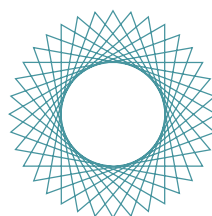


EVOLUTION, REVOLUTION OR ADAPTATION

The challenging world of Communications
Directors in Belgium and the Netherlands



VMAGROUP

COMMUNICATIONS | DIGITAL | MARKETING
INTERIM | PERMANENT

THIS REPORT IS BASED ON THE RESPONSES OF 100 IN-HOUSE COMMUNICATIONS LEADERS IN BELGIUM AND THE NETHERLANDS.

IN THE FOURTH QUARTER OF 2018, WE ASKED THEM TO PARTICIPATE IN A SURVEY FOCUSING ON TRENDS AND DEVELOPMENTS IN THE PROFESSION, AND THE CHALLENGES THEY ARE FACING.



CONTENTS

INTRODUCTION	4
PROFILE OF RESPONDENTS	6
REPORTING LINES	7
MEMBER OF THE MANAGEMENT BOARD	7
SURVEY RESULTS: STATUS OF THE COMMUNICATIONS FUNCTION	8
INTEGRATION OF COMMUNICATIONS AND MARKETING	8
DEFINING BUSINESS STRATEGY	9
SAFEGUARDING LEADERSHIP TRANSPARENCY	10
SAFEGUARDING BRAND AUTHENTICITY	10
REPUTATION MANAGER VS. CHANGE DRIVER	11
TRUSTED ADVISOR VS. TRANSFORMATION LEADER	11
SURVEY RESULTS: CHALLENGES AND TRENDS	12
BUSINESS CHANGES OVER THE LAST YEAR	12
EXPECTED BUSINESS CHANGES OVER THE NEXT THREE YEARS	12
TECHNOLOGY TRENDS	13
KEY PRIORITIES	13
WHAT KEEPS YOU AWAKE AT NIGHT	14
CHANGES TO FUNCTION/TEAM WITH THE BIGGEST IMPACT	14
WHAT VISION OF THE ORGANISATION'S FUTURE EVOKES PASSION	16
GAPS BETWEEN VALUES AND CULTURE	16
CONCLUSIONS	18
CONTACT US	19

INTRODUCTION

Transparency, consistency, alignment, new technologies, leadership, trust, pro-activeness, agile working, financial communications, M&A, CEO change, big data, employer branding and labour market communications – no-one can say the job of a Communications Director is getting less complicated.

At VMAGROUP, we sit at the heart of the communications profession. The conversations we have with senior level communications leaders – whether they are looking to build or restructure their teams, or are looking for advice and support as they take the next step in their own career – provide us with great insight into the latest trends and developments in the profession, and the challenges communicators face.

In addition to those conversations, we conduct regular market research to delve more deeply into some of the issues and challenges which are impacting the communications profession. This enables us to get the views of a broader spectrum of communicators than our daily conversations allow.

In 2016 we conducted a survey in which we asked CEO's of companies across Europe what they expected of their communications function and their Communications Directors. There were some very clear trends in the results of that qualitative survey:

- Gone are the days when corporate reputation was seen as something of an afterthought. It is evident that CEOs consider reputation as an important factor to be considered during strategic decision-making, and this defines the role of the Communications Director.
- The role of the Communications Director now encompasses more than being a trusted advisor, to also providing proactive - and even provocative – business change leadership.
- Monitoring and safeguarding corporate authenticity and transparency are essential functions of the communications department, taking into account a wide variety of stakeholders and the speed at which news (and fake news) spreads across digital channels.
- Communications leaders are expected to drive digital transformation, and to demonstrate value to the bottom-line through ROI.
- CEOs recognise the need to align content development and channel selection with the integration of internal and external communications; also to enhance engagement and engender internal ambassadors for their organisation.

- CEOs clearly called for leaders who proactively drive strategic communications rather than simply implement an agreed communications plan.

At VMAGROUP, what we observe is a profession that is struggling to meet those expectations, not because of lack of capability in the talent pool – the best are as good as they always were – but because the formal machinery of the organisation very often does not enable it. Team size, skills and budgets are not always commensurate with the status and increased scope expected of the profession.

CEOs are right: businesses are transforming and corporate communications is now a key driver in change processes and commerce. The communications function is multi-dimensional, internationally tuned-in, serving multiple stakeholders on and offline, working in traditional media while also grappling with what at times appears to be out of control opinion on the internet. All this calls for different skills and capabilities, and for communication leaders who truly and deeply understand the business essentials.

