orangefiery

LEADERSHIP COMMUNICATIONS DURING COVID-19

A survey of US organizations

APRIL 3, 2020

Just be open and transparent with employees.
These are scary times.

Q21: What is the most important thing you would like to share with leaders regarding how they communicate with employees during the COVID-19 pandemic? (open-ended)

orange*fiery*

THE GREAT DISRUPTION OF COVID-19

evaluating leadership communications amid the ever-changing context of a pandemic

There is no precedent in our modern era for the disruption attributable to COVID-19, the disease caused by the novel coronavirus identified in Wuhan, China in December 2019. At the time of this writing, there are more than a million cases of COVID-19 worldwide and nearly 53,000 deaths. In the United States, there are more than 242,000 cases and 5,700 deaths and those numbers are increasing dramatically each day.

The public health response in the U.S. has been felt throughout business in society, with "shelter in place" orders covering 75% of the country that are expected to remain in place for weeks. Non-essential travel and large gatherings have been banned. Businesses, government agencies and nonprofits have had to dramatically change policies and practices, often with little notice or preparation.

Leaders have been forced to step forward with action and communications as never before in this time of crisis. This survey assessed how they are doing, what impressions they are creating and what the priorities should be for the future.

orangefiery

OBJECTIVES & METHODOLOGY

research objectives

- Understand how the COVID-19 pandemic was impacting organizations and their communications practices

- Determine what kinds of communications organizations were carrying out to navigate the COVID-19 disruption

- Understand what impact those communications were having on employees

- Understand employee expectations for future communications

methodology

- Online survey of employed U.S. adults age 18-64

- Fielded March 25 to March 29, 2020

- 454 respondents

- Confidence level 95%, margin of error: +/- 4.6%

COMMUNICATING DURING COVID-19

KEY FINDINGS

DATA

RECOMMENDATIONS

APPENDIX

orangefiery

" *A lot of people are freaking out and maybe just need someone or something to reach out to, to help keep them at ease.*

Q21: What is the most important thing you would like to share with leaders regarding how they communicate with employees during the COVID-19 pandemic? (open-ended)

orangefiery   6

KEY FINDINGS

1. The public health response to COVID-19 has had an impact on most organizations, either shifts, decreased activity or (in fewer cases) increased activity.

2. Respondents say organizations have responded well to the communications challenge, providing frequent, on-topic communications in the right channels about the pandemic.

3. In rating the effectiveness of communications, smaller majorities said communications were very or extremely trustworthy, appropriate in tone, clear, and honest and open. Only a slim majority of respondents say they are extremely or very satisfied with the COVID-19 communications they have received from their employers.

4. Leaders rated organizational communications more highly than employees did on several issues, including trustworthiness, clarity, being open and honest, and successfully alleviating anxiety and concern.

5. Only about a quarter of respondents gave their organizations strong marks on three important leadership behaviors: clarity, honesty and being available for discussions and/or questions.

6. Less than half of employees said they believe their organization is extremely or very interested in hearing employee feedback during this pandemic.

7. In future communications, respondents say they want more transparency about what the organization knows and doesn't know, more information about resources for emotional and mental health, including dealing with stress and anxiety, and stronger acknowledgement of the difficulty of the situation.

8. In more than 200 open-ended answers, the top responses for what respondents felt was the most important thing for leaders to do in pandemic communications were: be open and honest, stay calm and lead by example, help employees stay safe and healthy, be factual, check in and be direct.

LOOKING AHEAD

Survey respondents provided insights into what concerns them the most and what they would like to see from their employers/organizational leaders when they are communicating about the COVID-19 pandemic.

There is still time to improve upon the communications around COVID-19 that have already been distributed, as the situation will likely continue for many weeks, or possibly months.

The following slides provide research results and actionable recommendations for improving your employee communications during the COVID-19 pandemic.

