

#### **CHAPTER 12**

# Measuring and Evaluating Internal Communication

Julie O'Neil, Michele E. Ewing, Stacey Smith, and Sean Williams

# WHY MEASURE AND EVALUATE INTERNAL COMMUNICATION?

The question of how to measure internal communication had an easy answer for too many years. We don't. There were many reasons why, including the "too busy, too dumb, too hard" argument that the authors of this chapter heard first-hand in the practice of public relations for many years. Scholars echoed a more robust sentiment in that spirit; Meng and

J. O'Neil (⊠)

Bob Schieffer College of Communication, Texas Christian University, Fort Worth, TX, USA

e-mail: j.oneil@tcu.edu

M. E. Ewing

School of Media and Journalism, College of Communication & Information, Kent State University, Kent, OH, USA

e-mail: meewing@kent.edu

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Berger (2012), for example, identified a lack of money and staff, difficulty determining a direct link between communication initiatives and business results, and time constraints.

During the past decade, internal communication measurement became not only a must-have in a practical sense but a symbol of strategic thinking. Suppliers of internal communication services responded to client demands with proprietary measurement strategies and methods (Sanders, 2018; Smarp, 2019; Vaughan, 2017). This shift illustrates the old business adage that organizations invest in the things they find valuable.

Internal communication has an impact on organizational objectives, sometimes directly, sometimes indirectly. Measurement and evaluation approaches can include both financial indicators, such as ROI and financial outcomes (Dortok, 2006; Ehling et al., 1992; Grossman, 2013; Harter et al., 2002; Meng & Berger, 2012; Towers Watson, 2013) and non-financial indicators, such as trust, satisfaction, and advocacy (Meng & Berger, 2012; Meng & Pan, 2012). Indeed, as both scholars and practitioners believe, internal communication affects employee attitudes, beliefs, knowledge, and behavior. Impact on safety, quality and productivity often relies on the often-cited drive for employee engagement. This idea indicates that highly engaged employees advocate for the organization, be more readily retained, exert higher degrees of discretionary effort, and generally conduct themselves more like owners than workers (Kahn & Heaphy, 2014). Byrne et al. (2016) discussed the difficulty in determining effective methods of measuring employee engagement, and though engagement is just one potential measure, its relationship with internal communication has been studied frequently (e.g., Mishra et al., 2014; Ruck et al., 2017; Tkalac Verčič & Polški Vokić, 2017).

Many strategic planning methodologies align communication objectives with organizational objectives and create good opportunities for

Jackson Jackson & Wagner, Rye, NH, USA e-mail: ssmith@jjwpr.com

#### S. Williams

School of Media and Communication, Bowling Green State University, Bowling Green, OH, USA

e-mail: sdwilli@bgsu.edu

S. Smith

measurement. Popular planning methodologies include the OGSM tool-Objectives, Goals, Strategies, Metrics (Lafley & Martin, 2013); RPIE-Research, Planning, Implementation, Evaluation (Escovedo, 2012); RACE-Research, Action, Communication, Evaluation (Begin & Charbanneau, 2012); and AMMO-Audiences, Messages, Methods, Objectives (Williams, 2015). Each of these models connect internal communication activities to organizational impact, as long as the organization in question has articulated goals that can indeed be affected by internal communication. Measurement, therefore, is more than "proving value." It also is a diagnostic tool that reveals opportunities for planning.

Measurement can also be of immense value in assessing and building an effective organizational culture. Based upon data, communicators can direct resources to the areas most in need of attention, conserving those resources and supporting the desired culture. As Williams asks, "Is the work atmosphere the way that the people within the organization want it to be, or can it stand to be improved?" (Vaughan, 2017, para. 10).

As an ongoing strategic activity, measurement, and evaluation enable communicators to join other organizational functions in solid, research-based, data-driven strategy. Clear, measurable objectives and strong strategic plans designed to drive toward those objectives, with evaluative processes firmly in place, contribute to the perception of the value of the function and its leaders. Meanwhile, measurement-based campaigns provide ongoing data to either validate assumptions or enable corrective action. This, then, represents the main answer to the question, "Why measure internal communication?" Measurement acts as an informer to strategic planning, a cue as to current state and guide to campaign planning, and as a means of evaluating the value of campaigns and of programs as a whole. Measurement and evaluation can examine the impact on employees, the organization, and society at large. This multipart utility makes measurement an indispensable tool for any internal communicator and strategic manager.

