defense or Deputy Secretary of Defense to the entire enterprise throughout their tenure. In fact, the DBB has found that some DoD personnel do not know who the current incumbents are. Since the persons in these positions typically change at two to three years, it makes it all the more difficult not to feel so distant.

Every successful leader keenly understands the consequences of taking a lax approach to financial management, and most recognize the detriments of taking a lax approach to people management. However, it is questionable if the Department's leadership genuinely realizes the risks of taking a lax approach to communication management - how and how often ideas and information flow within and throughout DoD.

The Department of Defense's readiness to adopt transformations of its internal communications is inconsistent. While the Department has shown it can radically change its internal communications, as seen in its response to 9/11, this momentum was driven by a crisis and two simultaneous conflicts. Some recommendations can be implemented quickly, but others will require more time and resources. To maintain workforce engagement and enable senior leaders to communicate effectively across the organization, the Department should begin this transformation now. Building the necessary infrastructure and starting to communicate transparently are essential steps towards creating a culture of openness and engagement.

Leaders who typically prioritize dialogue, as opposed to monologues and one-directional practices, put a premium on ensuring people in their organizations talk with each other and not just to or at each other. A recent survey, The Cost of Poor Communications, of 400 companies with 100,000 employees each cited an average yearly loss per company of \$62.4 million due to inadequate communication to and between employees. McKinsey & Company found employee productivity increases by 20-25% in organizations where employees feel connected and where companies recognize the importance of internal communications.

It is evident through the Deputy Secretary of Defense's task to the DBB to study this issue that the Department has identified internal communications as an issue it intends to improve upon. Through this Study, the Defense Business Board has found that by learning from private industry best practices that have just gone through similar growing pains since COVID, the Department can take several significant steps to engage in enterprise-wide communications from senior levels of the Department to the lowest echelons to provide strategic clarity, increase employee engagement and productivity, and become a much more agile organization overall.



## **Tasking**

On April 25, 2024, the Deputy Secretary of Defense tasked the Defense Business Board (DBB)'s Talent Management, Culture, & Diversity Advisory Subcommittee with studying the issue of and submitting recommendations for enhancing the Department of Defense's ability to communicate enterprise-wide.

Specifically, the Honorable Kathleen Hicks, Deputy Secretary of Defense tasked the DBB to:

- Analyze communications best practices used by large public and private organizations and determine which are scalable and applicable to DoD;
- Assess supervisory roles;
- Evaluate tools and technologies considering factors such as security, culture, workforce readiness, and innovation potential;
- Assess current internal communication strategies that support the 2022 National Defense Strategies (NDS) and other subordinate strategies;
- Evaluate and propose metrics and key performance indicators to measure the effectiveness of these strategies; and
- Consider and address any other issues deemed pertinent by the DBB.

The Study Terms of Reference in Appendix A guided the full scope of research and interviews for this Study.

## **Approach and Methodology**

The Subcommittee conducted two (2) months of study and gathered data from a series of interviews and a comprehensive literature review to challenge and validate assumptions.

The team analyzed and synthesized data from more than 35 organizations and individuals across the public and private sectors. Discussions included perspectives and experiences from senior government officials and private-sector executives alike.

The interviews with 20 individuals over Zoom from 45 minutes to over one hour each.

Notes and key takeaways for the Study were captured; although, they strictly adhere to the Chatham House Rule.

# **Summary of Findings**

The Department does not have a central internal communications unit in charge of developing and coordinating enterprise-wide communications. It primarily relies on a disjointed system of email distribution of memos with attachments through the chain of command as the primary means to communicate to the enterprise.

Because DoD has no Internal Communications team, it lacks a comprehensive strategic internal communications plan, including goals, objectives, evaluation criteria, editorial calendars, platforms, and myriad channels to create surround sound communications.



Leading organizations involve top management in key communications efforts to build connections and confidence with the workforce, facilitate transformation efforts, and minimize inconsistent interpretations of key policies and priorities.

Using a variety of tools (e.g., email, video, a mobile application, text, and in-person sessions) will undoubtedly increase engagement, personalization, and inclusion. Military and DoD Civilian leaders throughout DoD would still be tasked with providing supplemental communications specific to their teams because those direct communications have proven fruitful.

- 1. There is no integrated internal communications strategy maintained for DoD Civilians, Reservists, and Active Duty Service Members, outside of ad hoc, initiative, or program-specific communication plans. This challenges DoD's:
  - a. Agility to meet the needs of the warfighter;
  - b. Clarity to prioritize existing and evolving strategic objectives;
  - c. Ability to engage employees consistently in shaping the future of DoD; and
  - d. Ability to combat disinformation, misinformation, and stovepiped communications across components/Services.
- 2. Industry and other government agencies have outpaced DoD in its tools, tactics, technologies, processes, and strategies regarding internal communications, while DoD lacks the infrastructure to communicate enterprise-wide, has no Internal Communications Team to formulate an internal communications strategy, and continues to rely on memos and emails passed through the chain of command with the hope that it gets to the lowest echelons of the Department.
- 3. Communications throughout DoD are highly fragmented, inconsistent, and not measured, and the DBB is unable to locate anyone currently serving as the "steward" of the current state or working on a strategy for improvement.
- 4. "Communicators" throughout DoD are not regularly interacting with each other across components and services, nor working from shared processes, editorial calendars, or even priorities, highlighting one of the greatest opportunities for non-platform-based improvements to be made for internal communications.
- 5. DoD has missed a critical opportunity to make OSD leadership present and relatable to DoD personnel through more regular and informal communications, town halls, video, external social media, and email communications.

The DBB recognizes that the Department is not fully ready to adopt all modern internal communications techniques at once, despite having shown the ability to make radical changes in response to crises. While some recommendations can be implemented quickly, others will require more time and resources, highlighting the need for a gradual and strategic approach to transformation.



## **Summary of Recommendations**

- 1. OSD Public Affairs Office (PAO) develops an Internal Communications team with a comprehensive, multi-channel top-down internal communication strategy, and an organizational architecture to accelerate future work. The establishment of an internal communications team with the existing staff of Public Affairs is a critical first step. Along with this OSD internal communications team, establishing a "communicator's community" within DoD across Services and components can help accelerate messages, provide clarity, and establish best practices.
- 2. Deploy new non-sensitive communication tools to both increase the effectiveness of and manage communications across channels while measuring the impact. This starts with the ability to send enterprise-wide emails but should in time also include testing an app accessible by all DoD Civilians and Service Members, accessible to PAOs for crafting localized messages around enterprise communications.
- 3. Work with PA teams to create a multi-channel communications plan for each pillar of the National Defense Strategy and other critical initiatives as needed with a higher fidelity communication plan and regular drip of content.
- 4. Incorporate the voices of OSD along with existing hierarchical communications practices to ensure "surround sound" in the future. Intentional efforts to "cross the chasm" from OSD and the Pentagon to the global force must include town halls and a more regular digital presence amongst field staff.
- 5. Deploy the use of critical Key Performance Indicators (KPIs) to determine effectiveness and iterate for the future. This includes the use of a consistent set of metrics like source Urchin Tracking Modules (UTMs), open rates, click rates, click-to-open ratios, read time, and communication surveys. This data should be used divest from some communications tools and testing of innovative approaches.



#### **Final Comments**

The Defense Business Board (DBB or the "Board") appreciates the Deputy Secretary's confidence in entrusting the DBB with this important study. The Subcommittee applauds the hardworking people of DoD who commit themselves to the defense of this Nation. The Subcommittee commends and genuinely thanks all those in private industry and academia as well as those who have contributed immensely and whose advice and knowledge were invaluable to this Study. We hope this Study is useful in their endeavors.

Respectfully submitted,

Matthew Danie

Study Lead

Hon. David Walker

Study Lead



# **Preface**

This Study, DBB FY 24-04, Communicating in Large Organizations, is a product of the Defense Business Board. The DBB's recommendations herein are offered as advice and do not represent DoD policy. References in this Study to case studies involving non-DoD entities do not imply DoD endorsement.

The Secretary of Defense established the DBB in 2002 to provide the Secretary and Deputy Secretary of Defense with independent advice and recommendations on how "best business practices" from the private sector's perspective might apply to the overall management of DoD. The Secretary of Defense appoints DBB members, who are senior corporate leaders with demonstrated executive-level management governance expertise.

DBB members possess a proven record of sound judgment in leading or governing large, complex organizations and are experienced in creating reliable and actionable solutions to complex management issues guided by proven best business practices.

Authorized by the Federal Advisory Committee Act of 1972 (5 U.S.C. 10) and governed by the Government in the Sunshine Act of 1976 (5 U.S.C.§ 552b, as amended), CFR 102-3.140, and other appropriate federal and DoD regulations, the DBB is a federal advisory committee whose members volunteer their time to examine issues and to develop recommendations and effective solutions, aimed at improving DoD management and business processes.



# **Study Members and Signatures**

Hon. Deborah James serves as Chair of the Defense Business Board. Hon. David Walker and Matthew Daniel co-led the Communicating in Large Organizations Study. Other Subcommittee members who contributed to this Study are Dr. Alex Alonso, Cheryl Eliano, Erin Hill, Jennifer McClure, and Robert Wolf. Major Mike McDonald, U.S. Army Representative to the DBB, and Mrs. Janice McLaury, researcher and writer, provided support to the Subcommittee. **Appendix C** provides biographies of the Subcommittee members.

The Subcommittee presented the Study and its findings and recommendations to the entire DBB membership during an open public meeting on September 10, 2024. After discussion and deliberations, the DBB unanimously approved the Study. The briefing slides presented and approved are in **Appendix B**, and any public comments received are in **Appendix F**.

#### **Signatures**

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**DBB** Chair

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Alexander Alonso

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# **Internal Communications are Critical to the Modern Organization**

Effective internal employee communication and engagement efforts are essential to maximize performance. Creating meaningful interactions fosters a positive and unified culture that contributes to recruitment, retention, and productivity enhancement. Better communication helps to improve and enhance economy, efficiency, effectiveness, innovation, and employee morale. Providing consistent messages and information is especially critical during major transformation or crisis management periods and can make the difference between success and failure.

The Institute for Public Relations interviewed multiple executive-level communicators and found common themes around how internal communications created intangible value. These included:

- Contribution to company culture and community
- Increased employee confidence
- Greater collaboration and connection among employees and leaders
- Increased encouragement for employees to share their voices
- Recognized employees
- Increased employee confidence in the company's direction, strategy, and leadership
- Employees' motivation to innovate ii

Multiple private sector DBB interviewees have stated that despite the tragedy of the COVID-19 pandemic, it forced companies to rethink and reprioritize their internal communications to keep employees informed and engaged and make them feel heard through transparent communications. This was done through myriad tools and channels along with large-scale transformation of various technologies which ended up increasing transparency and trust in senior leadership and organizational strategy, direction, and purpose.

# **Background**

The Department's DNA is rooted in its purpose to provide combat-credible military forces needed to deter war and protect national security. However, DoD continues to face increasing international threats and domestic challenges requiring an urgent need to review its priorities, business operations and practices, collaborations, and measurements for success.

Key to this effort is the necessity to improve non-sensitive internal communications and robust employee engagement (EE), unifying a cohesive workforce where everyone from leadership to frontline workers is aligned with mission goals, organizational culture, and deeply rooted values.

Effective communication implies leadership feels the pulse of its workforce and is open to the value each one brings as an individual and as a Total Force. In return, culture will define the people and the work they do every day, fueling the organization as it faces new challenges.

Recently surveyed employees in the private industry noted miscommunication and communication barriers lead to delays or failures in project completion (44%) and missed goals (31%). Communication issues present obstacles or delays throughout the enterprise, from acquisition to sustainment of warfighter systems to collaboration, innovation, and productivity.

Based on the current lack of effective outreach and an enterprise-wide, modern communications plan, it is clear the Department faces an inability to convey strategy, risks, changes, and new



priorities quickly and clearly. Looking to the future, in order to continue to dominate on the global stage, new internal communications tools are needed to better equip the warfighter and the Total Force, specifically robust and multichannel, non-sensitive, enterprise-wide communications will be critical to transforming business operations in the Department.

In 2023, an important trend in the corporate world is for internal communications to reduce complexity and to work with analytics to enhance productivity and communication across departments and relationship management. iii Interestingly, 60% of companies do not have a long-term internal communications strategy, and of those that do, 12% do not measure the effectiveness of communications. 74% of business transformations fail due to poor communications and absent or ineffective leadership. iv Today, no KPIs or metrics for internal communications from OSD exist. As such, The DBB is not surprised that enterprise internal communications within DoD are ineffective.

While policies and priorities may be set by agency leaders at headquarters, typically located in Washington D.C., the day-to-day work to deliver the mission is tasked to employees in the field who often feel isolated from those making decisions and disconnected from senior leaders back in Washington. Despite a common misperception most federal civil servants work in D.C., 85% live and work outside the D.C. Metro Area and across the country.

Communication with a geographically dispersed workforce is not a challenge unique to the Department. Gallup found almost three-quarters of employees feel as though they are missing out on company information and news and feel disconnected from their work or organization because the internal communication department is non-existent or doing a poor job.

Harvard Business Review found that 90% of remote-working employees were asking for weekly communication from their company, with 29% wanting daily communication. Accountemps research shows the number one cause for low morale is poor communication and sharing important updates with employees, recognizing achievements to ensure employees feel valued, and proactively communicating changes or crises is essential for successful internal communication and for building a healthy organization culture – a winning workplace and workforce. vi

A DBB interviewee, with previous experience in the Pentagon and a current senior position in a Fortune 10 company, stated the organization's CEO conducts monthly live in-person and electronic town halls with all employees, rotating between locations and teams. The recording is available for asynchronous viewing, and employees are encouraged to ask questions and vote on the ones they would like the CEO to address publicly, creating a transparent exchange. At every meeting, the CEO addresses topics relevant to business operations, including competitive threats, business strategies, organizational culture, pressing priorities, and key initiatives. The CEO also conducts live-streams around big events or announcements.

In interviews, the Board found consistently that other senior executives do the same, making themselves available for tough questions. This two-way exchange establishes feedback between senior leadership and employees and increases transparency, a more personal connection, trust, and enhanced culture within the organization.

In large, diverse, and dispersed organizations, like DoD, employees must hear directly from decision-makers rather than primarily through third-party sources or social media. Without clarity



and agility in regular communications, social media plays a huge role in misinformation and disinformation. As a result, companies of all sizes find themselves on the defense from memes, misinformation, disinformation, and competitive depositioning.

Dr. John Kotter, Harvard Business School, highlights communication challenges in hierarchical organizations, such as DoD, and proposes "Surround Sound Communication." The concept, covered in the DBB's *Improving Business Operations Culture* Study, uses a variety of channels to defeat silos and to deliver truthful, clear, and concise information from the top that echoes throughout the organization. Millennials expect more dialogue in internal communication, and internal social media channels are enabling more collaboration. Vii



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# Findings: Within DoD/OSD

Today, the Department of Defense has no enterprise-wide non-sensitive internal communications strategy. OSD has a loose internal communications strategy for itself, and most Services and components have an internal communications strategy for their own organization, but the Department of Defense does not. Additionally, no one in OSD can identify enterprise internal communications as "their job." This is largely producing the results one would expect: pockets of excellence, stovepiped activities, and most importantly, consistent friction with change management efforts to drive enterprise efforts.