COMMUNICATING DURING COVID-19

KEY FINDINGS

DATA

RECOMMENDATIONS

APPENDIX

orangefiery

COVID-19 HAS CAUSED UNPRECEDENTED DISRUPTION

83%

said the public health response to COVID-19 *has had an impact* on their organization

Shift in activity (e.g., delays, new focus/priorities) — 58.4%

Decrease in activity — 43.2%

Increase in activity* — 20.0%

Other** — 5.7%

None of the above — 4.6%
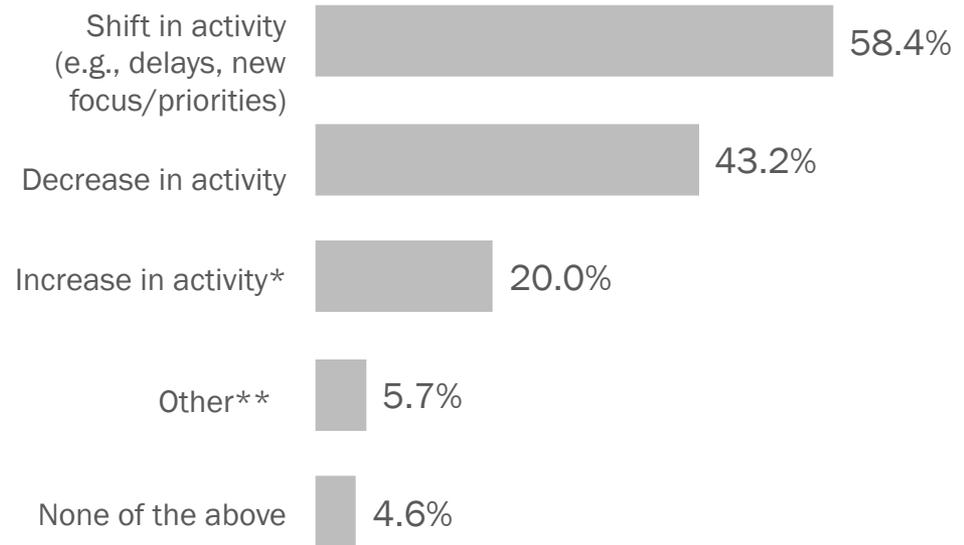
* Leaders more likely (26%) to say increase in activity than employees (18%)

** "Other" responses primarily noted a shift to remote work or having to stop work due to organization closure

SOURCE: Orangefiery analysis. Online survey conducted March 25-29, 2020

Q6: Please rate how much you agree or disagree with this statement: the public health response to COVID-19 has had an impact on my organization (Strongly agree, agree, neutral, disagree, strongly disagree) Q7: What kind of impact has the public health response to COVID-19 had on your organization?

orange*fiery* | 10

ORGANIZATIONS HAVE RISEN TO THE COMMUNICATIONS CHALLENGE

85%
said their organizations have been *using the right communication channels* to reach them

83%
said organization leaders have been *keeping their promises* by doing what they said they would do and communicating what they said they would communicate

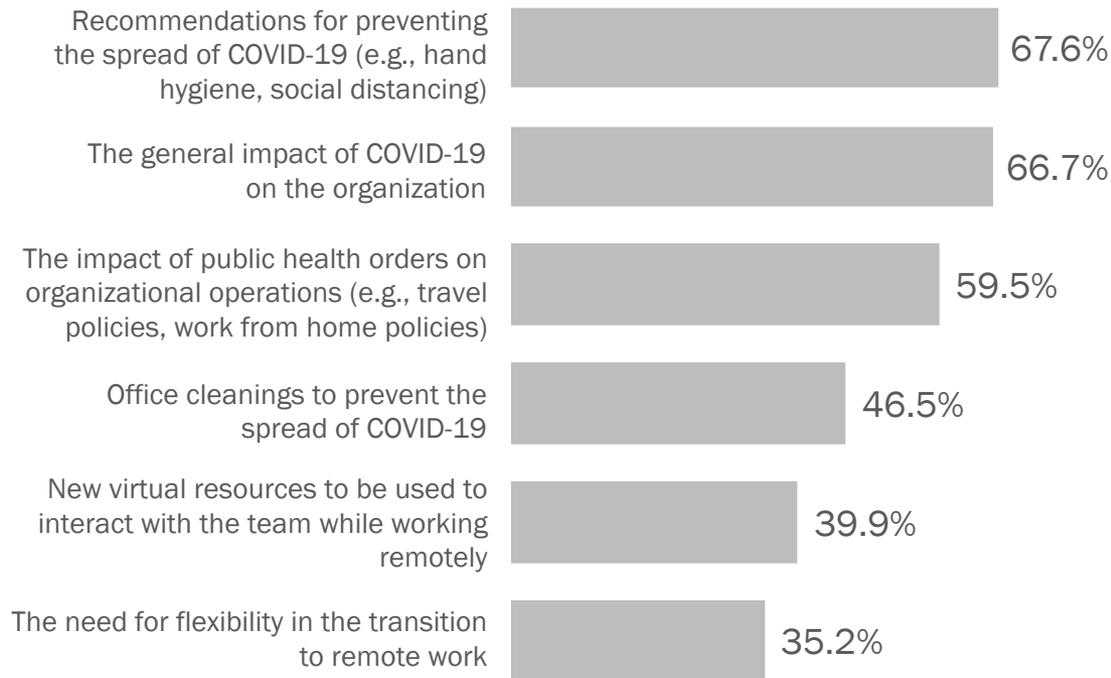## 79%
said communications *have been frequent enough*