# How to Measure and Evaluate Internal Communication?

Measurement and evaluation infuse the entire internal communication process, from conducting formative research to assess the situation/identify problem or opportunity, setting objectives, identifying target audiences, formulating strategy and tactics, to evaluating results to identify feedback and make improvements (Gregory, 2000; Paine, 2011).

#### The Measurement and Evaluation Process

## Step 1: Align Communication Objectives with Organizational **Objectives**

As with any communication process, internal communicators must first align their objectives with the organizational goals. Practitioners should secure leadership's buy-in to these objectives early on, as they may be the most important internal customer and their expectations will guide how the program's success is measured. If the buy-in is achieved upfront, then support through budgeting, advocacy, and silo-busting (when needed) should be available. When writing communication objectives, practitioners must ensure that they are relevant, achievable, and measurable. Whereas a goal is aspirational, an objective includes a measure of impact (AMEC, 2020), so that the practitioner can showcase whether and how they have met their communication objectives. The acronym "S.M.A.R.T." is often used to define the most effective goal and objective design (AMEC, 2020). Good objectives are:

- Specific: scope is narrow and well-defined.
- Measurable: metric clearly defines achievement.
- Attainable: realistic budget and resources (time) for plan implementation.
- Relevant: related to the overall goals and stakeholders.
- Time bound: within the period of the plan.

Ultimately, writing clear and relevant communication objectives helps to focus communication efforts, increase the efficiency of communication efforts, secure management buy-in and to build an accountability system, which provides value for the internal communicator (Institute for Public Relations, 2021). Below are examples of SMART communication objectives.

• Increase by 20% the frequency of discussions around economic goals and employee contribution toward revenue by respected and influential supervisors within six months.

• Raise employee participation in external volunteer opportunities by 5% within five months.

# Step 2: Identify Target Stakeholders and Communication strategy

Internal communicators must next determine which stakeholder(s) are key to achieving their objectives and prioritize them. Due to limited time and budget, prioritization is key. For example, in the Walmart case previewed in this chapter, the company spent significant time researching their target employee audience. After conducting more than two years of research to identify innovative ways to reach associates around the world, Walmart identified three key audiences: (a) Entrenched Loyalists, (b) Opportunity Seekers, and (c) Daily Subscribers. Walmart ultimately decided to focus on Opportunity Seekers, and they sought to develop strategy and tactics to reach this prioritized target audience.

### Step 3: Measure Communication Activity

Measurement and evaluative activities should be guided by the designated communication objectives. Common approaches to measuring internal communication effectiveness include outputs, outtakes, outcomes, or impacts (AMEC, 2020), which are explained in the next section.

# Step 4: Evaluate and Make Improvements

Scholars and communicators recommend implementing ongoing evaluation during a campaign or program to assess effectiveness of communication strategies and tactics, as well as progress toward achieving objectives and goals (AMEC, 2020; Lindenmann, 1993; Watson, 2001). According to the Institute for Public Relations (2021) "the purpose of evaluation is not celebration but optimization." For example, do employees view content as relevant and useful and why? Which channels in the internal communication program are attracting the highest engagement and why? How do internal communication data align with data from other organizational departments? Asking good questions allows the practitioner to make timely improvements to audience segmentation, messaging, channels, and other communication elements.

#### Internal Communication Standards: What to Measure and Evaluate

Academics and communication practitioners have opined that internal communicators both grapple with knowing how to measure and evaluate internal communication as well as doing so in different ways (Mendez et al., 2013; Meng & Pan, 2012; Ruck, 2015; Ruck & Welch, 2012). The lack of a standardized approach to measuring internal communication adds to potential inefficiency, because practitioners and their organizational leaders do not have a shared vocabulary to compare and contrast results. To address these challenges, the Institute for Public Relations Measurement Commission created a task force committee in 2015, comprised of academics and practitioners, to identify industry standards for internal communication measurement. A standard provides a shared vocabulary for organizational leaders and communicators to compare and contrast results (Institute for Public Relations, 2013). Following a two-year comprehensive research process, the task force identified 22 standards for internal communication (O'Neil et al., 2018), which were organized into three categories: outtakes, outcomes and organizational impact (Table 12.1).

#### Outtakes

Outtakes involve the response and reactions of the target audience to the communicative activity. These standards, such as awareness, knowledge and retention of information, are designed to evaluate informational communication objectives. For example, measuring employees' awareness and understanding of organization's business goals, safety protocols and other topics that employees need to understand to effectively perform their jobs.

