

A Work Project, presented as part of the requirements for the Award of a Master's degree in Management from the Nova School of Business and Economics.

A CONSULTING LAB ON INNOVATING INTERNAL COMMUNICATION IN THE DIGITAL ERA

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Abstract

The current project concerns the improvement and innovation of VFM's Internal Communications in the digital era. It delves into the challenges faced by the internal communications team of a large organization and the opportunities presented by market practices, considering their suitability to the unique characteristics of the Group. Through comprehensive internal and external analyses and a careful evaluation of different strategic paths, the thesis provides tailored recommendations for the enhancement of VFM's Internal Communications. The recommendations are composed of three areas, Communications Management, Employee Experience, and Connections, and are complemented by a detailed implementation plan.

Keywords: Strategy Consulting, Strategy, Insurance Sector, Portugal, Internal Communications, Management, Channels, Employee Experience, Leadership.

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List of Abbreviations

VFM – Name of the Company

IC – Internal Communication

ICT – Internal Communication Team

ROI – Return on Investments

AI – Artificial Intelligence

M&A – Mergers and Acquisitions

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1. Executive Summary

VFM is a group of mainly insurance companies with a strong legacy of mergers and acquisitions (M&A) and a very significant position in the Portuguese insurance market. It helps clients manage, anticipate, and protect themselves against risks and unforeseen events to live in the present and the future with maximum security and serenity. The Group also provides beyond insurance services that add value to the insurance business, the core activity.

Due to the considerable size of the organization, which directly employs close to 1400 collaborators, a massive volume of information results from the activities of an assortment of teams. The ICT of the company, composed of five elements, has the complex task of disseminating to the organization a mix of information that adequately represents what is occurring in the company without overloading employees. Due to the substantial disparity between the sizes of the team and the organization, the process of developing communications creates intense pressure on the relatively small team, which, under the current governance model, is responsible for the raw creation of most of the content while managing the initiatives and requests of a multitude of external teams. In addition to the operational constraints, the ICT faces the challenge of developing a balanced content and channel strategy that successfully covers relevant topics and simultaneously fosters employees' attention and engagement. The following question set the project's challenge: **“Can VFM improve and innovate its internal communication strategy?”**

The project was delineated based on four goals. Firstly, a comprehensive internal analysis was conducted to meticulously explore the fragilities of the company's state of IC, deeply understanding the implications of the current content and channel strategy, and thoroughly analyzing the whole process of developing communications. In this analysis, both the point of view of the ICT and the collaborators, through interviews, were taken into consideration, culminating in a holistic view of the current landscape. Secondly, an extensive external analysis

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sought to find practices in the market that adequately met the difficulties found in the internal analysis and presented promising opportunities for innovation. Through the conduction of autonomous research and external interviews with relevant professionals, the team aimed to find material for the development of well-founded hypotheses. Thirdly, a comprehensive evaluation of different strategic paths, deeply understanding their suitability to VFM's specific case. The evaluation culminated in the meticulous crafting of tailored recommendations, which can be divided into three distinct areas: Communications Management, Employee Experience, and Connections. Finally, a detailed implementation plan was created, considering each recommendation's specific characteristics and requirements to ensure optimal execution.

2. Project Overview

The purpose of this project was to provide an answer to the question: **Can VFM improve and innovate its internal communication process?** To better comprehend the project's scope, the team developed a clear description of the objectives, the steps to reach them, and the expected outcomes. This report aims to have a strong synthesis effort prepared by three consultants, with inherent content compression determined by the rules, covering a wider range of activities.

2.1. Project Context and Governance

The Consulting Lab is a hands-on consulting project conducted by a team of students in a professional environment, providing both student and client benefits. This program enables students to apply their theoretical skills and expertise role in real-world consulting practice. Working on a challenging project allows students to draw on their previous educational and professional experiences. Participation in authentic counseling services helps develop practical career paths and capabilities through an integrated approach while collaborating and learning from experienced professionals. Furthermore, consulting labs teams are expected to have an in-depth understanding of specific industries, such as insurance in this case. The advantage for the company is having a diverse group of students who offer fresh and unbiased perspectives on the

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challenges they present. Student problem-solving and other research methods can also provide new insights and encourage organizations to explore different perspectives on ongoing projects.

This project was part of the ICT to understand how to improve the communication flow within the company, uncover the key elements of this new plan, and determine how it benefits the employees in numerous ways.

The central objective of this project was to develop recommendations for ICT to rethink its communication strategy to ultimately contribute to its employee flourishing by creating solutions that benefit employees and the firm. For over three months, the students collaborated with ICT on creating a synergistic process for exchanging and assessing ideas and concepts that contributed to the design of a new strategy. To reinforce the collaboration with the client, the team conducted weekly meetings, resulting in a total of 12 days by the end of the project. As members of the Steering Committee, the Commercial, Strategy & Innovation (S&I), and People & Organization (P&O) teams provided remarkable insights and engaged closely with the team to ensure the project's success.

2.2 Project Challenge

VFM's ICT faces the difficult challenge of digesting the huge flow of information characteristic of large organizations and distributing it to an overloaded workforce whose attention span is increasingly shorter.

The relatively small team, composed of five laborious members, has the increasingly difficult task of capturing many events and initiatives happening in a multi-brand company with around 1400 direct employees and subsequently defining an information distribution plan for people who frequently receive more than 100 emails in one day.

For the first part of the challenge, the small team faces the difficult task of being, at the same time, content creators and managers of communication, using a decentralized process that hinders planning and control. Furthermore, there is a tendency, from the teams that contact the

ICT, to do it in a non-timely manner, which turns the planning of communications into an even harder task. Regarding the second part of the project, the challenge consists of understanding each topic's relevance and understanding each company channel's role in content distribution, always bearing in mind the limited attention span of VFM's collaborators.

2.3. Project Scope and Goals

The Consulting Lab's goal was to understand the gaps between VFM's Internal Communications procedures and market best practices. Subsequently, upon determining the existence of those gaps, the consulting team provided actionable recommendations suitable to the company.

Within this ambition, and based on the initial information provided by the client, the ICT of VFM, the Nova SBE defined the following goals:

1. **Evaluation of organizational practices:** Execute a comprehensive analysis of the current IC's managerial practices, understand the roles and responsibilities within the current governance model, and assess the information experience of VFM's collaborators.
2. **Identification of market best practices and other valuable procedures suitable to VFM:** Analysis of prevalent market best practices and strategic case studies, highlighting potential areas for VFM to adapt and integrate, and investigation of emerging trends, identifying key strategies and opportunities.
3. **Assessment of different relevant opportunities:** Based on the specific case from VFM, analyze the suitability of several potential strategies, explore the potential benefits and risks to the organization, and build strategic recommendations.
4. **Implementation roadmap:** Create an implementation roadmap, with impact measuring, for the recommended strategies.

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When outlining the project's scope, it's crucial to recognize the boundaries of the Consulting Lab, assuring alignment between the team and the company. The following subjects were identified as not within the scope:

1. **Intra-area communication:** It was defined that the team would not analyze the transfer of information inside each area of the company.
2. **Technical technology consulting:** Although the team was willing to provide orientation on leveraging technology, the consulting lab did not commit to providing technical insights or assisting in developing custom solutions.
3. **Physical communication:** it was determined that the focus of the project would be mainly digital channels, excluding internal events and office interaction.

3. Project Calendar and Methodology

To address the challenge of deeply understanding the current situation at VFM and defining a comprehensive strategy to improve effectiveness, the project was purposefully structured into three distinct stages. These stages were carefully planned, focusing on the predetermined goals and deliverables aimed for VFM.

The stages were developed as follows:

- **Phase 1: Diagnosis and Research (February 19th to April 12th | 8 weeks):** During this critical phase, it was conducted a deep diagnosis of the procedures and information experience of VFM, as well as a comprehensive investigation, aligned with the specificities of the organization, of the state of the sector and current trends. This phase included a kick-off document presentation and comprehensive internal and external analyses. These seven weeks created a solid base for the following two stages, giving the team the necessary information to progress steadily toward informed and insightful recommendations development.

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- **Phase 2: Analysis (April 13th to May 1st | 3 weeks):** In this phase, the team used all the information collected in its internal and external analyses to identify the main opportunities for improvement and developed hypotheses tailored to VFM's unique characteristics. It involved a strategic meeting with the steering committee and culminated in a comprehensive and well-structured framework for crafting strategic recommendations.
- **Phase 3: Recommendations (May 2nd to May 13th | 2 weeks):** During this intense phase, the team meticulously built on the framework set by the analysis phase. The product was a set of detailed recommendations with a clear value proposition and an implementation roadmap. The stage finished with a comprehensive final presentation of the recommendations to the steering committee.

4. Baseline Research

4.1 Literature Review

The project literature review focused on the current knowledge of internal communication. Moreover, the team used various frameworks and methodological concepts to support the analysis and recommendation phases during the project.

[7C of communication] – The 7C of communication refers to the definition of effective communication. To be effective and efficient, communication must be clear, concise, correct, complete, compassionate, concrete, and considerate. The team used this framework to understand and define good communication. Moreover, it served as a base for the recommendation phase (Ramakrishnan, 2018).

[Humanization] – Humanization refers to the process of recognizing employees as complex human beings with complex lives and mental states that could influence their work activity. Humanized organizations recognize that these employees flourish in an environment where they

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are treated as such and not just a set of skills. Therefore, they prioritize the purpose and a personalized experience, fostering proximity with other employees and psychological safety. This theory helped the consulting team define the best recommendations for effective internal communication, such as the role of leaders and personalization in communication. (Pillay, 2022)

[Segmentation] – Segmentation refers to dividing a large market or audience into different sub-groups, each with distinct characteristics. This could be based on demographics, geographic position, and behavioral components. Considering the employees of VFM as the internal communication market, the team used demographic and geographic segmentation to understand the different perceptions and behaviors regarding IC. Moreover, this theory helped the consulting team identify the various segments for the recommendations. (Yi, 2018)

[SWOT] – The SWOT analysis serves to analyze a company's strengths, weaknesses, opportunities, and threats. It is used to evaluate how an organization compares to its competition and to assess its internal and external elements (Gurel, 2017). The team used this framework for the situation analysis and to understand the main pain points and possible challenges of the current IC.

[Qualitative Research] – The team collected qualitative insights by conducting interviews and asking open-ended survey questions. The aim of this research was to gain a deeper understanding of the stakeholders' behaviors, experiences, and perceptions of VFM's internal communication and also gather rich insights from industry experts (Vishnevsky & Beanlands, 2004).

[Quantitative Research] – Through the analysis of two internal surveys, one conducted by the consulting team and one by the ICT, quantitative research was conducted. This data helped the team understand if there were patterns between IC preferences and different segments, such as age and gender (Watson, 2015).

[Issue Tree] – The issue tree is a strategy framework used to evaluate the different hypotheses. This methodology consists of creating a series of questions for each hypothesis and further breaking this question into sub-issues to prove or disapprove the initial hypothesis. It was beneficial to use this framework to create a clear path for hypothesis testing and to choose the final recommendations (Rasiel & Friga, 2002).

[Action Priority Matrix] – The team used an action priority matrix to evaluate the final recommendation and create an implementation roadmap. This framework compares the effort and impact of a determined action to prioritize strategic initiatives. The effect is measured on the y-axis, while the x-axis is the effort. The matrix is then divided into four quadrants: Quick Wins (high impact – low effort), Major projects (high impact – high effort), Fill-ins (low impact – low effort), and thankless tanks (low impact – high effort) (Hull, 2024).

4.2 What is Internal Communication?

Internal communication identifies all those processes related to the production and dissemination of information, interactions, and relationships inside the organization. It is a multi-disciplinary topic since it combines aspects related to Human Resources Management, Public Relations, and Marketing. Investing in internal communication yields tangible advantages such as better overall performance and attracting top talent (CIPD, 2023). According to a study performed by the Salesian University of Technology: *“Internal communication is a management function in charge of intra-organizational communication [...], information dissemination and management and production of internal media, [...] Employee engagement, loyalty and motivation, value for money, and trust and credibility are the hottest issues they are dealing with”* (JAKUBIEC, 2019). The following aspects characterize a strong internal communication plan according to external research (Forbes, 2023):

- **Clearness:** Creating a positive organizational environment involves implementing clear, transparent communication and effective information management.

- **Openness and Equality:** Internal communication must be honest and open to create a positive work climate and enhance productivity.
- **Bidirectional and Horizontal:** Two-way communication improves communication quality, and horizontal interactions involve colleague accessibility and receptivity to feedback.
- **Informal:** Informal communication helps employees feel more comfortable, trusting, and open to expressing their opinions, making it a more relaxed and honest approach.
- **Constant and Coherent:** Communication must maintain coherence and consistency from recruitment to employment, ensuring employees have reliable and updated information throughout every process.
- **Innovative:** Incorporating enjoyment, surprise, and curiosity into internal communications fosters employee engagement and awareness of the organization's vision, mission, and values, promoting enthusiasm and reinforcing fundamental organizational.

The team conducted a deeper analysis of what generally companies should do to improve the process of internal communication (Santos, 2023), which will be further developed in the “*External Research*” part:

- **Select the right tools:** Recognize diverse audiences within your organization, each with unique communication preferences, necessitating multiple tools, while avoiding overwhelming staff with unnecessary channels.
- **Craft a segmented plan:** Craft internal communications that engage, align with organizational values, cater to all recipients, provide necessary context, and reinforce the organization's vision and mission.

- **Solicit and welcome dialogue:** Promote two-way communication for feedback and dialogue, aiding goal alignment, strategy development, relationship improvement, and issue resolution.
- **Onboard, train, reinforce:** Allocate time and resources to provide communications training for all leaders, enabling effective information sharing with their teams.
- **Conduct internal communication audits:** Continuously assess that internal communication is effective, aligns with objectives, fosters engagement, and drives continuous improvement, ensuring that communication practices evolve to meet changing needs and circumstances.

4.3 Benefits of Effective IC

To further explore the baseline definition, the team deep-dived into the benefits of a strong segmented internal communication strategy and its impact on a particular company. This analysis was based on market research, where the team concluded five key benefits of effective IC (Rodsevich, 2023), and understood how these benefits translate into measurable results:

- **Boosting Employee Engagement:** developing emotional commitment towards the organization and its goals, leading them to invest discretionary effort in their work. Based on a survey of 2024 (Gallagher, 2024), 63% of the respondent identified “engaging teams around purpose, strategy, value” as a top priority for their IC strategies. Gallup has found that 83% of UK employees are either disengaged or have doubts about their employer (Gallup). It’s costing the UK up to £70 billion annually in lost productivity (Gallup).
- **Better decision-making:** A clear process for connecting the entire team to the correct information at the right time is essential for preventing issues from escalating. On average, 74% of employees miss out on company information and news (Gallup, s.d.). When well-informed about processes, changes, and company information, employees

are better equipped to make decisions that align with the company's objectives (Gallagher, 2024).

- **Enable feedback and innovation:** Effective communication should foster a dialogue that promotes transparency, encourages employees to be proactive, and allows them to suggest new ideas. According to a study from Queens University, 39% of employees a lack of open, honest communication negatively impacts morale (Queens University, 2020). When communication is open and transparent, employees feel empowered and engaged, which fosters a healthy workplace environment.
- **Higher employee retention rate:** A robust two-way communication channel can often reveal issues and allow for proactive measures to be implemented before employees contemplate leaving (Gallagher, 2024). The number one reason employees leave is a lack of recognition, supported by the 84% of employees considering leaving their current jobs if offered another role within a company with an excellent communication method (Glassdoor, s.d.). According to Gallagher's 2024 study, to foster retention, 1517 employees were asked about the top 3 priorities for 2024 and cross-referencing with it last year (Gallagher, 2024). The main conclusion was that leadership's role increased substantially, with 30% of employees choosing this option as their top 3 priority (Gallagher, 2024).
- **Increase employee contribution:** Employees who receive sufficient information to perform their duties effectively are 2.8x more inclined to be engaged (workhuman). When looking into the financial impact, business divisions with engaged employees report a 23% profit increase (Gallup, 2022).

5. Situation Analysis

During this phase of the project, the team had its first contact with VFM and its ICT to understand the status quo and the main challenges perceived by ICT.

The ICT provided the consulting team with a first picture of their day-to-day tasks and some concerns related to those tasks.

From there, the team analyzed the state of the sector. Before deep diving into the VFM landscape, the team aimed to have a grasp of the current state of internal communications, which would allow analyzing with a heightened perspective.

5.1. Internal Communications Team briefing

5.1.1. Introduction

VFM is one of Portugal's main players in the insurance sector. It is a large organization, employing around 1400 people.

The ICT is inserted in the Brand and Organizational Culture department and is composed of five people. The team is responsible for managing the internal communications of the company in cooperation with other teams of the department and the “*internal clients*”, which are other groups of the company who contact the ICT to communicate within the organization.

5.1.2 Digital Channels

The ICT employs various digital channels to share the company’s news and other relevant communications, which are described below.

Corporate Intranet (iOne) – it is the Group’s central and unifying axis of internal communication, providing collaborators with the following information:

- News, with the possibility of including images, videos, and links;
- Photo and video galleries for events;
- Human resources information, work tools, corporate library, ...

There are around 300 news published on this channel per year.

Corporate Email (Commint) – Tentatively used for disseminating communications of absolutely transversal and strategic scope to avoid the trivialization of the channel. Around 100-120 communications are made through this channel per year.

Internal Social Networks (Viva Engage and private Facebook group) – Collaborative and democratized internal channels in which employees are invited to freely assume an active role in boosting the channel through the publication of internal posts or upon evaluation – creating specific communities (Viva Engage).

Televisions / Led walls – Equipment present on all floors, with the possibility of transmitting videos, photos, news, and calendars.

Gamification App (“Somos VFM”) - Created to diversify the way employees relate, involve, and get to know the VFM universe, providing a fun and interactive experience, namely through the launch of challenges.

The ICT is the sole administrator of news posted on iOne (intranet), emails sent through Comint (corporate email), and content shared on TVs/Ledwalls. However, as mentioned before, there is complete freedom regarding communications in social networks. Further research on the gamification app was not conducted, as it is considered out of the project's scope.