Proactivity was, perhaps, the central watchword in our interviews with CEOs. This was the clearest vote of confidence for all: in asking for more resilient leadership, CEOs were not running Communications Directors down, they were actively encouraging them to step-up.

So, we summarised the challenge to Communications Directors as formulated by CEOs:

Be fearless, take the opportunity. Learn the business better, become more involved and invest in strategic risks. Be prepared to challenge authority from a position of expertise – it's what you're hired to do.

Based on all the conversations we have with communicators across a range of industries, we are left wondering whether the day-to-day practice, tasks and responsibilities of Communications Directors are in fact in line with what we concluded from our CEO survey; that the job has evolved into an essential leadership function or whether that is still work in progress.

Before returning to our CEO pool to gauge the current temperature of their demands and expectations regarding the communications function, in this survey we report about the actual responsibilities, activities and opinions of Communications Directors in Belgium and the Netherlands.

What their day-to-day looks like may stimulate them to take up the leadership mantle advocated by CEOs. For some however, it may push them away because the daily priorities for departments that are too small or lack the right skills render it impossible for those Communications Directors to achieve that leadership rather than adviser role.

From our many conversations and job briefings, we have also observed:

- Reorganisation and restructuring of the communications function is a constant, resulting from:
 - Redefined market focus; product portfolio, new markets, etc.
 - M&A activity
 - Centralisation/decentralisation of organisational functions
 - Cost-cutting and agile ways of working
 - Shareholder or investor pressure
 - Increased regulation
 - Political and economic uncertainty
 - Technological developments
 - Increased importance of sustainability
 - Alignment with employer branding and labour market communications
- In general, growth in FTEs in communications departments has been stagnant (at best) whilst expectations are increasing and tasks are becoming more complex.
- We have seen that in some cases ongoing restructuring has led to smaller communications teams. Remaining roles often have a larger and more integrated scope, but the necessary new talent is not always hired, for various reasons.
- The development of digital channels is imperative, and the integration of internal and external messaging is crucial to establish corporate trust.
- Within some international organisations, communications departments have become more international in structure and outlook; teams are no longer bound to the HQ office. We see smaller local communications teams spread over multiple markets, with remote and flexible working developing rapidly.
- Though larger companies may still have dedicated investor relations functions, financial communications based on a solid understanding of the company financials is almost a *sine qua non* for communications leaders
- Some, but not all, larger companies have implemented multi-functional agile ways of working, increasing the need for project management skills and understanding IT terminology.

On behalf of VMAGROUP, I would like to thank everyone who participated in the survey and the valuable insight provided for the benefit of the sector. We are always happy to engage in conversations about the opportunities and challenges facing communicators in today's complex business environment.

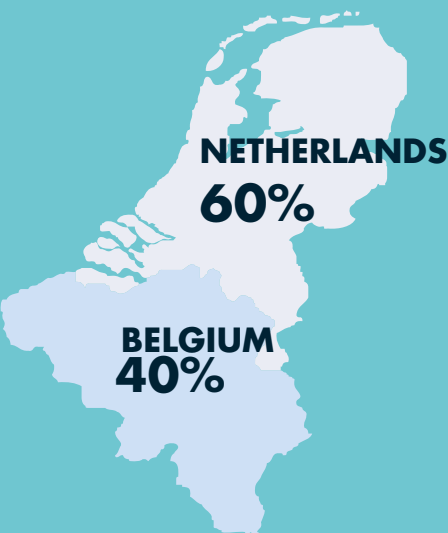
Willem de Ruijter

Executive Director

T: +31 (0)20 808 3990
+32 (0)2 808 9061

E: wderuijter@vmagroup.com

PROFILE OF SURVEY RESPONDENTS



60% of the respondents are based in the Netherlands, 40% in Belgium. By and large we have not seen substantial differences between the markets and where we did, it will be mentioned explicitly.

The large majority of respondents worked for an **international company** and approximately half have **international responsibility**.



TIME IN CURRENT ROLE



55% of the respondents had a 'Director' job title, 23% 'Head of' and 22% were 'Manager'.

