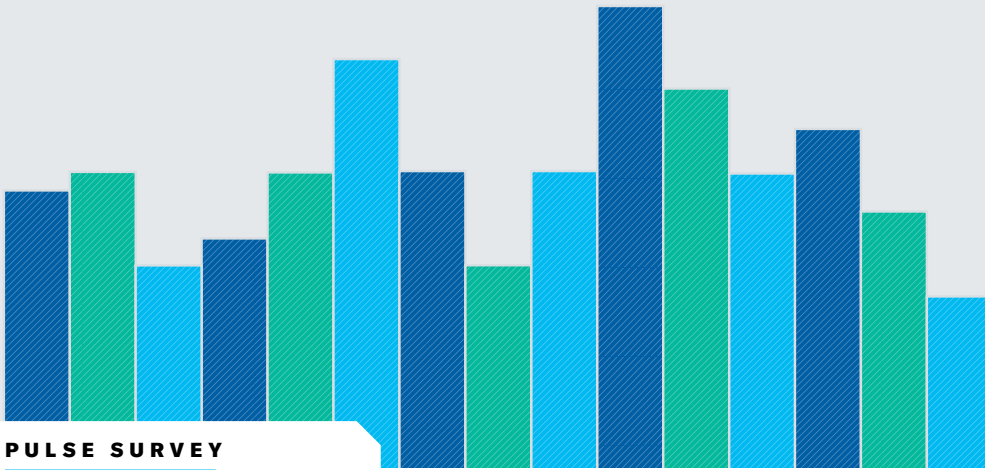


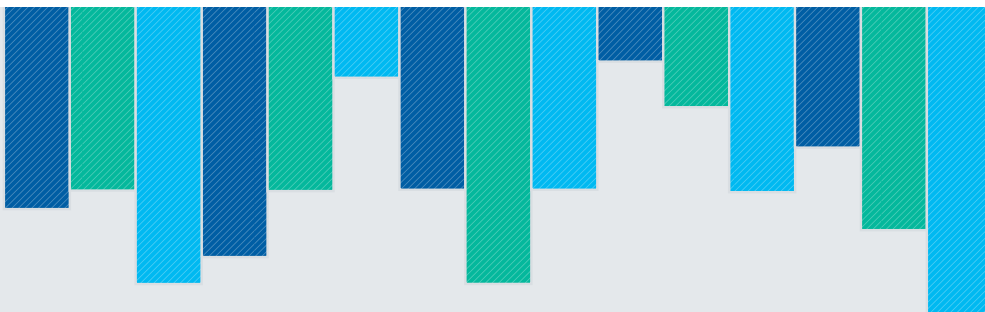


**Harvard
Business
Review**

ANALYTIC SERVICES



Harnessing Visual Communications to Build Trust and Connections



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There's no denying the pandemic unexpectedly turned our world upside down, like a great tsunami washing away and replacing aspects of our "normal." Diversified embarked upon this research journey with Harvard Business Review Analytic Services months before Covid-19 hit—seeking to gain insights on how businesses communicate, expecting that the digital transformation would continue to slowly build but wouldn't be truly realized for some time. After enduring rapid change this past year, this research is even more critical for business leaders everywhere.

Through its many challenges, the pandemic accelerated the realization of our digital future. Never before have so many people—both personally and professionally—engaged in the use of visual communication technologies, and no, we don't just mean through Zoom or Teams. Yes, collaboration tools are important but so, too, are digital signage for wayfinding or disseminating mass notifications, webcasting to deliver a message, and operations centers to visualize and act on developing situations. Embracing these technologies broadens your reach and enables meaningful connections despite social distancing. Still, we understand that is easier said than done.

Before the pandemic, visual communications were primarily gaining momentum with progressive companies, master communicators, and celebrity CEOs. However, most considered these technologies "nice to have," not mission-critical. When Covid-19 irreverently upended our world, leaders were forced to pivot quickly not only to maintain business continuity but more importantly, to communicate plans to adapt in ways that made employees feel safe.