43%
said communications have been *more frequent than usual*

SOURCE: Orangefiery analysis. Online survey conducted March 25-29, 2020

Q12: Do you believe the communications have used the right/appropriate channels (e.g., email, internal messaging platform, meetings) to reach employees? Q16: Do you believe your organization's leaders have kept their promises in terms of doing what they said they would do and communicating what they said they would communicate? Q11: Do you believe the communications have been frequent enough?

FOCUS IS ON IMPACT, OPERATIONS, PREVENTION AND REMOTE WORK

Recommendations for preventing the spread of COVID-19 (e.g., hand hygiene, social distancing) **67.6%**

The general impact of COVID-19 on the organization **66.7%**

The impact of public health orders on organizational operations (e.g., travel policies, work from home policies) **59.5%**

Office cleanings to prevent the spread of COVID-19 **46.5%**

New virtual resources to be used to interact with the team while working remotely **39.9%**

The need for flexibility in the transition to remote work **35.2%**

82%
said communications have *focused on the right topics*

RESPONDENTS RATED COMMUNICATIONS FAIRLY WELL ON TRUST, TONE, CLARITY AND HONESTY

66%
believe that the communications are *extremely or very trustworthy*

66%
believe that the *tone of the communications is extremely or very appropriate*

64%
believe that the *messages in the communications are extremely or very clear*

63%
believe that the communications are *extremely or very honest and open*

orangefiery | 13

ORGANIZATIONS MAY BE DOING LESS WELL ON SATISFYING NEEDS AND PROVIDING USEFUL DIRECTION ON WHAT TO DO

55%
of employees and leaders are *extremely or very satisfied* with the communications about COVID-19

30% are moderately satisfied

11% are not very or not at all satisfied

53%
of employees and leaders believe that the communications are *extremely or very useful in communicating what employees should think and do*

30% believe they are moderately useful

13% believe they are not very or not at all useful

COMMUNICATIONS RECEIVED LOW MARKS FOR ACCURACY, KEY AREAS OF CONCERN

38%
said communications
have always been factually accurate

34%
said the messages
have a clear purpose

25%
said communications do not
effectively address misinformation and/or rumors

23%
said messages are not very or not at all successful at *alleviating anxiety and concerns*

ONLY ABOUT A QUARTER OF RESPONDENTS SAY COMMUNICATIONS THEY RECEIVED REFLECT THREE IMPORTANT LEADERSHIP BEHAVIORS

28%
said communications have used *clear messages and clear and consistent terminology*

23%
said communications have clearly indicated *what leaders know and don't know*

23%
said communications have indicated that *company leadership are available for discussions/questions*

although 78% said their organization's leaders are as available as they should be

IN SOME AREAS, LEADERS GAVE HIGHER MARKS THAN EMPLOYEES

	leaders	*employees*	*% difference*
Communications are honest and open	75%	58%	17
Communications are successful at alleviating anxiety and concern	46%	33%	13
Communications are frequent enough	85%	76%	9
Communications clearly indicate what leaders know and don't know	29%	21%	8

orangefiery

IN OTHER AREAS, EMPLOYEES DESCRIBED COMMUNICATIONS DIFFERENTLY THAN LEADERS

	employees	*leaders*	*% difference*
Communications have an appropriate tone	54%	45%	9
Communications acknowledge the difficulty of the situation	48%	39%	9
Communications use clear messages and clear and consistent terminology	30%	24%	6
Communications have a clear purpose	36%	30%	6

orangefiery

FEWER THAN A THIRD OF RESPONDENTS SAY COMMUNICATIONS ADDRESS EMPLOYEE BENEFITS & EMOTIONAL/MENTAL HEALTH

31%

of organizations are communicating *about sick days, personal days and other benefits* to deal with sick family members, children at home, etc.