**BE FEARLESS, TAKE THE OPPORTUNITY.
LEARN THE BUSINESS BETTER, BECOME MORE INVOLVED AND INVEST IN STRATEGIC RISKS.
BE PREPARED TO CHALLENGE AUTHORITY FROM A POSITION OF EXPERTISE – IT'S WHAT YOU'RE HIRED TO DO.**

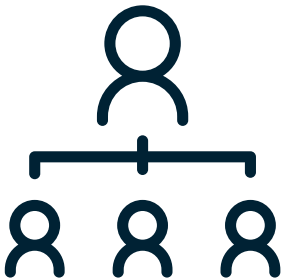


REPORTING LINES

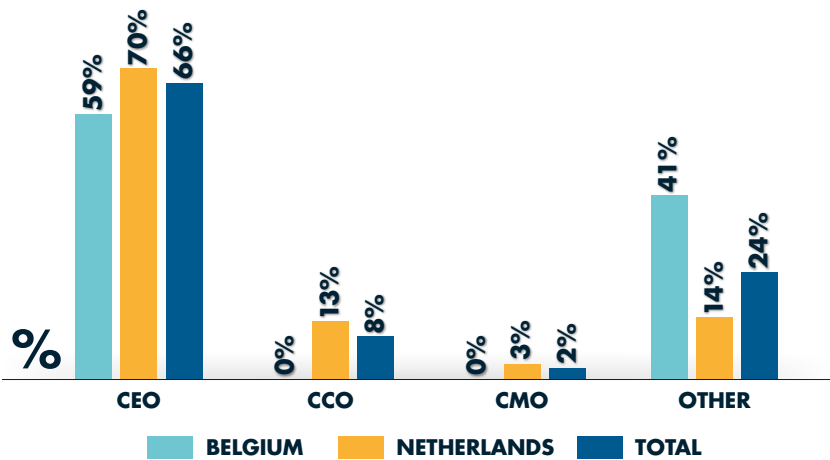
The majority (66%) of respondents report directly to the CEO. This is reflective of both the seniority of the respondents and that the role of the communications function is valued by the business leaders.

+/- 50% of the respondents are not members of their organisation's Management Board and this is surprising.

89% of the respondents have direct reports and 25% of those have teams with 10 or more direct reports.

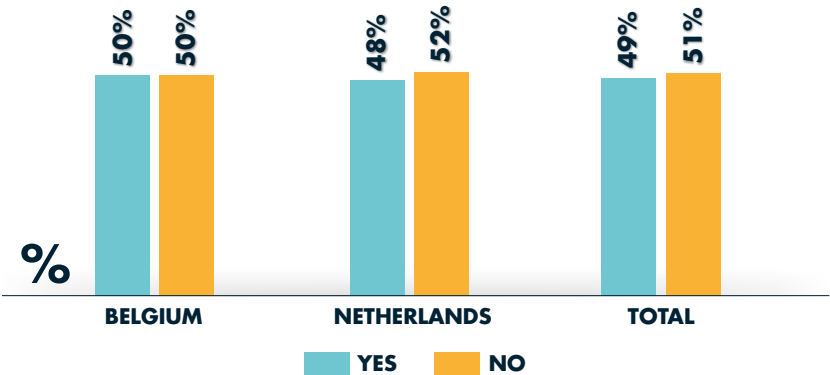


REPORTING LINES (%)



*Most common open text responses for "Other" were: Corporate Communications Director, Chief/Director/Head of Public Affairs, Head of HR.

MEMBER OF THE MANAGEMENT BOARD (%)