It is certainly not that the efforts have not been extended here in the past. In fact, the events of 9/11 forced the Department's internal communications strategy to be much more robust. According to DBB interviewees, the national tragedy forced the Department to be much more proactive in internal messaging and to consider how best to communicate with various audiences and the Total Force, including the Guard and Reserves, which were activated at levels not seen in decades. Beforehand, things were done primarily through press releases published on a rudimentary website, but that process was no longer sufficient, immediate enough, or personalized appropriately. The Department stood up a new "Pentagon Channel," revamped its website, and even named a "Deputy Assistant Secretary of Defense for Internal Communications." This work was accelerated by a national tragedy, but Secretary Rumsfeld had already laid the groundwork with his staff. Pentagon Town Halls, which became important for culture and communication post-9/11, had actually begun in the months that preceded the tragedies of that day.

One interviewee said that as far back as the Rumsfeld era, the Secretary of Defense hosted town halls in the Pentagon Auditorium that were live-streamed on DoD internal website and the Pentagon Channel. They would even have live feeds from abroad that the Secretary wanted to focus on, such as free elections in Iraq and Afghanistan, and host a live conversation between Secretary Rumsfeld and General George Casey, who would speak to the entire Pentagon live from abroad to speak of the importance of what was happening. This presented a level of authenticity to the workforce, who may have felt separated from what was happening in the Middle East.

When on a "wartime footing," the PA function within OSD went into overdrive, especially given the number of Reservists and Families that needed to stay up to date on policy and current events within the Pentagon. New programming was brought online, new metrics went in place, and the Department responded in a way consistent with how it has always served the American people with excellence. Given the length of that military engagement and the evolution of Department leadership, much of that work was correctly shuttered or consolidated into different departments.

Even as the Board praises the efforts at internal communications during that time, it must now reflect that it still did not truly address the enterprise. The position of Deputy Assistant Secretary of Defense for Internal Communications has been abolished with most of its duties assigned to the Defense Media Activity. Programming was geared towards the Services abroad, as is still the case through Stars and Stripes and other legacy investments that remain to this day. Unfortunately, those channels are not designed to serve the hundreds of thousands of Civilians and contractors who are responsible for running the operations of DoD and its services. It was not designed to keep those Civilians and contractors in the loop on issues of strategy and policy.



In the interactions of this sub-committee with OSD staff, the DBB regularly hears about the "frozen middle," and challenges to culture change. During this study, it became evident that some of the table stakes structures, practices, and tools that would be required to create change are not in place. A culture of "deference" to Service PAOs, who operate with the tacit understanding that their job is to filter communication results in little enterprise-wide communications actually making it to leaders who can most influence change within DoD.

## **Organizational Structures**

In addition to having no enterprise-wide internal communications strategy, DoD has no internal communications division or team responsible for enterprise-wide strategy. Internal communications activities are run as "side of desk" activities by OSD PAO, often receiving the most attention when the internal narrative is helpful for an external website like defense.gov. No one body in DoD has the centralized function to develop content, coordinate enterprise-wide communications, and facilitate enterprise-wide feedback. One senior defense official summed it up well, "the state of internal communications within DoD and the Services is franchised and fragmented." Also, there is currently no apparatus or infrastructure, other than external media or cascading leader talking points, to send out a message from the Secretary of Defense or other senior-level DoD officials to the lowest echelons of the Total Force and garner feedback.

Only one senior DoD official specifically mentioned that they have shifted in their Service from a "99% external focus" on messaging to more of a 40-60 balance, with the preponderance continuing to be external. However, this individual mentioned specifically that the internal communications piece has long been neglected not just in his Service, but Department-wide and that it has resulted in a failure to engage with their most important audience – the Service Members and their families. This official also stressed to subordinates that internal communications is a "warfighting priority," and that the internal communications should also be baked in and directly tied to the NDS and integrated deterrence. This concept that the quality of internal communications as a warfighting priority would benefit all PAOs to embrace.

There is no staff ensuring that the videos or assets from OSD leaders actually make it into the hands of field staff. Much of this responsibility is delegated through the Services and DAFAs through the chain of command or through Public Affairs networks, such as the Armed Forces Networks or Stars and Stripes, which are primarily focused on messaging deployed or overseas stationed Service Members rather than the Total Force. Even within the Services, the Subcommittee again heard a deference to local commanders and field leadership to filter what is communicated, and a recurring focus on Service Members and families over civilian employees.

While DoD does not have a central internal communications unit, the DBB has found the Secretary of Defense's Chief of Communications routinely brings together the Service Chiefs' Offices of Communications to synchronize efforts, which is to be applauded. Unfortunately, in our findings, the majority of this synchronization effort is focused on communications to elected officials or the public, not a focus on existing DoD employees. Within the Services, Service Chiefs have their own playbooks and regular monthly and biweekly touchpoints with subordinate PAOs. That is indeed a critical step, but these connections into only the top tier of each service result in limited cascading communication. A stark contrast can be drawn between the degree to which DoD has moved increasingly over the decades towards a "Joint" strategy, while communications languish in silos and stovepipes.



The Services have taken initiatives on their own to improve their internal communications, but it has contributed to the "silos of excellence" challenge. Several Services have noted that frontline junior level Service Members and civilians prefer supervisor and commander face-to-face interpersonal communication for official policy guidance.

However, OSD and Service-level PAOs do not focus enough on empowering subordinate PAOs with the talking points required to explain what those frontline supervisors and commanders need to know to talk with their subordinates and civilian teammates smartly about any major changes. During this study, the Subcommittee saw virtually no reference to enterprise-wide initiatives or focus areas like the National Defense Strategy or DoD values.

Some PAOs have mentioned that junior Service Members would enthusiastically welcome more engagement from the Secretary of Defense and the Deputy Secretary. When they visit posts and bases, it puts a human face on the National Defense Strategy and Pentagon policies, providing junior Service Members a rare opportunity to directly engage with senior leaders on how their actions directly contribute to the NDS.

There is also a natural tension between senior-level PAOs from OSD and the Services and local-level PAOs seek independence to tailor news for specifically for the troops in their immediate area. Many subordinate PAOs also have to contend with what their local Commanders want to push out into the information environment through PAO channels.

For existing PAOs throughout the field, a senior DoD employee lamented that they wished organizations outside of the Public Affairs Offices at the OSD and Service-levels would include additional offices from across the enterprise that originate transformation, policy, changes, etc., and that tie into internal communications efforts early to ensure clarity. They wished for a common DoD-wide enterprise platform to better reach Service Members, civilians, and family members while allowing Services the ability to customize messages to their cultures and audiences. Similarly, another Pentagon leader acknowledged that they "run their fact sheets on major changes by" a PAO, but don't incorporate them into the planning or execution process.

While failing to have formal organizational structures for internal communications, the Department also lacks informal structures for knowledge and practice sharing. The Board sees a model of how this can work in a recent gathering of communicators across the intelligence community (IC). This internal conference allowed practitioners to participate in panels and plenary sessions to discuss what is working and not and to give awards to those leading communications across multiple agencies.



## Case Study: The Intelligence Community's "Community of Communicators"

The Intelligence Community plays a crucial role in national security, requiring effective communication strategies to ensure that information flows seamlessly among various agencies, to congressional oversight, and to the public. In recent years, the Office of the Director of National Intelligence (ODNI) has hosted an "Intelligence Community Communicators Summit" and "Intelligence Community Strategic Communications Day of Learning" to enhance collaboration, share best practices, and improve internal and external communications.

The Day of Learning included in-person and live-streamed interviews featuring ODNI leaders, White House National Security Communications Advisor John Kirby, IC Press Secretary Nicole de Haay, and national security reporters to discuss how the press covers the community, including how media relations officers in attendance from various agencies could improve their relationships with reporters. Throughout the day, in both large and break-out sessions, officers discussed career paths and established and strengthened relationships within the community. The community aims to bridge communication gaps between different agencies, ensuring that all members understand their roles and contributions to the broader mission of national security.

150 communicators participated, with feedback from junior officers being blown away by seeing the Intelligence Community's Press Secretary so comfortably and candidly with reporters on stage. The "Day of Learning" played a direct role in influencing how junior officers see their profession, enhancing collaboration, sharing and standardizing best practices, and affirming a shared purpose among the various IC agencies, leading to follow-on engagements including having junior officers from other IC agencies return to ODNI to observe subject matter expert press briefings.

Importantly, participants took to heart the perspectives they heard directly from Director of National Intelligence Avril Haines, as Assistant Director of National Intelligence for Strategic Communications Timothy Barrett interviewed her on stage, and she shared that it is vital to have a communicator at the table on her leadership team while weighing decisions – and that it is important to have communications, including internal communications, woven into all aspects of the national security mission rather than as an afterthought.

By fostering collaboration, sharing best practices, and emphasizing communications as a necessary dimension of the national security mission and a career specialty that should be developed across the IC, the IC's Community of Communicators enhances the effectiveness of internal communication efforts across various agencies with complementary mission sets. As the IC continues to evolve, the lessons learned from this initiative will be invaluable in addressing future challenges and ensuring that all members are aligned in their mission to protect national security.

#### **Process and Channels**

A senior DoD interviewee stated that leadership, such as the Secretary, is a primary internal communications tool, and he or she will communicate through his or her subordinates on the civilian and uniformed side down the chain of command. This creates a natural tension, as deference to subordinate leaders as part the federated structure of DoD allows them to pick and choose which messages to highlight or concentrate on for their forces as a means of tailoring it to them.



Aside from the use of the chain of command, several DoD interviewees also spoke about an overreliance on email and memorandums. Several had mentioned official publications, Armed Forces Network (AFN) TV and Radio, Microsoft Teams and Microsoft 365, and Professional Military Education (primarily Intermediate Level Education and War College) as a more effective means of addressing the Total Force.

Where deployed, collaborative software such as intranet sites, Zoom, Microsoft 365, and Microsoft Teams have enabled real-time collaboration, video teleconferences, live-streamed presentations, and town halls with additional capabilities for feedback, and more. These modern-day innovations and capabilities are commendable and have certainly reduced costs and barriers to cross-functional collaboration. However, these channels are fragmented and largely completely disconnected from one another.

In fact, the DBB recommended as part of its IT User Experience Study to move to a single Office 365, multi-factor authentication domain across DoD to streamline and standardize DoD user experience. While this has occurred largely within the Pentagon, outside the building still relies on bespoke sign-ins separate from an enterprise-wide experience, adding to the fact that the Secretary would be unable to send a single email to the entire enterprise, even if he wanted to.

Moreover, a DoD DBB interviewee with significant recent private-sector experience relayed that the private sector is working hard on addressing "deskless employees" – those that do not rely on computers to primarily do their job and comprise a significant portion of the Total Force. Many companies are turning to new tools to conduct internal communications with them, focused on mobile communications since many employees generally have more access to mobile devices than computers.

With a large deskless workforce and no technology today to relay critical non-sensitive information, internal communications must come through cascading leaders. Many on-the-ground frontline troops do not have access to computers daily, and due to security restrictions often requiring a Common Access Card to even get email or conduct mandatory training, deskless workers' digital access to internal communications would be very difficult without new systems. To address this, the Department of the Air Force has deployed a platform publicly available to Airmen to put on their personnel devices through the Apple App Store and Google Play Store to access publicly available information in an easy to digest location.

Some interviewees, however, disagree on implementation, ranging from text messaging to an intranet site, and new and existing apps. There was also debate on the ability or acceptance to "mandate" applications and cultural acceptance to do so. Many of the interviewees reinforced the importance of managers and supervisors as messengers due to their ability to conduct face-to-face communications with frontline employees, and their authenticity and authority. It is important to note that in the Pentagon and the services, many local area commanders do conduct regular town halls with those in their units, although generally, live-streaming is not an option.



# **Critical Messages**

"We need to write guidance that will speak to the 100%. Whether you're working at the commissary or at DFAS or along the DMZ or you're in Djibouti, you need to understand that your job is ultimately about homeland defense...It goes back to the NASA example asking the janitor what he does. He's helping put people on the moon."

-DoD Senior Official

The DBB also found that critical messages, like the National Defense Strategy (NDS) and budgeting priorities, are often not well understood outside of the top echelons of DoD staff. Instead, the DBB heard from one senior leader that many of the messages that are prioritized are just on telling the "good news." The messaging prioritized is more focused on morale than alignment on strategy.

For the NDS in particular, when questioned about efforts to relay core tenants to employees, one senior level communicator answered, "On the NDS, almost zero (communication)... the way we work this is through our professional military education and almost exclusively to the office corps... The vast majority - 90% of the workforce - are not exposed to or interested in those documents." Another interviewee suggested that if the goal is for DoD employees to understand the tenets of the NDS, it would be helpful to hear more often from the Secretary of Defense, Deputy Secretary of Defense, and other senior leaders, though there should also be more work done to enable chains of command to pass that information along.

The DBB also found that checking in on the effectiveness of messaging is done through "spot checks." The spot checks will help probe the understanding of those more junior leaders and a series of probes on how they then communicated with their staff. With this ad hoc form of message checks, paired with a failure to track metrics on internal communications success, and added to a lack of infrastructure to get messages out, it should not be a surprise that senior Pentagon leaders often express frustration at a "frozen middle," when in truth, the messages may not make it out at all for staff to act on.

From the perspective of strategic implementation, research has found that two types of communication are important. First, communication by top managers plays a key role in sharing organizational values, goals, and strategic objectives among organizational members. Without effective communication, strategy implementation is likely to fail. The second is upward internal communication to generate feedback and suggest ideas for improvement. viii

# **Managers and Supervisors**

Many of the DBB interviewees in the government have focused on addressing O6- and O7-level officers and civilian equivalents to get messages to the lowest levels. One claimed that a message from the Secretary of Defense or Deputy Secretary of Defense to that level would carry a lot of weight further down, because it would then go to frontline supervisors, which have much more direct influence with frontline Service Members, who may disregard messages from the Secretary, Deputy Secretary, Chairman, or Service Chiefs, due to perceived separation from them.

Several of the DBB's interviewees have backed up each other's strategy of starting at top leadership and the frontline employees to message the middle while focusing time and resources on the "movable middle" and not the "frozen middle." While this is a key tool that lends trust and



credibility with supervisors, one interviewee warned that this also results in "the world's largest game of Telephone."

#### **Metrics**

Finally, several DBB interviewees both in DoD or with past relevant experiences in DoD have claimed that there are no significant metrics to measure internal communications nor is there a system in place to do so at present. This was true in interviews with OSD and service staff. The Deputy Secretary of Defense's OSD Pulse Survey does provide some metrics related that hint at internal communications effectiveness within OSD, but nothing directly measures the impact of internal communications efforts. Similarly, the Subcommittee found multiple Services who were gathering data on Service Member sentiment regarding communication, however these surveys often continue to be focused on Service-level communication to Service Members, missing the opportunity to monitor key factors around enterprise-wide communications and civilian and contract employees.