#### Outcomes

The most meaningful way to measure and evaluate is outcomes, which are the effects of the communication on the target audience (AMEC, 2020). Outcomes typically measure changes in attitude, opinion, and behaviors among target audiences as a result of the communication initiative or campaign. Motivational communication objectives can be measured using these standards including advocacy, empowerment, and collaboration. Some examples of how these standards can be used in evaluating the level of employees' discretionary efforts with defending the company's reputation, how employees feel empowered take initiative and make decisions to solve problems, and how are employees sharing ideas and collaborating across departments and divisions. Other examples of outcomes include increased job satisfaction, innovation, sales, and likelihood to recommend other people to work at the organization.

Table 12.1 Internal communication measurement standards and definitions (O'Neil et al., 2018)

Standard	Definition
Outtakes	
Awareness	Whether employees have heard of an organizational message, issue, or topic
Knowledge	Employees' level of comprehension about organizational messages, issues, or topics
Understanding	Employees' ability to relate their knowledge to their work in a way that helps the organization achieve its goals
Relevance	Degree to which employees communication from the organization meaningful and useful
Retention of Information	Degree to which employees can recall key messages or topics when asked after an x timeframe
Outcomes	-
Attitude	A way of thinking or feeling about a subject (about an organization, topic, or issue) ranging from very positive to very negative
Advocacy	Employees <sup>3</sup> discretionary effort and time to promote or defend an organization and its products and services
Authenticity	Perception that an organization is transparent, honest, and fair, especially regarding the pursuit of its organizational objectives
Empowerment	Employees have the information, rewards, and power to take initiative and make decisions to solve problems and improve performance
Collaboration	The process of employees across different divisions and or units coming together to solve a problem and/or create something successfully
Teamwork	The process of employees within the same unit coming together to successfully achieve a common goal or objective under the leadership of an appointed manager
Discretionary Effort	The amount of effort employees give to an organization, a team, or a project, above and beyond what is required
Trust	A belief in the reliability, truth, and integrity of the organization's leadership, decision-making, and communication
Satisfaction	Extent to which employees are happy or content with their job or work

(continued)

Table 12.1 (continued)

Standard	Definition
Transparency	The willingness of the organization to share positive and negative information with employees in a timely fashion
Fairness	Employee perception that organizational processes that allocate resources and resolve disputes are impartial and just
Organizational impact	,
Productivity	The quality and quantity of work output based on resources
Innovation	Thinking differently and experimenting with new approaches, ideas, or behaviors related to the organization
Continuous Improvement	The process by which employees offer small or large improvements to improve efficiency, productivity, and quality of a product or process in the work environment
Reputation	Stakeholders'—both internal and external—evaluation of an organization based upon personal and observed experiences with the company and its communication
Employee Retention	The number or percentage of employees who remain employed after X period of time
Safety	Employees' freedom from physical and emotional harm, injury or loss

The Barcelona Principles 3.0 (AMEC, 2020) recommend that communicators measure both outputs and outcomes. Outputs, those things that are visible to the eye, are typically the easiest but least useful way to measure, at least when measured in isolation. For example, an employee who clicks on email or newsletter story does not equate to the employee understanding, retaining, or applying the information shared. While outputs by themselves may not be meaningful to internal communicators, linking outputs to outcomes can provide a more holistic assessment of the communication initiative. For example, practitioners could track an employees' attendance (output) at a training meeting to learn about social media in the workplace and then analyze their use of social media to collaborate, share feedback, or advocate for the company (outcome).

# Organizational Impact

The scope of these standards focuses on evaluating if and how communication initiatives influence organization performance—the ultimate measurement of communication success. Some examples include productivity, continuous improvement and employee retention. It is important to recognize the challenge of aligning internal communication efforts as the direct influence organization performance; however, using benchmark and post-measurement methods can be effective in isolating how communication influenced organizational performance.

Engagement wasn't included as an internal communication standard (O'Neil et al., 2018), because it is a function of several other standards, including knowledge, understanding, discretionary effort, trust, and satisfaction. Internal communicators may want to isolate issues related to engagement and develop more effective strategies to resolve the challenges. For example, if an organization recognized apathy among employees and a decline in discretionary effort, an analysis beyond poor "engagement" is needed. What specific factors influence change in employees' perceptions and behaviors? Is it uncertainty about roles in the organization? Confusion about the relevancy of information shared? Perceptions about a lack of transparency by organizational leadership? If communicators can better understand these influencers by independently measuring them, they can then more effectively address the root cause of the engagement problem. Further, a more in-depth analysis of specific attitudes and behaviors impacting engagement aligns with the creation of specific and relevant communication objectives.