24%

of organizations are communicating about *resources for emotional and mental health*, including dealing with *stress and anxiety*

Leaders are *more likely than employees* to say this information is being communicated (29% v. 22%)

orangefiery | 19

Don't just acknowledge the situation. Do something about it if you do care about the well being of employees. Provide benefits when times are tough for employees as we are there ready to work hard every day. It's a two-way street.

Q21: What is the most important thing you would like to share with leaders regarding how they communicate with employees during the COVID-19 pandemic? (open-ended)

orangefiery   20

WILL EMPLOYERS STEP UP THEIR COMMUNICATIONS EFFORTS? RESPONDENTS AREN'T SO SURE

54% of employees
(v. 64% of leaders)

believe their organization is
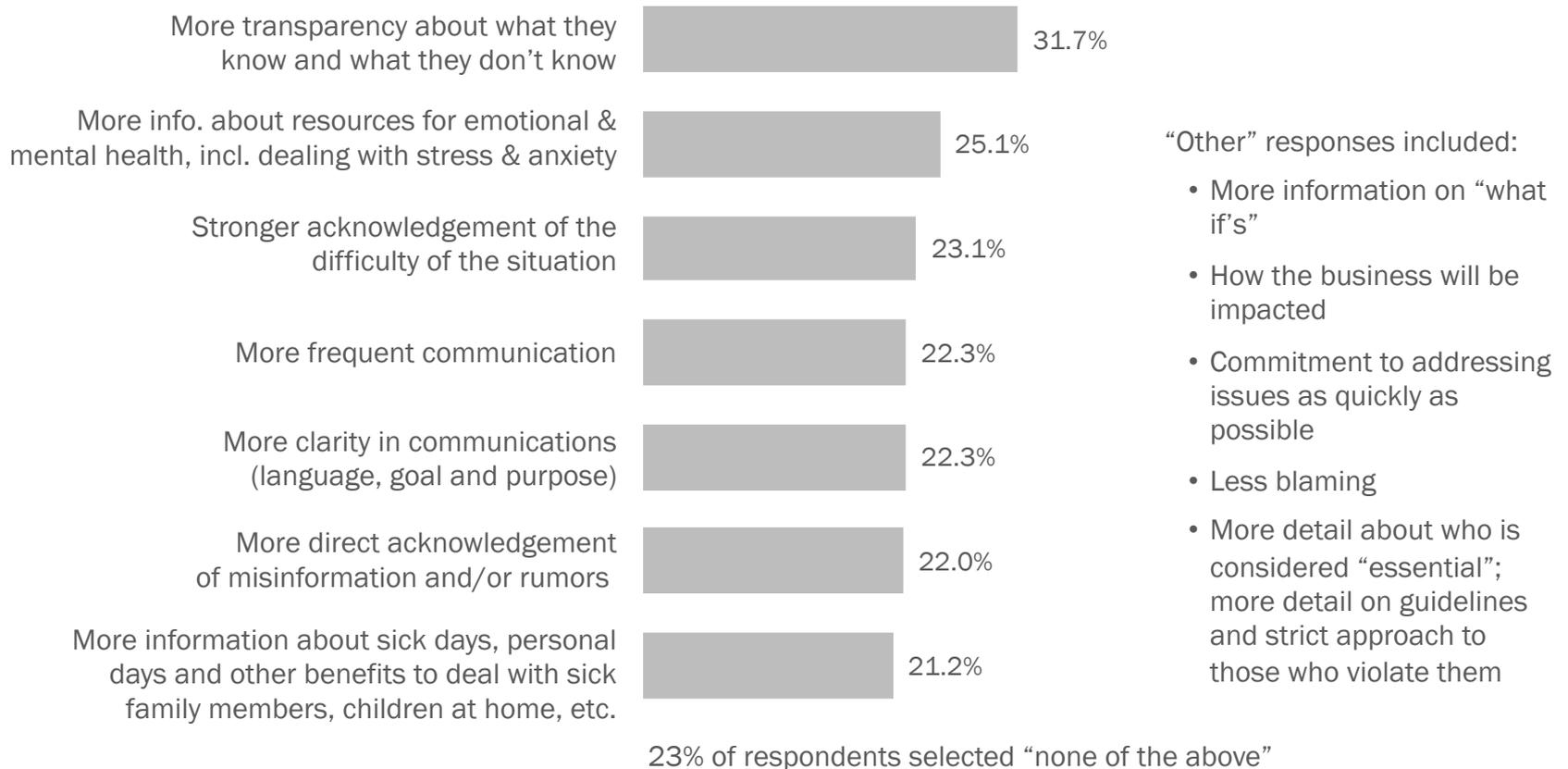*extremely or very committed to satisfying employee communications needs*