5.1.3 SWOT Analysis

The comprehensive analysis of VFM’s internal communication was conducted using the SWOT matrix to identify its strengths, weaknesses, opportunities, and threats.

Strengths (S):

- 1. Variety of channels** – VFM’s ICT has a multi-channel strategy, which facilitates a better information flow inside the organization. Offering a range of channels and platforms for communication ensures flexibility and caters to different communication preferences among employees.
- 2. Satisfaction among employees** – In the survey conducted by the ICT in January 2024, the respondents showed a high level of satisfaction with the general IC. In fact, to the

question “*Are you satisfied with VFM’s IC?*” 96.5% of the respondents answered “*satisfied*” or “*very satisfied*”.

3. **Interacting Platforms** – Interactive platforms, such as Viva Engage and Facebook, encourage employee engagement, facilitating knowledge sharing and idea generation.
4. **Flexible and motivated team** – The ICT is quite assured of the need for a change and is receptive to innovation. This attitude is quite important, as it shows a willingness to cooperate and openness to future recommendations.

Points of Improvement (W):

1. **Overload of information** – In such a large organization, it is pretty challenging to process everything happening across the company and deliver a mix of content that successfully transmits pivotal information and does not overload collaborators. The ICT expressed the difficulty in balancing the need to spread information with maintaining a reasonable flow of communications.
2. **Lack of Measurement** – The ITC lacks internal metrics to measure the effectiveness of its channels and communication. Leveraging the power data could significantly improve the effectiveness of IC management.
3. **Lack of segmentation** – VFM comprises various brands and teams, all with different activities and responsibilities. Moreover, the workforce is characterized by different age groups, roles, and interests. Nonetheless, currently, the IC is not segmented since the channels used by the ICT do not allow for segmentation, and the ICT disposes of a few distribution lists (i.e. list of contacts for the dissemination of communication, an example is the list based on the office – Porto and Lisbon)

Opportunities (O):

1. **Competitive advantage** – Effective communication helps organizations foster a competitive advantage. According to a Zappia report, companies with effective

communication plans are 3.5 times more likely to outperform competitors (Flynn, 2023).

This is because effective communication can foster advantages such as higher retention, productivity, and engagement, which could result in better overall performance.

2. **Internal culture** – The company has an internal culture of openness to disruption (one of the Group's strategic values is “to dare”) – this is relevant to the project, as it can indicate a general predisposition and openness to disruption.
3. **Humanization** – Effective communication must be transparent and empathetic, characteristics that are present in humanized companies. Humanization includes communication that prioritizes purpose and personalization, features that the team considers crucial for this project.

Threats (T):

1. **Fast-paced Environment** – The business context, considering both the insurance and beyond insurance sector, and VFM’s internal environment is undergoing massive change. For example, the introduction of Artificial Intelligence (AI) in the workplace, hybrid work, and the recent pandemic have increased the speed of change. Therefore, over the last few years, the pace of communication and the amount of information communicated have grown exponentially, which could result in information overload.
2. **Legacy of Mergers and Acquisitions (M&A)** – The legacy of M&As translates into a long history of different cultural shocks and makes VFM a multicultural company. VFM comprises diverse brands in the insurance sector and beyond insurance. This proliferation of various companies/brands, each with a clashing culture, hinders the communication focus and the production of a clear and intelligible internal narrative for all.
3. **Governance** – Currently, the ICT has centralized governance, being the sole administrator of the main IC channels. The ICT had doubts regarding the current

governance model and its inherent processes, expressing the desire to explore more efficient systems.

4. **Cooperation** – Several internal teams seriously lack participation in internal communication. At the same time, the “internal clients” tend to approach the ICT very close to when they expect to communicate, creating immense difficulties with planning the flow of information. In addition, there is a typical disagreement between the ICT and the other teams, who always expect their topics to be communicated with the highest frequency through every possible channel.
5. **Engagement** – There is some concern around the current engagement of collaborators with internal communications. The first challenge concerns the channels controlled by the ICT, where the team worries about being perceived as a “spam generator”. Secondly, in the social networks, mainly Viva Engage and the Facebook group the ICT worries about the low level of engagement from the employees.

5.2. ICT Survey

To measure employee satisfaction with IC, the ICT sends a yearly survey to the whole company. The survey, shared through the Commints, is composed of 31 questions ([Appendix 3](#)), including multiple-choice and open-ended questions. This review aims to understand the general perception of VFM’s IC.

To analyze VFM’s current situation, the ICT shared the 2023 IC satisfaction survey results with the consulting team. The following paragraphs contain the main insights from the survey, which the consulting team used as a base to structure the internal interviews and the initial hypotheses.

The 2023 IC Survey received a total of 347 answers, representing just 25% of VFM’s workforce. From this survey, the team had an initial analysis of the current situation of the IC. First of all, the general perception of the IC is very positive, with 96.5% of the respondents saying that they

are either satisfied or very satisfied with it. Secondly, the survey highlighted the employees' preferences regarding the IC channels. In fact, the most accessed channel for IC is the emails, followed by the Intranet iOne. On the other hand, social networks, mainly Facebook and Viva Engage, as well as TVs and Ledwalls, showed a low usage level. The low engagement in social networks may be justified by the fact that the roles of these channels overlap. Indeed, both Viva Engage and Facebook have the same function, and the news shared on them is the same, which represents a weakness of the current channels. Moreover, the survey also investigated the themes shared by the ICT and their relevance. Question 22 asked the employees to evaluate twenty different IC topics, giving the following evaluations: *"Indifferent"*, *"Moderately Interesting"*, *"Important"*, and *"Essential"*.

Organizational Strategy is considered the most important topic, with 54% of the respondents saying that it is essential. Similarly ranked were themes regarding *HR* (48.8%), *Global Financial Results* (42.9%), and the *activity of the core business* (42.4%). All these topics receive a grade of less than 1% for *"Indifferent."* *Conversely, employees were most indifferent regarding topics of "Diversity and Inclusion," "Dynamics of Distribution Channels," and "Information Security."*

The open questions in the survey investigated the motivation behind the low engagement in some channels and additional feedback and suggestions for the ICT. Interestingly, there were some patterns in the answers. Indeed, more employees underscored the overload and overlap of information in IC, creating confusion and a negative perception of the IC. Indeed, this perception was also reflected in the questions regarding general feedback.

"With so many channels, people get confused and end up losing interest. The information is very heavy and delayed"; "More segmented communication, focusing on the mobile channel, reducing the number of transversal notes to all employees"; "Communication should be

personalized by the managers of each area in order to be tailored to a specific group of employees”.

The above quotes from the survey capture some of the respondents' most frequent recommendations. Firstly, employees lament an overload of information and channels, suggesting that reducing both would be beneficial. To reduce the amount of information, the respondents have also suggested employing segmentation to balance these challenges. Lastly, the respondents have also pointed out the importance of leaders and managers in IC, suggesting that they should have a more active role.

5.3. State of the Sector

The evolution of workplace technology, the adoption of hybrid work models, and an intensified emphasis on employee engagement have compelled organizations to elevate their communication strategies significantly. The absence of access to engaging, easily understandable information could lead to marked declines in workforce engagement, productivity, retention rates, and profitability.

To achieve their goals, ICTs must consistently assess the effectiveness of their tools and approaches. The most progressive ICTs are reevaluating the entire information lifecycle – from creation and dissemination to employee reception – and leveraging leadership to amplify communication. Their reassessment not only aims to enhance internal information flow but also prioritizes comprehending and accommodating employees' specific needs.

To increase our knowledge of the sector, we deeply investigated Gallagher’s “State of sector of 2023/2024” (Gallagher, 2024), a well-regarded report by a reputed consulting firm that has an area specifically focused on internal communications.

According to the report, communicators expressed that the main purposes of internal communication are culture, belonging, and strategic alignment.

The main priority of 2024 is engaging teams on purpose, strategy, and values. Significantly below, the second priority is developing and refreshing the internal communications strategy, while the third is enhancing leadership visibility, which is an upward trend.

Regarding the barriers to success, the most mentioned were lack of time/capacity and disengaged employees. In third and fourth, a little behind were lack of budget and unfit internal technology, which might be strongly correlated.

When examining the most used channels, we saw that the most used channels, within the scope of the project (we excluded events), were, by order of usage: email, intranet, and app. Interestingly, VFM's digital channels did not include an actual communication app.

Additionally, the report provided some insights into what noticeably produces increases in channel effectiveness and satisfaction, from which we can highlight:

- Channel framework and strategy
- Employee feedback
- Audiences' creation

6. Internal Analysis

In this phase, the team performed a comprehensive internal analysis that can be divided into two parts: **the procedures of the internal communication team**, which were analyzed through meetings and email exchanges, and the **experience and feelings of collaborators**, which were understood through several interviews. Finally, we gathered the main insights of our analysis, more specifically, the pain points.

6.1. Internal Communication Team (ICT)

Through this analysis of ICT, the consulting team understood the various phases of content development and distribution.

6.1.1. Content Development

1. Initiative:

The team has a strong connection with the other communication teams of its department:

- Brand, Partnerships/Sponsoring, and Events.
- Public Relations & Digital Communication.
- Beautiful Business - focused on the humanization of collaborators
- A-Team - focused on events outside the work context that seek to strengthen the communion of people,

It also has a strong relationship with other teams outside of the department, mainly with marketing teams, who are very keen on communicating.

On the other hand, there are other teams who are somehow distant from the ICT, from which we can highlight the operations teams. Naturally, if these teams do not contact the ICT, it becomes quite difficult to perform a balanced coverage of what is happening inside VFM. On some occasions, the ICT hears from third parties of relevant occurrences in these silent teams, but this is not a reliable and appropriate model.

2. **Timing:**

Very regularly, the approaches made to the ICT, with the purpose of communicating, are made in an **extremely untimely manner**. By extremely untimely, it is meant one week before the desired date of communication. In such a large organization, planning a balanced flow of information becomes even more challenging if the teams regularly manifest their intentions with so much delay. As a result, communications are delayed, or the flow increases, which consequently has effects on the collaborators' engagement with communications.

3. **Content Creation:**

The process of creating content starts with an email from one of the other teams asking to schedule a meeting, which is answered through email with a Teams invite. These meetings usually take around one hour: on some days, the team has meetings the whole day, until 17h, leaving no time to develop content. This tendency for meetings is a concern at VFM, which has

already tried to tackle it and will continue to do so in the future. Still, on the topics of meetings, the team is forced to be present in certain meetings of projects outside the department just to be aware of what is occurring.

After the meeting, the team will most often create a draft of the communication and mail it to the other teams. In this stage, until a final version is reached, there can be some back-and-forth regarding changes in the original draft, all of which are managed through email exchanges with multiple teams.

This whole process is extremely slow because the team is always dependent on the availability to meet and answer the internal clients, which can take more than a day, as internal communications are not a priority to them. Therefore, it takes more than one week from the first contact until the final version. This is concerning, as it strongly impacts the capacity of the organization to spread information quickly – it is a serious threat to time-sensitive communications.

Additionally, it is a very heavy process, with meetings and multiple email exchanges: developing communication almost seems like a small project. And, truthfully, unless it is a highly relevant communication, the details of the publication are not that impactful or important to collaborators. By holistically analyzing the whole process (Appendix 4) we notice that a five-people team is single-handedly developing communications that represent the activity of a 1400-person company while, at the same time, spending multiple hours with meetings and email exchanges. Furthermore, we can observe that the inexistence of technology forces the team to execute decentralized requests (other teams asking to communicate) and campaign management. Through this analysis, the team could understand that the ICT faces an enormous challenge. Looking back on the lack of initiative of some teams, it would be almost unbearable to add even more to the already (very) difficult mission.

6.1.2. Content Distribution

1. **Planning:** Upon the conclusion of the content creation phase, the team needs to decide when to publish the information. It is important to note that the team does not use a calendar for communications planning. Since different collaborators are each managing their own campaigns, it can be challenging to plan and control the flow of information. Furthermore, it naturally impacts the ability to plan communication in advance.
2. **Distribution:** In this phase, the team will distribute the content to different channels. Unfortunately, if the collaborators want to distribute content to both email (Outlook) and intranet (SharePoint), they cannot do it at once – the team executes a decentralized channel distribution, which results in repetitive tasks. Furthermore, it is not possible to schedule publication in Outlook, forcing collaborators to use the platform at the time of the publication.

Focusing on the choice of channels, although there are some ideas about each channel's purpose, there is not a clear channel framework that defines each channel's strategic role. In light of that, the team has a tendency to overlap channels – many topics are distributed in Outlook, SharePoint, and also Viva Engage, being the latest or directly distributed by the ICT or by other teams. This strategy can diminish the relevance of each specific channel for employees, as they constantly see repetitive content. Still, the team could understand the reasoning behind an occasional publication on both email and intranet, though it should certainly not be a habit.

Regarding audiences, the ICT never employs audience targeting, which is partly due to the inexistence of updated lists on the emails of collaborators in different brands, and areas. Considering the organization's size, there should be many occasions where information would be irrelevant to a high number of collaborators. Furthermore, it limits the capability of an organization to spread information since if certain content is relevant to only a part of the organization, the ICT could dismiss it because it does not have

transversal importance. Resuming, it affects the organization by compromising the dissemination of relevant content and by provoking the distribution of content to non-interested parties. Regarding the latest, it affects the way collaborators perceive internal communication, and consequently their engagement, and also unnecessarily consumes their time (even looking at the title consumes time).

3. **Measurement:** The team's analytics practices are based on two surveys: the engagement survey and one specifically dedicated to Internal Communications, which was previously analyzed.

The team does not perform any measurements regarding the analysis of its publication, so it is completely in the dark.

The **inexistence of an analytical approach** has two main consequences: firstly, it does not allow VFM to know if collaborators are informed of what is happening in the company or if they are missing out on important information; secondly, it prevents the ICT from understanding what topics are most valued by collaborators, which could help the team to provide them a better experience, more aligned with their needs and interests, ultimately improving their engagement and satisfaction.

6.2. Interviews

The team conducted internal qualitative interviews to understand employees' main perceptions regarding the current internal communication process, as well as their preferences, recommendations, and opinions for further development in the research part. To do so, the team decided to create segmented criteria depending on three main variables:

- **Level:** The level of responsibility and activities changes between Top Management, Middle Management, and Entry Level. Therefore, the information needed to conduct their job is different (Kaiser & Craig, 2011).

- **Generation:** Different generations have different preferences on how they receive information. Baby Boomers tend to prefer formal communications, while Millennials appreciate short and concise messages, and Gen Z is more visually oriented (Rocco, 2023).
- **Brand:** Core Insurance and Beyond Insurance brands differ culturally. Thus, internal communication needs to be segmented accordingly.

Based on our hypothesis, the team identified **eight** different types of employees to perform the interviews (Appendix 51a-c). This objective was accomplished with great support from the internal communication team, who helped select the interviewees based on the criteria.

At this point, twelve internal 1-hour in-depth were undertaken, of which 50% were women and 50% were men. Around 34% of employees were under 35 years old, 66% were above this age, 75% were from the Core Insurance Brands, representing most of the company, and 25% were from Beyond Insurance. Finally, employees from 12 different areas were interviewed. This part of the internal qualitative research produced powerful and insightful information that was broken down into the project's hypothesis.

Firstly, regarding *employee experience*, the team was able to conclude the most important pain points regarding each channel and the perception towards them:

Email: seen as the most efficient and important channel, dedicated to work-related content and urgent matters.

- **Commint** – This channel lacks suitability since it was mentioned that some content was not appropriate to be shared on this channel.
- **Viva Engage Notifications** – Viva Engage notifications are received in the email inbox, creating a feeling of overload.

- **Length of Emails** – Employees disregard long emails and recommend highlighting the main message to promote efficiency.
- **Target** – Employees mentioned the importance of segmenting the content according to the target audience, for example, beyond insurance receiving information about benefits they cannot access.

Intranet: seen as a complement to email and the most dynamic channel in the group.

- **Landing Page** – The landing page represents a singular opportunity to capture the attention of individuals, and currently, there is a huge banner covering most of the space.
- **Searching Tools** – Users struggle to effectively utilize search filters, making it less user-friendly and difficult to find desired information, especially older news.
- **Content** – Employees showed interest in some topics that are still not displayed on the platform: external news about the market, competitors, or VFM outside of Portugal.
- **Icons** – People claim that they are not user-friendly and not intuitive.

Viva Engage: the platform is not seen as a crucial channel for information flow, and most employees do not use it.

- **Information Topics** – Some employees, mainly younger ones, showed positive appreciation for the possibility of using the platform for informal topics like football or lifestyle.
- **Participation** – Although some employees feel interested in the communities, most of them end up not participating in this channel.
- **Accessibility** - Lacks easy access, hindering the level of usage.

Gamification: seen as an interesting dynamic of displaying information. However, the utilization rate has been decreasing.

- Lack of Dynamism – The app “*Somos VFM*” was very useful after the pandemic. However, the amount of content being shared started to gradually decrease and started to lose adherence.
- **Lack of Communication** – This channel requires continuous updates regarding communication insights.

TV/Ledwalls: seen as an interesting channel with the potential to display information.

- **Placement** - Most TVs are positioned in open spaces, where employees are dedicated to their work, so it is important to have them displayed in a casual environment, such as the cafeteria.
- **Attention Rate** – Some employees do not pay attention because they are not aware of the information being shared, recommending a banner at the top with the topic.

Secondly, regarding *connections*, the team divided the information between the two different levels of leadership:

1. **Top Leadership:** In general, employees feel that top managers are not approachable enough, creating a distance between them. It would be appreciated to have a more active presence from them in the communication inflow.
2. **Middle Leadership:** While employees perceive the expectation to be informed, middle managers lack the seriousness to fulfill this responsibility and instill a similar mindset within their teams. Certain middle managers may fail to encourage team participation in company initiatives, such as the Medis challenge.