In summary, internal communicators should identify and prioritize the standards that best align with evaluating communication objectives.

# Ways to Measure and Evaluate Internal Communication More Holistically

In recent years, scholars (e.g., Buhmann et al., 2018; Northhaft & Stensson, 2019; van Ruler, 2019) have advocated that communicators adopt novel and more holistic approaches for measuring and evaluating in organizations. Northhaft and Stensson (2019) encouraged academics to move away from functional measurement and evaluation to enable richer and alternative explanations of communication phenomenon. Buhmann et al. (2018) recommended that practitioners focus on insight, listening, and learning to better understand the role of communicators in providing "counsel, education and training, coaching, strategizing and planning" (p. 117). van Ruler (2019) postulated that communicators should focus more on formative—not summative—research in order to remain agile

and fluid as organizations adapt to rapid and often unforeseen changes and events. According to Volk (2016), one of the most pressing challenges related to measurement and evaluation is the need to develop a "conclusive, holistic theory of value creation through communication" (p. 974).

Both quantitative and qualitative approaches should be undertaken to measure and evaluate internal communication efforts (AMEC, 2020; Lindenmann, 2003; Macnamara, 1992). Qualitative research, such as focus groups, in-depth interviews, sentiment analysis, can help internal communicators to understand and describe how and why employees are engaging with content and responding. Qualitative approaches are particularly useful for uncovering intangible contributions of communication in organizations (van Ruler, 2019; Volk, 2016). Eiro-Gomes and Duarte (2008) recommended a case study approach to examine social and cultural change in order to holistically examine work processes and communication planning. Place (2015) suggested that communicators use case studies and scorecards to holistically measure and evaluate organizational communication. Place explained that the German Public Relations Association and the Association of Communications Consultancies use scorecards and audits to indicate how communication engenders value creation and aids decision-making, considering the organization's culture (Huhn et al., 2011). O'Neil and Ewing (2020) qualitatively examined how communicators working for large global companies identified intangible contributions of their internal communication efforts. Using social capital theory (Portes, 1998) as a framework, the researchers explored how internal communication builds and maintains employee relationships and creates social capital for the organization, which can be accrued and later expended for organizational benefit.

Quantitative approaches (e.g., surveys, digital metrics, readership numbers) can establish statistical baseline numbers or examine the relationship between variables or predictors of variables. Digital tools and developments have made it easy to capture real-time data and metrics. For example, practitioners might use Google Analytics to understand time and behavior spent on a website or social media analysis tools to examine usage, engagement, sentiment or conversation topics. Practitioners might conduct periodic or annual survey data to measure such variables as satisfaction, reputation, or commitment. Digital data can easily be correlated with survey data to analyze relationships between variables or predictors

of dependent variables such as trust, satisfaction and commitment (Men et al., 2020b) or engagement (Men et al., 2020a).

# LOOKING AHEAD: NEW WAYS TO MEASURE AND EVALUATE INTERNAL COMMUNICATION

Fueled by the ubiquity of digital tools and developments in artificial intelligence (AI), internal communication measurement and evaluation continue to adapt accordingly.

## Digital Channels and Analytics

The advancement of technology has expanded digital channels to inform, connect, collaborate, and motivate employees (Men & Bowen, 2017; Men et al., 2020b). For example, organizations are increasingly using internal social media for internal communication strategies (Cardon & Marshall, 2014; Haddud et al., 2016; Sievert & Scholz, 2017). Communicators can access and transform data into insights to define SMART objectives, drive strategy, segment target audiences, pinpoint affinities and behaviors, and identify influencers who can help amplify messages. For instance, if an employee team or unit is frequently and effectively using communication channels to collaborate, that team can serve as influencers to motivate other employees to access these channels. Further, digital analytics can help communicators create the right content in the right channels at the right time (Men & Bowen, 2017; Social Chorus, 2018; Zerfass et al., 2017).

