

# Information Mapping at the Bank of Montreal

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*“Whatever else you bring to the 21<sup>st</sup> century workplace, however great your technical skills and however attractive your attitude and however deep your commitment to excellence, the bottom line is that to be successful, you need to acquire a high-level of information literacy.*

*What we in the knowledge industries need are people who know how to absorb and analyze and integrate and create and effectively convey information – and who know how to use information to bring real value to everything they undertake. Blessed indeed are they who achieve mastery over these skills for they shall inherit the new century.”*

**F. Anthony Comper**

**Chairman and CEO, Bank of Montreal**

June 14 speech to University of Toronto 1999 graduating class

## Challenges with the Bank’s Communications

In 1996, an executive from line management of the branches indicated that the volume of communication was unacceptable and asked that headquarters take immediate steps to minimize the amount of information being sent to branch employees. Additionally, the Personal and Commercial Client Group (PCCG) was moving away from the traditional branch structure to a more focussed sales and service organization. This was to create additional challenges to the current communication processes and would require a new approach to internal communication.

## The Need to Rethink our Communications

The traditional ways of developing and writing our internal communication no longer worked. We needed not only to change communication but also the way in which we develop communication. As a result a project was established under the direction of Norm Thompson Vice-President Customer Service and Branch Operations, with four key objectives:

1. Reduce the volume of paper going to the branches by 50%.
2. Support the move to a sales culture.
3. Improve the content structure.
4. Improve the format of change announcements.

## **Re-Engineering our Communications Process**

Through the project scoping exercise, we knew that the issue was much broader than simply reducing the volume of paper and changing some of the formatting. If we were to simply 'turn off the fire hose' and rename some of the communication vehicles used, then we would have accomplished very little.

- How would we identify what needs to be sent and what does not?
- How would we address the value of the communication?
- Was 'turning the fire hose off' the answer?
- How do the line employees define effective communication?
- What about the authors... how do they define it?
- How would we ensure that future communications meet the needs of the intended audience as they continue to change?

These and many other questions would remain largely unanswered unless we were to clearly understand, from ground zero, what the communication needs are, how they use the information, and what would be needed to support a rapidly changing business environment, both now and in the future. We needed to re-engineer our communication process.

## **Defining the Goals of our Communications**

Through a series of focus groups and workshops we learned that there were specific goals that the project must meet in order to be successful:

1. Communication must have a consistent design, based on its purpose.
2. The content must be structured to meet the following user needs. The content must be
  - scannable
  - concise
  - coordinated
  - relevant
  - timely, and
  - facilitate fast track navigation.
3. The standards must apply to ALL areas communicating with Line employees.

Internal communications deals primarily with change management: issues of people, performance expectations, behavioral change, training, etc. In many cases, our communication is addressing the very nature of resistance to change itself. While there are many buzzwords and catch phrases for change and how we handle it, humans are by their very nature, resistant to change.

## **CommunicationWorks and Information Mapping**

CommunicationWorks represented the re-engineered process, dealing with each critical step in a communication process. It is designed to provide a common, consistent approach that ensures the author can clearly understand what needs to be done, why, and how.

A key component of the process is the use of *Information Mapping* for the content development. We began working with Robin Kennedy (Senior Vice-President, Information Mapping, Communicare) to examine how Information Mapping could be used to help achieve these goals.

### **Testing the Prototype**

We had determined that a prototype was required to test our goals. A series of focus groups were run with employees from across the country to develop a prototype that would address:

- Design
- Format
- Content structure
- Distribution
- Implementation.

### **Test Results**

The early results were astounding.

#### *User Feedback*

We are beginning to see the results pay off. I have highlighted those results where Information Mapping was identified in the feedback by users.

<b>Pre-Implementation</b>	<b>Post-Implementation</b>
Information arrives too late	Timing was excellent
It's difficult to find what is needed, quickly	The package clearly defined the roles and made it easy to find what I needed
It takes too long to read	It was easy to read
I can't tell what is relevant	Information was relevant to my role
I have to re-create the communication for my team to ensure I get the right information to them	I no longer have to re-create the information - it's completely re-usable
Too much information	The just-in-time approach works well

Using Information Mapping helped Line users to

- see a logical flow to the information
- find information quickly
- identify what is relevant to them
- understand information clearly
- re-use the information, and
- think strategically.

### *Headquarters Feedback*

This summarizes some of the feedback received from Headquarters.

- The program clearly shows us that the current approach no longer works.
- A single standardized approach... about time!
- The process needs to be implemented across the bank and not just PCFS.
- Improved productivity through Information Mapping means
  - less time to write, and
  - the ability to re-use the information so it's only written once.
- Coordinating our information was long overdue.
- We are all communicating to the same audience. Using a consistent approach makes sense.
- 25% reduction in support calls.
- Reduction in documentation costs.

### **Commitment to the Process**

If organizations are to be successful, they must make a commitment from the top down to accept nothing less in their internal communications. This commitment has been made by our Vice-Chairman of PCCG, Ron Rogers.

### **Conclusion: Successful Communications**

The Bank has made significant progress in understanding the critical nature of internal communication. The use of Information Mapping, while not the only factor in the success of our process, plays a very significant role. Without Information Mapping and the benefits it has brought our organization, we would most certainly not have been as successful in our attempts to improve internal communication.

I believe that, together with the use of Information Mapping, CommunicationWorks positions the Bank to deliver consistent and effective internal communication both now and in the future. The program will change as the needs of the users change. But by constantly ensuring a consistent process such as CommunicationWorks and the use of Information Mapping within it, we will ensure we are successful in our communication.

*“We aren’t in the business of managing money. We are in the business of managing information about money.”*

**F. Anthony Comper**

Quoted in the Globe and Mail, August 18, 1999