Executives could no longer hop on a flight to stay in touch with local employees or clients. Managers were suddenly unable to huddle with their teams around a conference table. Coworkers could no longer meet at the water cooler to connect day to day. The world felt distant, and most everyone was forced to replace human experiences they once took for granted. Leaders had to evolve in order to thrive once the waves of the tsunami settled.

As providers and consumers of these technologies, we know visual communications help build trust and are an effective alternative to interhuman experiences. But simply knowing it's important to build trust and camaraderie is no longer enough. Modern leaders must now take the next step in deploying technologies to connect with customers and stay ahead of the competition as well as attract and retain top talent.

We encourage you to read on for invaluable insights on how you can take the next step and make a true difference in how the world views your business.



Anthony Cuellar
Senior Vice President,
Global Marketing
Diversified

Harnessing Visual Communications to Build Trust and Connections

Effective communication between business leaders and their employees and stakeholders is table stakes. It helps build trust and enable collaboration, ultimately leading to innovation and business growth. Often, the most productive interactions entail a visual component—for instance, videoconferencing—which contributes to more personal, interactive, and agile meetings.

The Covid-19 pandemic has been a stress test of how well organizations harness visual communication technologies to maintain business continuity and bring success to their companies. Organizations that utilize visual communication technologies are better able to build trust by enhancing dialogue between their leadership, employees, and customers.

“We very quickly and fully implemented web-based visual communications across the company so that we could ensure that both our internal business continuity and our alignment with our company vision and our culture continued,” says Aimee DiCicco, senior vice president of commercial business development at FedEx Office, of her company’s response to the Covid-19 crisis.

A March 2020 Harvard Business Review Analytic Services survey of 298 executives reveals the importance companies place on visual communication technologies, defined as any technology that facilitates integrated visual or audiovisual communication, including digital video, livestreaming video, social media images/video, digital signage, and videoconferencing.

The survey found that even before the pandemic unfolded, when business leaders communicated effectively with their audiences, they helped build trust and success for their companies. In addition, executives overwhelmingly agree that to establish trust, business leaders need to make themselves visible to internal audiences (92%) and external audiences (85%).

HIGHLIGHTS



92% of executives agree that to establish trust, business leaders need to make themselves visible to internal audiences.



87% of executives agree that leveraging modern communication technologies for both internal and external business needs is critical to an organization's success today.



59% of business leaders agree that lack of trust in an organization leads to loss of top talent and trouble hiring the best talent.

However, the survey also reveals that while business leaders recognize the importance of communication technologies and visibility for building trust and business success, many lag in terms of the adoption of such technologies. The first step toward bridging this gap is for companies to make visual communication technologies part of a strategy. Creating a road map for their use can help business leaders become more visible to their organization.

This report discusses the importance of trust for business success and how visual communication technologies help foster it. The report also delves into benefits of visual communications, such as collaboration and revenue-generating opportunities, while looking into challenges that companies have with the adoption of visual communication technologies.

Visual Communications Bring Big Benefits

The Covid-19 pandemic has put a spotlight on bolstering communication and building trust between companies and their employees—and enhancing collaboration to ensure business continuity. “In the midst of uncertainty and in crisis, connection is more important than ever,” says J.P. Gallagher, president and CEO of NorthShore University HealthSystem (NorthShore) in the Evanston, Ill., area.

According to the Harvard Business Review Analytic Services survey, videoconferencing is cited by more than one-third of executives (37%) as their most used visual communication technology to connect internally, followed by theater-style presentations accompanied by screens (36%) and streamed town hall presentations via videoconferencing (32%).

The pandemic has only accelerated the adoption of visual communication technologies. At Accenture, for example, videoconferencing increased from 14 million minutes a month before the pandemic to 90 million a month (equivalent to more than 170 years) during the pandemic, according to Marc Carrel Billiard, senior managing director and global innovation lead at Accenture.