Finally, when looking into *communication tools*, the team tested the possibility of introducing new ways to improve the inflow of information. The mechanisms tested during interviews were the following:

1. **Dashboard:** An option within Intranet iOne that centralizes information and facilitates access to it, conceiving direct reachability to links, apps, and information segmented to them according to their preferences. All employees ranked this tool as very valuable, improving the ease of access and time efficiency.
2. **Mobile-Friendly Experience:** Mobile phone usage is so relevant nowadays that it is important to allow people to access their personal dashboards, feeds, and the company social network with their phones, providing a mobile-friendly experience. Employees generally expressed interest in easily accessing company information with their mobile phones, and ICT could leverage notifications.

This will provide a much better experience, and employees will have a richer overview of publications specifically relevant to them. They will also have a place that allows them, for example, to verify pending tests, access platforms, easily view relevant financial metrics, submit expenses, or access any other relevant People Hub information/feature.

7. External Analysis

The external analysis was composed of research on **best practices, trends, case studies, and external interviews** with industry experts. It provided the team with the necessary insights to develop informed hypotheses and eventually create tailored recommendations that tackled the difficulties faced by VFM and introduced innovative practices/experiences.

7.1. Trends

To understand how the industry is changing and how VFM needs to evolve in this context, the team researched IC trends (Flores, 2024).

First of all, with the recent launch of Chat GPT, artificial intelligence is taking the lead in organizations and will surely play a crucial role in IC. Indeed, in the Gallagher 2024 State of the Sector Report, when asked about how impactful internal communicators believe technology will be for internal communications over the next five years, 68% of the respondents answered that

AI will have a high impact, and 48% believe the same for hyper-personalization (Appendix 6) (Gallagher, 2024). AI could benefit IC through content creation, delivery, and automated chat box. Another important trend is hyper-personalization, which is a sub-branch of AI, and it refers to a marketing strategy that uses analytics, data, and automation to create highly targeted and customized customer experiences (Deloitte). The same could be replicated in IC, tailoring personalized content to employees through data analytics and increasing overall engagement. Nowadays, there is also a shift towards mobile-friendly communication, integrating platforms that empower employees to stay always connected and informed, providing easy access to critical updates, messages, and collaboration tools. Other important trends include leveraging video format, focusing on well-being and mental health, and leveraging the power of data.

7.2. Research

The project's external research was very much based on the insights provided by some of the best providers of Internal Communication services. These companies sell top-of-the-line technology for Internal Communications in large organizations, delivering a packaged solution that includes consulting services. From those, the team can highlight Staffbase, whose clients include Samsung and DHL, and Sociabble, a company derived from Microsoft, whose clients include AXA Group and Capgemini.

7.2.1 Communications Management

Large organizations' internal communications involve managing different digital channels and multiple campaigns. Multi-campaign and multi-channel management can be quite challenging for ICTs, which are often relatively small in comparison to the organizations they serve. By using a Content Management System, ICTs are much more prepared to face their daily challenges.

Content Management System

A content management system is a platform designed for creating, managing, and distributing content within an organization's internal intranet (Staffbase, 2023).

It allows users to create and edit digital content, using text, images, videos, documents, and others. In addition, it is possible to create templates for constant formatting and simplifying the creation process.

The platform allows the creation of collaborative fields, providing a space for collaboration in the development of content and approval flows. It also enables managers to review and control IC easily. Furthermore, it usually has a content calendar, helping collaborators plan communications effectively.

Regarding the distribution phase, it allows users to schedule publications, select the audience they desire, and preview the publication, making sure it meets quality standards.

Finally, the platform has analytical capabilities, allowing users to understand the outcome of their publications. A content management system centralizes the management of internal communications, increasing efficiency and facilitating the planning, control, and analysis of communications.

Governance

The existence of a content management system is related to the governance of decentralized content creation, even though the distribution is dependent on a managing committee that has the final say. Indeed, in large organizations or enterprises, which are the main clients of these platforms, there is a huge flow of information characterized by an enormous number of teams having something to share. Without a platform that centralizes communications management and a governance model that integrates with the platform and allows both autonomy and control, the task of internal communicators is much harder (Staffbase, 2023).

7.2.2. Personalization

Personalization is a growing trend in e-commerce, and there is a clear connection between personalization strategies and return on investment (ROI). According to McKinsey, companies that grow faster have 40% more of their revenues coming from personalized actions (McKinsey,

2021). Some of the best examples of personalization, or hyper-personalization, when done at the highest level, can be found in Netflix and Amazon (Deloitte, s.d.). Amazon provides product recommendations based on customer demographics, psychographics, and previous purchase and view history, while Netflix recommends content based on past viewing history.

In fact, 71% of consumers currently expect personalization, so internal communications, whose consumers are the employees, should adapt accordingly (McKinsey, 2021).

Employees are constantly being bombarded with loads of messages/information that aim to grab a few moments of their attention. If organizations want to connect with collaborators effectively, they should personalize their communications, focusing on delivering relevant content to the recipient.

To achieve this, organizations should do audience segmentation: split its audience and the workforce into sub-audiences based on different criteria (Staffbase, 2024).

The sub-audiences could be based on location, brand, area, or any other criteria that could help optimize content delivery. For example, a new tool that is only relevant to the marketing teams should not be communicated to operations collaborators. In this specific case, the criteria for the sub-audiences would be the area.

Accenture case (1)

Accenture wanted to transform its internal communications, with one of its main objectives being to deliver a more personalized experience to its collaborators.

To achieve this goal, it changed its portal home page and started presenting content based on each specific user's line of business and interests. In addition, collaborators receive personalized notifications regarding report deadlines, required training, and technology changes (Accenture, 2024).

7.2.3 Channels

Email

Employees perceive email communications as the ones of the highest importance. Organization should do their best job of preserving the perceived value of emails (Thomas, 2024). This channel should be left for company announcements, important updates, or other highly relevant communications. From the moment that companies banalize emails, open rates are prone to significantly decrease and, therefore, important communications might be missed. Additionally, emails can be used for newsletters, which, by being “*recaps*”, differ substantially from overwhelming employees with multiple communications (Thomas, 2024).

A comprehensive study by Axios HQ found that early mornings, until 9 a.m., are the optimal time for corporate emails. Moreover, compared to weekdays, Mondays have a slight but not significant edge (Axios HG, 2024).

Intranet

An intranet is a private network within an organization used for information sharing. It is a secure place to communicate with the workforce, share documents, and store all information. It can be seen, essentially, as the main hub for experiencing company information. Large companies have, throughout the years, turned this channel into the main pillar of internal communications, moving away from email.

Accenture case (2)

Another main objective of Accenture was moving away from overwhelming email boxes. Since the portal/intranet is the main channel, it started using its corporate email only for highly relevant topics, which resulted in a 200% increase in its corporate email open rates. In addition, employees receive an email, the “Good Morning Accenture,” that provides a recap of top articles and open actions needing attention (The Drum, 2023).

Social Network

A study in 2019 examined the reasons employees use organizations' social networks. The results showed that the main reasons were entertainment and social interaction. This indicates that employees might not be seeking relevant information on these platforms but instead looking for entertaining topics and socialization (Liu & Bakici, 2019).

The team found out that several companies, including an insurance company, were leveraging the features of these social networks for knowledge-sharing. This can, indeed, significantly help employees find information to execute their tasks.

7.2.4. Analytics

Internal communications should measure its communications to understand if the company has an informed workforce and to improve the effectiveness of its content delivery, allowing communicators to deliver the right content to the right target.

The following measures can be seen as the most relevant (Fritx, 2024; Sims, 2024):

- **Reach** – how many people opened the communication and what percentage of the recipients did so.
- **Attention** – how much attention did the people that opened the communication give to it (read, skimmed, glanced)
- **Engagement** – how much did collaborators interact with the communication (likes, comments, shares).

It is also relevant to track the level of usage and interaction with the organization's platforms (First up, 2024).

Finally, it is important to evaluate the metrics that were collected. To do this, internal communicators should use benchmarks based on pre-defined goals or on the industry.

7.2.5. Information Experience

Intranet

The team spent considerable time researching the design and features of intranets. As the company's information hub, it was important to understand how it could be optimized.

It was found that, on most home pages, including the layout suggestion of Microsoft, collaborators would, when logging in, have an immediate broad view of what was happening in the company through the presentation of several news articles (Microsoft Developer, 2023). Microsoft, in its layout, used the “*tiles*” layout, which seemed to the team, in its perspective, the best layout for displaying news. Furthermore, many intranets provided quite visible access to relevant places: Human Resources, tools, and events, ... Microsoft, on the side of the tiles web part, had a web part called “*dashboard*”, which was essentially a set of cards centralizing access to relevant information, like the one mentioned above, and providing notifications such as “*I remaining task*”. Interestingly, this dashboard could be personalized: it was possible to target the cards for specific audiences, so, for example, a certain tool only used by Marketing would only appear to Marketing collaborators.

Mobile-friendly experience

Smartphone usage is currently very high, including in the office. Portuguese people use their smartphones for an average of three and a half hours per day, and the habit is even stronger among younger generations. (Marketeer, 2022)

Instead of forcing collaborators to use a desktop, companies could provide a mobile app, enabling their employees to access information and interact with the organization wherever they are, however they want.

Zurich case

Built for employees, by employees, One Zurich brings key actions and information into one handy, modern interface that supports employees wherever they go. It is the center of interaction between the company and its workforce and the cornerstone of Zurich's strategy to modernize

and digitize the way of working. The app features include News/Communications, Human Resources (book time off, view pay slip, ...), Well-being, Integrations (SAP, Service Now, ...), IT Support, ...

The app won the *Qorus Innovation Award 2022* in Workforce Transformation (Qorus, 2022).

7.2.6. Leadership

External research has highlighted that leadership has a crucial role in IC. Effective Leadership benefits not only the IC but has tangible effects on the overall performance of the organizations, and therefore, leadership skills should be fostered and constantly developed. According to Deloitte, there must be a new definition of leadership that prioritizes communicative skills (Deloitte, 2018). Therefore, companies should develop initiatives that promote these characteristics.

PHC- “Ask the CEO”

At PHC, once a month, for 30 minutes, the CEO, Ricardo Pereira, answers all the employees’ questions, covering themes from the strategy and goals of the company to financial performances and possible problems. After a short presentation of the company's latest updates, a link for the Q&A is shared. Through this link, employees can anonymously ask all the different questions, and the CEO will try to answer all. The initiative aims to engage the employees in IC and involve them in decision-making. Benefits of such initiatives include better-informed employees, higher engagement, and fostering an environment of trust and transparency (PHC, 2023).

Microsoft – Team Meetings

Through the external interviews, as explained in paragraph 7.2, the team had the possibility to understand how Microsoft Portugal incentivizes and shares its IC. One of the best practices for leadership is the weekly meetings with the employees that leaders organize to discuss relevant company news. Autonomy is left to managers, who organize and schedule a weekly meeting with their team, which could be up to 15 people. The aim of this initiative is both to foster

proximity and to help employees understand and engage in company news. The topics can cover financials, people (ex. new employees), and strategy. These meetings also serve to celebrate the various achievements of the team members, thus cultivating the company's values.

7.2.7. Video Communication

In today's evolving corporate communication landscape, the integration of video has become increasingly crucial for fostering employee engagement. (Sociabble, 2024)

Due to their dynamic nature, videos combine audio and visuals more effectively to capture employees' attention: 75% of employees are more likely to watch a video than to read an email (HR Cloud, 2023).

Videos have a powerful emotional impact, allowing for the conveyance of emotions, tone, and non-verbal cues. They create a greater sense of human connection, cultivating the meaningful, trusting relationships employees seek to establish.

Their usage can be especially beneficial for management messages and company announcements, but they can also be used for training and development, team updates, and project showcases.

7.3 External Interviews

As mentioned in the methodology chapter, the team conducted external interviews throughout the semester to better understand best practices in the market regarding internal communication strategies, their impact on their respective employees' performance, and finally, to inspire the team to design the final recommendations adapted to VFM's reality and characteristics.

The external interviews were conducted with three main institutions: Microsoft, PHC Business Software, and Nova School of Business and Economics. A total of seven 1-hour in-depth external interviews were performed with individuals and teams from the organizations mentioned above. The interview guides per profile are available in Appendix 7a-d. The interviews yielded useful insights, which were divided into three categories, resulting in the

project's three guiding pillars: *Communication Management, Employee Experience, and Connections*.

Regarding the first pillar, *Communication Management*, which regards how the information flows are being administrated by the Internal Communication Team, the most referred points were the usage of tools that would help manage the process and deadlines, as well as improving the analytical approach regarding the diffusion of information. In the session with Mrs. João Ferreira, Digital Engineer and Software Developer at Microsoft, the team was able to explore the Viva Amplify Tool, having a deep explanation of its utility in creating campaigns for certain topics and sharing them in the respective channels, build a budget for VFM and explore specific details. In the interview with Mrs. Abel Ferreira, Executive Director and Board Member, the team was able to explore the relevance of leveraging targeted information based on employees' preferences. This could be developed by the usage of usage of tools providing regular touchpoints where workers and managers can come together with a growth mindset to discuss impact and future development, as well as the importance of developing a more objective and analytical based process to prioritize communications, to avoid the overlap and overload of information between channels.

Concerning the second pillar, *Employee Experience*, the interview with Ricardo Parreira, CEO of PHC Business Software, was extremely insightful since the company is on the podium of the best companies to work in Portugal for the fourth consecutive year (Visão, 2023). In this sense, the team started to explore the best practices regarding channels, and the CEO mentioned they avoid the overuse of email, adopting a policy of "*Inbox Zero*" (Google, 2022), except for on-to-one communications, being forbidden to send more than one paragraph per email. Thus, the internal network covers the previous channel, so the information is concentrated here, where eight to ten short messages are sent daily. The most important information needs to be reminded, so PHC uses the TVs to do so. Finally, with the usage of digital marketing and artificial

intelligence, the company can transmit segmented information according to employees' preferences and communicate with emotion to create a reaction in users.

Moreover, this second pillar was also explored in the interview with Professor Laurinda Alves, Assistant Professor of Communication Leadership and Ethics at Nova School of Business and Economics, where the main topic highlighted in this interview was the essential role of communication, both informal and formal, in raising awareness to employees and the impact it has on their performance. Regarding high-importance topics, where a higher rate of awareness from the audience is necessary, maintaining human contact is a best practice since it transmits proximity with stakeholders, being an efficient way to transmit the message given the short span of attention from them. This contrasts with normative information, which should go through a more formal channel, like email, following certain guidelines.

Lastly, on the *Connections* pillar, all the interviews highlighted the importance of the leadership role in the communication strategy. It is even mentioned as an additional channel for information flow. Indeed, the workforce perceives leaders' communications as extremely relevant, mentioning the importance of engaging the team in participating in the process and reinforcing the need to review the most urgent topics shared. During the interviews, the team was able to understand this could be done in two ways: engaging with employees and training leaders to communicate effectively.

Regarding the first, one of the best practices found was managers undertaking weekly meetings with baseline workers to improve the awareness rate towards information. This should be done by incentivizing expectation alignment (both with the team and the company) and improving time management. As discussed in the Benefits chapter, this process will yield several added values.

When it comes to the second method, as discussed with Professor Laurinda Alves, there is a misconception that leaders are entities that are supposed to teach only. However, when performing internal research, most leaders did not actively participate in the internal communication process because they lacked the internal resources to do so. Thus, the team discovered the development of training initiatives as a best practice through the usage of guidelines, video classes, and workshops. The flow of communication will then be affected by the impact this will have on individuals and teams.

To conclude, from the seven in-depth external interviews, these three companies were identified as the best-practice entity in the market, helping the team define the project's key three pillars. This process allowed the team to further develop the hypothesis, test it in the internal research, and finally provide fact-based recommendations, serving as major inspiration sources.

8. Hypotheses Development

In this stage, the team extensively reviewed and cross-analysed the information collected on the internal and external analyses. This process culminated with the development of twelve initial hypotheses that would serve as a basis for the posterior development of recommendations. The hypotheses were divided into the following three areas: Communications Management, Employee Experience, and Connections (Appendix 8).

After developing the hypotheses, the team launched an internal survey to test them and obtain further insights for developing recommendations.

8.1. Communication Management

8.1.1. Promote better initiative and timing

To have appropriate coverage of everything that is happening in the company, it is important that VFM's collaborators take more initiative in participating in internal communications. If several teams continue to be separated from IC, collaborators will continue missing relevant

Group Part

information. Therefore, there should be a strong push for an increase in initiative and further incentivization in the areas that still show reluctance to participate.

On the other hand, it is crucial that the first contact with the ICT happens as early as possible. The other teams should communicate their intentions in a timely manner, transmitting their timelines with significant antecedence. This would allow a much easier and better planning of communications, avoiding occasions where too much information would be communicated at the same time or, to avoid overloading but still adverse, the forced delay of communications.

8.1.2. Define a more efficient process for the development of communications

As explained in the internal analysis, the current process is slow and heavy. The team loses much time in email exchanges and meetings, which puts a lot of pressure on their availability to create content. Then, the content creation is very dependent on them: the team is very operational in most communications. As a result, ICT faces a very difficult challenge.

The team considered that the process should be redefined, turning it quicker and more efficient and boosting the productivity of the ICT. The process should be streamlined to achieve this, and the ICT should assume a more managerial and less operational role.

8.1.3. Implement a more analytical approach

It is extremely important to tackle the current lack of analytical tools and start measuring communications. The ICT should track each publication's reach, attention, and engagement. Quite importantly, this analysis should also be executed by segment to understand the preferences of different audiences. This analytical work will help the company understand if employees are informed and, therefore, more capable of performing, and will help the ICT continuously deliver more relevant content. This increase in relevance will promote an increase in the perceived value of internal communications, ultimately improving the attention given to them and the satisfaction of collaborators.

8.1.4. Communications Management Platform

Through the external analysis, the team understood the clear benefits of a platform that centralizes communications management. In addition to the features of the Content Management System explored in external analysis, it would be extremely beneficial if the platform gave the ICT the possibility of managing not only the intranet but also email, avoiding the need for decentralized channel management.

The team expected the platform to have the following capabilities:

- **Perspective and control** – giving the team a holistic view of all the requests being made and campaigns/publications being developed.
- **Streamline Processes** – facilitating the development of communications through collaborative fields and approval flows.
- **Multi-channel** – allowing the distribution to both Outlook and SharePoint from one single place.
- **Analytics** – providing analytical data on the different publications.