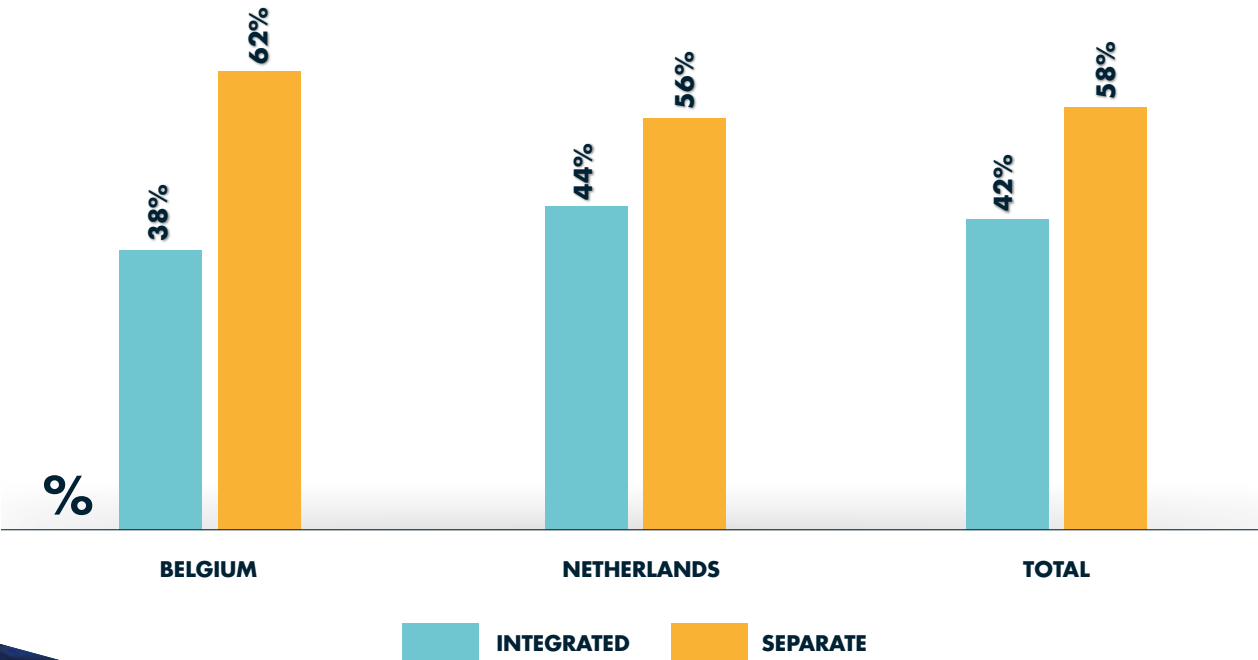


SURVEY RESULTS: STATUS OF THE COMMUNICATIONS FUNCTION

INTEGRATION OF COMMUNICATIONS AND MARKETING

In the majority of cases, the communications and marketing functions are separate (58%), slightly less so in the Netherlands compared to Belgium

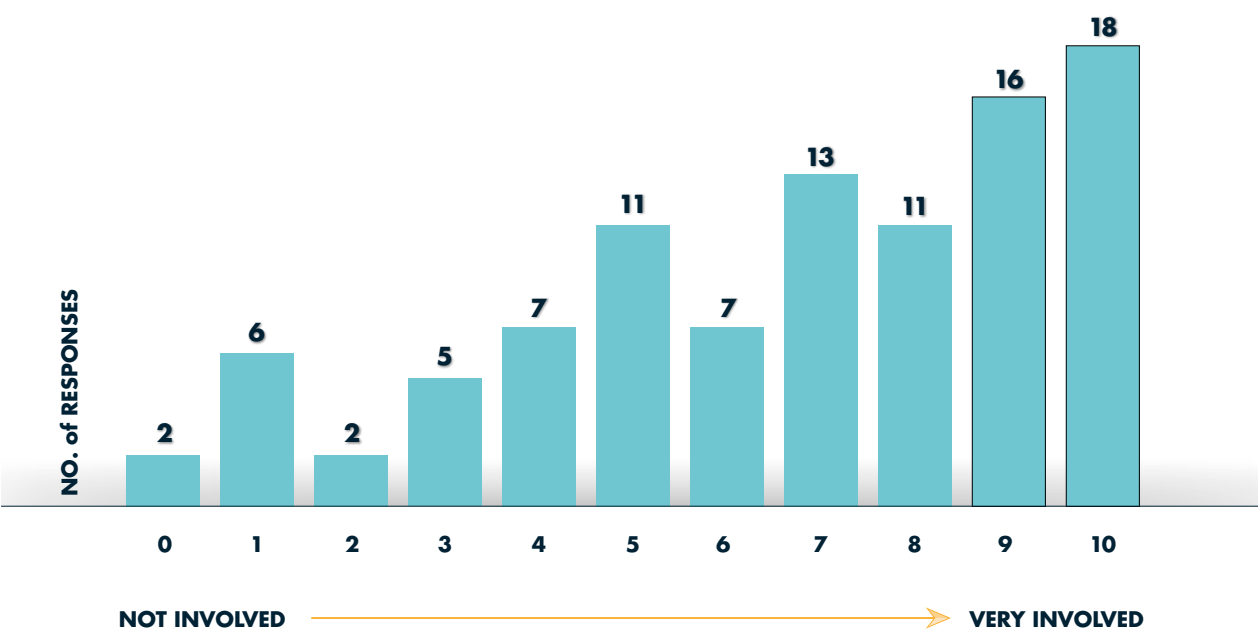
INTEGRATION OF COMMUNICATIONS AND MARKETING (%)



DEFINING BUSINESS STRATEGY

As would be expected, across both markets communications leaders are involved to some extent in defining their organisation's strategy. However, some 41% of respondents indicate their involvement is a score of 6 or less.