The use of visual communication technologies has been yielding business benefits for organizations. For instance, 63% of senior executives say remote work and video communications have resulted in creating a more agile organization that is able to pivot quickly, according to a November 2020 survey of 357 global professionals by Forbes Insights and Zoom. More than half of those survey respondents (56%) say that video meetings have been effective for generating innovative ideas on how to improve the business.

But it also takes certain leadership qualities to build trust with employees, customers, and investors. The most important qualities that enable senior leaders to build trust,

the Harvard Business Review Analytic Services survey finds, are showcasing ethical business practices and leading by example (70%). Respondents also point to leaders being transparent about changes in the organization (57%) and listening and responding to their audiences (54%) as the two other most important qualities for building trust.

On the flip side, the inability to build and maintain trust can have harmful effects on organizations. While lack of trust clearly hurts the organization externally with customers and partners, lack of trust can do the most damage internally, as it negatively impacts the hiring and retention of employees, morale, and corporate culture. **FIGURE 1**

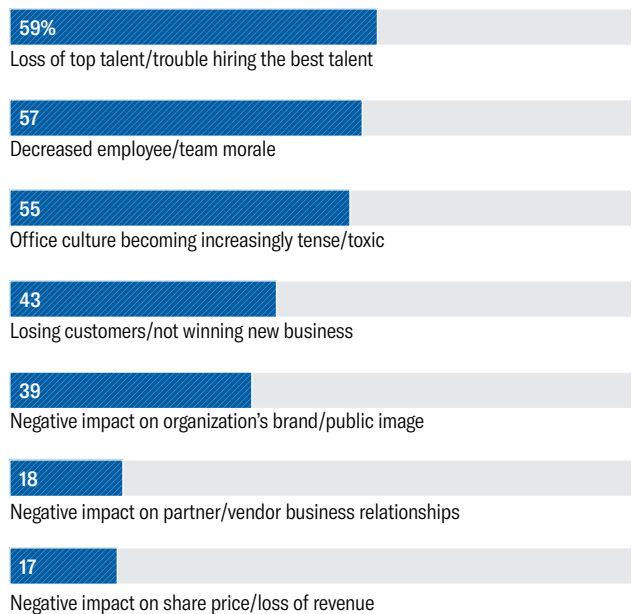
Companies need better communication strategies, particularly while many companies continue working remotely, to hire the best talent and maintain business operations. ClickUp, a workplace productivity platform, is currently on a hiring spree, adding around 15 new employees per week. With onboarding done virtually, Zeb Evans, ClickUp’s founder and CEO, relies on visual communications to meet his new employees. “I’m still able to connect with everyone

FIGURE 1

Trust Is a Must

Workforce issues are the most likely to emerge in organizations without trust

What are the most harmful potential business impacts of internal (e.g., employees) and external (e.g., consumers, investors) audiences not having trust in an organization?



Source: Harvard Business Review Analytic Services Survey, March 2020



“If people can see their leaders face-to-face, they have that emotional connection with the person who’s delivering the message. It’s a much deeper bond. Visual communication is a key piece for building trust,” says James Lake, global audiovisual architect, Siemens Digital Industries Software.

and get to know who they are as a person. I do a culture and core values presentation via visual communications so that even though they’re remote, they still feel connected and a part of our community,” he says.

FedEx Office’s DiCicco says her company used visual communications to completely reimagine its new employee onboarding and training due to the pandemic, shifting it from a multiday in-person experience to a more virtual learning environment that creatively educates, engages, and drives alignment with company goals. “[Virtual onboarding] has had a very positive impact on our team members’ time and their work-life balance,” she says.

“Under these difficult conditions, companies need to care for and nurture talent. They can achieve that by maintaining a sharp focus on developing policies that support their people, like flexible work arrangements, and supplying technology solutions that allow people to connect with each other,” says Laura Newinski, deputy chair and chief operating officer at KPMG U.S., in KPMG’s “2020 U.S. CEO Outlook” report.