8.2. Employee Experience

8.2.1. Deliver a personalized information experience

As approached in both internal and external analyses, the distribution of information should include understanding to whom the information is relevant. The ICT should segment the workforce and target sub-audiences according to the specific case. As explored before, audience targeting will result in collaborators receiving a more relevant mix of content, increasing their attention to internal communications and saving them the time unnecessarily consumed with irrelevant content.

8.2.2. Define a more efficient channel usage

There should be a clear definition of the role of each channel in IC, moving away from the current practice of channel overlapping. Employees themselves expressed in the interviews that it was unclear to them what the purpose of each channel was: there are quite irrelevant

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communications on email, regarding, for example, photos, while there are corporate communications on the social network, Viva Engage. Employees also mentioned the inappropriate and sometimes exhausting Viva Engage notifications that they receive by email, regarding, for example, sports activities, which correctly belong to Viva Engage, according to them. Being email a channel with high perceived value from the perspective of collaborators, they emphasized the need to control what is communicated there. This is in line with our external research, where email was recommended to be left for highly relevant communications. In conclusion, there should be set guidelines for the range of topics that belong to each channel.

8.2.3. Improve the intranet

During the interviews, the team understood that the landing page was a crucial opportunity to capture collaborators' attention. Currently, there is a huge banner for one single news occupying the whole page, with employees being forced to click on arrows to see other news. After seeing the first news, their attention ends up going elsewhere. The team believed that the tiles layout, suggested by Microsoft, would provide a much better perspective over the current news than one single and giant banner. Furthermore, due to its external analysis, the team realized the importance of adding a space that centralized access to various information: a dashboard in Microsoft language. This dashboard would be an efficiency enhancer, saving employees the time of constantly looking for information that would be easily accessed. Overall, the new layout, with the tiles and the dashboard, would provide collaborators with a holistic view of information, especially if the dashboard included notifications and a much better overall experience.

8.2.4. Foster a Mobile-Friendly Experience

As explored in the external analysis, smartphones are increasingly relevant to society. They are the main place to look for information, and it is where people use social networks. In addition, as Baby Boomers leave companies and Gen Zs join them, the average smartphone usage will gradually increase. Therefore, VFM should provide mobile-friendly access to information, both

for intranet news and, especially, Viva Engage (social network) publications. As mentioned before, people have the habit of using social networks through their phones, so adherence to Viva Engage depends on friendly mobile access to the platform.

8.3. Connections

8.3.1. Strengthen the presence of top leadership

From the external analysis, the team understood the benefits of the active roles of leadership by hearing directly from top management and middle-high managers.

Hearing directly from top managers is a key ingredient for employee engagement, which results in higher productivity: nearly 70% of employees would go “*above and beyond*” their duties if they felt more engaged and valued at work. Therefore, VFM should enhance the role of Top Management.

8.3.2. Enhance the role of middle managers

Due to their direct contact with teams, middle managers can strongly influence how employees interact with information and engage with the organization. They can use this influence to incentivize people to pay attention to communication and, therefore, become more informed; they can also incentivize employees to participate in activities or, for example, to engage with the news published on the intranet. Thus, VFM should incentivize Middle Managers to foster an active role in IC.

8.3.3. Leverage video format

Through the external analysis, the team understood the relevance of videos in fostering employees’ engagement with the company. Furthermore, VFM’s collaborators had a generally positive reaction to a higher usage of videos in internal communications, though they emphasized the importance of keeping them short.

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Leveraging video format can yield especially high returns for the case of leadership messages, in which the sense of greater connection to leaders can strongly improve collaborators' attachment to the organization.

8.3.4. Create a more engaging community environment

Viva Engage, the company's social network, could be further dynamized, creating a more engaging community environment.

Firstly, being a social network, research shows us that collaborators expect to find entertaining content there. Although the current publications on topics like sustainability can attract some people, the platform misses some more informal content. The team believed it would be interesting to include communities of topics like football or lifestyle. It was expected that the inclusion of these "*lighter*" topics would attract people to social networks, as the same topics would attract them to use platforms like Instagram or Facebook. During the internal interviews, collaborators, especially the younger employees, were very fond of this idea.

Secondly, the platform could be used as a knowledge-sharing hub, a practice the team found in its external analysis. With so much knowledge spread through VFM and people spending significant amounts of time looking for information, Viva Engage could be a forum where people share knowledge with each other. This centralization of knowledge sharing streamlines information access, increasing efficiency, and cultivates a culture of collaboration.

8.4 Internal Survey

To test the various hypotheses developed, the consulting team conducted an internal survey to better understand the employees' perception of IC. The various questions of the survey can be found in Appendix 9.a

8.4.1 Methodology of the Survey

The survey had in total 36 questions to investigate VFM employees' opinions on IC. It was shared by the Commints email, and 344 answers were received in total, representing 25% of the population of VFM.

To ensure truthful answers and confidentiality, the format of the questionnaire was anonymous. The questions were divided into three parts: Personal Details, General IC, and Hypotheses Testing.

The *Personal Details* section was composed of 6 questions that the team later used to segment the answers. Indeed, the team asked the respondents about their age, gender, time in the company, office, brand, and area where they worked.

Regarding the *General IC* part, the team wanted to investigate the general perception of IC. Thus, the questions focused on the frequency of IC channel use and employees' feelings on the volume, efficiency, relevance of themes, and frequency of communications. The team also surveyed employees' favorite topics and in what channel they wanted them to be shared. These questions aimed to understand the employees' priorities regarding themes and channels to find the best match with the organization and ICT's priorities.

The last section, *Hypotheses Testing*, intended to assess how employees would react to the proposed changes. Therefore, the team asked about segmentation, changes in the Intranet platform, mobile-friendly communication, and leadership. To test the latter hypotheses, the team first asked about the respondents' positions in the company (individual contributor or team manager) and created two different paths depending on the answer. Individual Contributors were asked about their perception of the role of leaders in IC. In contrast, managers were asked to evaluate their role, barriers to participating in IC, and possible ways to interact with their team members.

8.4.2 Survey Analysis

Demographics

The demographic data indicates that the majority of respondents were Millennials (ages 28-43) and Generation X (ages 44-59), which aligns with the average employee age at VFM, between 40 and 45 years old. Additionally, 43% of the respondents possessed over 20 years of experience within the Group. A higher number of respondents were employed in the core business rather than in the beyond insurance brands, with a greater concentration working in the Lisbon office compared to the Porto office.

Channel Usage

When asked about how frequently the respondents accessed the different IC channels, the team could identify that emails were the most popular, with 30% of the respondents saying that they *always* access it and 45% saying that they *frequently* access it. On the other hand, Facebook was the least accessed channel, with 40% of people *never* accessing it. This number decreases to 23% for Viva Engage, which still has 45% of the respondents access *rarely*. TVs and Ledwalls are only seen occasionally, with over 30% of the respondents saying they see them *sometimes* (Appendix 9.b).

Efficiency, relevance, frequency, and volume

To evaluate the questions regarding efficiency, relevance, frequency, and volume of communication, the team calculated average scores for the answers (Appendix 9.c). Scores were calculated in the range 1 to 5, giving a score of 1 for the answers “*No Adequate*” and “*Inefficient*” and a score of 5 for the answers “*Totally Adequate*” and “*Totally Efficient*”. The scores reflected the employees’ behaviors regarding channel usage: Commints received the highest score (3.82), followed by the iOne (3.67), TV and Ledwalls (2.87), Viva Engage (2.72) and, lastly, Facebook (2.51). Considering the different attributes evaluated, as it can be seen in Appendix 9.d, while channels like Email and Intranet had positive grades for every feature, TVs, Ledwalls, and Social

Networks always had average grades below 3, meaning that the respondents were either indifferent or unsatisfied considering efficiency, relevance, volume and frequency.

Themes

Employees were then asked to express their preference regarding the channels they would like to use for the following themes to be shared: *Official Communications, News of the Company, Internal Events, Organizational Changes, and External News* (Appendix 9.e)

For official communication and organizational changes, the respondents expressed a preference for emails. This could be because they represent the most relevant and urgent news, and emails are perceived as the most efficient channel. The intranet is preferred for general news, such as news of the company, internal events, and external news. Moreover, employees preferred TVs for internal events content and news. Interestingly, the respondents did not see social networks fit to share these kinds of news. The only substantial answers recorded were for Viva Engage regarding internal events (88 answers) and Facebook for external news (95 answers). Overall, for these topics, the respondents tended to prefer Viva Engage over Facebook.

In addition, the team investigated the employees' perception of 15 specific themes (Appendix 9.f). To evaluate them, average grades were calculated in the range of 1 to 5, giving a score of 1 for the answer "*Totally Disinterested*" and a score of 5 for the answer "*Totally Interested*". All the themes presented were perceived as very important, with average grades above 3.7. The team could also see that employees were very interested in the general news of VFM and news on news about them, such as benefits. Strategy and vision were perceived as the most relevant and, therefore, should be prioritized in IC. On the other hand, *Diversity and Inclusion* was the theme with the highest response for *Totally Disinterested*, with 3.3% of the respondents choosing this answer and 4.8% choosing *Disinterested*.

Hypothesis Testing

When asked about segmentation, mobile-friendly communication, and weekly recaps, the hypothesis that received the highest grade was the latter, with a score of 4.06. Mobile-friendly communication received a score of 3.43, while segmentation just 2.51. The survey also had an open-ended question regarding where employees would like to receive segmented communication. However, the answers highlighted the fact that many of the respondents misinterpreted the concept of segmentation and expressed the fear that segmentation would result in gatekeeping some important information from Individual Contributors, which is not the aim of the hypothesis developed by the team. Indeed, as previously explained, segmentation would result in reaching employees with the news most relevant to them.

Leadership

Individual contributors highly value the active role of leaders in IC and believe that this could impact their engagement and understanding of the communication shared in the Group. Indeed, when asked if they would like to see a more active presence of the managers in IC, 76% of the respondents agreed with this statement.

On the other hand, more than 60% of the leaders who answered the survey already believe that they were present in the IC processes, actively contributing and alerting their team members to important news. Foreseeing a possible mismatch in the employees' and leaders' perceptions of their presence, the team wanted to investigate the possible barrier to the managers' participation. The survey highlighted that lack of availability and lack of internal resources were the main challenges to the leaders' active participation in IC. To test the hypothesis further, leaders were asked if they would like to have communication training, and the recommendation was positively received by most of the respondents, receiving an average grade of 3.9 out of 5.

Finally, the team cross-analysed the tools preferences of these two categories for interacting and understood that both leaders and individual contributors would have to have weekly touchpoints, either weekly meetings or weekly alerts of the most important news.

9. Recommendations

Once the issue tree was finalized, with the initial hypothesis developed, the consulting team successfully developed seven different recommendations. This chapter explains the different proposed initiatives, their value proposition, risks and limitations, and implementation roadmap, developed with the help of the internal survey and meetings with the ICT.

9.1 Communication Management

Through its internal and external analyses, the team understood the importance of redefining the process of developing communications. Therefore, the team crafted the following recommendations to enhance the process.

9.1.1. Improve internal communications management through the usage of a centralized platform

The current IC management showcases the following difficulties:

- A slow and heavy process that frequently requires one week or more until its completion
- An overloaded ICT who faces the difficult challenge of managing the IC of a large organization while being operational in most communications and spending a considerable amount of time with emails and meetings
- Inefficiencies that arise from decentralized request management, campaign management, and channel distribution
- Difficulties with planning, control, and analysis that derive from decentralization and lack of analytical tools.

To tackle these difficulties, the team considered it was important to adopt the usage of a communications management platform. The team's suggestion was Microsoft Viva Amplify, a

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relatively recent product by Microsoft that aims to centralize internal communications, helping companies to create, manage, distribute, and measure communications. Although there were slightly better platforms on the market, the companies who owned the technology provided them with packaged solutions that included other technologies and consulting services, which would naturally result in a much higher cost. Viva Amplify comes in a package denominated Employee Communications and Communities, which also includes premium features for Viva Connections and Viva Engage and has an annual cost of 1.86€ per user. Since using the platform depends on a subscription of the package to all employees, and taking into consideration that VFM has a workforce composed of around 1400 collaborators, the annual cost would be around 2600€. However, since VFM is a large organization with other subscriptions, Microsoft informed the team that VFM should be able to negotiate a price lower than 2600€.

In Appendix 10.a-c, it is possible to find many of Viva Amplify's features in a visual representation, from which we can highlight the following:

- 1: The platform's icon can be pinned to the Teams tab, providing easy access to it – this accessibility, which brings Internal Communications to employees' workplace, is expected to incentivize participation in the process
- 2/3: It allows the ICT to manage all requests and campaigns from one single place – it increases efficiency and gives the team a better, more holistic perspective over communications, substituting the current decentralized management through multiple emails and meetings
- 4: It allows the creation of templates, accessible to all users - it contributes to streamlining the communication process
- 5: It has multi-channel management capabilities, allowing the team to distribute to Outlook and SharePoint from one single place – it enhances efficiency, as the team is not

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forced to switch between channels and create duplicate publications for duo-channel communications

- 8: It allows users to request approval for their drafts – this improves efficiency, as the creation of approval flows significantly facilitate the role of ICT members in comparison with the current email-based model
- 11/12: It enables the ICT to analyse communications by providing the team the reach and engagement of each publication, per channel and audience – it delivers valuable insights on how informed collaborators are and helps the ICT to continuously improve its effectiveness, as it can understand how relevant each topic to each audience is

The collaborators' access to Viva Amplify should be moderated to prevent excessive communication requests.

Although the platform provides a calendar for each campaign, giving users a holistic view of all publications within that campaign, it does not have a calendar that aggregates all campaigns. This is a concerning absence, as it does not allow ICT to plan the flow of information properly.

In light of that, the team found a solution: Teams Calendar Pro (Appendix 10.d). This free collaborative calendar stays on the team channel's tab in Microsoft Teams, allowing every member of the channel to consult and edit it. It provides different timeline views and color-coding, which facilitates the distinguishment between the different communication channels.

Together, both tools will enable the following:

1. **Planning and control:** It will centralize the management of communications, providing the team a holistic view of communications and facilitating the plan and control of the communications flow

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2. **Multi-channel and Multi-campaign:** It allows the ICT to manage the development and distribution of communications from one single place
3. **Process streamlining:** It significantly facilitates the development of communications by providing collaborative spaces, approval flows, and other features
4. **Analytics:** It enables communicators to analyse the reach and engagement of their publications

New Governance Model

The introduction of Microsoft Viva Amplify and Teams Calendar Pro is associated with a new governance model.

In this model, VFM's teams would be responsible for initiating the process, creating content, and embracing the ICT's leadership. Their roles would consist in:

- Initiate campaigns with the ICT members as approvers, creating a collaborative field with them (Viva Amplify)
- Define the objectives and key messages of the campaigns (Viva Amplify)
- Create drafts of publications and request approval from the ICT (Viva Amplify)
- Ultimately follow the guidelines defined by the ICT.

The ICT would be responsible for reviewing content, occasionally creating content, and planning, controlling, and analyzing communications. The roles would be the following:

- Review the approvals requested by other teams, editing when necessary (Viva Amplify)
- Participate in the drafting of specific highly relevant communications, where their skills are particularly needed (Viva Amplify)

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- Analyze the performance of communications, including per audience, using the data for continuous improvement (Viva Amplify)
- Ultimately define the frequency/volume, channel/s, and audience of each topic
- Plan and control the flow of information using a collaborative calendar (Teams Calendar Pro)

While the previous governance model was based on complete centralization, the new model is based on decentralized content creation and centralized decision-making, planning, and control.

Value Proposition

The recommendation enables a much quicker and lighter process that allows VFM to be a more agile organization, capable of spreading information to interested parties, if desirable, in a single day. Secondly, the ICT would become more efficient and productive, capable of coping with an increase in participation in IC and having more time to engage in strategic thinking, perform internal audits, and develop highly relevant communications. Finally, the ICT would be more capable of planning communications, controlling the flow of information, and analyzing the outcome of the distributed content, allowing the team to continuously improve its work.

Risks and Limitations

Viva Amplify does not provide a metric for the actual attention given by collaborators to the communications, as it only measures the reach and interactions. In addition, the platform does not have a calendar that aggregates all the campaigns, forcing the team to manually impute scheduled communications on Teams Calendar Pro. Thirdly, it does not allow, to the team's knowledge, to define who is able to check the analytics of each publication, meaning that all content creators would have access to this information.

Implementation Roadmap

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The implementation should start with the adoption of the free app Teams Calendar Pro, which will immediately help with the planning and control of communications. The ICT members should consult the calendar before scheduling and edit it, using color-coding, after the scheduling of a communication. Secondly, the Employee Communications and Communities package should be subscribed for one year, negotiating a fair price considering the unique characteristics of VFM. Following the subscription, a video explaining the new way of participating in IC should be created, showcasing how to use Viva Amplify. In this video, the ICT would incentivize participation in IC and stress the importance of timely participation for planning purposes. The video should be uploaded to Viva Amplify, allowing collaborators to review the process whenever they desire to participate. After the video, the Viva Amplify should be pinned to all the participants in the process, enabling easy and visible access to the platform. Finally, the ICT should firmly stick to the plan, resisting collaborators' temptation to use the previous heavy process and continuously incentivizing participation and timely requests.

9.1.2. Improve the content distribution strategy through the implementation of content prioritization

In a rapidly evolving business environment, where a significant amount of information must be communicated across various departments, the internal communication team needs to prioritize topics, understanding the appropriate frequency/volume of each and the channel that better represents its relevance.

During the internal qualitative research and several meetings with the internal communication team, it was possible to conclude that an analytical and objective approach towards content prioritization needed to be implemented. Thus, the team interviewed the strategy department to understand how the communication matrix could be developed, and which factors should be included in this analysis. After this interview and additional research, the team identified the

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following as the criteria for determining a certain topic's relevance: importance to stakeholders, alignment with strategic objectives, and financial value.