# **Intentionally blank**



# What the Subcommittee Found in Public and Private Organizations

According to a number of DBB interviewees, COVID-19 highlighted a renewed and increasing importance of internal communications tied into every major part of the organization. Organizations with an increased focus on internal communications found increased levels of executive engagement have up to 59% more engaged employees and led to 21% higher average profitability. ix

Despite the correlation between engaged employees and productivity, a 2024 report found 59% of private-sector employees are not engaged and 18% are actively disengaged, meaning they may undermine the company.<sup>x</sup>

According to the Institute for Public Relations study on Organizational Clarity, many U.S.-based employees understand their organization's purpose and mission but see communication of the strategy as an area of improvement. xi This is true despite an incredibly robust structure in most organizations to improve, which highlights the large opportunity in front of DoD.

# Case Study: NASA's Internal Communications Efforts Pay Off As It Wins "Best Place to Work in the Federal Government"

NASA, the United States government agency responsible for the nation's civilian space program for aeronautics, aerospace, space technology, and science research, has recognized the critical importance of effective internal communications in fostering a cohesive and informed workforce. NASA's strategic approach to internal communications, particularly in the context of evolving work environments and the need for transparency and engagement among its diverse workforce has helped secure its repeated ranking as The Partnership for Public Service's #1 Best Place to Work in the Federal Government - Large Organizations for 12 straight years.

With a workforce that includes civil servants, contractors, and various stakeholders, NASA faces unique challenges in ensuring that all employees are informed and engaged. Of note, NASA has a civilian workforce of about 18,000, and about another 35,000 contractors supporting the agency's missions, and included in most of NASA's internal communications. The agency's internal communications strategy is designed to address challenges by promoting clarity, consistency, and a shared vision across its multiple centers and mission directorates for the benefit of humanity.

NASA has established a "Community of Practice" that brings together communicators from various centers and mission directorates. This initiative encourages the sharing of best practices, resources, and strategies for effective communication. By fostering collaboration, NASA aims to standardize messaging and streamline communication efforts across the agency.

Secondly, NASA's strategic plan is updated every four years and is communicated both internally and externally. The plan serves as a roadmap for the agency's communications and is accessible to the public on NASA.gov. The Administrator, Bill Nelson, directly leads the initial communication of the strategic plan, followed by messages from senior leaders to emphasize key points.

Administrator Nelson also conducts regular town hall meetings as a cornerstone of NASA's internal communications strategy. These meetings provide a platform for leadership to share important updates, celebrate successes, and address employee concerns. The town halls are



designed to be inclusive, allowing participation from all levels of the organization, including contractors and stakeholders.

Managers also play a crucial role in disseminating information to their teams and are equipped to ensure consistent messaging. The agency also delivers a steady flow of Administrator and leadership messaging, official internal communications that update on key campaigns and efforts, and encourages employees to provide feedback on communication effectiveness, which helps refine strategies and improve engagement.

One mechanism for providing feedback and enhancing transparency is rooted in NASA's embrace of technology to enhance its internal communications. The agency utilizes a robust intranet platform called "OneNASA," which serves as a centralized hub for information sharing. This platform allows employees to access resources, updates, and community-generated content, fostering a sense of connection among the workforce.

NASA's internal communications efforts exemplify a proactive approach to fostering an informed and engaged workforce, and it continues to be rewarded by repeatedly occupying the #1 Best Place to Work in the Federal Government - Large Organizations.

## **Internal Communications Strategy**

A key part of the communications strategy must be consistent and iterative communication regularly from leadership. xii *Harvard Business Review* suggests several best practices for top leadership in their internal communications for both engaging with managers as well as frontline employees:

- Do not conflate brief, clear communications. Spend the time to communicate to be ultraclear, no matter the medium. You can never be too clear. xiii
- Establish communication norms.
- See the hidden opportunities in written communications. Being behind a screen can create new opportunities for certain team members who might be less inclined to speak out in groups.
- Create intentional space for celebration.
- Tell it like it is. xiv

Consistently, the DBB heard from private organizations that their internal communications strategies were an intersection of two critical elements: an overarching internal communications strategy and an initiative-specific communication plan. The overarching internal communications strategy included elements like key recurring messages based on strategy, style guides, brand voice guidelines, editorial calendars, regular editorial meetings, listening channels, and metrics for effectiveness. The initiative-specific communication plans established the primary messages, rhythms, channels, communicators, and metrics to measure effectiveness.

These strategies also outline guidance regarding the localization of communications, versus what should come from the communications function. Given the importance of local voices and leaders from within services and DAFAs for much of DoD communication, this should be a critical consideration in the articulation of a communications strategy for DoD.



What interviews and a robust literature review have found is that many organizations are moving towards increasingly diversified means - meaning internal communications are multi-channel but need to dance a fine line of not overwhelming employees with internal communications on every platform, so they are inundated with the same messages repeatedly. Simultaneously, they need to dance a fine line of not overwhelming employees with the same messages on every platform. This requires a sophisticated strategy to avoid what research has shown of 80% of U.S. employees hitting "information overload." xv

From the perspective of strategic implementation, research has found that two types of communication are important. First, communication by top managers plays a key role in sharing organizational values, goals, and strategic objectives among organizational members. Without effective communication, strategy implementation is likely to fail. The second is upward internal communication to generate feedback and suggest ideas for improvement. xvi

Another facet of their strategy is the use of digital communication platforms that employees can consistently expect to use for receiving company news. Over the past 10 to 15 years, organizations have increasingly adopted digital platforms to serve as communication hubs, including social media. However, there are conflicting reports of how effective these tools are, both on organizational intranets and external social media and collaboration sites. Often, internal digital platforms fail to live up to their potential, but it may be one of the only ways to engage enterprise-wide with an increasingly recognized category of employees - deskless workers. \*\*xviii\*\*This is why a strong internal communications strategy threads the needle between scaled digital communications platforms and the necessity of leveraging other channels to bring internal communications close to the user through town halls or managers.

Another key facet of an internal communications strategy is determining the primary personas that an organization is trying to connect with. For example, multiple DBB interviewees have reiterated that organizations are increasingly trying to keep deskless workers engaged. They often feel out of the loop, primarily relying on their managers or supervisors for corporate communications, which can lead to miscommunication. In a workforce where so much of the news generated comes from one location, but the majority of the workforce is geographically dispersed, the strategy should account for how to engage those audiences and how to account for the lack of access to physical desktops. For this reason, many organizations have turned to a mobile app accessible in "bring your own device" (BYOD) environments.

#### **Structure**

Structurally, according to the Institute for Public Relations, best-in-class communicators rank where internal communications sit within an organization's structure and the extent to which it is networked into key corporate communications officers and corporate decision-makers as critical issues. This ensures that internal communicators can effectively disseminate important information throughout the company.

In DBB interviews, there was a split of where "Chief Communications Officers" sit. Many report directly to the COO or CEO and have strong linkages with Human Resources functions with a greater focus on employee engagement, or reporting into a version of the Legal Office, where they had a greater focus on the integration of external/internal communications. In either case, more



staffing was dedicated to internal communications than to external communications in all instances, a stark contrast to DoD.

Many internal communications officers the DBB interviewed serve as team leaders during organizational strategy sessions, ensure coordination with corporate communications for a unified message, albeit to different audiences, and oversee all key internal communications within the organization. \*\*xviii\*

In every organization the Subcommittee interviewed, all internal communications are not completely centralized within the scope of the Chief Communications Officer. In fact, in every interview, there were decentralized teams by brand (service), geography, division, or other company-specific structure. Despite this, each communication executive expressed that they were accountable for internal communications, whether or not it reported to them.

As a result, they often operated their own teams as both communicators and as a Center of Excellence that maintained stylebooks, gave feedback to teams on execution, provided training and community, maintained an enterprise editorial calendar, and integrated HR communications with other critical business communications.

A recurring best practice interviewees proffered was that of establishing a "community of communicators." While some of these were held through synchronous town halls or gatherings, the most common practice was to stand up online groups to quickly disseminate the latest guidance via a platform like Teams or Slack.

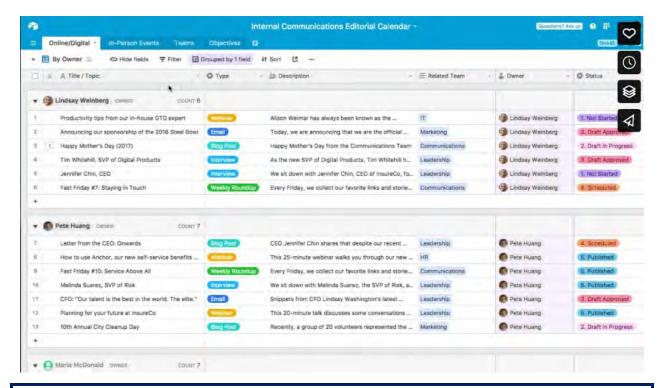
Importantly, these platforms also allow enterprise communicators to quickly discover additional frequently asked questions, address questions on context from the communicators themselves, and advise them on nuances in the message if needed. This two-way channel with communicators allowed for quick triage and remediation of issues that came up, either in the public eye or amongst employees.

#### **Process**

The Partnership for Public Service recommends that leaders in the field and at headquarters should prioritize communicating with field staff early and often. Today, they can use robust technology to keep field employees connected. This will help them feel informed, included, and committed to their agency. xix

Many DBB interviewees mentioned that they either work off of a deliberate editorial calendar or have a structure in place for messages to flow from the organization's strategic agenda to at least semi-annual or quarterly calendars around specific themes on strategy, important announcements like product launches or new initiatives, or crisis communications that require immediate transparent communications and synchronization.





Case Study: The Department of Health and Human Services Increases Federal Employee Viewpoint Survey (FEVS) Participation Through a Deliberate Internal Communications Strategy

James Egbert, human capital strategy branch chief at HHS, stated that they created a deliberate plan annually to send regular pulse emails to all employees. These messages went to the division and department levels before, during, and after FEVS, to ensure consistency and visibility.

Additionally, HHS established a FEVS Engagement program team with several internal communications experts to disseminate information on various platforms about agency priorities, inform employees throughout about activities, and demonstrate the results.

To tackle the fact that different divisions and offices within HHS have unique cultures, the team crafted bespoke messages to meet their needs, ensuring local messages matched up with their internal target audiences to maximize effectiveness.

As a result of these efforts, HHS experienced a substantial increase in FEVS participation. The response rate at the department jumped by nearly 15 points from 57.2% in 2018 to 71.9% in 2019 while the government-wide rate rose by only 2 points.

One DBB interviewee at a Fortune 500 company outlined their organizational internal communications process. While email open rates may be low at other organizations, this company's process is so consistent, the employees have come to see it as the primary channel they should expect to receive news through.

Every employee receives a weekly newsletter with things that may be important for them to know. This has been ongoing for nearly 10 years. They also have a regular monthly town hall with the CEO, which is broadcast to every employee and features live questions employees can ask.



Questions are processed by the employees themselves through a transparent voting system, and the most upvoted questions can be answered company-wide. The video is also recorded for asynchronous viewing.

They also have an intranet, an internal video-based site, and internal social media to both communicate and flatten the hierarchy. This allows the CEO to communicate nearly directly and in real-time with the entire organization and provides an avenue for the employees to provide democratic, transparent feedback for the CEO to be made aware of issues and address them.

That being said, not all communication is CEO-level communication. These companies usually have guidance in place to determine when executives' voices should be used as the primary communicators, when messages should be pushed through more local channels, or some combination of both.

#### Channels

Through all DBB interviews, it was clear that private industry does not rely on a single medium for internal communications.

Many companies conduct quarterly or semi-annual town halls. The Defense Business Board interviewed one senior communications executive at a Fortune 10 company who stated that the CEO hosts monthly live-streamed town halls and special events when an announcement must be made. Subordinate senior executives do the same thing with their teams, which may be geographically dispersed. These live-streams are also recorded so employees in different time zones can watch them asynchronously and provide feedback after publishing.

These townhall meetings help employees better understand how their work efforts contributed to overall organizational success and provide a forum in which employees and managers could discuss organizational changes and suggest operational improvements. xx

Even amongst the public sector, the Surface Transportation Board has embraced online communication through public-facing hybrid hearings, live-streaming, and sharing of recordings on its YouTube channel, and United States Patent and Trademark Office (USPTO)

"People only have so much bandwidth today. Employees are being challenged on a whole bunch of different levels. Every day, they have to make decisions about how they spend discretionary time that they have over lunch hour or over their break. 'Do I really want to watch this video interview with the chairman? Do I care about that?' And so, I think when employees have the opportunity to drive how they get information and how they share information, they're going to be a lot more engaged than feeling like I'm on the receiving end of this very polished message from the organization. I think that's where the real value is going to come from is because they get to drive the way they pursue information, share information, and have dialogue with their employees, have dialogue with their colleagues."

-Global Employee Communication Leader

Division Chief John Tindal claimed that they also, "...make a point to live-stream events and have remote participation to help employees feel a part of the community." xxi

Employees may even prefer to receive customized information from a variety of sources. Varying the means of communication, such as e-mail, face-to-face meetings, large and small group meetings, intranet websites, and townhall meetings, can also be an effective strategy to reinforce the message and reach all employees while providing an opportunity for management to respond to employee concerns. XXIII



#### Case Study: The Department of State's Dissent Channel Forces Employee Engagement

The Department of State has a Dissent Channel as a formal mechanism for State employees to express dissatisfaction or dissenting views on foreign policy issues. It was established in 1971 as a confidential means for personnel to share concerns without a fear of retribution.

Over time, this has turned into an important channel for State Department personnel to have candid discussions around foreign policy matters, encourage open communication, and help make the Department make more informed decisions.

According to senior State Department officials, the Secretary of State and other senior officials review each response and respond accordingly.

In more widespread issues or serious cases involving many letters through the Dissent Line, senior State Department leaders may conduct a live town hall with live-streaming options to address the issue with a wide audience. This has helped employees both feel heard and keyed in senior management to potential issues or concerns within the Department.

One disadvantage of using many channels or tools to send the same message, however, can be that employees may become frustrated if they do not know which communication channels are used to convey specific forms of information. To overcome this, organizations need to choose a consistent method and inform people where to find important information. \*xxiii\*

A private-sector interviewee noted that this is where an intranet is useful because it provides a splash page where all the employees know live-streams, recordings, and live feedback all take place for each monthly and special event.

In an interview with a senior communications expert, the DBB found that many employees prefer not to be inundated with the same message repeatedly. This interviewee provided the option of intelligently publishing a message to multiple channels and tracking which ones the employees open. From there, leadership would be able to receive engagement metrics, clickthrough rates, demographics, and the ability to cancel notifications for individuals on other platforms, so the employee does not feel "spammed" by an announcement from leadership. This also provides the ability to rapidly shift communications channels to where users are engaging the most.

There are, of course, inherent advantages and disadvantages for each medium of communication. The bottom line on the use of channels is that decisions about what channel to use should be based on users. One interviewee highlighted the starkest difference between DoD and private industry internal communications as this: in DoD, communications revolve around the person at the top of the chain, in private industry, communications revolve around the end users. At DoD, defense gov, memos, and cascading communications represent a convenience to senior-most executives, ignoring the implications of whether or not the actual message gets out to the Total Force in order to create change. This paradigm must evolve.



#### **Email**

E-mails continue to be a primary channel used for business communication. This has been confirmed almost unilaterally by all the DBB's interviewees. However, because of its formality, email may not be as effective in internal communications.