Building Trust through Technology

The Covid-19 pandemic has created a deep need for building trust between leadership and employees, many of whom have been struggling with economic, health, and child care concerns. To maintain that trust and reassurance about the future, organizations should first create a strategy that ensures the continuity of the workforce and put in place programs that help employees manage remote work with family needs, including caregiving and remote learning.

After establishing a strategy and developing programs to support employees, organizations need to communicate these developments to employees—and to build trust, communication should come from the organization’s leadership. “Seeing your leaders in front of you is one of the key ways to build trust,” says James Lake, global audiovisual architect at Siemens Digital Industries Software, an industrial software company specializing in electronic design automation and product-lifecycle management software.

Ninety-five percent of respondents to the Harvard Business Review Analytic Services survey consider strong internal communication directly from a business leader regarding changes to the organization as helping establish trust within the organization.

“If people can see their leaders face-to-face, they have that emotional connection with the person who’s delivering the message. It’s a much deeper bond. Visual communication is a key piece for building trust,” adds Lake. In an era of remote work and where face-to-face communication isn’t physically possible, visual communication technologies allow employees to see and connect with their leaders.

It should not come as a surprise, then, that nearly two-thirds of respondents (64%) say that the best “rock star” business leaders—those with powerful public personas—are the ones who communicate the most effectively. But many business leaders don’t stack up. Thirty-four percent of executives say business leaders communicate very effectively or extremely effectively with internal audiences, and 40% say those leaders have mastered effective communication with external audiences to the same degree, showing room for improvement.

The keys to trust-building communication are transparency and authenticity, according to Gallagher. That’s true whether the most important messages that leaders need to convey are the most difficult, as was the case at the beginning of the pandemic, as well as whether those messages are procedural or celebratory. For instance, NorthShore was the first health system in Illinois to develop and launch in-house Covid-19 testing in early March 2020, and it mobilized one of its hospitals to centralize care for Covid-19 patients across the system, which involved a great deal of internal and external communication. At the same time, all nonemergency services were shut down under the quarantine restrictions, essentially turning off all revenue from other services that normally support the organization’s employees.

“We pushed out a lot of information about the economic impact of the virus on our organization,” says Gallagher. “We had to communicate with our employees frequently about what we were doing and how we were doing it. To update employees, we put out brief video messages that



With in-person meetings suspended due to the pandemic, businesses have ramped up their use of visual technologies to bolster collaboration.

were authentic and less rehearsed than official memos, which helped in the heat of the moment given everything that people were juggling.”

Visual Technologies as Collaboration Tools

Visual communication technologies also help businesses collaborate better. A study by the Institute of Corporate Productivity and Rob Cross, Edward A. Madden Professor of Global Business at Babson College,¹ found that companies that promote collaborative working were five times more likely to be high performing.

DiCicco describes how visual communication tools helped foster collaboration across functions at her organization. “Internally, the combination of visual technologies enabled us to have that real-time collaboration, get immediate feedback, and allow the various departments within FedEx Office, whether it be marketing, facilities, management, operations, or planning, to be able to continue to collaborate,” says DiCicco. “We were able to continue to work closely to provide viable solutions for both existing and new clients coming to us across all industries and businesses of all sizes.”

The Harvard Business Review Analytic Services survey shows how well these tech tools work to foster collaboration. The most-cited (40%) benefit of leveraging visual communication technologies is that they enable collaboration among employees and teams. **FIGURE 2**

With in-person meetings suspended due to the pandemic, businesses have ramped up their use of visual technologies to bolster collaboration. To make visual collaboration more agile, ClickUp created an internal tool, Clip, to increase productive collaboration. Clip enables the creation of short, shareable videos that can be viewed at any time in place of scheduled videoconferences, saving people time but still allowing for clear communication. “You don’t always need a full meeting in order to interact with somebody. You may

FIGURE 2

Visual Communications Enhance Collaboration

Improved collaboration is the top benefit of visual communication technologies

Which of the following benefits has your organization achieved from its use of visual communication technology?