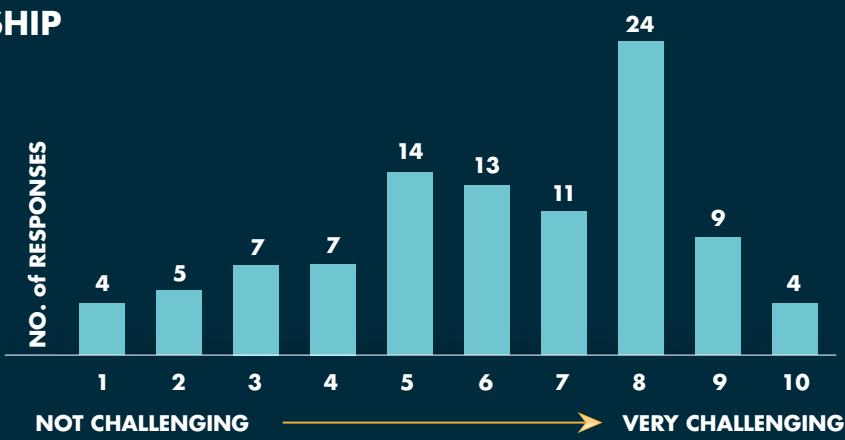
INVOLVEMENT IN DEFINING YOUR ORGANISATION'S BUSINESS STRATEGY (NUMBER OF RESPONSES)



SURVEY RESULTS: STATUS OF THE COMMUNICATIONS FUNCTION

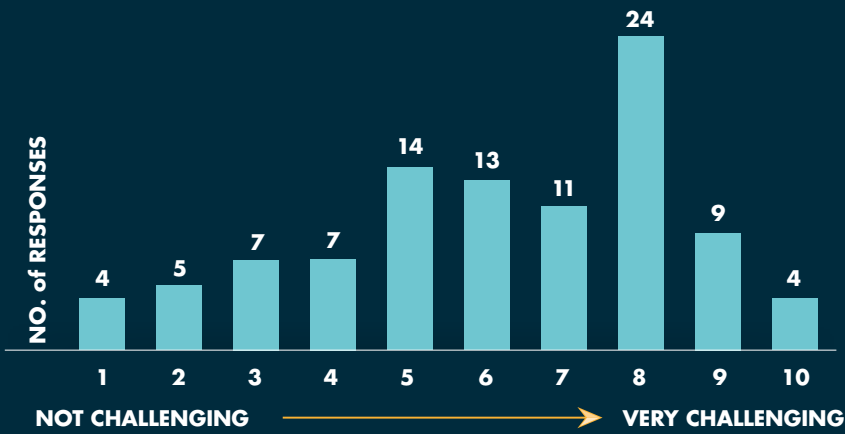
SAFEGUARDING LEADERSHIP TRANSPARENCY

Safeguarding leadership transparency is often seen as a key responsibility of Communications Directors. This is seen as a greater challenge than safeguarding the brand's authenticity. 50% of respondents said safeguarding leadership transparency is a real challenge (score of 7 or higher).



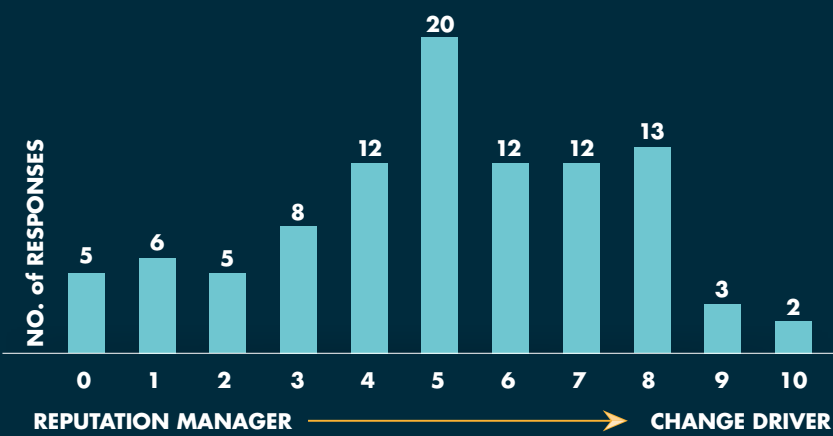
SAFEGUARDING BRAND AUTHENTICITY

Safeguarding brand authenticity is often seen as a key responsibility of Communications Directors, and across both markets it is considered more challenging than not.



