

How-to Guide

Conducting an Annual Review of Your Internal Communications Plan and Activities

Whether it is the end of the calendar year or your company’s financial year, it is good practice to do an in-depth annual review of your internal communications plan and activities. Reviewing your efforts of the past year can provide valuable input in shaping your plans and budget requirements for the coming year.

This how-to guide offers you a step-by-step approach to help you conduct the review and capture the learnings and ideas to build into next year’s plan.

STEP 1: REVISIT YOUR OBJECTIVES

The first step in the process is to revisit the objectives you set at the start of the review period as a reminder of what you set out to achieve at the beginning of the year.

Include both the formal objectives you set as part of your internal communication strategy and plan as well as the less formal aspirations and plans you had for the period under review – the various projects or activities you planned to undertake at the beginning of the year.

STEP 2: GATHER FEEDBACK AND INFORMATION

The next step in the process is to gather the feedback to help you review and assess the year’s activities. In this step you should focus on capturing the available data points you will use to objectively assess the year as well as feedback from your leadership team, direct reports or colleagues, and your most important customers.

Start by capturing the data points in support of the key performance indicators (KPIs) you identified at beginning of the review period when you set your objectives.

Table 1: Template for communication objectives (refer to the [How-to Guide](#) on developing an internal communication strategy)

Objective	What should audiences think/feel/do as a result	Key Performance Indicators (KPI)

Next, pull reports for your communication channels where you have access to analytics that are supported by technology.

Then, identify the relevant questions and sections in the employee surveys you've conducted during the period, as well as other sources of feedback from your audiences.

Finally, focus on getting feedback from your important stakeholders such as your leadership team, direct reports or colleagues, and your most important customers.

TIP: Ask your stakeholders what they feel went well and what could have gone better. Encourage your stakeholders to give specific details and consider using the STOP-START-CONTINUE feedback model.

STEP 3: REVIEW AND REFLECTION

In step 3 you will focus on two activities. First, you will review the feedback gathered in step 2 and assess how you did against the objectives you set at the beginning of the review period. Then, you will spend time reflecting on our experience of the review period.

Review the information and data you collected in Step 2

In reviewing the data points and customer feedback you collected during step 2, look out for areas that stand out – the good and the bad – and explore the reasons for this. In your customer feedback, look out for trends that may indicate behaviours, actions or an approach that could enable consistent success or hamper your efforts.

Make sure you capture the learnings, successes and opportunities you identify throughout this step.

Reflect on your experience of the review period

Once you've reviewed the data points and your customer feedback, it is also important to spend some time to reflect on your own experience of the year and unpack the learnings that you can take into the future.

Start by reflecting on what you feel good about achieving during the period under review. Good questions to consider include:

- What went well?
- What do you feel proud of?
- Which activities or outcomes went better than expected?
- What made it successful?
- Are there learnings or best practices that you can take into the future?

Once you have reflected on what went well, it is time to tackle the activities that didn't go so well. Good questions to consider include:

- What could have gone better?
- Why didn't it go as planned?
- What was within your control to change?
- What was outside of your control to change?
- What could you have done differently? Can you take this learning into the future with you?

STEP 4: REMAINING ITEMS

As part of step 1, you not only noted the formal objectives you set for the year, but also the less formal aspirations and plans you had for the year – the projects or activities you planned to undertake at the beginning of the year.

Before closing out the review, take time to think through this list and identify the items you aimed to do but did not manage to complete.

What were the reasons you were not able to complete these items? Was it due to availability of time, budget, resources, skills and support or because there were shifts in the external environment, the business' focus or the needs and priorities of your audiences?

Finally, consider whether the activities you were not able to execute on in the last year are items you should roll over into your next plan or scrap from the list.

Item	Reasons why this item remains incomplete	Rollover into the next year, or scrap from the list?

STEP 5: CAPTURE THE OPPORTUNITIES FOR NEXT YEAR

In the final step of the review process, you will focus on noting the learnings, best practices and opportunities you want to capture as part of your plan for the coming year. To guide you in this process, use the template below:

OPPORTUNITIES FOR THE NEXT YEAR
The successes from the past year that I want to build on:
The new opportunities I've identified that will drive continuous improvement:
Important items I wasn't able to complete this year that should be carried over:
Behaviours, actions and issues I need to be aware of that could jeopardise success:

CLOSING

Making time to regularly review and reflect on the progress you are making against your plans and objectives is as important as investing the right level of effort and resources to deliver on your plans and objectives.

As you close out this review, think about when you will conduct your next review and schedule the review upfront in your calendar to help you prioritise this important step.

Finally, don't forget to celebrate the progress you and your team have made in the last year and to recognise areas of excellence and the contributions that made all the difference.