Source: Harvard Business Review Analytic Services Survey, March 2020

just need to update somebody on the latest developments or data. For instance, for our daily analytics meetings, instead of booking a block of time, we make presentation videos. It has made us more efficient,” says Evans.

Accenture has also adapted. The company’s Immersive Collaboration Platform uses extended reality technologies to “teleport” people and let them have interactive experiences virtually. The platform brings people together, wherever they are in the physical world, in an immersive and collaborative virtual-reality environment. Participants on the platform are able to interact with digital objects—and each other—through a combination of sensorial and immersive technologies.

To keep employees informed, Siemens has been using digital display communications around its office building, which work extremely well in rapidly changing situations



63%

**of senior executives
say remote work and
video communications
have resulted in
creating a more agile
organization that is
able to pivot quickly.**

**Survey by Forbes Insights and Zoom,
November 2020**

as employees are instantly and continuously updated with new information.

External Communication and Revenue Generation

Communicating with customers rather than employees calls for different tech tools and communication strategies. The most popular visual communication technology for external audiences, the Harvard Business Review Analytic Services survey found, is prerecorded video delivered via company social media channels (38%), followed by prerecorded video delivered via company website (32%) and videoconferencing and theater-style presentations accompanied by screens (each 21%).

The survey shows that before the pandemic, though, many companies weren't surprising and delighting their customers through these technologies. Only 21% of respondents say they've created a wow factor for customers through visual communication technologies.

In the era of the elevated customer experience, effective use of visual communication technologies starts with understanding what the customer wants. Thanks to its deep understanding of its customers' needs, for FedEx Office, using visual communications to help clients during the pandemic came naturally. "The world of FedEx Office is where the digital and the physical come together," says DiCicco. "We use digital communication technologies to help our clients see where the physical visual communication strategies could be a benefit." To this end, FedEx Office created a website to show clients how best to use physical graphics and signage for safety messaging.

But other companies are not as in tune with their customers' preferences. The top challenge that organizations experience in their adoption of visual communication technologies to communicate with external audiences is lack of research on external audiences' preferences in terms of visual communication technologies (27%). **FIGURE 3** Other top challenges include lack of know-how about state-of-the-art visual communication technologies (26%) and senior leadership not championing visual communication technologies for external communications (23%).

Few businesses are able to incorporate visual communications as part of a new business model to generate revenue (10%) or perceive such technologies as beneficial (4%). With visual communication technologies enabling new, enhanced marketing and distribution channels, the next stage of achieving digital maturity will be to use these technologies as tools to transform business models.