Many top managers remain addicted to emails and believe that once an email is sent, employees understand the message warranting no further communication, forgetting that emails are not a rich communication medium.

When used consistently and during expected windows, email can be useful. One internal communications executive at a Fortune 500 company stated that they have used a short daily newsletter for over 9 years, and employees expect it. Because of the consistency, the open rate is over 80%, and the organization relies on that as a vehicle for pushing information to all employees.

This holds with data where ContactMonkey, an email marketing company, has confirmed that if employees receive a consistent weekly newsletter on a specific day, they will expect that any important communication will arrive that day. Because of this conditioned behavior, they are more likely to engage with it. xxiv

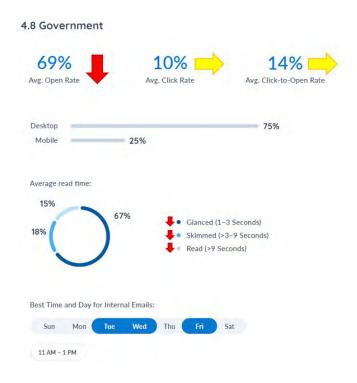
However, because email is the primary medium for business communication, it can be difficult to find relevant information lost in a sea of emails. This leads to wasted time, missed communications, and miscommunication.

Some recommend that for day-to-day communication between employees, it may prove more efficient to implement a team chat with some audio and video features. \*\*xxv\* Furthermore\*, emails should not be used for sharing or attempting to richly describe goals, values, and strategic objectives, which would be better suited for richer media such as face-to-face meetings. \*\*xxvi\*

While email retains a 69% open rate with a 14% open rate industry-wide, it should not be relied upon as the only communication medium. Average read times for emails are about evenly split between those who simply glanced at an email (1-3 seconds) versus actually reading the email (over 9 seconds). xxvii

The metrics do not compare favorably when comparing the government overall to industries with more than 10,000 employees.





#### 5. Email Metrics by Employee Size

The table below indicates internal email benchmarks for companies based on the number of employees within a company.

Number of Employees	1-50	51-200	201-500	501-1000	1001-5000	5001-10,000	10,001
Avg. Open Rate (%)	69%	68%	73%	66%	68%	67%	71%
Avg. Click Rate (%)	11%	14%	14%	10%	10%	8%	10%
Avg. Click to Open Rate (%)	15%	20%	19%	14%	15%	12%	14%
Avg. Desktop (%)	64%	79%	85%	84%	86%	78%	93%
Avg. Mobile (%)	36%	21%	15%	16%	14%	22%	7%
Avg. Read time < 3 sec	32%	34%	35%	35%	35%	33%	42%
Avg. Read time > 3 -9 sec	25%	29%	28%	29%	27%	28%	30%
Avg. Read time 9 < sec	43%	37%	37%	36%	38%	39%	28%

Source: ContactMonkey xxviii

#### **Organizational Intranet**

Many business leaders the DBB interviewed seemed to believe that reliance on a company intranet was hit or miss.

An intranet provides several things including a central repository for company information that could act as a historical record to find company-specific internal information as well as provide certain security guarantees that are not afforded by external apps, social media, or SMS.

As a top-down internal communications tool, an organizational intranet can be useful for controlling direct downward internal communications. However, one downside to a company intranet is the inability to proactively inform "deskless employees."

#### **Mobile Applications**

To bridge the gap between headquarters, traditional office workers, and deskless employees, many organizations have shifted to mobile applications. For collaboration and team communication, 45% of remote employees reported using Zoom, 43% used Google Chat; and Microsoft Teams gained to 42%, followed by Slack and Discord with 38% each.

One head of communications with experience working for several Fortune 500 companies has found that going "mobile-first" was a huge change for employee communications. This individual also stated that the company-wide intranet was floundering, so they adjusted their communications strategy from where they wanted the employees to be to meet the employees where they were. In this specific case, it was the professional social network LinkedIn.

With the rise of deskless workers, private industry has moved to ensure that regardless of whether there is a mobile application or not, internal communications should be "mobile-friendly,"



meaning that communications are easily accessible and digestible on phones or other mobile devices. In an attempt to meet their employees where they were communicating amidst a floundering intranet, one Fortune 500 Executive Communicator told the DBB they moved internal communications to external social media.

For one particular company the DBB interviewed, they believed the success of their internal communications app, measured at roughly 98% of users logging in each week, was tied to the integration of other frequently used capabilities into the same app. When logging into the app, the default view is internal communications, however, they also use APIs to integrate PTO requests, benefits information, and timecards into the same app, increasing the likelihood that users are in the app daily and being made aware of critical information.

#### **External Social Media**

While LinkedIn is designed more for professional networking, job search, and career development, this Fortune 500 company found that there were employees who were essentially influencers for company communications, cutting across peer internal communications, downward, and upward.

Several senior-level communications experts the DBB interviewed shifted to LinkedIn as a specific use case for their organizations. They found that this is where the employees in their organizations were interacting, sharing information, and communicating, so this is where company communications went. Additionally, an advantage of using external social media like LinkedIn regularly is that it also serves to capitalize on insights from the DBB's study on Talent Pipelines by establishing an employee brand that attracts great talent by letting them see the good work happening in DOD, to understand its priorities, and to imagine how they might "fit" into that strategy.

Moreover, the company's internal communications department could reach out directly to "superusers" or influencers to tell them exactly what messages were approved and that they were trying to convey to the workforce, ensuring a networked approach to on-brand messaging with accurate information.

These interviewees also emphasized that all information, regardless of whether it is in an in-house standalone app or external social media, like all enterprise-wide internal communications, should not contain, host, or publish sensitive or secret information.

Apps and social media may have cultural and generational advantages and disadvantages. Many older generations in the workforce are either unfamiliar, unwilling, or uncomfortable with using apps or social media, especially for internal communications. However, apps and social media have additional benefits of cutting across silos. These technologies also allow for multiple communicators at all levels and departments to use the platform and tag relevant audiences to reduce unnecessary noise while essentially flattening the hierarchy.

Moreover, forcing younger generations who may be more comfortable with apps and social media to communicate with friends may be uncomfortable using them for interacting with their organizations, especially when off "company time."

One DBB interviewee has claimed that the majority of users (55%) are already disabling notifications by default because audiences already feel inundated with them throughout the day.



This communications expert has claimed that app/social media clickthrough rates and engagements were, like email, around 1% and declining. This interviewee has recommended SMS (text messaging) as a means of communicating both externally and internally.

#### **SMS**

According to Nielsen data, users check their phones every 4.5 minutes on average. Over half of those checks are to check text messages.

A senior communications expert interviewed by the DBB claims that SMS has a 99% open rate within 5 minutes, a 45% clickthrough rate, and a 30% response rate – which can in some cases be significantly higher than email, apps, or company intranet.

Additionally, modern-day tools can use machine learning, generative artificial intelligence, and natural language processing to conduct engagements/artificial two-way communications with audiences through SMS should it be necessary.

The DBB received a demonstration of one company's proprietary software that showed how surveys could be administered and receive open-ended responses that artificial intelligence software would then bin and summarize.

Like all the previously discussed media, there are disadvantages to SMS. Many private-sector communications executives the DBB interviewed were largely dismissive of using SMS as a viable internal communications channel due to cost constraints, legal hurdles, and opt-in and out approaches. Interviewees state that when their organizations do use SMS, it is typically in emergencies where they need to alert employees immediately. DoD already has similar SMS alerts in place.

Furthermore, there are monetary costs associated with every SMS sent to each user. This may not be a significant factor in the grand scheme of the Departmental budget, but if the intention is DoD leadership's ability to send messages to each of the 4 million employees across the globe, cost should be a consideration.

#### **Town Halls**

Almost all of the DBB interviewees in the private sector have mentioned regular town halls as part of their internal communications strategies. Not only are they performed regularly with speaking roles for the CEO, senior leadership, and other top-level directors, but they are typically live, inperson, streamed globally, recorded for asynchronous viewing, and posted to channels where employees know where to watch, have easy access to watch, and provide subsequent feedback.

Questions and feedback from the audience are typically solicited and submitted ahead of time, analyzed during the town hall, and answered during the session to provide action and feedback as well as transparency to the workforce.

Importantly, town halls were not discussed as "free for alls" in any of the interviews for this study. Most consistently, CEOs and other executives use town halls to focus the company on strategy. Often, pieces of the strategy are spread out and delivered during each town hall, and this is also the channel for delivering updates to the company if the strategy is evolving.



While the DBB does recommend the use of streamed and live town halls conducted by the Secretary and Deputy Secretary, it is important to acknowledge the risk that might come from OSD executives who are not well respected by Service Members being put regularly in front of the total force. As one former communications executive suggested in Subcommittee interviews, "You have to play to the strengths of your executive. Some are good at delivering speeches in front of people – they thrive off that energy." For other leaders, it might be an unwise strategy and expose their communication gaps.

#### Case Study: Prudential's Webcast Helps Steer the Company in a New Direction

Prudential's company culture had become cautious and risk-averse, requiring a new direction for accelerated growth. Digital commerce and technology threatened the business, leading CEO Charlie Lowrey to transform the company to a more agile, customer-centric trajectory.

The executive leadership team directly partnered with their communications team to craft their first live global webcast to clearly paint the picture of Prudential's journey, vision, and strategy.

This transformational change envisioned Prudential to become a global leader in expanding access to investing, insurance, and retirement, security through investments in growth, businesses and markets, industry-leading customer, and client experiences, and creating new financial solutions.

Before the webcast, the team devised a teaser campaign to build excitement and awareness. The company's first live global webcast drew more than 30,000 employees out of 40,000, followed by a multi-channel campaign to make the elements of their new strategy relevant to every area of the business. The communications team also provides managers with tool kits to equip leaders with the information they need to align the strategy to their teams.

During the webcast, employees could interact with 30 Prudential executives from around the world to answer questions about the new vision.

Finally, this webcast was followed up with a similar live quarterly webcast to continually update employees on the progress, which continued to draw thousands of live viewers internationally along with replays of the webcasts for asynchronous viewing. xxix

#### **Other Tools**

Some organizations are moving towards all-in-one intelligent tools to serve as an "omnichannel" communications hub that intelligently and adaptively uses multiple channels to message their workforce. This hub uses artificial intelligence to segment audiences based on multiple factors such as employment level (e.g., frontline employee, supervisor or manager, vice president, or executive), brand, user location, communication preferences, and other demographic information to message them in a bespoke manner.

Prioritized messages that the organization wishes the employee to see due to its urgency or importance can be shown or pushed more than once or given a higher priority on a splash page on the intranet to ensure the employee is exposed. Several DBB interviewees used Open Enrollment for healthcare as a prime example of a prioritized message they might want the employee to know about through a multichannel prompt.



# Case Study: British Broadcasting Company (BBC) uses an Intelligent Communications Platform

The BBC required a new communications platform to message every level of its globally dispersed news organization about strategy and direction.

Through an intelligent communications platform, the BBC was able to take a multilevel approach in conjunction with offsites, meetups, and workshops to align employees at all levels including executives, managers, and frontline employees on the new strategy.

Through this effort, it successfully aligned its business priorities with its company-wide communications in an agile manner. xxx

### Roles of Communicators, Managers, and Supervisors

Internally, top-level senior leaders such as the CEO and COO, are the most influential persons and are in charge of creating visions, goals, and strategies, defining the culture and identity, and inspiring and motivating employees. \*\*xxi\* They are the living representatives and key spokespersons who personify the organization. \*\*xxii\*

However, many DBB interviewees mentioned the importance that supervisors and managers play in internal messaging. They are where "the rubber meets the road" and are often seen by frontline employees, especially deskless employees, as the daily face of the organization.

One DBB interviewee at a Fortune 500 company did not dismiss the importance of supervisors, especially about the implementation of the communications strategy, but stated her organization kept internal communications flat, and employees and managers were allowed to go directly to each other to ensure they are getting the right expertise for the right projects. She proffered that going to levels up or down was not unusual, and people generally used a lot of chat and live video calls to ensure direct and timely information.

Another organization interviewed as a part of this study maintains internal social media groups via Teams to communicate with senior-level executives and managers simultaneously. While each of these may use its own decentralized teams to communicate to all employees, the centralized access to the VP+ population at a moment's notice can help keep everyone working from the same key messages, especially at moments when something about the company comes up in the media.

Jessica Kriegel, a workplace training consultant who has researched compassionate leadership stated, "The big insight here is that employees feeling cared for is directly tied to communication.... And the folks who communicate the most with the front line are their supervisors. That's why frontline supervisors are so critical, because if they're communicating effectively then the workforce feels cared for." xxxiii



#### Case Study: Walmart Flies 2,200 Managers to "Manager Academy"

Walmart finds managers and supervisors to be of such importance that it flies a group of 50 managers from across the country multiple times a year (with 2,200 expected this year) to what it calls its "Manager Academy."

"The intent of the academy is to walk away knowing what are our values, what are our expectations of leaders, how do we operate effectively with the view of putting our people first," said Donna Morris, Walmart Inc.'s Chief People Officer.

At Walmart, the largest private employer in the world, managers take part in breakout sessions about how to make *all* of their workers, from the mechanics in car repair to the overnight shift workers mopping the floors, feel as if they're contributing to the bigger corporate mission.

Ms. Lorraine Stomski, Walmart's Senior Vice President of Learning and Leadership, attributes really strong store managers who are purpose-driven and values-driven to stronger business results. xxxiv

However, research on voice communication suggests that lower-level employees, concerned about negative reactions from upper management or feel that their feedback will be ignored, may withhold ideas and feedback to improve implementation. xxxv

The Institute for Public Relations adds that internal communications practitioners relentlessly reinforce key messages and the path forward, keeping key messages at the forefront of all communications and in every vehicle.xxxvi

Jack Welch weighed in, "There were times I talked about [the] company's direction so many times in one day that I was completely sick of hearing it myself. But I realized the message was always new to someone." xxxvii

"Relentless communication... I think the most you can just be aware of the need to always be communicating what your reasoning is and what your logic is, the better off you'll be."

- Professor Jesper Sorenson
Professor of Organizational Behavior at the Stanford
Graduate School of Business

A 2003 GAO study found that successful communication will require twice the time and effort than was at first planned. A JPMorgan Chase managing director told them that during their integration process, managers would dedicate as much as 25% of their overall work time to communicating with employees about a particular merger. xxxviii



#### Case Study: Maximus Uses a Managers' Toolkit to Empower Them

Maximus, a company that works with governments around the world to improve the delivery of public services, had grown to a hybrid workforce of over 34,000 employees across the United States. Previously, Maximus had used a trickle-down approach to communicate important, announcements, events, and company changes through their directors who were then encouraged to share the information with their subordinates.

Unfortunately, this process failed to get their managers to answer questions or address frontline employees' concerns.

Maximus decided to create their own internal information hub on Microsoft Teams called "Leadership Connection," as a tool to provide managers with direct, advanced notice of messages before they are shared with the wider employee population. It also had the added benefit of reducing the overall volume of emails while simultaneously increasing transparency and accountability.

The communications team created the Leadership Connection to automatically add a remove members based on a fine set of criteria and was open to any Maximus employee with a direct report.

After conducting a pilot with a small group of managers, they made adjustments and conducted a 30-minute training session with all managers to demonstrate how announcements and messages would appear. The plot form was finally launched with an email announcing Leadership Connection which provided more than 4,600 supervisors and managers with previews of upcoming communications and additional important information.