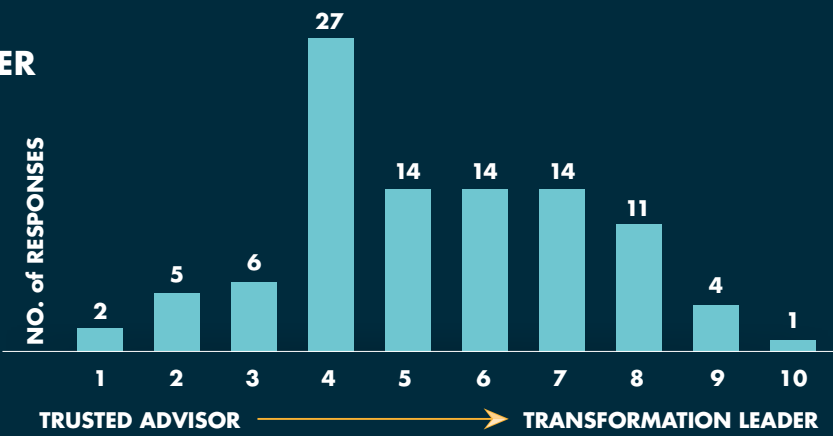
REPUTATION MANAGER VS. CHANGE DRIVER

The bulk of respondents perceive themselves as a blend of reputation manager and change driver. Again, only 30% see themselves more as a change driver (score of 7 or more).



TRUSTED ADVISOR VS. TRANSFORMATION LEADER

The bulk of respondents perceive themselves as a mix of trusted advisor and transformation leader. Only 30% believe they operate more as a transformation leader (score of 7 or more).

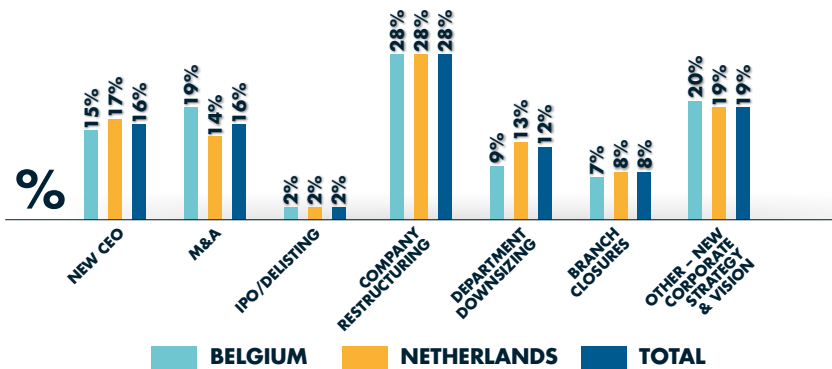


SURVEY RESULTS: CHALLENGES AND TRENDS

BUSINESS CHANGES OVER THE LAST YEAR

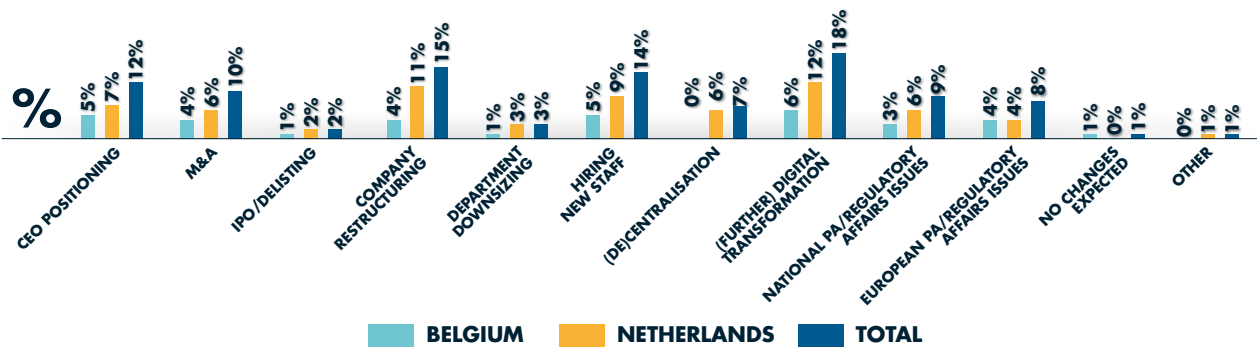
The top three major business changes in the last year cited by respondents were company restructuring, new CEO and M&A developments.