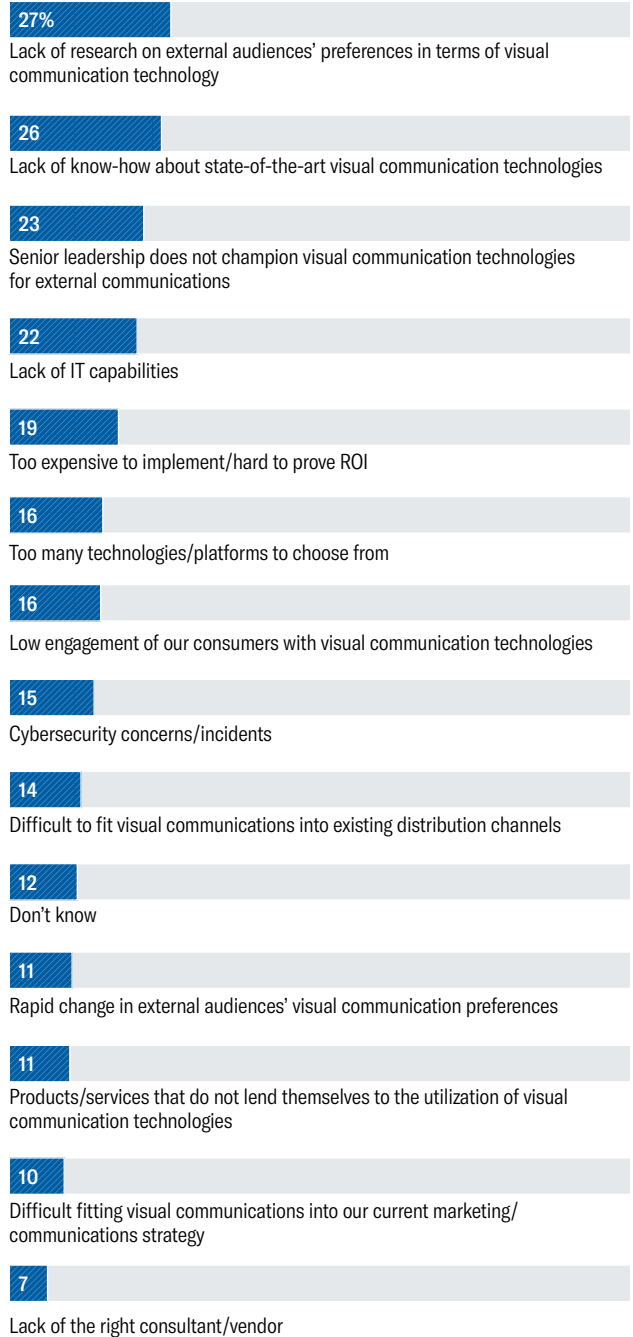
FedEx Office has been making use of visual communication technologies for sales by bringing solutions to potential clients via webinars and online Q&A sessions. "Visual

FIGURE 3

Know Thy Audience

Organizations don't know what visual communication technologies their customers want

What, if any, challenges has your organization experienced in its adoption of visual communication technology to communicate with external audiences (e.g., consumers, investors)?



Source: Harvard Business Review Analytic Services Survey, March 2020



In the era of the elevated customer experience, effective use of visual communication technologies starts with understanding what the customer wants.

communication technologies allow our sales teams to connect our experts with existing and new customers to help educate them on different ways to approach the business in this new environment,” says DiCicco.

Gallagher recognizes the potential of visual communication technologies to improve care for patients at NorthShore. For instance, he says that telemedicine can improve access to health care by offering an alternative way to visit with doctors when transportation or concerns about spread of the virus prevent people from seeking care. The hospital system is making significant investments in digital platforms and smartphone capabilities. These investments not only enable patients to stay connected with their physicians but also help monitor their health, with readings transmitted digitally while the patient may be at home. “Such capabilities allow us to improve health while being responsible with our resources, which is key to providing meaningful experiences in value-based care models,” says Gallagher.

Understanding Roadblocks to Visual Communication Technologies Adoption

Companies don’t just face obstacles with external communication; they face them with internal communication, too. And inertia is frequently the culprit for why companies lag in adoption of state-of-the-art visual communication technologies. As one respondent to the Harvard Business Review Analytic Services survey notes, “[It’s a] legacy issue, wherein choices were made prior to social media, and new forms of media are held back in favor of existing contracts with various vendors. The marketing budget is, therefore, used primarily to support different media, which are less effective but have been established longer.”

The top challenges that companies experience in their adoption of visual communication technologies to connect with internal audiences include lack of strategy for visual communications by senior leadership (42%), lack of know-how about state-of-the-art visual communication technologies (32%), and lack of internal IT support and training (30%). **FIGURE 4**

The survey thus reveals a significant gap between how executives perceive the need for modern technologies to communicate effectively and the current utilization of such technologies. Leveraging modern communication technologies for both internal and external business needs

FIGURE 4

Where There’s a Will, There’s a Way

Lack of strategy is the top challenge to the adoption of visual communication technologies

What challenges has your organization experienced in its adoption of visual communication technology to communicate with internal audiences (e.g., employees)?