One pulse survey demonstrated that more than half of the group's members found Leadership Connection "useful" or "very useful." One manager gave the feedback that "Getting communication through Teams is much faster than finding the info in [an] email inbox." Another manager stated that Leadership Connection posts "help reinforce email communications, which can sometimes be missed." xxxix

#### **Metrics**

It is important to understand which communication channels are resonating with employees and why. This can help leaders and communicators focus their efforts on the channels that are most effective while identifying areas for improvement.

According to studies conducted by the Institute for Public Relations (IPR), best-in-class companies relentlessly track and measure strategies, tactics, and channels. They intentionally treat their employees like customers. x1 Across DBB interviews, the Subcommittee found private sector communicators referencing many of the same key KPIs for their communications: click rates, open rates, click-to-open rates, content engagement rates, read time, and "call to action" completion. These KPIs are often put into dashboards for communicators to regularly reference.

While many companies acknowledge that measuring communication effectiveness and the link between communication and business results is essential, many companies focus on employee engagement as the measure of how effective internal communications are. In fact, 85% of



employees report feeling more motivated when management offers regular updates on company news and 80% of Americans agree that employee communication is the number one factor inspiring trust between a company and its employees.<sup>xli</sup>

Businesses with effective internal communications processes have 50% less employee turnover and increase employee retention by 4.5 times with enhanced team collaboration and communication. xlii While engagement rates of employees are a helpful measure, they are also a lagging indicator of the success of communications, and with the number of efforts aimed at improving engagement, isolation of variables can be challenging.

In fact, the IPR believes that this alone does not provide deep enough insight into identifying gaps to inform internal communication strategies. xliii The IPR suggests proposed standards that effectively lead to outcomes and organizational impact. Practitioners must know what and when to measure, analyze the data, and show how they're using those insights to drive continuous improvement.

This includes measuring employee satisfaction/engagement, awareness of the mission or intranet usage, strategic priorities, channel effectiveness, and employee understanding of key messages to name a few. They also include feedback from face-to-face engagements, employee surveys, exit interviews, and pulse surveys in addition to climate surveys.

One other common "measurement" tactic used across private sector communications teams was a brief annual "communication survey." A communication survey gives communicators a chance to gather qualitative insights at scale about what employees believe they want from their communications team, what channels they believe they prefer, who they want to hear from, and the success of key communication initiatives.

One employer also suggested that since they also rely heavily on the voice of managers for internal communications, they are measured in annual manager surveys for their effectiveness in passing along information from the perspective of their team, producing more "public accountability" for their ability to communicate.

With the combination of qualitative insights from annual surveys and quantitative insights based on embedded UTMs and other KPIs tied to channels or specific communications, an internal communications team can get a picture of what is working and what is not. This is critical because communication preferences evolve for employees. Whether it is consumer adoption of new technologies as they evolve, or the mass shifts caused by COVID, employees have evolving expectations and desires. It is only through a commitment to measurement and iteration that an internal communications team can stay on top of the work they must do to continue to improve and ensure that corporate strategy, policy changes, cultural expectations, and other important information are received and acted upon.

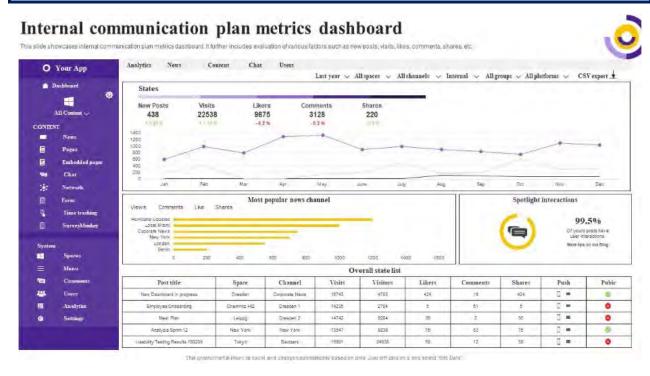


#### Case Study: Impact of Measurement at Dupont

"That which gets measured gets done. We deepened our focus on communications measurement, and perhaps more importantly, connected those communications metrics to business outcomes. During our 2016-2017 merger communication at DuPont, we routinely showed steady, solid progress and connectivity between communication measurement efforts and organizational health and engagement scores.

We also showed the impact of internal communications on voluntary attrition rates in a very compelling and positive way.

We had to up our game, literally, in measurable ways. That means knowing what to measure and when, doing the analytics on the data, and showing how we're using those insights to drive continuous improvement. It is what leadership cares about and how it assigns a value to the function. xliv



An example of some metrics based on audience segmentation and engagement rates. xlv



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### **Recommendations**

- 1. OSD PAO and Service and DAFA PAOs develop an internal communications team, a comprehensive, multi-channel top-down internal communication strategy, and an organizational architecture to accelerate internal communications.
  - **a.** The OSD, Services', and DAFAs' Public Affairs Office must have an internal communications team. While it is understandable that the department must invest in external communications, the failure to carve out a section of this organization to have responsibility for internal communications or to even identify one internal communications KPI will continue to produce delayed change efforts, inconsistent messaging, and variable outcomes.
  - b. Map all critical PA teams and establish a "Communicator's Community" to ensure consistency in messaging, the latest tools, techniques, and procedures, and ensure timely delivery of critical messages. Today, OSD PAO "ends its work" with direct communication to top-level service and component PAOs. This allows for communications to be confused and misunderstood through a game of telephone and to be executed, or not, on a timeline convenient to cascading leaders. The OSD PAO should begin to see a part of its role as acting as a center of excellence (COE), where it communicates and shares tools and resources directly with PAOs across the enterprise, not limiting its communication only to a top tier of PAOs. That said, hearing from local leadership and service-specific messaging is often more effective, so access to enterprise communicators shouldn't mean an overuse of these communicators as a channel. Examples of how to establish the community include establishing a Teams community, creating email distribution lists, offering regular training, and hosting annual virtual/in-person conferences, among other approaches.
  - c. Establish the use of an editorial calendar to ensure all services and components know when to expect the delivery of critical messages and enable cascading communication teams to wrap messages in the necessary local context. While much of the work of PAOs is about responding to current events, this shouldn't serve as an excuse to fail to properly plan. This editorial calendar must be a collaboration between numerous offices within OSD, such as P&R, and include elements of planned policy changes, regular drip messaging around the NDS, critical preparation themes addressing budgeting cycles, and other topics as appropriate.
  - d. Provide Communicators access to training on how to use new tools, and calendars, participate in communities, and other communication-related competencies and skills focused on user-based design approaches. Communication is a dynamic field, requiring practitioners to be highly skilled in the latest marketing trends, techniques for addressing misinformation and disinformation, and the use of tools (like an editorial calendar) and other processes. As the PAO established a team dedicated to internal communication, upskilling for current communicators should be perceived as a part of its scope.



- 2. Deploy new communication tools to both increase the effectiveness of and manage comms across channels while measuring the impact.
  - a. Use video, mobile applications, email, public social media, manager toolboxes, as well as memos for multi-pronged communications campaigns to ensure "surround sound" messaging. At this time, there is no way for OSD to even send an enterprise-wide email. This must be remedied. OSD leadership shouldn't expect to build the rapport for meaningful change management until it has a means to communicate directly with the force, in addition to the current means of cascading hierarchical communication. OSD PAO should consider using LinkedIn and other public social media for non-sensitive information to reach audiences where they already are.
  - b. Consider the deployment of an opt-in role-based communications application, available on both desktop and mobile, for access to Communications that can be tailored to audience profiles (rank/grade, service, component, unit, status, duty location, etc.). While the primary communication strategy should be to go where users are (social media, email, manager huddles), there are technologies that would allow for audience-specific messaging to address numerous attributes of users to make decisions about what communications they see. By deploying a tool like this, OSD can empower spans of control for local messaging/context by hundreds or thousands of PAOs, while also tracking effectiveness and monitoring that critical messages are making it to the field. A pilot(s) conducted within a service can validate the effectiveness of a tool before deployment to the enterprise.
  - c. Deploy analytics dashboards to measure the effectiveness of comms and adjust methods and channels as metrics dictate. DoD has multiple analytics platforms at its disposal and should choose which is most effective. Once selected, an internal communications dashboard should be developed to track the impact particular messages and channels are having so future approaches can evolve.
- 3. Work with PA teams to create a multi-channel communications plan for each pillar of the National Defense Strategy and other critical initiatives as needed.
  - a. Clearly articulate "so what... now what" in internal communications strategies (what are we stopping, what are we changing). Policy changes like the NDS are robust and critical messages and necessary cultural changes can be lost in the multitudes of words. DBB interviews led to polarized views, where OSD staff believed the NDS was well understood, and field staff was largely unaware of anything beyond "PRC as a pacing challenge..." OSD PAOs should take more deliberate steps to articulate for cascading PAOs a higher fidelity of messaging to use, both for the NDS and other initiatives like budget, policy changes, and more. They should use the established COE and PAO/Communicators Community as recommended above to get this information quickly and accurately across the enterprise.
  - b. Create toolboxes for line managers to share NDS or other critical initiatives and facilitate conversations about why it matters to them. While services and



components should ultimately own what messages get to line managers, each critical initiative should have a staple of a tool like a "manager's toolbox" that OSD uses to jumpstart conversations for any critical policy or cultural changes.

- 4. Incorporate the voices of OSD and managers to ensure "surround sound" in the future.
  - a. Establish more regular communications from OSD, including the Secretary of Defense, Deputy Secretary of Defense, and other principals regarding strategy, priorities, progress against critical goals, and DoD's impact to Americans. During this study, the DBB found that consistency in channels and communications breeds a belief in the importance and clarity of where to look for messaging. An example might be a monthly newsletter from OSD to the enterprise highlighting key initiatives and priorities and celebrating healthy cultures and practices. The practice of "deference" of all messaging to service and component leadership produces a workforce feeling disconnected from and even sometimes cynical about decisions made in the Pentagon.
  - b. Establish a regular cadence of live-streamed and recorded "town halls" for two-way communications around critical initiatives. While videos of Pentagon leadership are regularly posted to defense.gov, they represent a formality and rigidity that doesn't always resonate with field staff. Town halls have been used before (Rumsfeld), and the technologies deployed in response to COVID-19 provide an opportunity for live and direct non-sensitive communications on some level of regular frequency (quarterly) to much of the force. These can also provide a wealth of content from which video assets can be deployed to channels for use by multiple PAOs and connect decisions made in the Pentagon with the work being done by service and civilian employees across the globe.
  - c. Deploy deliberate manager strategies for cascading comms (standard of 1-2 days in advance of comms). Today, DOD often uses managers for the delivery of critical messages, though executed haphazardly. In the future, line managers should be used to reinforce messages and answer questions about how new policies and strategies matter to work. For meaningful conversations to be successful, PAOs should help managers by getting the toolboxes mentioned in the recommendation above out to the field in advance of broader announcements and communications.
  - d. Map "influencers" who can help amplify communications and critical messages where needed. Modern technologies have been used to create organizational network analysis (ONA) of "influencers" within organizations. The department should consider mapping the individuals and departments that exhibit influence and find times to leverage this informal network to create change and influence organizational behavior. (An example can be found <a href="here">here</a>.)
- 5. Deploy the use of critical metrics to determine effectiveness and iterate for the future.
  - a. OSD PAO and Service PAOs track source device UTMs (intranet, email, app, text, etc.) and mobile vs desktop. As the department deploys more tools like Teams or the use of an app recommended above, PAOs should get familiar



- with the use of UTMs (Urchin Tracking Modules) and QR codes and embed these within links in emails, on intranet sites, and via other communication channels to identify traffic sources and effectiveness.
- b. OSD PAO and Service PAOs report on open rates, click rates, click-to-open ratios, read time, and follow-through on calls to action. These metrics should become standard to internal communications dashboards and empower PAOs to test and evolve channels, messaging, communicators, and timing.
- c. Conduct regular brief communications effectiveness surveys for feedback. In addition to employee engagement surveys like FEVS, many industry internal communications teams conduct annual surveys to understand employee sentiment regarding channels, communicators, and technology to understand how to evolve their strategies. The department should deploy a similar concise (no more than 10 minutes) survey strategy to evolve its communications strategies, with the ability to disaggregate data by level/rank, geography, service/component, length of service, civilian/service, etc.
- d. **Iterate with more effective messaging approaches.** A culture of innovation requires a culture of iteration. Every new approach used should be deployed with a measurement plan, defined success metrics, regular retrospective sessions, and a plan to disseminate learning via the community of communicators.
- e. **Deprioritize and divest of unsuccessful channels**. Every newly tested approach, as well as all legacy communication channels (Stars and Stripes and AFN, etc), must be evaluated using data to ascertain their effectiveness as internal communications channels, and decisions must be made to divest or deprioritize those channels for more effective tools.



COMMUNICATIONS PLAN TEMPLATE				
Target Audience	Message	Vehicle	Responsibility	Timeline
Who do we want to inform?	What do we want to tell them?	How are we going to tell them?	Who will be involved in the communication and how?	When will we communicate?
Employees	Encourage FEVS	[In addition to email, group settings—agency events, town halls, or team meetings—can be effective places to encourage staff to complete the survey.]	[Determine what levels and sections of the organization should be involved. It may help to consider the role of: • Senior leaders. • Work unit leaders. • Supervisors. • Communications stal. • Human resources stal. • Employee union(s).]	[Consider how early and often to communicate with staff in the time leading up to the survey launch.]
Employees	Announce FEVS results.	[In addition to email, consider other vehicles to share the results:  • Town hall briefings;  • Supervisor conversations.  • Video messages.  • Intranet posts.]	[Consider what level of the organization, in addition to senior leadership, that this message should come from Is there a role for work unit or component heads?]	[Consider how quickly you can share results after receiving them from the Office of Personnel Management.]
Employees	Announce Best Places to Work results.	[In addition to email, consider other vehicles to share the results:  • Town hall briefings.  • Supervisor conversations.  • Video messages.  • Intranet posts.  • Physical collateral posted in high-traffic areas.]	[Consider what level of the organization, in addition to senior leadership, that this message should come from Is there a role for work unit or component heads?]	[Consider how quickly you can share results after receiving them from the Office of Personnel Management.]
External Audience	Announce Best Places to Work results.	[If results are positive, consider sharing them through: • Social media. • Agency newsletters. • Job postings.]	[Consider ways to involve employees and their stories in external announcements about your results.]	[Consider how quickly you can share results after receiving them from the Partnership.]
Employees	Update about ongoing efforts to improve the employee experience	[In addition to email, consider other vehicles to share updates: • Town hall briefings. • Supervisor conversations. • Video messages. • Intranet posts.]	[Consider what level of the organization, in addition to senior leadership, that this message should come from. Is there a role for work unit leaders or employee-led working groups?]	[Determine key milestones that warrant messaging throughout the year.]

An example communications plan template from the Partnership for Public Service's "Communications Toolkit." xlvi



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## **Conclusion**

By the nature of directing this Study, the Deputy Secretary has identified communicating in large organizations an urgent problem in need of a solution. The Department faces multiple, but not insurmountable, issues in its ability to communicate internally from senior level leadership like the Secretary of Defense and Deputy Secretary to the most junior Soldiers, Sailors, Airmen, Marines, Guardians, civilians, contractors, and family members.