43% of employees
(v. 60% of leaders)

believe their organization is
extremely or very interested in hearing employee feedback during this pandemic

WHAT RESPONDENTS WANT TO SEE MORE OF FROM COMMUNICATIONS

More transparency about what they know and what they don't know — 31.7%

More info. about resources for emotional & mental health, incl. dealing with stress & anxiety — 25.1%

Stronger acknowledgement of the difficulty of the situation — 23.1%

More frequent communication — 22.3%

More clarity in communications (language, goal and purpose) — 22.3%

More direct acknowledgement of misinformation and/or rumors — 22.0%

More information about sick days, personal days and other benefits to deal with sick family members, children at home, etc. — 21.2%

23% of respondents selected "none of the above"

"Other" responses included:

- More information on "what if's"
- How the business will be impacted
- Commitment to addressing issues as quickly as possible
- Less blaming
- More detail about who is considered "essential"; more detail on guidelines and strict approach to those who violate them

"

*We need more regular updates.
Our lives are hanging in the balance
and we should not be left feeling like
we have no idea what's going on.*

Q21: What is the most important thing you would like to share with leaders regarding how they
communicate with employees during the COVID-19 pandemic? (open-ended)

orangefiery | 23

RESPONDENTS SAY THEY WANT RELEVANT CONTENT TO UNDERSTAND PERSONAL IMPACT

"

scenarios of the impact of COVID-19 on the organization and the organization's plans

"A clear plan in the event of a shut down"

"More transparency of what the scenarios of the future could be"

"Long-term guidance and outlook based on different scenarios"

the impact on my role and work

"More communication about the impact on employees"

"More about how goals are shifted/what expectations for work are"

"More of a plan, less confusion for employees"

"Communication from leaders about what they are doing and what is expected of us as employees"

the impact on my job security

"I wish there was more communication about if I still have a job"

"Communicate with ALL employees directly about pay"

benefits information and other resources

"Plans regarding our pay and benefits especially when the company is losing money"

"More options for those of us that need the work to keep paying bills"

"More empathy and employee programs to help with hardships"

"More information about resources for people with anxiety or who are prone to panic"

orangefiery

PEOPLE WANT CONSISTENT MESSAGES, WITH VISIBILITY FROM LEADERSHIP

strong leadership from the top

"Communication has been varied at different levels and a more coordinated communication is needed; little has come from the highest level and possibly too much from lower levels of the administration"

"Management follow directions from upper management on how to proceed"

consistency of communications across all levels of the organization

"More consistency across groups/divisions"

"Everyone in the work business should be filled in on the same information so there are no lost or confused people"

"It has been 100% email and inconsistent depending on source/author"

"They filter things through a hierarchy of managers instead of being open with all employees; different departments get different 'spins' on information because of this"

"Communication should come from a single source to avoid discrepancies"

frequent communications and opportunities to connect with leaders

"I would mostly like more frequent communication and discussion with management"

"Try and be more frequent and tell us what are the thoughts of the leadership"

"More frequent in person flow from my 'leaders'"

(K)eep calm as everyone is struggling.
We need to do what we can and
some sacrifices will be made.

Q21: What is the most important thing you would like to share with leaders regarding how they communicate with employees during the COVID-19 pandemic? (open-ended)

orange*fiery*   26

RESPONDENTS SAY THE MOST IMPORTANT THINGS FOR FUTURE COMMUNICATIONS INCLUDE HONESTY, CALM, SAFETY (1/2)

be honest and transparent
Do not sugar coat any information. Stay honest even if the news is difficult to deliver.

stay calm, lead by example
Staying level-headed and calm helps set the tone for the organization.

help employees stay safe and healthy
Let employees know you are prioritizing their health and safety. Share information about what the company is doing to ensure safety.

be factual
Messages should be based on facts from reliable sources and acknowledge that current facts may change.

check-in and care
People are scared and anxious; do not minimize this. Find a way to check-in with staff to get updates on how they are doing.

be clear and direct
Information and updates should be delivered clearly and concisely – no cryptic messages.