Firstly, since the targets of internal communications are collaborators, who decide to spend, or not, their time with what is communicated, the ICT should consider what is important to them. Secondly, it is relevant to understand how much each topic is aligned with strategic objectives, fostering a cohesive and purpose-driven culture. This should be done alongside the strategic department, continuously fostering alignment between IC and VFM's strategy. Finally, being profitability the ultimate goal of VFM, the ICT should always take into consideration the potential financial added value associated with each specific topic.

Therefore, once the IC classifies the topic within each criteria (being that one of their roles as described in the suggested governance model), the combination of the scores of the three variables should give a degree of relevance, and, according to this metric, the internal communication team can understand on which channel a certain content should be shared and with what frequency (Appendix 11 .a). According to market best practices and internal surveys representing employees' preferences, the team developed a suggestion regarding which type of content should follow through each channel (Appendix 11.b .c .d .e)

Value Proposition

With the implementation of this recommendation, firstly, it will be possible to verify an increased satisfaction in collaborators with IC, as the content distribution will better represent their perceived importance of each topic and the value they attribute to each channel.

Moreover, it will improve awareness, since collaborators will better understand the priorities of the company, being their attention directed accordingly.

Risks and Limitations

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On one hand, the relatively frequent practice of the ICT of publishing on the intranet what was communicated through email, can reduce the perceived value of the intranet, reducing employees' attention to this channel. The implementation of a newsletter, who brings iOne publications to email, bears the same risk of devaluing the intranet.

On the other hand, implementing a prioritization system will probably result in complaints from teams whose topics were not prioritized.

Implementation Roadmap

The first step of the roadmap is to implement this new mechanism, which means analysing the relevance of each topic using the previously defined criteria and choosing the appropriate channel and frequency/volume based on that relevance.

Secondly, implement the periodic newsletter based on iOne publications, with links to the intranet for more details. The newsletter can be created in the two following ways: automatically sends to employees' publications they had not seen in the past week or manually curated by the internal communication team.

Finally, it is crucial to continuously analyze collaborators' reactions to the distributed content (reach, engagement) to understand the relevance they give to different topics. Also, it is crucial to continuously be in touch with the company's strategy to better understand how relevant each topic is to VFM.

9.1.3. Personalize internal communications through the practice of audience targeting

Currently, VFM does not segment its workforce and, therefore, does not practice audience targeting, resulting in collaborators receiving irrelevant information. For example, beyond insurance collaborators received communications regarding benefits that they do not have access to – besides unnecessarily consuming their time, these emails emotionally affect beyond insurance people and damage the organization's culture. Furthermore, several people

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complained that they received emails about policies and regulations that did not affect them – as a result, they lost trust in these legal emails, ignoring them many times. In addition, IT communications regarding certain platforms are sent to people who do not use these platforms (presumably only used by certain areas). Certainly, there were more cases of topics being distributed that were irrelevant to some of the recipients.

In a world where people feel an overload of communication and spend, on average, according to McKinsey, around 28% of their workday reading and answering emails, it is crucial to consider to whom the information is relevant (McKinsey, 2012).

The absence of audience targeting has a major source: the emails of the people who compose the different brands and areas of the company are not updated, which makes it impossible to segment the workforce and target the interested parties.

We recommended a quick resolution of this issue, which would open a new world of possibilities for IC besides allowing it to cease the practice of distributing irrelevant content. It would then be possible to distribute content that was only interesting to specific areas, like information about commercial agents or new tools/platforms, or, as another example, content that was specifically relevant to managers. Moreover, in moments where there is a lot to communicate, in order to moderate the flow of information, audience targeting could be used to ensure that information would at least reach collaborators to whom the information was most relevant.

Value Proposition

Firstly, efficiency would be increased, as collaborators would not consume their time with irrelevant information. Secondly, VFM would have a better-informed workforce due to the following reasons:

- Collaborators would gain trust in Internal Communications and, therefore, would be more attentive to what is delivered to them.

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- Collaborators would gain access to relevant information that was previously occulted from them due to the topic's absence of transversal relevance.

Risks and Limitations

The only identified risk for this recommendation was the possibility of employees' emails not being properly updated, which could mean irrelevant content being communicated or relevant content not reaching all the interested parties.

Implementation Plan

Firstly, there should be an updated dataset with the emails of collaborators across different categories: brand, area, role, location, and other categories, such as if it is or not a parent (for children initiatives). Secondly, this dataset should be connected to Microsoft Azure, and the audiences subsequently created based on the categories mentioned in the previous step. Since the dataset would be synchronized with Microsoft Azure, the audiences would be automatically updated whenever a collaborator joined or moved across the company (assuming the original dataset would be updated). Finally, it is important to inform participants in IC of the new targeting capabilities, stressing the importance of identifying to whom the information is relevant when they intend to communicate with collaborators.

9.2. Employee Experience

Besides improving communication management through ICT, it is also important to improve employees' interaction with information by providing them with an overall better information experience.

9.2.1. Provide a better information experience

With the aim of providing collaborators with a better information experience, VFM can make some changes to the design and usability of iOne's landing page, which is currently fully

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occupied by one giant banner. Being the landing page such a relevant part of the connection between the company and the workforce, the team believes it is important to optimize it.

Firstly, the highlighted news web part should switch to the “*tiles*” layout, which provides a more broad and immediate perspective of what is happening in the company, removing the current “*arrows*” layout, which occupies too much space and forces collaborators to click on the arrows, an action they are not prone to do (their attention goes elsewhere).

Secondly, a visible filter should be introduced for the visible search bar, as the search bar that has a filter is hidden. As employees do not know about the latter, they complain about the difficulty of finding some news without filtering options.

In addition, create a dashboard on the side of the landing page through the implementation of a web part denominated “*Viva Connections Dashboard*”. The dashboard would centralize access to relevant information and personal tools, saving employees significant time in fulfilling their needs. It could provide immediate access, showcase notifications, and quick views regarding *My Spot* information (i.e. tool for parking in the office), like available holidays or pay slips, Business Academy, future events, relevant tools... It is relevant to note that the cards can be targeted to specific audiences, which allows the showcase of different tools according to the area the user belongs to.

Finally, the icons that are currently on the side of the landing page should be removed, as collaborators claim they are not user-friendly.

In addition to the intranet redesign, and considering current habits, it is important to provide mobile-friendly access to information, which will be increasingly relevant as the workforce demographics will continuously change. By using the Viva Connections app in the Teams mobile app, employees can have access to a personal feed similar to social media that includes organization news and posts from the communities they belong to in Viva Engage. The feed

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allows them to interact with the publications (likes, comments, shares), just like they do on Instagram or Facebook. Moreover, collaborators would have access to the previously mentioned dashboard, which would allow them to submit expenses, register for events, or check any data without the need to use a desktop. Naturally, the usability of the dashboard depends on the features introduced by the company. Interestingly, due to the potential access to Viva Connections premium features, it would be possible to create a completely different dashboard experience for frontline workers, namely commercial agents.

The Viva Connections app is completely free, being only the premium features dependent on the Employee Communications and Communities package subscription.

Appendix 12.a demonstrates the current iOne's design, while Appendix 12.b showcases the team's suggested design (the cards in the dashboard do not represent the team's suggestions as they are merely illustrative). The mobile feed and dashboard can be found in Appendix 12.c and 12.d, respectively.

Value Proposition

The implementation of the team's suggestions would result in better awareness of what is communicated, as collaborators have a more holistic view of the news in iOne and mobile access to communications. Additionally, efficiency would be increased, as the dashboard would spare collaborators the time spent accessing information and tools. Furthermore, employees would be more engaged, as they could, by accessing their personal feeds, interact with the company like they do on social media. Finally, there would be a better connection to front-line workers, as using a desktop would cease to be a necessity for accessing information and interacting with the company.

Risks and limitations

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Although setting quick links in the dashboard is extremely easy, quick views and notifications can require some effort. In addition, people who have professional phone, and therefore access to the Teams app only through there, might not be on using the phone, while others might not be interested in installing and using the Teams app.

Implementation Roadmap

Regarding the implementation roadmap, the team suggests starting by contacting the Microsoft partner and explaining to them the desired changes in iOne: a new layout for highlighted news, a visible filter, a Viva Connections dashboard, and icon removal. Then, the dashboard should be initially created with some quick links, which are much easier to set up. Thirdly, the mobile experience should be activated by pinning Viva Connections to everyone's Teams mobile app. This can be achieved by setting a new app setup policy in Teams' admin settings. Afterward, the ICT should create a video showcasing and explaining the changes in iOne and inform on the new mobile-friendly information experience. The communication should inform employees that they can engage in the app just as they do in their social media feeds, encouraging them to do so. Finally, the dashboard should be continuously improved, introducing notifications in the cards (examples, remaining vacations, training deadlines) and quick views (examples: pay slips or upcoming events), which are important for mobile access. Collaborators should be involved in this continuous process, as the dashboard mainly aims to improve their experience.

9.3. Connections

From the internal survey a, the team discovered that employees highly value the role of leaders in IC and, thus, would want to see them have a more active role. Indeed, also according to the Gallagher State of the Sector Report (Gallagher, 2024), 3 in 5 employees say that managers' communication is below expectation. Therefore, the consulting team developed the following recommendations to enhance the role of managers in IC and use them as a communication

channel. At the same time, the team suggested providing support to the managers through training.

9.3.1. Enhance the role of Top Management through “Ask the Top Management” sessions

VFM should organize and initiate “Ask the Top Management” sessions to foster proximity between the Top Management and the individual contributors. These monthly sessions will allow employees to interact directly with the Top Managers through live sessions where they can ask questions anonymously. The question can cover whatever theme the employees want to ask, from benefits and salaries to the company's financial performance.

The consulting team proposed that the sessions should be monthly with a different manager each time. They should last up to 45 minutes to maximize the efficiency and participation of the meetings.

Value Proposition

According to the 2024 *Pumble Report of Communication in the Workplace*, 68% of organizations employ leader-live events, with an effectiveness rate of 98%, which would foster benefits such as higher engagement and retention (Pumble, 2024). Indeed, the suggested recommendation will demonstrate a commitment to fostering proximity between Top Management and employees, ultimately increasing employee productivity and engagement in internal communication. Moreover, the open Q&A would allow the creation of a culture of trust and transparency, which could benefit the overall environment in VFM.

Risks and Limitations

The potential risk of this initiative would be the lack of time for Managers to participate. Indeed, in the internal survey, many managers indicated that their lack of availability was the main barrier to their participation in IC. Another limitation would be a lack of engagement from the

employees due to a lack of time or interest, which would ultimately result in a failure of the initiative.

Implementation Roadmap

To implement this recommendation, the first step would be to set the goals and objectives to be able to measure its success later. Secondly, the ICT should schedule the sessions, develop a registration process, and promote this initiative through the TVs and the Intranet iOne. Once these steps are completed, the ICT should launch the sessions and monitor them through monthly surveys for the participants. One metric to evaluate the success of the recommendation should be the *Net Promoter Score*, adding in the survey the following question: “*Would you recommend this session to another employee?*” (Qualtrics, 2024).

9.3.2. Enhance the role of Middle Management through weekly touchpoints

From the internal survey, the consulting team saw that both leaders and employees would like to have weekly touchpoints to discuss relevant internal communication news. For this reason, to enhance the role of Middle Managers, the team recommended organizing weekly meetings with leaders and their team members. From best practices, the team saw that these touchpoints should last 15 minutes to be easy to schedule and efficient. Moreover, to ensure success, the team suggests having face-to-face meetings, preferably during coffee breaks. The middle managers will serve as a communication channel, explaining and alerting the employees of the most important communication and being open to collecting feedback and questions.

Value Proposition

This initiative would foster proximity between leaders and employees and improve employees' understanding and engagement in internal communication. As previously mentioned, better-informed employees are more productive and more engaged in the company's activity.

Moreover, it would give the ICT a direct feedback channel, as employees can share their thoughts and suggestions regarding IC directly with their leaders.

Risks and Limitations

As for the previous recommendation, lack of availability may be a challenge for the successful implementation of this initiative. Other risks include the fact that people may use these 15 minutes to discuss work-related topics, such as tasks, and not IC. However, the biggest risk of this recommendation could be the misalignment of middle managers and the ICT. Indeed, for this initiative to succeed, leaders must be aligned with the goals and objectives of IC and must represent the company with its values and strategy.

Implementation Roadmap

The first step in the implementation roadmap of this recommendation is to set goals and objectives and communicate them to the middle managers. The initial alignment should be about the general themes and tones to use in the meeting. However, after the introduction of Viva Amplify and the periodical newsletters, the ICT could automatically send to the managers personalized emails with possible topics to cover in the touchpoints. Moreover, the ICT should give managers the autonomy to organize the meetings as they see fit and serve just as a guide and not an active owner of the initiative. Secondly, the ICT should promote this program through TVs, explaining to both managers and employees the benefits of the recommendation. Lastly, collecting feedback and monitoring these touchpoints through direct meetings with the Middle Managers and the yearly IC satisfaction survey is crucial to measure the success of it and constantly improve it.

9.3.3. Support managers by providing training programs for effective communication

The previous recommendations suggest that managers should play an active role in IC. Still, it is crucial to support their development and learning process regarding soft skills, such as

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communication, empathy, and public speaking. Leaders must represent the company's values; thus, they must communicate them effectively. For this reason, VFM should provide training and leadership programs that focus on how to communicate effectively. These trainings should focus on the framework of 7C: clear, concise, correct, complete, compassionate, concrete, and considerate.

Value Proposition

This initiative will be key to ensuring the engagement of the leaders in IC, fostering their overall productivity and retention. It will also guarantee an upskilling of the workforce. The training will provide a general improvement of the managers' soft skills, which not only include communication but also networking and teamwork. Furthermore, it will create a better environment in VFM. Indeed, managers will be able to better support the employees and foster interpersonal relationships with them, ultimately improving their team members' engagement and productivity.

Risks and Limitations

Barriers and resistance to change from management can create problems in the implementation and success of the activity. Indeed, recent studies highlight that many times, changes are not implemented due to resistance from leaders, especially traditional ones (Deloitte, 2023). Another challenge may be the management positions' lack of availability and time, which do not perceive IC and training as a priority. To overcome these challenges, it is crucial to communicate to the leaders the impact and the benefits of such initiatives and onboard them in the process.

Implementation Roadmap

The first step of this initiative would be to identify the different management training needs. The ICT, together with the Business Academy and Beautiful Business Team (teams owners of the other training and leadership programs), should investigate the skills gap among the managers.

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This could be done through surveys and interviews with the leaders. Once the training needs are identified, the ICT should develop the programs, identifying the different formats to implement. Indeed, the training could be conducted by providing guidelines, with live events or videos. Finally, the team should implement the recommendation, monitor, and improve it, collecting feedback and implementing the suggestions.

9.4. Action Priority Matrix

To prioritize the different recommendations to the client, the team used an Action-Priority Matrix (Hull, 2024).

The recommendations were evaluated based on the effort and impact and located accordingly in the four different quadrants of the matrix. Impact was measured by the possible increase in employee engagement, or the ICT increase in efficiency. Effort was measured based on the allocation of resources needed, i.e., time, money, and human resources. *Figure 1* displays the matrix with the recommendations. Recommendations 2, 3, 5, and 4 are classified as *Quick Wins*, which require low effort to be implemented and would have a high impact. The initiatives in the second quadrant (1, 7, and 6) are Projects that require high effort but also have high impact. For this project, the team did not develop any *Fill-ins* nor considered *Thankless Tasks*, which are all low-impact recommendations.

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Figure 1 Action Priority Matrix

9.5. Other Insights

Besides the comprehensive set of recommendations, the team had other insights for VFM.

Email

It is recommendable to, when possible, deliver IC emails, including the proposed newsletter, before the beginning of the workday. According to external research, in this particular time range, before 9 a.m. in the case of Portuguese firms, IC emails are more likely to effectively draw employees' attention. This particular time range corresponds to the early morning, Research shows us that, during workdays, the early morning, before people start working, is the best time to send internal communications emails, as open rates are the highest. Through their "Good Morning Accenture" initiative, Accenture decided that the best time for collaborators to receive internal communications would be when they start their day.

Televisions

Many VFM televisions are in workspaces where people focus on their work, and some collaborators have their backs to the televisions. As collaborators expressed in the interviews, it would be preferable to have the televisions in the cafeterias, where people are not working and, therefore, are more likely to pay attention to them.

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Furthermore, employees complained that they often do not know what is being transmitted, resulting in losing their attention. It would be beneficial to always include, in the television, a reference related to what is being shown.

Viva Engage

Firstly, Viva Engage is currently not directly visible to employees, being that a barrier to their access to the platform. We recommend pinning Viva Engage to everyone's Teams' tab, incentivizing access to the social network.

Secondly, many VFM's collaborators showcased frustration regarding receiving Viva Engage notifications in their emails. By pinning Viva Engage to Teams, they will start receiving notifications on Teams. We recommend showing them, in a video, how to manage the notifications on email and Team, suggesting that the latest would a more adequate channel to receive these notifications.

Finally, with so much knowledge spread throughout the company, and also taking into consideration the time spent in looking for information, there could be communities functioning as knowledge-sharing platforms, facilitating the process of acquiring information.

All channels

Throughout the interviews, VFM's collaborators expressed that it was important to them to have an informative resume of the content of the communication in its beginning, laying on them the decision to look, or not, for more detail. It is quite recommendable to provide this resume, as employees are likely to disregard long communication and, consequently, miss relevant information.

Example: policies/regulations - employees expressed that they felt demotivated to read a whole document, meaning that many of them might be disinformed on these topics. In this case, the

most important policies/regulations could be highlighted at the beginning of the communication.

10. Limitations and Further Research

The project's key objective was to find innovative initiatives to improve the current IC inside VFM. However, the research presents some limitations. Considering the survey, one of the main limitations could be the relatively small sample size, resulting in a lack of representation of some categories of VFM's population, altering the outcome. Moreover, regarding the qualitative analysis conducted, the consulting team could have fallen into some subjectivity and generalizability biases due to the interpretative nature of the interviews. (Mwita, 2022)

Given the constraints within the current project—such as time limitations, communication hurdles, stakeholder management challenges, and alignment issues—further investigation from ICT is necessary to validate the provided recommendations. Additionally, ongoing monitoring is needed to mitigate risks effectively. Future inquiries could delve into enhancing communication tools like Viva Amplify, offering leadership training, and promoting best practices. Moreover, additional research should address the financial obligations for project execution, potential collaborative partners, and the economic and social impacts of the proposed solutions on the insurance market.