Effective internal employee communication and engagement efforts are essential to maximize performance and foster a positive and unified culture that contributes to recruitment, retention, and productivity enhancement. Better communication helps to improve and enhance economy, efficiency, effectiveness, innovation, and employee morale. Providing consistent messages and information is especially critical during major transformation or crisis management periods and can make the difference between success and failure.

The DBB has found that DoD is not alone in attempting to solve this issue, as many public and private industry organizations have struggled since the COVID-19 pandemic. The private sector has recognized that without deliberate internal communications teams and infrastructure, morale and productivity can suffer, and disengaged employees can even undermine organizational strategy. However, while the Department largely continues to communicate via email and memos, other members of the United States Government and the private sector have innovated to treat their employees like customers, keeping them informed and engaged through various means.

DoD needs to establish a centralized internal communications unit to develop a comprehensive, multi-channel internal communications strategy that is both based on an editorial calendar and is also agile enough to address any forthcoming crises. DoD can enable this new team to catch up to industry best practices by helping it deploy new multi-channel intelligent communications tools, incorporate senior leadership voices to discuss strategy, policies, and issues facing the frontline, and use key performance indicators to continually measure its internal communications strategy. A "Community of Communicators" would be able to both share best practices amongst multiple DoD entities and keep DoD up to date with industry best practices.

By implementing these types of changes, DoD can rapidly enhance its ability to proactively communicate with its workforce and respond swiftly to evolving threats. DoD can modernize its enterprise-wide communications, boost engagement and personalization, and stay competitive in today's fast-paced information environment.



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Appendix B: Presentation to the Board

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### **Appendix A: Terms of Reference**



#### DEPUTY SECRETARY OF DEFENSE 1010 DEFENSE PENTAGON WASHINGTON, DC 20301-1010

APR 2 5 2024

#### MEMORANDUM FOR DEFENSE BUSINESS BOARD

SUBJECT: Terms of Reference - Communicating in Large Organizations

The Department of Defense (DoD or "the Department") could benefit from having the enterprise communications tools that promote cohesion within the Department — across roles, rank, and career level. Given today's complex communications environment, such communications tools can better engage the workforce and lead to more effective and efficient operations in an organization as large as DoD.

Therefore, I direct the Defense Business Board ("the Board"), working through its Talent Management, Culture, & Diversity Advisory Subcommittee ("the Subcommittee"), to examine the approaches and methods used to communicate within large organizations, both public and private. Specifically, the Board will provide recommendations to help improve DoD-wide enterprise communication and culture through a/an:

- Examination of how other highly matrixed large organizations, public and private, communicate across their workforces. Explore what practices used by these organizations are most applicable and scalable to the Department of Defense, Services, and Defense Agencies and DoD Field Activities.
- Review of the role of civilian and military supervisors throughout the Department in both the culture and process around communications.
  - Evaluation of the organizational structure, tools and technologies that would be
    best suited to help improve enterprise communication within the Department. The
    evaluation will include an assessment of the Department's readiness to adopt such
    tools given its culture, security considerations, ability to strategically communicate to
    part-time employees and members of the Reserve Components, countering
    misinformation, and workforce skills/training, and how such tools could shift the
    Department's culture towards innovation, enhanced cross-communication, efficiency,
    and effectiveness.
- Assessment of effectiveness of existing internal communication activities to support the implementation of the 2022 National Defense Strategy or other subordinate strategies.
- Analysis of possible metrics and key performance indicators to measure the
  effectiveness of communication strategies.
- · Any other related matters the Board determines relevant to this task,





I direct the Subcommittee to submit its findings to the full Board for its thorough consideration and deliberation at a properly noticed and open meeting, unless the meeting must be closed pursuant to one or more of the exceptions found in title 5, U.S. Code, section 552b(c). The Board will submit its independent recommendations to the Secretary of Defense or the Deputy Secretary of Defense no later than August 2024.

In conducting its work, the Subcommittee and the Board have my support to meet with Department leaders. The Board staff, on behalf of the Board and the Subcommittee, may request the Office of the Secretary of Defense and DoD Component Heads to timely furnish any required information, assistance, or access to personnel to the Board and the Subcommittee. All requests shall be consistent with applicable laws; applicable security classifications; DoD Instruction 5105.04, "Department of Defense Federal Advisory Committee Management Program;" and this Terms of Reference.

In accordance with DoD FACA committee appointment procedures, I authorize the addition of a consultant to the subcommittee with a background in organizational or internal corporate communications, to provide expertise and input into this study.

Material provided to the Board becomes a permanent part of the Board's record. Components are reminded that all data/information provided is subject to public inspection unless the originating Component office properly marks the data/information with the appropriate security classification markings and Freedom of Information Act exemption categories before the data/information is released to the Board. The Board has physical storage capability and electronic storage and communications capability on both unclassified and classified networks to support receipt of material up to the Secret level. Each Component should remember that Board and Subcommittee members, as special government employee members of a DoD federal advisory committee, will not be given any access to DoD networks, to include DoD email systems.

The Board and the Subcommittee will operate in conformity with and pursuant to the Board's charter, title 5, U.S. Code, chapter 10 (commonly known as "the Federal Advisory Committee Act"); title 5, U.S. Code, section 552b; and other applicable federal statutes, regulations, and policy. The Subcommittee and individual Board members do not have the authority to make decisions or provide recommendations on behalf of the Board nor report directly to any federal representative. The members of the Subcommittee and the Board are subject to specific Federal ethics laws, including title 18, U.S. Code, section 208, governing conflicts of interest, and the Standards of Ethical Conduct regulations in 5 C.F.R., Part 2635.

Thank you in advance for your cooperation with and support for this critical undertaking to inform subsequent decisions on how the Department addresses national security challenges in the coming decades.

Kellstoline



#### **Appendix B: DBB Presentation to the Board**



## **BACKGROUND**

#### Communicating in large organizations enables:

- · Agility to meet quickly evolving threats
- · Clarity and efficiency in executing strategy
- Engagement of employees
- · Tackling misinformation and disinformation
- · Effective response in times of transformation and crisis

While the speed and modes of communication have rapidly increased in the Information Age, the DoD still primarily uses memos and email.



#### The ToR asked the sub-committee to:

- Analyze communications best practices used by large public and private organizations and determine which fit for DoD;
- Assess supervisory roles in communications;
- Evaluate tools and technologies considering factors such as security, culture, workforce readiness, and innovation potential;
- Assess current internal communication strategies that support the 2022 NS and other subordinate strategies; and



 Evaluate the purpose metrics and key performance indicators to measure the effectiveness of these strategies





## **FINDINGS**

#### The DoD:

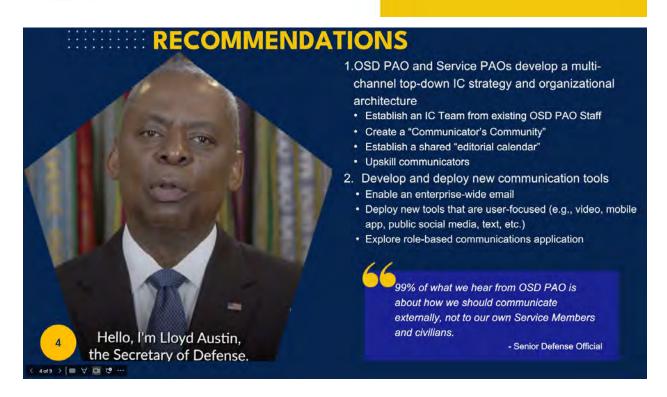
- Lacks a central internal communications unit developing/coordinating enterprisewide non-sensitive communications
- Lacks a central OSD-level/enterprise IC strategy with goals, objectives, editorial calendars, and evaluation criteria
- Primarily uses memos and no enterprise email could be sent today, even if desired
- Communicates in a fragmented, inconsistent, and rarely measured way
- Sends little to no direct communication enterprise-wide from leadership and created assets live hidden away

#### Private Sector Employers:

- Have large dedicated teams for enterprise-wide comms
- Are highly organized, even in decentralized contexts
- Communicates their top of house strategy regularly
- Track numerous metrics, conducts regular surveys, and iterates comms strategy regularly
- Holds regular virtual town halls or videos from CEO



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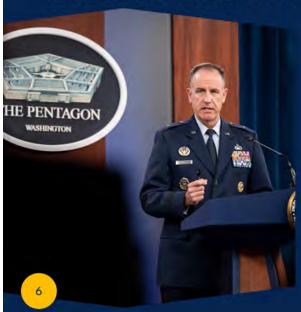


- OSD and Service leadership and PA teams create a multi-channel communications plan for each pillar of the NDS and other critical initiatives as needed
  - · Crisply articulate line "so what...now what"
  - Incorporate managers into NDS and similar initiatives' communications strategies

We need to write guidance that will speak to the 100%. Whether you're working at the commissary or at DFAS or along the DMZ or you're in Djibouti, you need to understand that your job is ultimately about homeland defense...It goes back to the NASA example asking the janitor what he does. He's helping put people on the moon.

- Senior Defense Official

## **RECOMMENDATIONS** (cont'd)



- 4. Incorporate voices of OSD and managers to ensure "surround sound"
  - Establish more regular IC from SECDEF, DSD, and other principals
  - · Establish regular livestreams and town halls
- 5. Deploy critical metrics to determine effectiveness
  - Establish critical IC metrics (use of UTMs; open rates; read time, etc.)
  - Conduct regular (but brief) comms surveys and iterate



# **Moving Towards Excellence**

Cascading communications only



- Most PAOs seeing their role as "filtering for relevancy"
- PAOs disconnected and operating from limited
- Prioritization on external public affairs
- Internal comms that do exist today focused on Service Members
- Absence of SECDEF and DSD from lives of DoD
- Effectiveness of internal comms is unknown



- · Establishing "bypass" connections to communicators, while still relying primarily on cascading communications
- All PAOs see role as "adding context for relevancy"



- PAOs are a "Community of Excellence" with development and insights
- · Balance public affairs with internal communications
- · Civilians and contractors are considered key stakeholders
- · Regular engagement and trust built with **SECDEF and DSD**
- · OSD internal comms are regularly measured and reported on



# **Recommendations Roadmap**

- · Establish more regular internal comms from SECDEF, DSD, and other principals
- · Establish an internal communications team from existing OSD PAO staff

#### Within 1 year:

- · Conduct communications survey
- · OSD PAO develops a multi-channel top-down internal comms strategy and organizational architecture, "So What, Now What"
- · Create a "Communicator's Community"
- · Establish a shared "editorial calendar"
- · Incorporate voices of OSD and managers to ensure "surround sound"
- · Enable enterprise-wide email and toolboxes for line managers
- Deploy deliberate manager strategies for cascading comms.
- · Upskill communicators

#### Within 18-24 months:

- Deploy new communications tools including a mobile application
- · Deploy critical metrics to determine effectiveness
- · Map "influencers" to amplify communications

( Bof > | E V D 😎 🕶 with more effective messaging approaches





# Appendix C: Talent Management, Culture, & Diversity Advisory Subcommittee Member Biographies



## DEFENSE BUSINESS BOARD

## THE HONORABLE DEBORAH LEE JAMES

CHAIR, DEFENSE BUSINESS BOARD and FORMER SECRETARY, US AIR FORCE

From December 2013 through January 2017, Deborah served as the 23<sup>rd</sup> Secretary of the United States Air Force with responsibility for 660,000 military and civilian personnel and a budget of nearly \$140 billion. She was the second woman to ever lead a military service in the United States.

Prior to this role, she served as President of SAIC's Technical and Engineering sector, a \$2 billion, 8,700-person enterprise. Earlier in her career, Deborah held other P&L positions and worked in the Legislative Branch of government and the Department of Defense (DoD).

Deborah has deep expertise in strategic planning, risk management, public policy, cyber security, space, logistics, and innovation. Deborah is a proficient speaker on business and government topics, including issues in national security and world affairs, politics in Washington, business transformation leadership, mergers and acquisitions, cost reduction strategies, and diversity and inclusion.

She is an accomplished keynote speaker and enjoys working one-on-one as an Executive Mentor with C-suite level professionals, sharing her expertise and providing advice on team building, organizational change management, partnering with the Federal Government, and transformational technology. Deborah is the author of the new book, "Aim High: Chart Your Course and Find Success" and she periodically appears on MSNBC, CBS, and other national news programs. Finally, Deborah serves on various for-profit and non-profit boards of directors. Deborah became a member and Chair of the Defense Business Board upon her appointment in September 2021.

#### Previous Experience

- 23<sup>rd</sup> Secretary of the United States Air Force
- · SAIC, President, Technical and Engineering Sector
- SAIC, Executive Vice President, Communications and Government Affairs
- SAIC, General Manager, Command and Control Business Unit
- Business Executives for National Security (BENS), Executive Vice President and Chief Operating Officer
- · Vice President, United Technologies, International Operations, and Marketing
- Assistant Secretary of Defense, Reserve Affairs, DoD
- Armed Services Committee, US House of Representatives

#### Education

- Columbia University, School of International & Public Affairs MIA, International Affairs
- Duke University AB, Comparative Area Studies

#### Today's Affiliations

- Member, Board of Directors: Textron, Unisys, Noblis, Systems & Technology Research, Atlantic Council. PenFed Foundation
- Executive Mentor, ExCO Leadership
- Senior Advisor, Center for Strategic and International Studies







## DR. ALEX ALONSO, PhD

# CHIEF KNOWLEDGE OFFICER SOCIETY FOR HUMAN RESOURCE MANAGEMENT

Dr. Alexander Alonso, PhD SH RM-SCP, is the Society for Human Resource Management's (SHRM's) Chief Knowledge Officer leader for business intelligence, research, insights, and innovation functions. In his role, he also serves as the executive lead for SHRM's subsidiary, CEO Academy, an institute designed to prepare emerging CEOs by learning from thought leaders and former CEOs with lived experience as captains of industry.

His career portfolio includes more than \$300 million across new revenue streams based upon practical thought leadership designed to make better workplaces for a more inclusive world. In fact, Dr. Alonso was recognized as an inaugural member of the Blue-Ribbon Commission on Racial Equity in the Workplace, a coalition designed to foster equitable and inclusive cultures. His research has been featured in numerous outlets, including USA Today, NBC News, BBC, CNN, and more. He has served as a member of several speaker's bureaus with more than 400 speaking engagements over the last decade being called "one of the most effective communicators of data in recent memory by HR Magazine.

His works have been recognized for their contribution to real-world human capital issues. They include being recognized with SIOP's 2007 M. Scott Myers Award for Applied Research in the Workplace for developing the federal standard for learning and development of healthcare providers; a 2009 Presidential Citation for Innovative Practice by the American Psychological Association for designing performance management systems; and the 2013 SIOP Distinguished Early Career Contributions for Practice Award for extensive applied research on the link between human resource management and organizational sustainability.