Ultimately, communicators can use data to establish benchmark metrics to gauge performance and measure impact on the business. Monitoring engagement rates (clicks, reactions, and shares) of employees' behaviors when viewing digital materials is one example of a digital metric. Evaluating sentiment or the tone of social media posts and online conversations can also be analyzed. Open and click-through rates (rate of clicks divided by impressions) for apps, emails, e-newsletters, and other digital channels can be tracked and analyzed. Conversation rates (the number of desired behaviors divided by total visitors), like requesting information or signing up for a project, can be used to evaluate behaviors. Other metrics include social reach (number of followers), unique impressions

(number of content views from single users), number of downloads, video views, site loyalty, as well as a range of other digital metrics (Austin, 2020; Chow, 2018; Duncan, 2010; Kaushik, 2020; Walters, 2019). These metrics can help answer many questions about internal communication efforts. For example: What channels are employees using? How often and when? What content is most viewed and generates more positive reactions in terms of likes, shares and comments? How does print compared to video? Are employees using computers or phones to access information? Regardless of the tool or metric, it is critical to view data from many sources to obtain a comprehensive understanding of actionable insights. If conducted appropriately, digital analytics provide an effective and robust way to measure internal communication.

### Technological Developments Informing Measurement and Evaluation

Public relations practitioners are starting to use AI to enhance their capabilities. Defined as the "ability of machines to perform tasks that typically require human-like understanding" (Knowledge@Wharton, 2018, para. 1), AI is being applied to public relations tasks such as responding to consumer questions, monitoring social media, and conducting outreach with journalists and influencers (Galloway & Swiatek, 2018).

There are two primary AI-fueled developments relevant to internal communication: chatbots and gamification. A chatbot is a software application that mimics human conversation via text or voice and interacts with people via a digital interface (Thomaz et al., 2020). Often referred to as conversational agents or virtual assistants (Thomaz et al., 2020), chatbots can facilitate conversations with people via messaging services such as Facebook Messenger, WhatsApp, Slack, Skype, Viber, and WeChat.

Although chatbots have been used most frequently for external communication tasks, they also have potential value for internal communicators (Holtz, 2016; O'Brien, 2019). While some employees don't have access to email or computers (e.g., healthcare, retail, industrial), almost every employee has a smartphone and uses messaging services, which chatbots use. Chatbots also enable a push/pull internal communication strategy (McGrath, 2016). Organizations can tailor information to be disseminated at a designated schedule, and employees can request when and the type of information they are interested in via a chatbot, thereby increasing message relevance and the likelihood that they will read the information (Holtz, 2016). Employees can ask a chatbot a question or

request additional information (McGrath, 2016). Finally, chatbots can be integrated with an enterprise messenger to facilitate the sharing of big data to engender workplace collaboration, as has been documented with software development businesses (Emanuel et al., 2020).

Since chatbots are facilitated by AI, measurement and evaluation may become easier as organizational data become even more digitally automated. As communicators measure and evaluate their impact, they can now also examine how chatbots contribute or correlate to other outcomes, such as employee productivity or innovation. Organizations may also need to measure employee satisfaction with the chatbot—what public relations practitioner Allen (2016) refers to as an experienced channel (in contrast to the paid, earned, shared and owned channels in the PESO model)—since internal communicators will assume a key role in developing and managing the chatbot. Moreover, employees' experience with the chatbot will indirectly shape their perceived trust and reputation with the organization, so internal communicators may also want to measure how employees' experience with chatbots contributes to perceived organizational trust and reputation. Communicators may also want to qualitatively examine how employees' interaction and satisfaction contribute to company culture and the organizational identity.

AI has also fueled the development and usage of gamification in organizations. Gamification involves using game design elements—badges, leaderboards, scoring, challenges, and rewards—to engage and motivate people to achieve future behaviors (Xi & Juho, 2019). Gamification has many possible applications for internal communication. Gamification can be used to motivate and direct employees to share knowledge across organizational units. For example, Mizuyama et al. (2019) analyzed a case study in which gamification incentivized comment aggregation and evaluation to facilitate relevant knowledge sharing. Araújo and Pestana (2017) suggested organizations use gamification to recognize and reward seasoned employees for sharing soft and hard skills with younger employees. Employees' engagement with gamification apps may facilitate dialogue and two-way symmetrical communication (Seiffert-Brockmann et al., 2018).