With the proposed recommendation, it is key that VFM and its ICT continue to foster engagement, efficiency, and proximity. Moreover, today's context is characterized by a fast-paced environment and innovative technological advancement, so ICT must remain updated on future trends and innovation in the insurance and communication sector.

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12. Appendix

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- b. Emails
- c. Intranet
- d. TVs
- e. Viva Engage

12. Employee Experience

- a. Current iOne
- b. New Landing Page
- c. Mobile Friendly Intranet (1)
- d. Mobile Friendly Intranet (2)

Group Part

- f. Viava Engage
2. How often do you read our Commint email communications?
 - a. Never
 - b. Only when the topics interest me
 - c. I try to read all of them, but I don't always manage to
 - d. I read almost all the ones that are sent
 3. If you usually do not read any or most of the Commint emails, please share the reason(s) for this.
 4. How often do you consult our other internal channels?
 - a. Intranet iOne
 - b. Facebook
 - c. Viva Engage
 - d. Internal TVs
 5. Primarily, for what purpose do you use our Intranet iOne?
 - a. Access My Spot
 - b. Access People Hub
 - c. Access Business Academy
 - d. Access Flex Now
 - e. Get news and stay updated on company happenings
 - f. Access other work applications (Useful Links)
 - g. Consult institutional/financial information of the company
 - h. Search for contacts/information about colleagues
 - i. Consult the company organization chart (and departments)
 - j. Consult internal mobility
 - k. Consult information about Impact24
 - l. Access the virtual library (iOneDocs)
 - m. Consult cost centers

Group Part

- n. Other purposes
6. If you indicated "Other purposes" in the previous question, please share some examples:
 7. How do you evaluate the news published throughout the year on our Intranet iOne in terms of their frequency/quantity, relevance, and length?
 - a. Frequency/quantity
 - b. Relevance
 - c. Length (of the content)
 8. Primarily, for what purpose do you consult our Commint emails?
 - a. Get news and stay generally updated on what is happening in the company
 - b. Learn about the most relevant organizational changes (new organizational structures and appointments)
 - c. Receive information and/or invitations to internal events
 - d. Learn about updates to Policies, Regulations, and Procedures
 - e. Other purposes
 9. If you indicated "Other purposes" in the previous question, please share some examples:
 10. How do you assess the communications released throughout the year via Commint email, in terms of their frequency/quantity, relevance, and scope?
 - a. Frequency/Quantity
 - b. Relevance
 - c. Scope (of content)
 11. What is your main motivation for attending our internal social networks (Viva Engage and Facebook group)?
 - a. Knowing the news and being globally up-to-date with what's happening in the company
 - b. Getting to know and/or interact with content shared by other colleagues
 - c. Sharing information/content with colleagues, teams, or the company
 - d. Other purposes

Group Part

12. If you indicated "Other purposes" in the previous question, please share some examples:
13. Of the internal social networks we have today, which one do you prefer?
 - a. "Viva Engage (corporate social network | formerly Yammer)"
 - b. Facebook (One VFM Portugal group)
14. Regarding Viva Engage (corporate social network | formerly Yammer), how do you assess the content published on it throughout the year, in terms of its frequency/quantity, relevance, and scope?
 - a. Frequency/Quantity
 - b. Relevance
 - c. Scope (of content)
15. Regarding Facebook (One VFM Portugal group), how do you assess the content published on it throughout the year, in terms of its frequency/quantity, relevance, and scope?
 - a. Frequency/Quantity
 - b. Relevance
 - c. Scope (of content)
16. Regarding the internal TVs, how do you assess the content shared through them throughout the year in terms of frequency/quantity, relevance, and scope?
 - a. Frequency/Quantity
 - b. Relevance
 - c. Scope (of content)
17. Regarding the internal events held throughout the year, how do you evaluate them in terms of frequency/quantity, relevance, and scale?
 - a. Frequency/Quantity
 - b. Relevance
 - c. Scale (of events)
18. Which improvements do you suggest to make our internal events more effective and appealing, in your perspective?

Group Part

19. Please provide us with some suggestion(s) for improvement that you believe would contribute to increasing the reach and effectiveness of our internal communication channel network
20. What other means or channels do you think we could explore additionally to further boost internal communication within the company?
21. Do you feel informed about the most relevant events of VFM Portugal Group?
 - a. Adequately informed
 - b. Well or very well informed
 - c. Would like to be more informed
 - d. Little or not informed
22. Which topics would you like to see explored more?
 - a. Organizational strategy
 - b. Human Resources
 - c. Organizational Culture
 - d. Training
 - e. Sustainability
 - f. Diversity and Inclusion
 - g. Innovation
 - h. VFM Foundation / CSR
 - i. Core Insurance Activity
 - j. Beyond Insurance Activity
 - k. Policies, Norms, and Procedures
 - l. Global Financial Results
 - m. Management Information (by business lines)
 - n. Customer Information (number of customers, retention/satisfaction rates, etc.)
 - o. Marketing Actions and Commercial Campaigns
 - p. Market Trends and Information
 - q. Health and Well-being

Group Part

- r. Information Systems / Technology
 - s. Information Security
 - t. Distribution Network Dynamics"
23. Would you like us to explore additional topics beyond those indicated in the previous question? Please share some examples:
24. How do you value the participation of the management team in managing and leading internal communication processes and flows within their teams?
- a. Not relevant
 - b. Slightly relevant
 - c. Indifferent
 - d. Important
 - e. Very important
25. If you believe that the role of managers is relevant for boosting internal communication within their teams, please share with us some suggestion(s) so that we can better capitalize on it in the future.
26. Overall, how do you assess internal communication in terms of frequency/quantity, relevance, and scope of the content shared across our internal channels and the initiatives/events organized throughout the year?
- a. Frequency/Quantity
 - b. Relevance
 - c. Scope (of events)
27. If you rated any of the factors as "Very dissatisfied" or "Dissatisfied" in the previous question, please share your reason(s).
28. Do you think our communication is inclusive? Do you feel represented?
- a. Yes
 - b. No
29. If you selected "No" in the previous question, please share your reason(s).

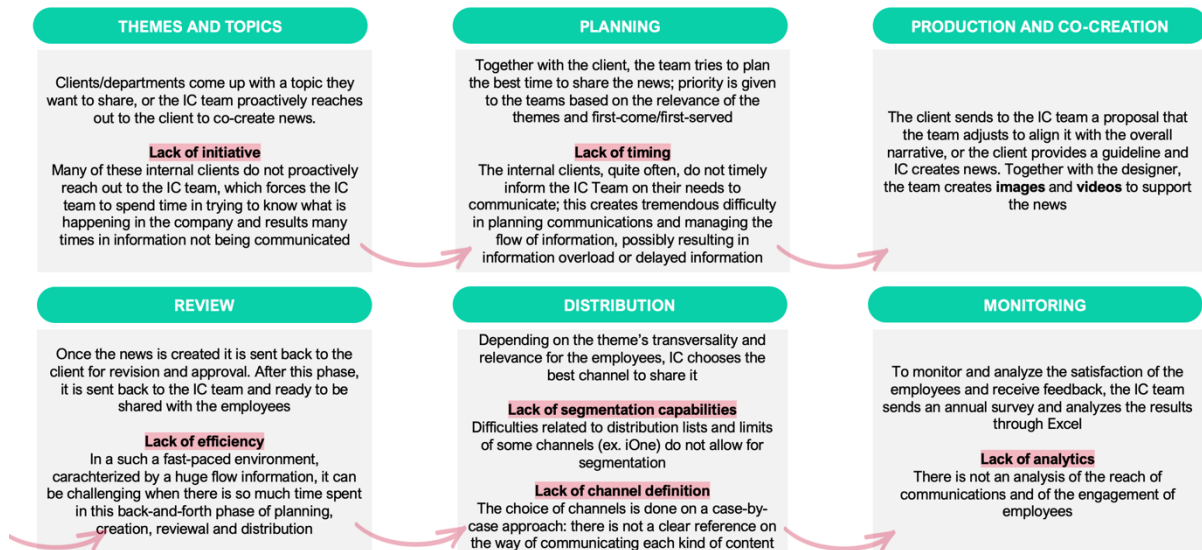
Group Part

30. Please share your improvement suggestions so that internal communication as a whole can be more effective in enhancing your knowledge and engagement with the company.

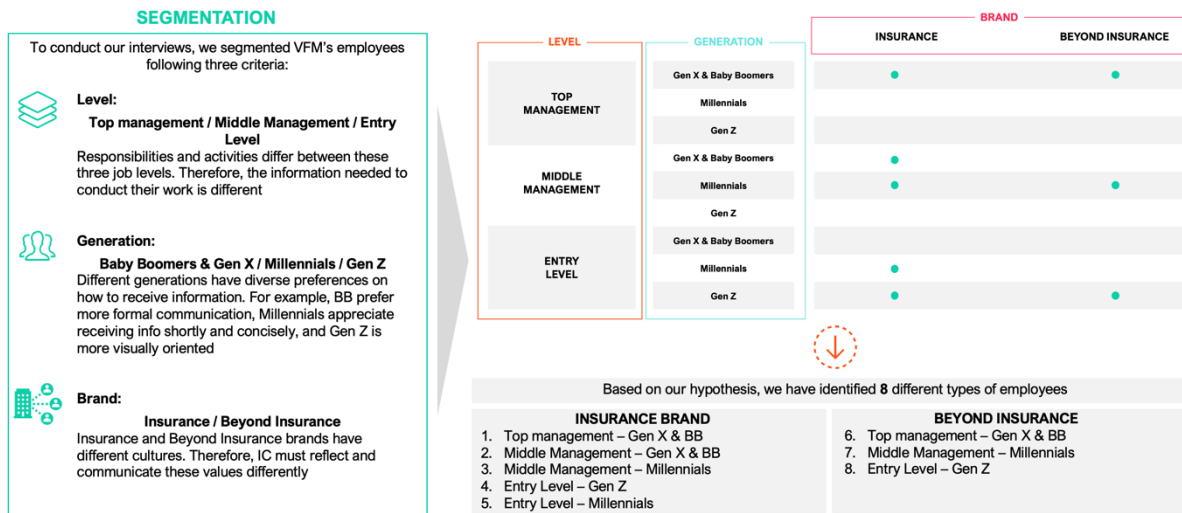
31. Finally, we appreciate it if you could indicate your overall satisfaction level with internal communication.

- a. Very Unsatisfied
- b. Unsatisfied
- c. Satisfied
- d. Very Satisfied

Appendix 4 – ICT content creation and distribution process



Appendix 5.a – Interview Segmentation



Appendix 5.b – Interview Guide

Introduction:

Hello! Thank you for your availability! The objective of this interview is to access VFM internal communications and explore opportunities for improvement.

Your answers and personal information will be kept anonymous and will only be used within the framework of the project.

Pre-interview questions:

(Age, brand, team, role, years of experience)

- To start, we would just like to know long have you been working in VFM?

GENERAL IC:

- How do you feel about the internal communication inside the group?
- How do you feel about the overall frequency/volume of internal communication in the organization?

CONTENT:

- What types of information do you find most valuable in internal communications?
- Are there any specific details or updates that you feel are often overlooked/missing in internal communications?

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- On the opposite side, are there any contents that you feel are not as relevant?
- **Beyond Insurance:** Do you see any difference in terms of your needs and interests of information between you and the people who work in core insurance
- **Management:** Due to your management position, do you see any difference in terms of needs and interests of information between you and other people

CHANNELS:

- What channels do you generally check to access information, and why? How often do you use them?
- Are there any communication channels that you feel are underutilized or, on the opposite, ineffective?

Email

- What is your opinion regarding the current volume and type of content of internal communications?
- What kind of content do you/would you like receiving through mail?

Intranet

- How often do you use it and for what purposes?
- What is your opinion regarding the current volume and type of content of the communications you find there?
- What kind of content do you/would you like receiving through the intranet?

What is your opinion regarding the current home page of the intranet? **Viva Engage**

- Do you use it? (If not, why?) (If yes, for what reason?)
- How do you feel about the current volume and type of content of the posts you find?
- What kind of content do you/would you like seeing in VivaEngage?
- How do you feel about some Viva Engage posts on your Intranet homepage?

Gamification

Group Part

- What do you think about the usage of gamification (maybe explain, ex. SomosAgeas, MedisActive)?

Tv/Ledwall

- Do you frequently check the TVs?
- Is the info relevant for you?
- What kind of content would you like to see?

SUGGESTIONS & IDEAS:

We would like to end this part of the interview by asking if:

- You have any personal concerns or suggestions regarding internal communications that were not mentioned?

HYPOTHESIS TESTING:

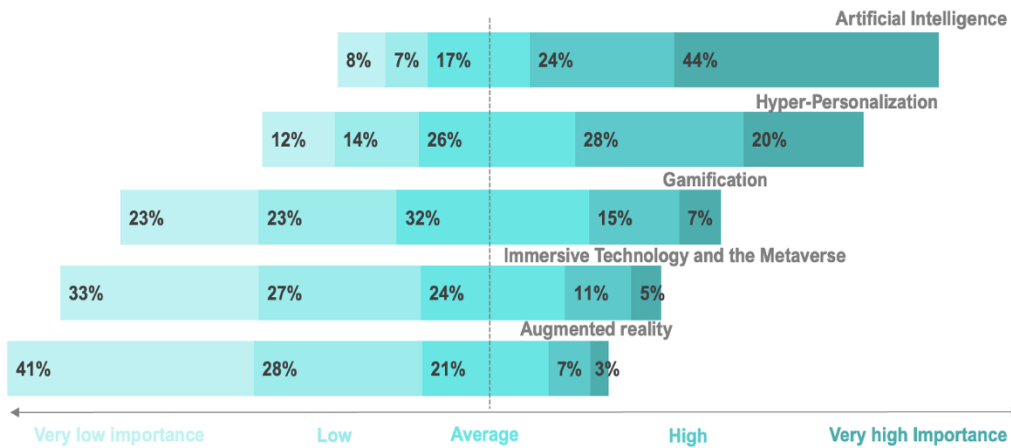
We would now like to share some ideas that we have for internal communications; we are looking for your honest opinion:

- What do you think about the idea of using audience segmentation on the distribution of information? Distributing information that would be customized to you?
- How do you see the possibility of having a dashboard that would have your calendar, your tasks/deadlines, relevant tools for your work, HR topics, ...
- How would you feel about the idea of having a personal feed that aggregates relevant news, viva engage posts, Teams posts, and stream videos?
- Do you use your phone to access information and interact with the organization? Do you believe the organization provides a mobile-friendly experience?
- How do you feel about the current presence of leadership in communication? (Is it sufficient? Should there be more?)

What is your opinion regarding the usage of video in internal communications?

Appendix 6 – Influence of Technology in IC

How impactful do you believe technology will be for internal communications over the next 5 years? (n = 1069)



Appendix 7.a – Joao Ferreira Interview Guide

Good afternoon João, thank you so much for meeting with us.

We are, as part of our thesis, doing a consulting project in internal communications for a large corporation in Portugal. They currently use SharePoint, Outlook and Viva Engage.

The company internal communications team is currently concerned with overloading employees with irrelevant content (“everything for everyone”). We have also noticed that there is some overlapping in the channels used to communicate: Viva Engage serves as the main base for posts around sustainability, diversity, well-being, sports, ... (interest-related content). They then use the email, intranet and also maybe Viva Engage for more corporate communications which sometimes might include these other topics around sustainability, well-being, ...

In SharePoint, they currently have as a home page a giant communication image that you can then switch with arrows. This image occupies the whole page. If we then scroll down, they have a news section which also occupies the whole page, it’s a format with the image of the news, then below the title, then some white space, and then the likes, comments, and the date. Then we can click to “see more news” and can then search by words and by date. Even we continue scrolling down we have a Viva Engage web part and then an events calendar web part: both again occupy the whole page.

Group Part

IC general questions:

1. Before asking more detailed questions, we would like to know, with your experience, what is your opinion regarding this scenario. Maybe some “best practices” in your view that you would like to share?
2. In your experience, what do you believe, using Microsoft 365, and possibly other technology, is the best content distribution strategy: what types of content through which channels?
3. One of our main hypotheses, possibly the biggest, is to deliver a personalized information experience: content curated to people needs and interests. How would you achieve this with Microsoft 365 technology and possibly with extensions/integrations?
4. What do you see as the optimal landing page? What kind of web parts? We were also thinking about suggesting including the Viva Connections dashboard...
5. Regarding the management of communications, we understand that it would be very beneficial to have an omni-channel central platform to cocreate on publications, to set approval flows, to have a calendar with all the scheduled publications (and audiences), and with strong analytical capabilities: what you recommend regarding this? Do you believe Viva Amplify is good enough? Are you aware of what happens in SharePoint whenever a campaign is created?

Microsoft specific questions:

6. In SharePoint/viva connections, how does it work with news that I have already see? In what, if any, web parts do they disappear?
7. Will the news in the news spotlight also appear on the feed web part of viva connections?
8. What do you think about targeting people who have not seen certain publications? How could we achieve that?
9. Within the same topic, do you know if it is possible to target people who have not answered surveys?

Group Part

10. How do you feel about emails digests? Can we target them to the people who have not seen certain news?
11. What kind of premium features would you highlight from the Microsoft Communities and Communications package?
12. How difficult is it to create integrations with the Viva Connections dashboard and is it something that each individual can customize to its liking?
13. How difficult is to create automatically updated audiences within Microsoft 365?