"Be upfront. Let them know the bottom line and what to expect. Give encouragement but not false hope."

"Keep calm. The employees relax when you do."

"Let us keep working from home 'til it's over."

"Keep doing what they are doing by keeping us informed every step of the way. Also keep telling people how important it is to distance ourselves from each other now and especially from the elderly."

"Don't brush aside peoples' anxieties."

"Be clear and concise. Stop the canned responses and cryptic messages."

SOURCE: Orangefiery analysis. Online survey conducted March 25-29, 2020

Q21: What is the most important thing you would like to share with leaders regarding how they communicate with employees during the COVID-19 pandemic? (open-ended) Answers ranked in order of number of responses per category.

orangefiery

RESPONDENTS SAY THE MOST IMPORTANT THINGS FOR FUTURE COMMUNICATIONS INCLUDE HONESTY, CALM, SAFETY (2/2)

communicate more
Provide frequent updates to staff and let them know what's going on; don't leave anyone in the dark.

be positive and remain optimistic
Even though times are uncertain and stressful, remain positive and be responsibly optimistic.

job security
Address concerns about job security proactively and directly.

scenarios and plans
Let staff know that you are planning for the future and considering various scenarios. Staff are looking for reasons to feel confident that their employers are thinking ahead.

acknowledge working together
Show appreciation of staff's commitment to the organization during this stressful, unprecedented time.

"

"Please overcommunicate."

"Stay positive."

"Employees want to know the company is as committed to us as we are to them."

"Don't keep changing things daily. Come up with a plan and execute it."

"We are a team. It shouldn't be a 'my way or the highway' approach."

orangefiery

COMMUNICATING DURING COVID-19

KEY FINDINGS

DATA

RECOMMENDATIONS

APPENDIX

orangefiery

ACTIONABLE STEPS LEADERS CAN TAKE TO IMPROVE COVID-19 COMMUNICATIONS (1/2)

1. Show empathy for employees. The pandemic is having an emotional toll on many, and they are worried and anxious about their health and job security. Keep this in mind in your communications.

2. Care. Show that you care about your employees and that they are your top priority.

3. Be a visible example of how to stay positive in a difficult situation. (As one of our respondents said, "Employees relax when you do.")

4. Share information on dealing with stress and anxiety, although take care not to be too directive about it. Provide resources that offer a variety of suggestions so that each employee can find something that is right for them.

5. Be specific, clear, factual and transparent in communications, even showing a willingness to say what you don't know when you don't have the answer.

ACTIONABLE STEPS LEADERS CAN TAKE TO IMPROVE COVID-19 COMMUNICATIONS (2/2)

6. Provide specific information about the measures the organization is taking to protect employee health. Also, address employees' needs on issues like safety measures, benefits, sick pay and compensatory time.

7. Establish direct communications channels from leaders to employees, so news does not get filtered or "spun" on its way through the organization.

8. As operations shift to a new (even temporary) "normal," address open questions about long-term impact on the organization.

9. Ask people how they're doing and create mechanisms to regularly solicit employee feedback.

10. As operations normalize, seize the opportunity to build greater trust and satisfaction through communications.
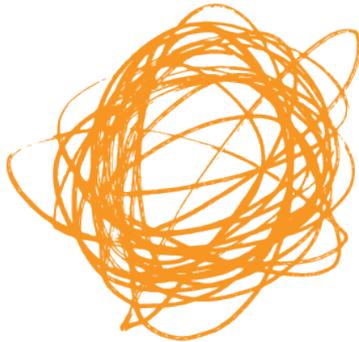
COMMUNICATING DURING COVID-19

KEY FINDINGS

DATA

RECOMMENDATIONS

APPENDIX

orangefiery

ABOUT US

Orangefiery is a consulting and communications firm focused on helping leaders and brands navigate inflection points. We aspire to provide our clients in healthcare, technology and other sectors with intellectually rigorous work that inspires their stakeholders and advances their business goals. With diverse backgrounds in management consulting, corporate communications, brand strategy and journalism, we design and implement real-world, actionable tools and frameworks to help leaders navigate challenges and growth opportunities with positive outcomes.

Founded in 2014

Offices in the Bay Area and NYC

Senior team model; 15-20+ years of communications experience

Focus on helping executive teams navigate inflections points

THANK YOU