According to Hall (2017), gamification can be used to make electronic learning more interactive, to increase productivity and efficiency, and to fuel sales competitions. Hall explained that companies can virtually reward an employee who illustrated a company value when making a business decision. Companies can incorporate a virtual treasure hunt to

motivate employees to learn how to use a new tool or platform. Organizations can award badges to employees who regularly contribute to company intranets or who answer a quiz based upon material presented in the intranet.

Regardless of the tactic, communication practitioners should ensure that gamification is well integrated into internal communication strategy to reach goals and objectives. Measurement and evaluation will accordingly align with that strategy, whether to analyze improvements in knowledge, knowledge sharing, sales, or productivity. Because gamification is often used to encourage and motivate employees to do something, communicators may also want to measure and evaluate motivation, satisfaction, or perceived sense of collaboration/teamwork that may result from participation with the game. Finally, similar to chatbots, gamification may contribute to company culture, so communicators can qualitatively examine how gamification elements contribute to the ethos of the organizational identity.

#### Conclusion

In summary, communicators have many approaches and tools to use when measuring and evaluating initiatives. Many exciting options exist for future research. One such avenue would be to examine the relationships among the internal standards reviewed in this chapter. Many of these standards—such as awareness and knowledge, collaboration and teamwork, and trust and satisfaction—are correlated with one another, perhaps even causal. Additional testing of the standards would map out the relationships among the standards (O'Neil et al., 2018). A second fruitful research avenue would be to qualitatively examine how internal communication creates value for organizations, both to inform practice and develop theory (Volk, 2016). Third, researchers could study how emerging technologies such as AI impact how employees engage and respond to internal communication as well as how new technology usage shapes organizational processes and culture.

# CASE STUDY: How Walmart Measures and Evaluates Internal Communication

Started in 1962 with one discount retail store, Walmart had grown into the world's largest retailer by 1990. During that time, communication with associates (employees) was very organic and largely unformalized. By 2010, a formal internal communication function was developed, and focused on effectively communicating to associates around the world.

Walmart then initiated a comprehensive, 30-month project to provide meaningful data and evaluative insights to better connect senior leadership with what was then approximately two million associates in 27 countries. According to Jenifer Bice, former senior director of internal communication and now director of event solutions, the project purpose was to "gain a more thorough understanding of Walmart's global associates in order to communicate in a way that creates dialogue and connection, developing advocates for the company that will ultimately result in viral content created by those associates."

Seeking to gather data to inform strategy, the research process consisted of four key phases: discovery, research immersion, ideation, concept development and testing. Upon conclusion of the research component, communicators identified two communication objectives:

- 1. Identify and implement innovative methods to connect associates around the globe based on topics relevant to them.
- 2. Develop well-developed and tested concepts that would enable Walmart associates to become:
- more connected to each other and to the Walmart purpose
- more engaged and effective in their current roles
- advocates and ambassadors for Walmart, with key metrics
- inspired to talk about Walmart's values, products/services and the associate experience to friends and family in a positive way, thereby enabling more sales and improved brand perception.

Internal communicators developed messaging, content, videos, events and programming to meet these objectives and later measured whether they met the project objectives, as described below.

- Focus on Why: This became a talking point of senior leadership and disseminated through the organization. Surveys, both quantitative and qualitative, showed notable changes in tone and approach by leadership, which helped associates feel greater connection and appreciation, both outcome measures. Moreover, Walmart used social media engagement metrics—an output measure to measure awareness and knowledge of messaging.
- Share Walmart Opportunities: A company effort was initiated to focus on highlighting associate opportunities; for example, the CEO promoted associates on stage, communication teams featured job opportunities, stories and videos about associates participating in community service, among other approaches. Communicators conducted qualitative and quantitative research to measure associates' level of connection with one another and the Walmart purpose—both outcome measures.
- Show We Care: Following a reorganization in China, internal communicators developed and trained human resource associates on how to share information with associates. Upon completion of the reorganization, 40% of Walmart China associates remained with the company, another outcomes measure, versus the less than 1% that was anticipated.

Walmart continues to measure and evaluate its internal communication efforts by tracking outputs, outtakes, and outcomes. According to Bice, "As communicators, it is up to us to continue to understand our audiences, seek insights and apply them in the ways that are most engaging and inspiring to them."

"We believed the combination of quantitative and qualitative research, all conducted in the respective countries, gave us the most rounded data and insights from which to work. Core team members were on site in the countries to learn alongside the research being conducted. This provided an added layer of knowledge and cultural understanding to add to the data set." Jenifer Bice, senior director, event solutions, Walmart.

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