Appendix 7.b – Ricardo Pereira Interview Guide

1. Which do you see as the main challenges of internal communications in a large organization?
2. What practices do you see as a reference for internal communications?
3. Do you recommend any other technology to optimize internal communications?
4. How should an organization inform people of the many things that are happening in a large company without overloading them with too much content?
5. Do you use segmentation in internal communications?
6. What role should each channel (email, intranet, social network) play in internal communications?
7. How many publications are made weekly in your intranet? And how many mails do you receive from internal communications?
8. What kind of content do you think should be communicated through email?
9. We have heard that long communications can be demotivating to read; do you have any recommendation related to this concern?
10. Do you recommend any other technology to optimize internal communications?
11. How much should top leadership be present and in what way?
12. Do you think middle managers, due to their direct connection with people, have a role in internal communications?

13. Do you use **video communication**? In **which occasions**?

Appendix 7.c – Laurinda Alves Interview Guide

Thank you very much for your time and availability. We are 3 Nova students participating in the Consulting Lab, where we are conducting a project for a large corporation (n. employee 1500) to improve their internal communication.

The current problems that we aim to solve are overload and overlap of information and lack of efficient strategy (i.e. prioritization of the content, segmentation, targeted communication).

The current strategy takes into account the use of different communication channels, such as emails and intranet. However, the company want to improve its efficiency and effectiveness, increasing overall employee engagement.

Internal Communication

- What are the challenges of effective internal communication (IC)?
- What are some best practices for IC? What are some best practices in Portugal?
- What should be the characteristics of a good IC strategy?
- What are the best/most efficient channels to use?

Leadership:

- How can leadership increase IC's effectiveness?
- What should be the role of leaders in IC?
- How can we foster engagement at leadership levels and how can we onboard leaders for the IC strategy?
- Based on your experience, is video communication a good way to foster proximity between employees and leaders?

Other topics:

- The company recognizes the importance of mental health, well-being, inclusivity, sustainability and other important topics and this is reflected in their IC and initiatives.

Group Part

However, how can these initiatives be communicated effectively, without being perceived as irrelevant or overloading the employees?

- Do you recommend any specific technology/software that can help Internal Comms professionals effectively manage communications and allow them to target different audience segments?

Appendix 7.d – Abel Aguiar Interview Guide

How do you define internal communication?

Role of Leaders in IC?

What practices do you see as a reference for internal communications?

Do you use segmentation in internal communications?

How many publications are made weekly in your intranet? And how many mails do you receive from internal communications?

What kind of content do you think should be communicated through email?

What is your opinion regarding email digests (an automated weekly newsletter that pulls publications from SharePoint)?

We have heard that long communications can be demotivating to read; do you have any recommendation related to this concern?

For what purposes do you use Viva Engage? Do you recommend anything to improve adherence to the platform?

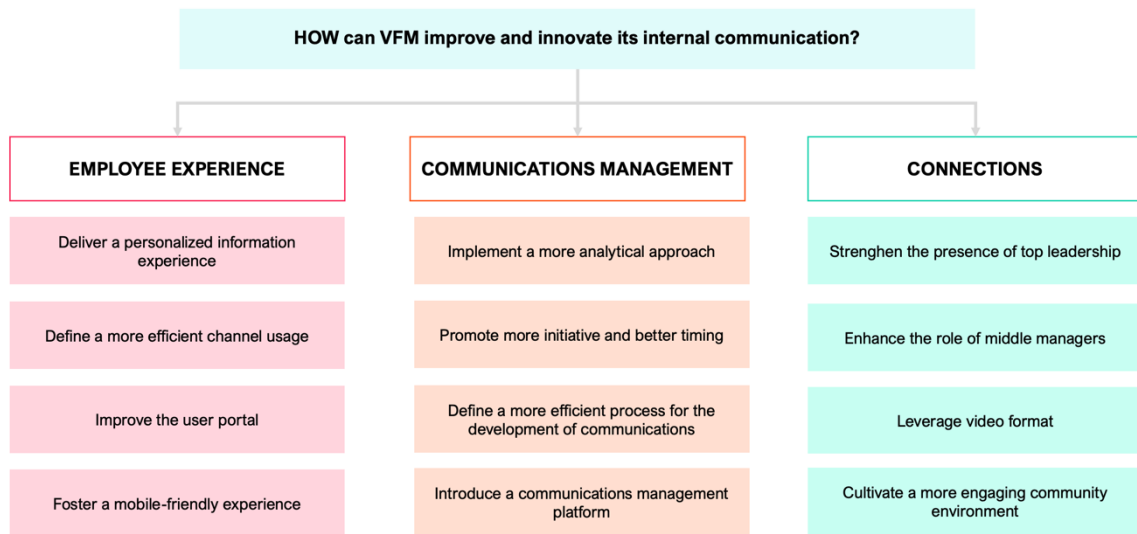
Besides Outlook, SharePoint and Viva Engage, do you recommend any other technology to optimize internal communications?

How much should top leadership be present and in what way?

Do you think middle managers, due to their direct connection with people, have a role in internal communications?

Do you use video communication? In which occasions?

Appendix 8 – Issue Tree



Appendix 9.a – Internal Survey Questions

VFM – Internal Communication Survey
<p>Welcome to our survey! We are a group of three Master's students from Nova SBE conducting a consulting project for our thesis, aiming to identify opportunities to improve internal communication within VFM.</p> <p>This survey is divided into three parts: Quantitative Analysis, Channel Segmentation, and Hypothesis Testing. We want to emphasize that there are no right or wrong answers; we are simply seeking your most honest opinions.</p> <p>All responses and personal information will be kept anonymous and will be used solely for this project. Your feedback is extremely important for our final recommendations.</p> <p>Thank you!</p>
<p>Quantitative Analysis</p> <p>1. How old are you?</p>

Group Part

- a. 21 – 27
 - b. 28 – 43
 - c. 44 – 59
 - d. 60+
2. What is your gender?
- a. Female
 - b. Male
 - c. Prefer not to say
3. How long have you been in VFM?
- a. < 1 year
 - b. 1-5 years
 - c. 5-10 years
 - d. 10-20 years
 - e. +20 years
4. In which building do you work?
- a. Lisbon
 - b. Porto
 - c. Other location
5. To which brand do you belong?
6. To which area do you belong
- a. Actuarial
 - b. Audit, Risk & Compliance - Audit
 - c. Audit, Risk & Compliance - Risk
 - d. Business Planning & Intelligence
 - e. Claims

Group Part

- f. Client Support / Production
- g. Clinical
- h. Commercial
- i. Communication
- j. Executive Management
- k. Facilities
- l. Finance
- m. Investments – Others
- n. Investments - Real State
- o. Legal
- p. Marketing
- q. People & Organization
- r. Procurement & Services
- s. Product Development
- t. Program & Project Management
- u. Reinsurance
- v. Strategy - Innovation
- w. Strategy - Strategy, M&A & Business
- x. Development
- y. Strategy - Sustainability
- z. Technology
- aa. Underwriting
- bb. Other

Channel Division

1. How often do you use the following channels?

	Never	Rarely	Sometimes	Frequently	Constantly
--	-------	--------	-----------	------------	------------

Group Part

Commint (Email)					
Intranel iOne					
Viva Engage (Yammer)					
Facebook					
TV/Ledwall					

2. Do you consider the following channels to be effective for sharing internal communications?

(Effective – the channel is useful for your basic needs of information)

	Not Effective	Barely Effective	Indifferent	Effective	Very Effective
Commint (Email)					
Intranel iOne					
Viva Engage (Yammer)					
Facebook					
TV/Ledwall					

3. Is the relevance of communication in the following channels adequate?

(Relevance – the information shared in each channel is important for your informational needs)

	Not Adequate	Barely Adequate	Adequate	Very Adequate	Totally Adequate
Commint (Email)					
Intranel iOne					

Group Part

Viva Engage (Yammer)					
Facebook					
TV/Ledwall					

4. Is the frequency of communication in the following channels adequate?

	Not Adequate	Barely Adequate	Adequate	Very Adequate	Totally Adequate
Commint (Email)					
Intranel iOne					
Viva Engage (Yammer)					
Facebook					
TV/Ledwall					

5. Is the volume in the following channels appropriate?

(Volume – Total amount of internal communications)

	Not Adequate	Barely Adequate	Adequate	Very Adequate	Totally Adequate
Commint (Email)					
Intranel iOne					
Viva Engage (Yammer)					
Facebook					
TV/Ledwall					

Group Part

6. Regarding official communications, in which channels would you like to see this topic shared?

Examples: Official communications: Policies, Norms and Procedures, Human Resources, Strategy and Vision...

You can choose more than one option

- a. Commint (Email)
- b. Intranet iOne
- c. VivaEngage (Yammer)
- d. Facebook
- e. TV/Ledwalls

7. Regarding Group News, in which channels would you like to see this topic shared?

Examples: Group News: Financial Results, Brand Activities...

You can choose more than one option

- a. Commint (Email)
- b. Intranet iOne
- c. VivaEngage (Yammer)
- d. Facebook
- e. TV/Ledwalls

8. Regarding Internal Events, in which channels would you like to see this topic shared?

You can choose more than one option

- a. Commint (Email)
- b. Intranet iOne
- c. VivaEngage (Yammer)
- d. Facebook
- e. TV/Ledwalls

9. Regarding Organizational Changes, in which channels would you like to see this topic shared?

Group Part

Examples: Organizational Changes: New acquisitions, New brands, New products, New technologies...

You can choose more than one option

- a. Commint (Email)
- b. Intranet iOne
- c. VivaEngage (Yammer)
- d. Facebook
- e. TV/Ledwalls

10. Regarding External News, in which channels would you like to see this topic shared?

Examples: External News: VFM outside of Portugal, Market Trends and Information...

You can choose more than one option

- a. Commint (Email)
- b. Intranet iOne
- c. VivaEngage (Yammer)
- d. Facebook
- e. TV/Ledwalls

11. Regarding specific content, which topics would you be most interested in?

	Not Interested	Few Interest	Indifferent	Interested	Totally Interested
Strategy/Vision					
Business Performance					
Diversity & Inclusion					
Workforce Recognition					
Awards/Benefits					

Group Part

Work Techniques					
Wellbeing					
Client Feedback					
Sustainability					
External News					
New Technologies					
Career Progression					
Regulation and Compliance					
Group Themes at International Level					
Market Tendencies					

Hypothesis Testing

1. Do you feel that, in certain situations, information should be conveyed to only a portion of the organization rather than to everyone?

(1=Completely Disagree, 5= Completely Agree)

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5

2. If so, in which situations would you suggest this be done?

Group Part

3. What do you think about the possibility of receiving a weekly email with the headlines of the week's news and links to each of them for iOne, in case you are interested in learning more about any of the news?

(1=Not Interested, 5= Totally Interested)

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5

4. What do you think of the option to have a dashboard on iOne that centralizes access to information, allowing direct access to: My Spot information, events, tools, and platforms you regularly use (customized to your workspace)?

	None	Little	Few	Some	A lot
Interest					
Effectiveness					
Interest					
Effectiveness					

5. What do you think about having, in the Teams app for mobile, the ability to access the Dashboard (previous question) and a personal Feed (similar to social media format) with Group communications and posts from Viva Engage (Yammer) communities you are part of?

	None	Little	Few	Some	A lot
Interest					
Effectiveness					

6. Do you think that with this possibility of accessing information on your mobile phone, you would be more informed about what's happening in the Group?

(1=Completely Disagree, 5= Completely Agree)

Group Part

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5

7. What is your position in the company?

In this section, the survey will proceed in different ways according to the option you choose.

- a. Employee (without team management)
- b. Management Team (Middle / Top Manager)

8. What factors prevent you from participating more actively in internal communication processes?

(1=Does not impede at all, 5= Impedes a lot)

	1	2	3	4	5
Lack of Availability					
Lack of Interest					
Lack of Communication Capacity					
Distance from the Team					

9. How would you feel about a more active contribution from leaders in the company's internal communication?

(1=Not Interested, 5= Completely Interested)

- a. 1
- b. 2

Group Part

c. 3

d. 4

e. 5

10. Do you agree that increased participation of leaders in the internal communication process would enhance your level of attention and understanding regarding what is communicated?

(1=Completely Disagree, 5= Completely Agree)

a. 1

b. 2

c. 3

d. 4

e. 5

11. How would you like to see leaders more involved in the internal communication process?

1st - Videos - Top leaders would be present

2nd - Meetings - Conducted by closer leaders

3rd - Participation - Led by closer leaders

4th - Alerts - Issued by more senior leaders

	None	Few	Indifferent	Some	A lot
Message from leaders through videos					
Weekly meetings					
Encouraging team participation in internal communication					

Group Part

Alerting the team to important news at least 1x per week						
--	--	--	--	--	--	--

12. Do you consider that you actively contribute to the internal communication process of the company? *(only for those that in question 7 answered "Management Team")*

(1=None, 5= A lot)

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5

13. Do you consider that you actively alert your team to internal communication topics and flows?

(1=None, 5= A lot)

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5

14. Do you think that if you played a more active role as a promoter of the importance of internal communication, your team would increase their level of attention and understanding regarding what is communicated?

(1=None, 5= A lot)

- a. 1
- b. 2

Group Part

c. 3

d. 4

e. 5

15. What factors prevent you from participating more actively in internal communication processes?

(1=Does not impede at all, 5= Impedes a lot)

	1	2	3	4	5
Lack of Availability					
Lack of Interest					
Lack of Internal Resources					
Lack of Communication Capacity					
Distance from the Team					

16. Do you feel that it would be important to provide leaders with communication training?

(1=None, 5= A lot)

a. 1

b. 2

c. 3

d. 4

e. 5

17. What do you believe is the most effective way to make your team more involved in the internal communication process?

Group Part

	None	Few	Indifferent	Some	A lot
Message from leaders through videos					
Weekly meetings					
Encouraging team participation in internal communication					
Alerting the team to important news at least 1x per week					

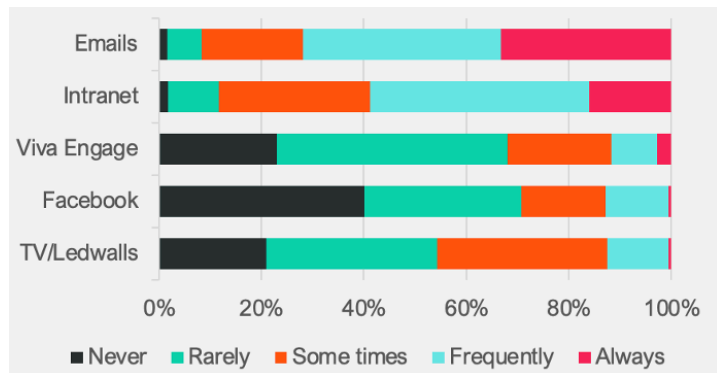
18. How available are you to adopt the following measures in your team, in order to improve internal communication?

	None	Few	Indifferent	Some	A lot
Message from leaders through videos					
Weekly meetings					
Encouraging team					

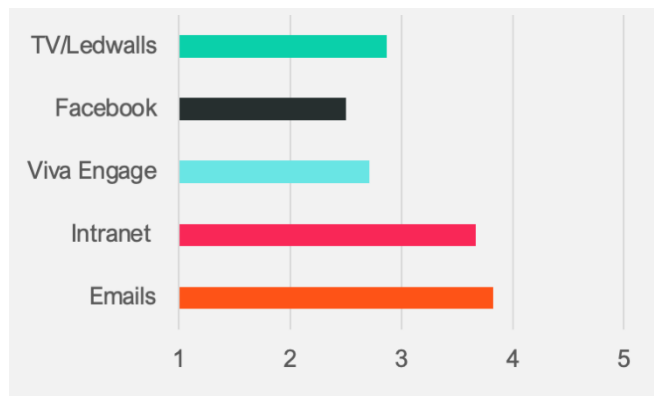
Group Part

participation in internal communication					
Alerting the team to important news at least 1x per week					

Appendix 9.b – Channel Usage



Appendix 9.c – Efficiency, Relevance, Frequency and Volume

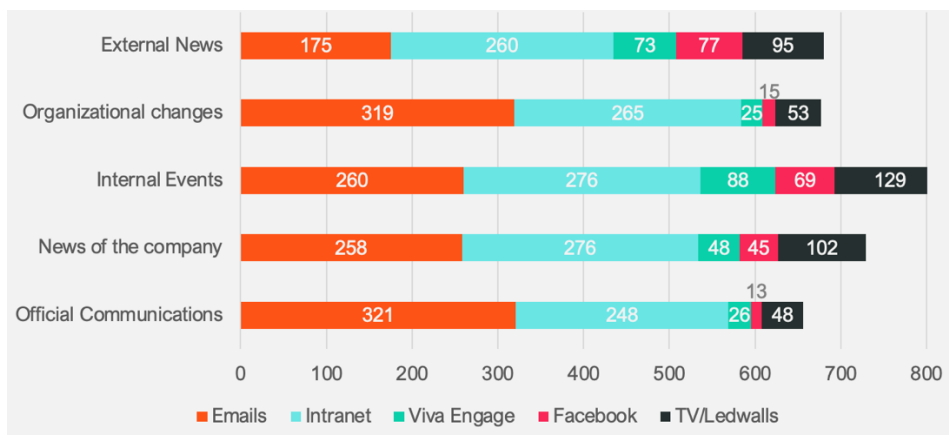


Group Part

Appendix 9.d – Efficiency, Relevance, Frequency, and Volume specific grades

Channels & Attributes	Emails	Intranet	Viva Engage	Facebook	TV/ledwalls
Efficiency	4.3	3.9	2.7	2.5	3
Relevance	4	3.8	2.8	2.5	2.9
Frequency	3.6	3.5	2.7	2.5	2.8
Volume	3.5	3.5	2.7	2.4	2.8
Average	3.8	3.67	2.72	2.51	2.87