Source: Harvard Business Review Analytic Services Survey, March 2020

is critical to an organization’s success today, according to 87% of business executives. However, only about half of executives say that their organization is very good at using visual communication technologies to effectively communicate with internal (48%) or external (49%) audiences, and fewer say their leaders use all the right visual communication technologies to interact effectively with all internal and



The increased use of visual communication technologies is expected to become a more permanent fixture, as people have come to expect visual communications to interact with organizations, whether as employees or customers.

external audiences, from consumers to the board of directors (43%). Clearly, there is a disconnect with business leaders believing that modern technologies are critical for staying in touch with stakeholders and yet not being adept at using visual technologies.

“There’s always a technology ramp,” says Lake. “We understand that the beginnings are painful. We have to do a really in-depth training. We would typically spend two weeks on-site to try and get 30% of the employees heavily trained on using new technology, because we’ve found that training a third really well is the tipping point in terms of adoption for us.”

To boost adoption—and create new use cases for visual communication technologies—companies should open technology development to other functions. “When we opened that technology to all of the users and not just the AV [audio visual] teams, people got very creative and adapted it to their needs like tracking metrics and industry news in real time and for interactive learning,” explains Lake. “It was a good lesson for us that we shouldn’t keep the technology under our umbrella but instead make sure that everyone has access and is able to shape it and change it.”

Once viewed as useful or nice to have, visual communication technologies have become a necessity for business continuity during the pandemic. Executives believe that video communications technologies have forever changed how companies work. After the pandemic subsides, 82% believe that more jobs will become remote and flexible, 74% believe that videoconferencing will become a dominant way to hold meetings, and 71% say that some office space will be eliminated, the Forbes Insight and Zoom survey found. The

momentum is clearly on the side of visual communication technologies, meaning business leaders need to spend time and resources on not only adopting and leveraging these technologies, but also on making them available and understandable to all employees.

Conclusion

The importance of visual communication technologies has been underscored by the pandemic. Organizations that tapped into the versatile opportunities presented by visual communication technologies are reaping the benefits in terms of building trust and enabling collaboration as well as creating new ways of interacting with their customers. The increased use of visual communication technologies is expected to become a more permanent fixture, as people have come to expect visual communications to interact with organizations, whether as employees or customers.

Companies should consider embedding visual collaboration technologies in processes and better utilizing such technologies to create or enhance new operating and business models. “[Thanks to visual communication technologies], we’ve been able to create more avenues than ever to meet our customers, employees, and team members where they are in a safe and efficient way,” says DiCicco. “This [way of engagement] can continue to help us foster trust in the future.”

Endnotes

- 1 Samdahl, Erik, “Prof. Rob Cross and I4CP Take Collaboration Partnership to the Next Level,” *The i4cp Productivity Blog*, August 2017. <https://www.i4cp.com/productivity-blog/prof-rob-cross-and-i4cp-take-collaborative-partnership-to-the-next-level>.

METHODOLOGY AND PARTICIPANT PROFILE

A total of 298 respondents drawn from the HBR audience of readers (magazine/ newsletter readers, customers, HBR.org users) completed the survey.

Size of Organization

24%
10,000 or more
employees

30%
1,000 – 9,999
employees

27%
100 – 999
employees

19%
Fewer than 100
employees

Seniority

28%
Executive
management/
board members

36%
Senior
management

18%
Middle
management

77%
Other grades

Key Industry Sectors

11%
Financial
services

8%
Technology

10%
Manufacturing

10%
Government/
not-for-profit

9%
Health care

8%
Education

9%
Business/
professional
services

All other sectors
less than 8% each

Job Function

22%
General/executive
management

8%
Consulting

All other functions
less than 8% each

Regions

43%
North America

22%
Europe

21%
Asia Pacific

8%
Middle East/
Africa

6%
Latin America

Figures may not add up to 100% due to rounding.



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