Throughout his career, he has published works in peer-reviewed journals, authored several chapters on community-based change initiatives in workforce readiness, and authored books like The Price of Pettiness, Talking Taboo: Making the Most of Polarizing Topics, and Defining HR Success: A Guide to the SHRM Competency Model in Practice. Alex also serves as a columnist analyzing major trends in the workforce for TIP and HR Magazine. He has served on several professional society boards, including as president for the Personnel Testing Council of Metropolitan Washington Area. Alex currently serves on the National Credentialing Council for Crane Operators Foundation; the SIOP Foundation Board of Directors; the North American HR Management Associations (NAHRMA) board; and the Zeal Capital Advisory board. He is a Fellow of SIOP, Division 14 of the American Psychological Association.







## MATTHEW DANIEL

# PRINCIPAL OF TALENT STRATEGY GUILD EDUCATION

Matthew Daniel stands out as a gifted leader, strategic thinker, and innovative operator in the field of Talent Development. Currently, he currently serves as Principal of Talent Strategy and Mobility at Guild Education, where he is responsible for research, consulting, and thought leadership on topics at the intersection of Learning and Development and DEI, reskilling, internal mobility, and the future of work.

For nearly 20 years, Matthew has consulted on talent development, talent management, and HR technology strategies for Fortune 500s, including companies like Nike, Boston Consulting Group, Bristol-Myers Squibb, Valero, GlaxoSmithKline, Allstate, ExxonMobil, Cigna Healthcare, Microsoft, Walmart, and General Motors. Matthew has also spent time serving in the public sector, with the first two years of his career on the Pine Bluff Arsenal, supporting contracts with both the Department of Homeland Security and the Department of Defense. Later, Matthew supported learning technology strategy for the Department of Veterans' Affairs.

Matthew spent six years internally at Capital One, leading learning design, technology, and innovation. He was responsible for learning and talent development in support of the organization's Digital Transformation, helping to architect the mobility of existing talent into new skills and new roles as the organization evolved. Matthew's experience evaluating HR systems has made him a partner to product and strategy teams across the edtech and talent development sector as they build to meet a growing field.

Matthew graduated first in his college class with a B.A. in History from the University of Arkansas at Pine Bluff, an HBCU. As a passionate member of the talent development community, Matthew has been a member of the Association for Talent Development for many years and served on the local board in Nashville, TN. He speaks regularly at industry events, inspiring and challenging his field. Matthew is regularly published in industry outlets like TD Magazine, CLO, HR.com, CTDO, and Training Magazine on the topics of Skills, Career Pathways, Mobility, and Equity in Development. Matthew serves as a member of the Talent Management, Culture, and Diversity Subcommittee of the Defense Business Board.







## **CHERYL ELIANO**

# DISTRICT 10, NATIONAL VICE PRESIDENT AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES

Cheryl Eliano is District 10, National Vice President of the American Federation of Government Employees, representing more 40,000 federal workers in Texas, New Mexico, Louisiana, Mississippi, and Panama. Eliano was first elected to the position in May 2014 and was re-elected to three-year-terms in 2017 and 2020.

Eliano's mission for District 10 is to provide exceptional leadership and service at all levels and locations for all those she serves. In 1979, Eliano began working for the federal government as a commissary cashier in Munich, Germany. She retired from federal employment in 2014 to serve as national vice president.

Prior to being elected as the AFGE District 10, national vice president, Eliano served as president of AFGE Local 1920 for more than 11 years. She made history when she became the first female elected to serve a full term as president. She also was the first person to serve in three major functions as well: secretary/treasurer, chief steward, and president.

Eliano scored numerous achievements during her time leading AFGE Local 1920, which represents Army civilians at Fort Hood, Texas. She helped organize and lead employee rallies to oppose the Department of Defense's National Security Personnel System and fought the contracting out of civilian positions on base. She helped create a labor-management forum to address workplace issues proactively, helping to avoid costly and disruptive disciplinary actions, and also created a program to train employees and managers on workplace discrimination, employee assistance programs, and other personnel issues. She also was instrumental in implementing alternative work schedules for Fort Hood employees.

She sits on the executive boards of the Texas Workforce Commission, the Texas AFL-CIO, the Texas Gulf Coast Area Labor Federation, and the Texas Labor-Management Conference. She is a member of the Killeen Chamber of Commerce and currently serves as chair of the AFGE National Executive Council's Organizing committee. She recently was elected as a Board Member of the AFL-CIO 2021. Eliano is also a licensed Evangelist Missionary at her church in Copperas Cove, Texas.

Eliano is the proud recipient of numerous awards honoring her commitment to the labor movement, including several leadership awards for maintaining labor-management partnerships and several certificates of achievements for conducting labor-management training at Fort Hood. She also received a humanitarian award from the NAACP. A native of Brooklyn, New York, Eliano attended the New York City College of New York for her Nursing Degree. She also holds certifications from the University of Maryland, New Mexico State University, and Central Texas College of Killeen, Texas. Eliano lives in Nolanville, Texas, with her husband Perry. They have five children and three grandchildren.







# ERIN HILL DEPUTY CHIEF AUDITOR BNY MELLON

Erin Hill is the Deputy Chief Auditor at BNY Mellon. Erin oversees the audit program for Clearing and Collateral Management, Pershing, Markets, Treasury Services, Market and Credit Risk, Credit Risk Review, Global Client Management, Marketing, and Communications.

Previously, Erin was BNY Mellon's Chief Administrative Officer, where she led Real Estate, Procurement, Third Party Governance, Real Estate, Aircraft, all other Corporate Services and certain enterprise-wide legal, compliance, and regulatory initiatives. Erin led the global CAO Roundtable, a forum of chief administrative offices across the company, ensuring alignment on firm-wide priorities and communications. Erin joined BNY Mellon in January 2018.

Prior to joining BNY Mellon, Erin spent 13 years at JPMorgan Chase & Co. in a number of senior roles. Most recently, Erin was the Head of Consumer Branch Banking and Wealth Management, leading the firm's 5,500 retail branches and 50,000 bankers and financial advisors. Previous roles at JPMorgan included Chief Administrative Officer of the Consumer Bank, Chief Operating Officer of Legal & Compliance, and Chief Financial Officer of JPMorgan's private equity business. Erin was also a corporate attorney with Wachtell, Lipton, Rosen & Katz, specializing in corporate governance and acquisitions. Erin was the finance director at Tishman Speyer Properties, an international real estate developer, leading significant real estate acquisitions, including Rockefeller Center. Erin started her career at Arthur Andersen & Co., a public accounting firm.

Erin earned her law degree from Columbia Law School; an MBA from Columbia Business School; and is a certified public accountant. Erin also has her Series 24, 7, 9, 10 and 66.







# JENNIFER MCCLURE FOUNDER & CEO UNBRIDLED TALENT, LLC

Jennifer McClure is an entrepreneur, keynote speaker, and high-performance coach who works with leaders to leverage their influence, increase their impact, and accelerate results.

Frequently recognized as a global influencer and expert on the future of work, strategic leadership and innovative people strategies, Jennifer has decades of in-the-trenches leadership and executive experience working in and with startups, privately held companies, and Fortune 500 organizations in a variety of industries.

As a top-rated keynote speaker, Jennifer has shared her insights with thousands of leaders at conferences and corporate events around the world. Clients include Procter & Gamble, General Electric, IBM, SAP, Oracle, Bloomberg, Charles Schwab, Stryker, Linkedlin, Notre Dame University, Society for Human Resource Management, Association for Legal Administrators, and Association for Talent Development.

In her informative and entertaining keynote programs and workshops, she shares a blend of research, best practices, case studies, and storytelling which leaves audience members inspired and motivated to take action when they return to work.

Jennifer is also the Chief Excitement Officer of DisruptHR, a global community designed to move the collective thinking forward when it comes to talent in the workplace, and she hosts a weekly podcast - Impact Makers with Jennifer McClure - sharing conversations with practitioners, entrepreneurs, authors, and speakers who are changing the world while building careers that they love and lives that matter.





## THE HONORABLE DAVID M. WALKER

#### FORMER COMPTROLLER GENERAL of the UNITED STATES

Mr. Walker is a nationally and internationally recognized fiscal responsibility, government transformation/accountability, human capital, and retirement security expert. He has over 40 years of executive level experience in the public, private, and non-profit sectors, including heading three federal agencies, two non-profits, a global service line for Arthur Andersen LLP, and serving as Comptroller General of the United States and CEO of the U.S. Government Accountability Office (GAO) for almost 10 years.

Mr. Walker is also a writer, speaker, and media commentator. He has authored four books, the latest is entitled America in 2040: Still a Superpower? (2022). His prior book was entitled Comeback America: Turning the Country Around and Restoring Fiscal Responsibility (2010), which achieved National Bestseller status. He has been featured in a number of major programs and documentaries including 60 Minutes and the critically acclaimed documentary I.O.U.S.A.

Most recently, Mr. Walker was the Distinguished Visiting Professor (William J. Crowe Chair) at the U.S. Naval Academy where he taught the Economics of National Security. Previously, he served as a Senior Strategic Advisor for PwC's Public Sector Practice (now Guidehouse). Mr. Walker was the Founder, President, and CEO of the Comeback America Initiative (CAI). Prior to founding CAI, Mr. Walker served as the first President and CEO of the Peter G. Peterson Foundation. Previously, he served as the seventh Comptroller General of the United States and head of the U.S. Government Accountability Office (GAO) for almost ten years (1998-2008). Under Mr. Walker's leadership, GAO underwent a dramatic and highly successful transformation.

Mr. Walker's appointment as Comptroller General was one of three presidential appointments by different Presidents (Reagan, Bush 41, and Clinton) during his 16 years of full-time federal service. The U.S. Senate confirmed him unanimously for all three Presidential appointments. His previous Presidential appointments were Assistant Secretary of Labor for the current Employee Benefit Security Administration, and as one of two Public Trustees for Social Security and Medicare. Mr. Walker also served as Acting Executive Director, Deputy Executive Director, and Chief Negotiator for the Pension Benefit Guaranty Corporation. He also has over 20 years of private sector experience, including approximately 10 years as a Partner and Global Managing Director of the Human Capital Services Practice for Arthur Andersen LLP. His initial private sector experience was with Price Waterhouse & Co., Coopers & Lybrand, and Source Services Corporation.

Mr. Walker currently serves on various boards and advisory groups, including the Defense Business Board and the Federal Fiscal Sustainability Foundation. He is a member of Advisory Committees for American Promise, the Institute for Truth in Accounting, the Center for the Study of the Presidency the Congress, and the Peter G. Peterson Foundation. He previously served as Chairman of the Independent Audit Advisory Committee (IAAC) for the United Nations, Chairman of the U.S. Intergovernmental Audit Forum, Chairman of the Government Transformation Initiative Board, and as a member of the Board of Directors for the International Organization of Supreme Audit Institutions, AARP, the Committee for a Responsible Federal Budget, the Partnership for Public Service, and the Connecticut Municipal Accountability Review Board. He is also a past member of the Trilateral Commission.

Mr. Walker is an inductee in the Accounting Hall of Fame, the Internal Audit Hall of Fame, the National Academy of Public Administration, and the National Academy of Social Insurance. In addition, he is a member of and has held various leadership positions in Rotary International and the Sons of the American Revolution (SAR). Mr. Walker is a non-practicing CPA who has a B.S. in Accounting from Jacksonville University, an SMG Certificate from the JFK School of Government at Harvard University, a Capstone Certificate from the National War College, and four honorary doctorate degrees from American University, Bryant University, Jacksonville University and Lincoln Memorial University. He has won numerous national and international leadership, professional, and public-service awards, including top awards from two heads of state (i.e., Austria and Indonesia) and two U.S. Cabinet Secretaries (i.e., Defense and Labor), the top award for his CPA profession (i.e., AICPA Gold Medal), and the first and only Alexander Hamilton Award for economic and fiscal policy leadership from the Center for the Study of the Presidency and the Congress.







## ROBERT WOLF

## FOUNDER 32 ADVISORS

Robert Wolf is the Founder of 32 Advisors, a holding company which includes the direct investing arm 32 Ventures, the bipartisan economic insights company Strategic Worldviews, and advisory services for corporate clients on financial matters, risk, and governance. Robert was named Chairman of the Al-driven messaging software platform Community in Summer 2022.

Prior to forming 32 Advisors, Robert spent 18 years at UBS, a global financial services firm. While at the firm, he held several senior positions, including Chairman and CEO of UBS Americas and President and Chief Operating Officer of the Investment Bank. He joined UBS in 1994, after spending 10 years at Salomon Brothers.

Robert held three Presidential appointments under President Obama: as a member of the Economic Recovery Advisory Board from 2009-2011, the Council on Jobs and Competitiveness from 2011-2013, and the Export Council from 2014-2016. In 2012 Robert was on the Homeland Security Advisory Council's Border Infrastructure Task Force.

Currently, Robert serves on the Board of Directors of the Obama Foundation, the Alumni Board of the Wharton School, the Economic Advisory Council for the Center for American Progress, and the Leadership Council of NYC's Robin Hood Foundation. He is also a member of the Council of Foreign Relations and the Partnership for NYC. Recently, Robert served as a member of New York City Mayor Eric Adams' transition team and on the Board of EJF's SPAC advising on the completed \$8.5 billion transaction with fintech company Pagaya. Robert also formerly served as Vice Chairman of the Robert F. Kennedy Center for Justice & Human Rights, on the boards of the Undergraduate Executive Board of the Wharton School, Children's Aid Society, Athletics Board of Overseers at the University of Pennsylvania, and Financial Services Roundtable. Robert was named multiple times to Worth Magazine's, 100 Most Powerful People in Finance. In 2016, Robert joined Fox News/Fox Business as a contributor, where he can be seen multiple times per week on the network.

Robert is a graduate of the Wharton School at the University of Pennsylvania, receiving a B.S. in Economics. While at UPenn, he played on the varsity football team that won IVY League Championships in both the 1982 and 1983 seasons and was an honoree into the Ivy Football Association in 2013. In May 2014, Robert received the Distinguished Alumni Award from the Wharton School. Robert was born and raised in Marblehead, MA and is in the town's Athletics Hall of Fame, and currently resides in Purchase, NY.





## **Appendix D: Contributors List**

The Defense Business Board would like to thank the following individuals and organizations for their time in contributing knowledge and information supporting this Study. Their help is greatly appreciated.

The Subcommittee interviewed the following individuals:

Michelle Amante, Vice President of Federal Workforce Programs, Partnership for Public Service

**Dr. Allison Barber**, President and COO of the Indiana Fever

Timothy Barrett, Chief Communications Officer, ODNI

Letty Cherry, General Manager of Image and Culture, Microsoft

Paula Davis, CEO, In Real Life Ventures

Jacqueline DeBuse, Vice President of Communications, Target

Marc Etkind, Associate Administrator for Communications, NASA

Tarek Kamil, Founder and CEO, Cerkl

**Jongsun Kim**, Under Secretary of Defense for Research and Engineering, DoD Performance Improvement Office/Office of the Director for Administration and Management, Executive Leadership Team, Senior Advisor

Leslie Letts, Vice President of Internal Communications, Amazon

Allyson Park, Chief Communications Officer, Walmart

**RDML Ryan Perry**, Chief of Information, U.S. Navy

Jerry Renne, Director of Public Affairs, U.S. Air Force

Major General Patrick Ryder, Press Secretary, DoD

**David Ross**, Head of Sales/Marketing, Community

**Dr. Kristin Saboe**, Head of Employee Voice, Google

**Hon. Ashish Vazirani**, Performing the Duties of the Under Secretary of Defense for Personnel and Readiness, DoD

Carlie Waibel, Principal Deputy to the Assistant to the Secretary of Defense for Public Affairs, DoD

**Jennifer Walsh**, Department of Defense Performance Improvement Officer and Director of Administration and Management

Steve Warren, Strategic Communications Advisor, U.S. Army



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## **Appendix E: Methodology**

The Subcommittee conducted two (2) months of study and gathered data from a series of interviews and a comprehensive literature review to challenge and validate assumptions. The team analyzed and synthesized data from more than 17 organizations and individuals across the public and private sectors. Discussions included perspectives and experiences from senior government officials and private-sector executives alike.