Appendix 9.e – Content / Channels



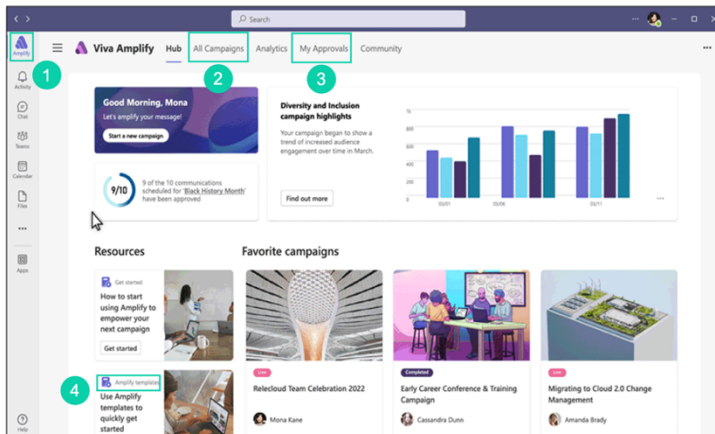
Appendix 9.f – Specific Themes



Group Part

Appendix 10.a – Viva Amplify (1-4)

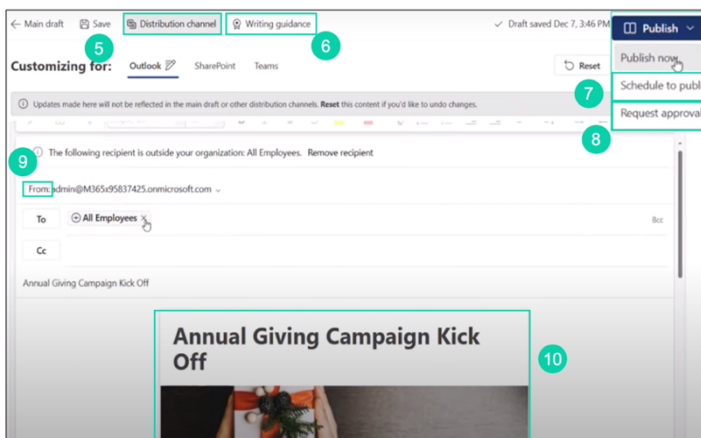
VIVA AMPLIFY



- 1** The platform can be pinned to the Teams bar, providing people a very easy access to it
Benefit: Since Internal Communications is, visibly, in the same place where people are working, the quick access is expected to increase collaborators' initiative to participate in GAP's Internal Communications
- 2** It allows the IC team to manage all their campaigns and publications from one single space, without being forced to perform a much more difficult coordination through multiple email exchanges with different people
Benefit: This increases the efficiency of the team and allows a much better perspective of all the communications being developed
- 3** It provides the member of the IC team an overview of all the communication requests that are being made throughout the company, instead of finding them spread through their email inboxes
Benefit: It provides an increase in the effectiveness of the team in managing communication requests
- 4** It allows the creation of templates that can be used across publications (Ex: Events) and soon across campaigns (this is possibly already available)
Benefit: It streamlines the communication process

Appendix 10.b – Viva Amplify (5-10)

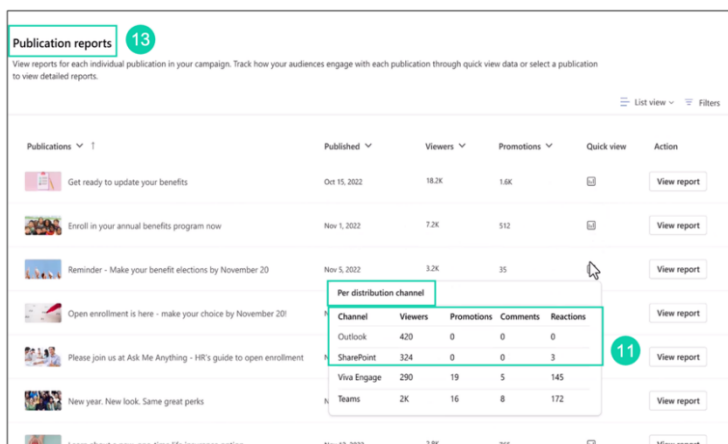
VIVA AMPLIFY



- 5** Multi-channel management capabilities, allowing management of SharePoint and Outlook from one place
Benefit: Increase in efficiency, as it avoids the need to switch between platforms and repetitive tasks of multi-channel publications
- 6** It provides writing guidance based on what Microsoft considers as "best practices", which can be specific to the topic of the publication
Benefit: Although the IC team is quite knowledgeable, this can help other collaborators of GAP to create a draft of the publication that would afterwards be reviewed by the IC team
- 7** It allows to schedule publications for Outlook
Benefit: It provides more flexibility
- 8** It enables the establishment of approval flows
Benefit: This can streamline the communication process, as the IC team can simply perform a review of an already drafted publication, instead of spending time and effort in emails and meetings with other teams
- 9** It allows the choice of the sender, which can be useful in communications from leaders, to foster connections
- 10** It automatically adapts the format of the publication to each specific channel
Benefit: It streamlines the communication process

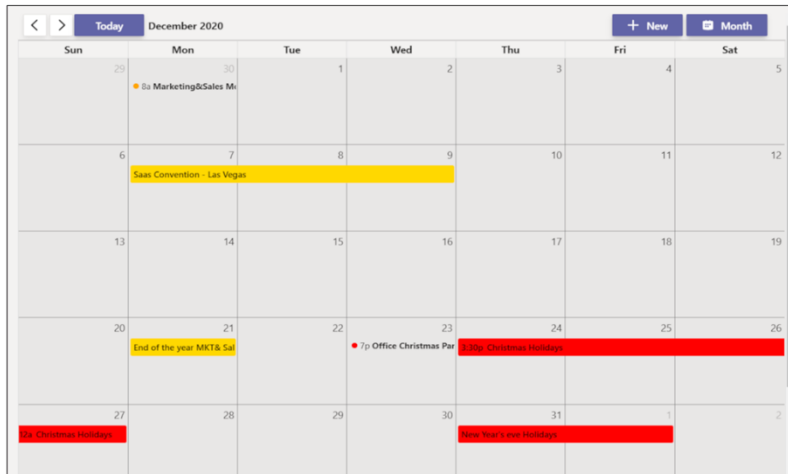
Appendix 10.c – Viva Amplify (11-13)

VIVA AMPLIFY



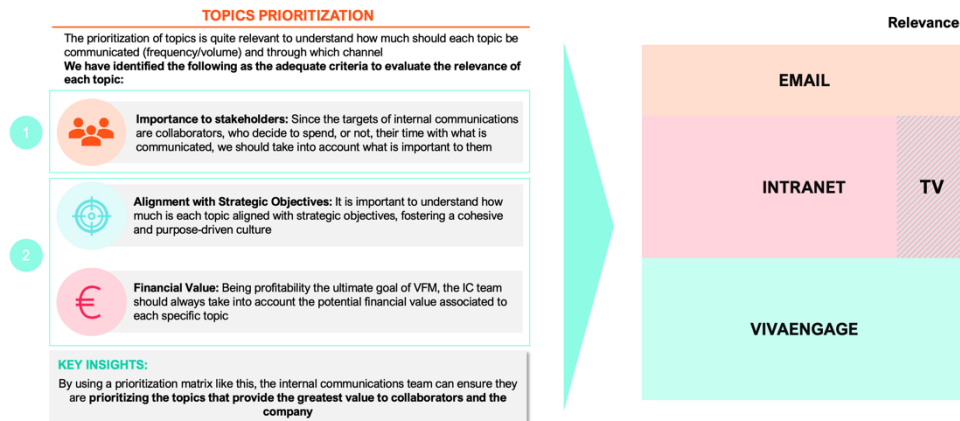
- 11** The platform allows communicators to analyse the reach and engagement of each publication; in "view report", there is data available regarding the proportion of recipients who opened the communication among the total recipients
Benefit: This enables understanding if the workforce is actually informed of what is happening in the company and allows the IC team to understand what topics are most and least relevant to the collaborators
- 12** Besides providing metrics per distribution channel, the platform provides metrics per audience, e.g. per area
Benefit: This provides the IC team the opportunity of understanding what topics are relevant to whom; for example, some information regarding commercial agents might be specifically relevant to the commercial teams
- 13** The publication reports page, offers a holistic view of the frequency and volume of a certain campaign (example: sustainability), as well as its overall reach and engagement
X The platform lacks a metric for the attention that collaborators give to communications when they open them

Appendix 10.d – Teams Calendar Pro

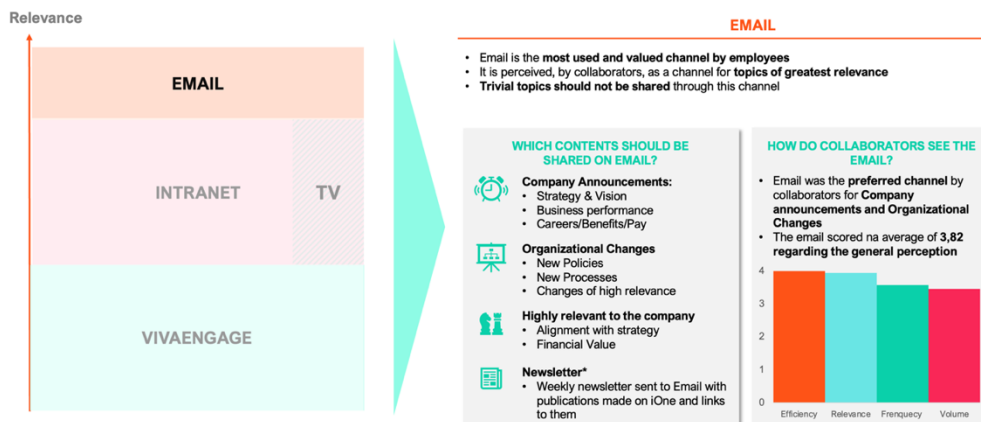


- Teams Calendar Pro**
- It is on the tab of a **Teams channel**
 - Can be **edited and consulted by everyone** in that specific Teams channel
 - Possibility of using **color coding to quickly distinguish between publications in different channels**
 - Allows having a broad **view of communications per day, month or year**

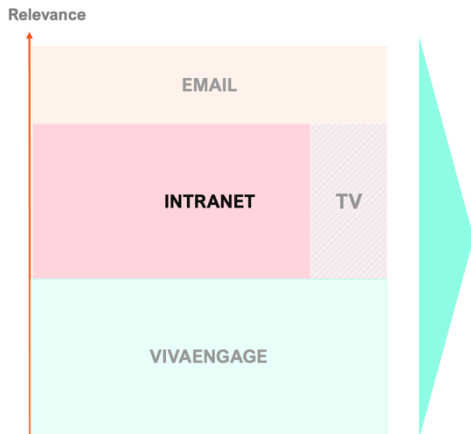
Appendix 11.a – Content Prioritization Matrix



Appendix 11.b– Emails



Appendix 11.c – Intranet



INTRANET

- Currently works as **repository of all communications**: it is important to **not highlight what is published through email**, protecting the reputation of the channel
- It should be used for topics that, **although not of the greatest importance, have relevance to collaborators and the company**

WHICH CONTENTS SHOULD BE SHARED ON EMAIL?

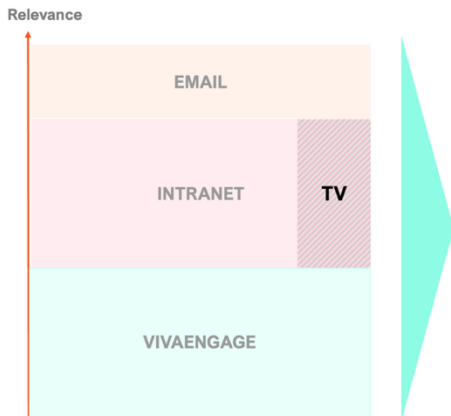
- Moderately Relevant to the Company**
 - Alignment with Strategy
 - Financial Value
- Internal Events**
 - **Group News**
 - News about the Group brands and teams
 - Technologies
 - Other group news
 - **External News**
 - Market trends
 - News about VFM outside of Portugal
 - Other external news

HOW DO COLLABORATORS SEE EMAIL?

- Email was the **preferred channel** by collaborators for **Company announcements and Organizational Changes**
- The email scored an average of **3,82** regarding the general perception

Category	Score
Efficiency	~3.8
Relevance	~3.8
Frequency	~3.5
Volume	~3.5

Appendix 11.d – TV



TV & LEDWALLS

- The communication should be based on **transversal topics of some relevance**, similar to the intranet, and could include **videos from stakeholders**
- TVs & Ledwalls can have an important role in **reminding** about certain topics, like events or other activities

WHICH CONTENTS SHOULD BE SHARED ON EMAIL?

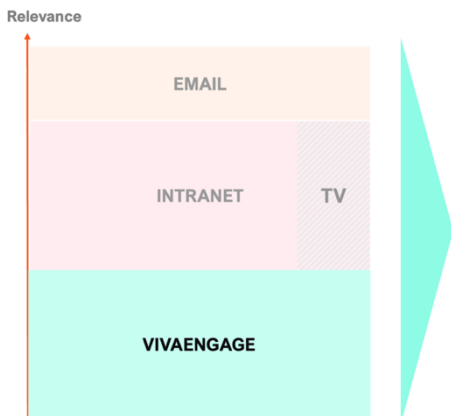
- Internal Events**
 - Photos of previous internal events
 - Dates
- Group News**
 - News about the Group brands and teams
 - Technologies
 - Other group news
- Leaders and Other Stakeholders**
 - Communications from leaders
 - Communications from other stakeholders
 - Thank you system

HOW DO COLLABORATORS SEE EMAIL?

- The **preferred topics** to be shown in televisions were: **Internal Events and Group News**
- The email scored an average of **2,9** regarding the general perception

Category	Score
Efficiency	~2.9
Relevance	~2.9
Frequency	~2.5
Volume	~2.5

Appendix 11.e – Viva Engage



VIVA ENGAGE

- Collaborative and democratized internal channels in which employees are invited to freely assume an **active role in boosting the channel**, through the publication of informal posts or, upon evaluation, the **creation of specific communities**
- It is **not an appropriate channel for more corporate communications**

WHICH CONTENTS SHOULD BE SHARED ON EMAIL?

- Informal Communication:**
 - Posts from specific communities to foster engagement and belonging in the organization
- Events and Activities**
 - Posts, photos and reactions from previous events and activities
- Company values**
 - Posts that celebrate the company's values of Share, Dare and Care. Possible Thank you program

HOW DO COLLABORATORS SEE EMAIL?

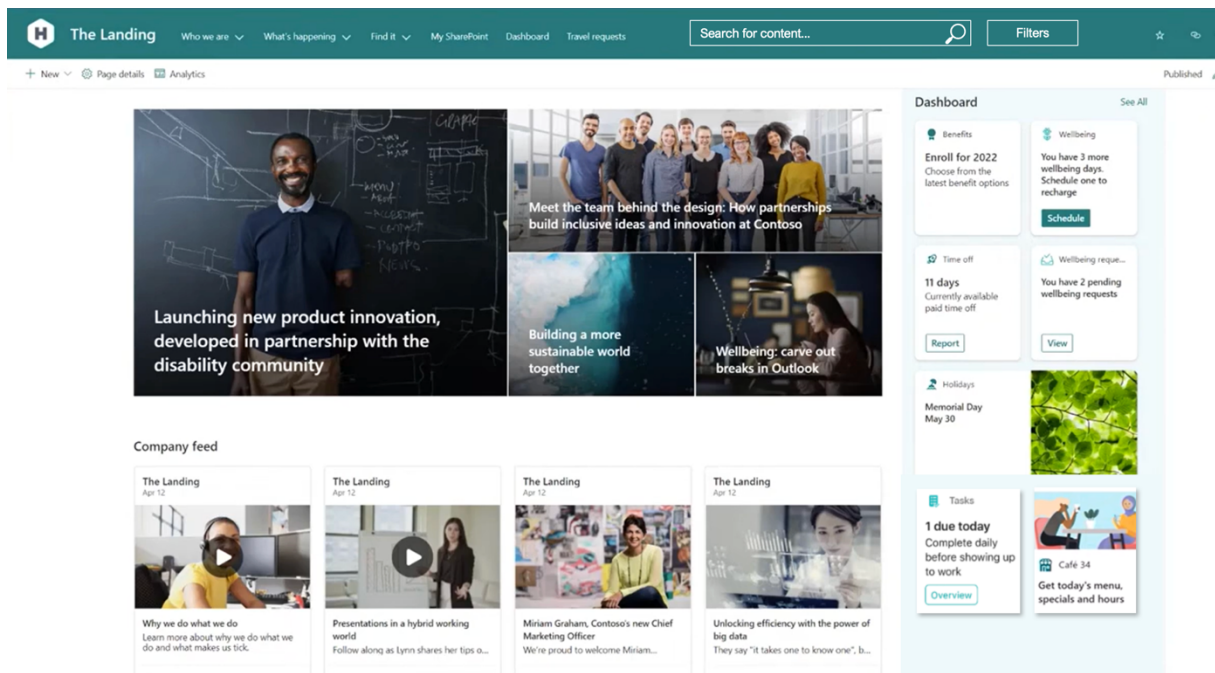
- Viva Engage was **very unpopular** amongst the main communication themes
- Viva Engage scored an average of **2,6** regarding the general perception

Category	Score
Efficiency	~2.6
Relevance	~2.6
Frequency	~2.2
Volume	~2.2

Appendix 12.a – iOne

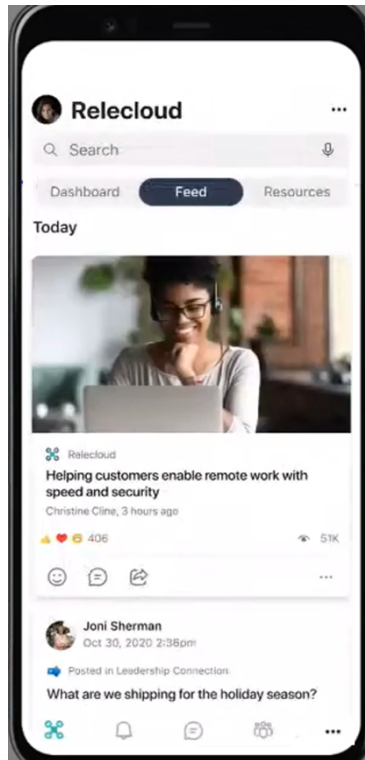


Appendix 12.b – New Landing Page



Group Part

Appendix 12.c – Mobile Friendly Experience (1)



Appendix 12.d – Mobile Friendly Experience (2)