The interviews with the over 25 individuals took place over Zoom and ranged from 45 minutes to over one hour each. There were at least two Subcommittee members on each call, led by Honorable Dave Walker and Matthew Daniel.

Notes and key takeaways for the Study were captured; although, they strictly adhere to the Chatham House Rule, meaning the participants are free to use the information received, but neither identity nor the affiliation of the participants would be revealed in this Study unless they specifically provided their consent to do so.



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### **Appendix F: Public Comments**

The DBB subcommittee was charged to examine Communication in Large Organizations. One of the aspects to include was: Review of the role of civilian and military supervisors throughout the Department in both the culture and process around communications.

The communication paradigm for supervisors of civilians is broken. None of the support structures to develop and execute their authorities are in accordance with 5 USC 7103(a)(10) xlvii. Supervisors of civilians do not receive clear strategic communications, there is too much noise in the signal, and they are not equipped or incented to filter noise and translate strategic intent into action.

Supervisors of civilians are a critical, cross-cutting population which have delegated authorities to <u>deliver mission through people</u>. Every DoD challenge and opportunity to transform the capacity of the civilian workforce rests on the shoulders of first-line supervisors. However, civilians' supervisors have been disempowered and are not developed to the capacity to effectually execute civilian talent management decisions.

- Per 5 USC 7103(a)(10) supervisors of civilians are supposed to "spend a preponderance of their time" executing their authorities, "independently", and "in the interest of the agency"
- Supervisors of civilians establish and maintain the culture for the civilian workforce
- Supervisors of civilians should be able to effectively translate strategic goals and objectives and communicate through their guidance, direction, and assignments to fully engage civilians' potential

However, supervisors' talent management authorities and competencies have been deprioritized in all aspects of their: selection, development, employment, and performance assessments.

#### • Selection:

- Civilian would-be supervisors are selected for their individual technical performance and often "rewarded" with a promotion to a supervisory position xlviii
- o Military supervisors are assigned by rank, coincident assignment, and to enhance their resume

#### • Development:

- There is no civilian supervisory competency maturity model to guide their development through progressively higher levels of competencies to execute talent authorities per 5 USC 7103(a)(10)<sup>xlix</sup>
- o Minimally "compliant" training of supervisors does not occur until after they are appointed
- o Centralized mandatory supervisor training is one-size-fits all, at the lowest levels of evaluation !

#### • Employment:

- No supervisors are allowed to make their talent management decisions "independently" or
   "spend a preponderance of their time" on supervisory responsibilities
- o There is no expectation or incentive for first-level supervisors to look beyond priorities of their immediate leaders and current mission needs

#### • Assessment:



- Civilian supervisors usually have mandatory supervisor performance elements but in practice, there is typically one catch-all with 15+ different expectations, and only one score can be assigned to all<sup>li</sup>
- o There is no mandatory supervisory performance element for military supervisors of civilians

#### ABOUT RECOMMENDATIONS

In consideration of making recommendations to the Department, please note the recommendations paradigm for the Federal government is broken. A analysis of over 500 people/culture DoD recommendations by a recent DoD Taskforce indicated there is often too little information that describe the purpose, intent, intended outcome, useful measures of effect, and how to reach the target audience/center of gravity. Further, the personnel delegated to implement recommendations are often far removed from the ability to reach and influence the decisions and behaviors, especially those first-level supervisors.

A recommendation is unpacked below to show how supervisors are implicated but unaddressed:

**Recommendation from** DBB FY22-03 Talent Management Study Report 18 Aug 2022 Liii

1. Transform civilian culture to prioritize talent management. Based on private sector best practices, the Department can transform the culture through a number of initiatives. This change should start with a DepSecDef memo to the field summarizing the Department's plans, further delineated below.

- **1.1** *Increase training opportunities & improve incentives.* The CHCO will:
- 1.1.1. Review all component civilian training budgets and set benchmarks to ensure dollars spent per
- employee annually are on par with the average private sector annual expenditure for a large corporation.
- 1.1.2. Review the DoD's Civilian Leader Development Programs facilitated by DCPAS and develop an
- initiative to increase the annual bandwidth from 500 personnel a year by using virtual options.
- 1.1.3. Review and align development incentives to show that the Department is serious about growing talent. Direct Components to conduct a review for skills associated with the functions identified by the CHCO as hard-to-fill and report on the feasibility of providing:

#### DEMONSTRATION OF THE IMPLICATIONS FOR SUPERVISORS OF CIVILIANS

- 1. Supervisors of civilians make the majority of talent management decisions and have no incentive or support structures to reprioritize them. Supervisors are not accountable for incorporating DepSecDef memos, and memos cannot be expected influence their talent management decisions.
- 1.1 There are no training decisions made without the authorization of supervisors of civilians, they execute 5 USC 7103(a)(10) authority to direct and assign all civilians to all training opportunities.
- 1.1.1 There is no mechanism to ensure supervisors are equipped with the capacity to make effectual and fiscally responsible talent development decisions.



- 1.1.2 All nominations for leader development programs are first approved by the first level supervisor. Post-development, there is no mechanism to ensure supervisors direct and assign employees to apply the knowledge, skills, and abilities obtained.
- 1.1.3 The greatest opportunity and authority to tap into hidden civilian talents rests with the supervisors. There is no mechanism to ensure supervisors fully leverage the capacity civilians offer. For example, supervisors are encouraged to continue to hire hard to find STEM talent versus assess, realign, and reprioritize work. Supervisors are not expected to assess STEM potential in non-STEM talent, foster, develop, and apply it, in fact supervisors are discouraged from doing so.





### **Appendix G: Acronyms**

AFN Armed Forces Network

BBC British Broadcasting Company

BYOD Bring Your Own Device

COE Center of Excellence

DAFA Defense Agencies and Field Activities

DBB Defense Business Board

DoD Department of Defense

DSD Deputy Secretary of Defense

EE Employee Engagement

FEVS Federal Employee Viewpoint Survey

IC Intelligence Community

IPR Institute for Public Relations

KPI Key Performance Indicator

NDS National Defense Strategy

ONA Organizational Network Analysis

OPM Office of Personnel Management

OSD Office of the Secretary of Defense

PAO Public Affairs Office

SECDEF Secretary of Defense

TBO The Big Opportunity

USPTO United States Patent and Trademark Office

UTM Urchin Tracking Modules





#### **Appendix H: Other Relevant Material for Internal Communications**

Respondents to an IPR survey found that most companies are monitoring or measuring the following items to assess internal communication effectiveness:

- 60% employee's satisfaction/engagement
- 60% intranet usage
- 56% impact on strategic objectives
- 56% financial/personnel costs for projects
- 46% channel effectiveness
- 45% quality of internal communication processes
- 31% of employee attitudes and behavior change
- 35% employee understanding of key messages liv

The IPR has also found the following based on responses to their survey:

The main barriers to properly measuring the effectiveness of internal communications:

- 40% organization doesn't have the right tools
- 32% the organization doesn't understand what to measure
- 32% the metrics are too difficult to get
- 30% it takes too much time to measure internal communications
- 22% IT won't run the reports needed to generate the metrics
- 22% it's too costly to measure internal communications
- 17% metrics are not actionable lv

Methods used for assessing internal communications effectiveness:

- 54% feedback from face-to-face events
- 51% intranet analytics
- 47% employee surveys
- 37% employee social networks metrics
- 28% focus groups
- 25% exit interviews
- 17% cost-benefit analysis lvi

#### Employees' structured listening methods:

- 63.9% regularly carry out internal climate surveys
- 56.3% use quick online polls to get feedback on single initiatives, projects, and issues
- 53.2% use mailbox for suggestions and proposals by colleagues
- 50% use feedback on top management statements
- 49.4% use focus groups
- 41.8% use panels of colleagues
- 39.9% use online voting systems (likes, etc.)
- 36.2% regularly hold listening activities lvii



One study conducted by the International Journal of Business Communications found that:

- Only 37% said they have a clear understanding of what their organization is trying to achieve and why.
- Only one in five was enthusiastic about their teams and organization's goals.
- Only one in five workers said they have a clear "line of sight" between their tasks and their team's and organization's goals.
- Only 17% felt their organization fosters open communication that is respectful of differing opinions and that results in new and better idea[s].
- Only 20% fully trusted the organization they work for. lviii

The qualitative survey [by The Institute for Public Relations] revealed four factors that contributed to IC teams driving business value.

- 1. An organizational structure that connects internal communicators with the rest of the company up and down the chain of command;
- 2. An innate understanding that strong internal communication will have a positive return for the brand and the company that need not be proven at every juncture;
- 3. An arsenal of tools and practices for both listening and communicating a message; and
- 4. A strong commitment to keeping employees across the company informed in a timely fashion, often before stories break in mass media and digital channels. lix

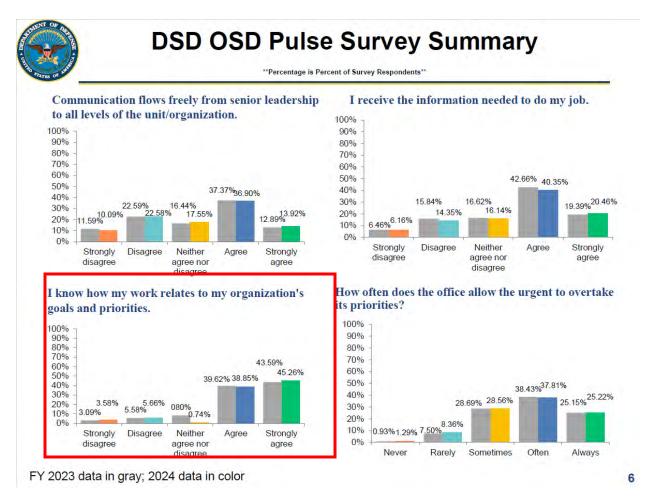
The best-performing agencies have leaders who communicate effectively with their teams. The Partnership for Public Service and Boston Consulting Group have ranked the Best Places to Work in the Federal Government based on the annual Federal Employee Viewpoint Survey (FEVS) conducted by the Office of Personnel Management (OPM) and 14 other agencies' independent surveys. <sup>lx</sup> Published in January 2024, FEVS ranked the Best Places to Work in the Federal Government. DoD is so large it is broken into several categories, each classified as "Large Organizations." Of those Large Organizations, only Departments of the Army and Air Force are listed among the Top 10 Best Places to Work in 2023, with a significant rise in overall satisfaction in the Army of just under four points. Of note, the Department of the Navy rose almost three points, while significantly, The Office of the Secretary of Defense (OSD), Joint Staff, and DAFAs actually slid from last year's data by almost three points.

The following is the Top 10 Best Places to Work in the Federal Government – Large Organizations:

- 1. NASA
- 2. Department of Health and Human Services
- 3. The Intelligence Community (collectively)
- 4. Department of Commerce
- 5. Department of Veterans Affairs
- 6. Department of Transportation
- 7. Department of the Treasury
- 8. Department of the Interior



- 9. Department of the Army
- 10. Department of the Air Force



From the DSD OSD Pulse Survey For 2023/2024, published in July 2024. 2,022 individuals responded.

Per the Deputy Secretary of Defense's recent Pulse Survey Data published in July 2024, there is a slight increase overall in the number of respondents who felt communication flowed freely from senior leadership to all levels and that they received the necessary information to do their jobs effectively compared to the previous year. The majority of personnel also believe they understand how their work relates to the organization's goals and priorities.

However, the data also suggests there is room for improvement with a fairly significant amount of personnel who strongly disagree, disagree, or neither agree nor disagree with those two categories.

Additionally, the majority overall agree that supervisors build trust within the team, which speaks to both the importance of supervisors or "middle management" and their ability to communicate effectively with those within the Department.

Communicators interviewed by the IPR also talked about ways internal communications created intangible value:



- Contribution to company culture and community
- Increased employee confidence
- Greater collaboration and connection among employees and leaders
- Increased encouragement for employees to share their voices
- Recognized employees lxi
- Increased employee confidence in the company's direction, strategy, and leadership
- Employees' motivation to innovate lxii

In addition, Peter Cardon, a professor at the USC Marshall School of Business, Business Communication Department, conducted research that examined the role of leadership communication on digital platforms and the nature of digital listening by leaders. In higher-performing organizations, leaders were found to be much more active communicators on internal digital platforms, especially when engaging in digital listening sessions with employees. lxiii



Several topics emerged as being key to internal communication. Participants were asked directly about some of these topics, and other points came up over the course of conversation. Much of these topics are addressed throughout the report; however, they're presented here, as well, for a more concentrated examination.

Topic Area	Observations
STRATEGIC PLANNING	Policies and Procedures: Some companies place the idea of highl structured policies and procedures very high on their priority list. Corporate strategies = Communications Strategies: Staying "on the sam page" as the company at large is an effective approach fo communications, keeping the company's goals and objectives in mind a all turns.
DIGITIZATION	Intranet: Several companies utilize an Intranet system, and reviews an mixed. One participated noted the importance of striking a balance between using this to convey information the company wants to share and the information that team members need.  Digital signage: A valuable tool particularly for companies within which many employees are not necessarily at a desk or with a compute (especially delivery and manufacturing people), and some don't go home and immediately go online. One participant noted that digital signage is used to convey a range of messages to this audience: including celebrating success, sharing important information, and communicating safety-related updates (particularly as it may relate to manufacturing). Internal/satellite TV stations: Used to deliver content to certain audiences—again, particularly those not working at a computer. Live Webcasts: It's OK to be less "polished" in this age of "tell it like is"—a straightforward and "as is" presentation of information is acceptable and actually embraced.  Social media: Addressed in several interviews, as reflected in comment included in comments on where improvements can occur.
REFLECTING BRAND PERSPECTIVE IN [INTERNAL/EMPLOYEE COMMS/EMPLOYEE ENGAGEMENT]	Annual goals: One approach to maintaining engagement is making it part of the Internal Communication group's annual goals. One participant said, "We contribute to the business's success by making sure wincrease the effectiveness and engagement of the [company] workforce in a way that's measurable so we kind of put it right out there."
BALANCING LOCAL REGIONAL AND GLOBAL COMMUNICATIONS AND COMMUNICATING IN DIVERSE LANGUAGES	<ul> <li>Customization: Customizing for country and regional levels is considere a best practice.</li> <li>Translation: When appropriate, content is translated for offices that speak a language other than the language in which the content was created (usually English). However it was noted that there is a point a which translating everything into multiple languages can become impractical.</li> <li>Video broadcasting: Closed-captioning content is an option for addressing an audience that doesn't all speak one language. Scripts ar translated into all necessary languages before content airs.</li> </ul>

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