“New corporate strategy and vision” was mentioned spontaneously as a major change as well, and this is probably strongly linked to the other events.



EXPECTED BUSINESS CHANGES OVER THE NEXT THREE YEARS

When asked about expected major changes in the next three years, it is interesting to see that further digital transformation ranks first, restructuring processes are expected to continue and hiring new staff is becoming important as well. European PA/regulatory affairs is more relevant in Belgium than in the Netherlands.



These responses clearly show that:

- Change is a constant, few respondents expect ‘no change’.
- Digital transformation is (remains) of major importance.
- The communications function is expected to grow. There may be a disparity here between ‘hope & belief’ on the one hand and ‘reality’ on the other hand.

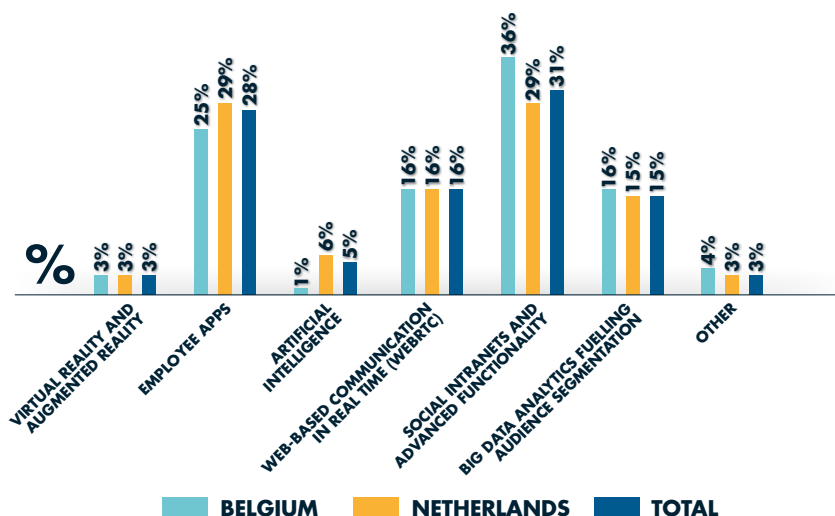
- Respondents expect the active M&A trend seen over the past year to continue in the next three years, more so in Belgium than in the Netherlands. With this in mind, discussions at VMAGROUP roundtables indicate that Communications Directors need to enhance their ability to converse with and understand the language of lawyers.

It is clear that communicating major corporate change is at the forefront of communications leaders’ minds. They have to do this in the context of digitalisation and a solid understanding of company financials.

TECHNOLOGY TRENDS

In most roundtable discussion events VMAGROUP has organised in the last few years, the potential impact of technological changes has been raised and from this survey it appears there are a number of digital trends Communications Directors are contending with. The four most commonly cited in relation to internal communications are social intranets and advanced functionality, employee apps, big data, and real-time web-based communications.

Whether in agile teams or not, working in close collaboration with the IT function is now a crucial element of a communicator's day-to-day work.



KEY PRIORITIES

We wanted to provide respondents with an opportunity to tell us about their priorities in their own words. The following were the most commonly cited (in no particular order):

Belgium

- Employee engagement
- Social media
- Change management
- Stakeholder management
- Crisis management preparedness

Netherlands

- Content management
- Stakeholder management
- Employee engagement
- Strategic alignment, including positioning and branding, and leadership communications
- Embracing new technology, including data analytics, automation and social media

While many of these priorities could be predicted, it is interesting to see that in the Netherlands some of the more commonly cited priorities are in response to strategic business developments and organisational change.

It is of course not possible to say how much of this is already happening and how much is a desired state of affairs.

SURVEY RESULTS: CHALLENGES AND TRENDS

WHAT KEEPS YOU AWAKE AT NIGHT

There were a range of responses from both markets and we have categorised them into the three most commonly occurring themes:

STRUCTURE OF THE FUNCTION, TEAM ENGAGEMENT AND ARMS-LENGTH MANAGEMENT IN CHALLENGING MARKET CONDITIONS

“
Lack of clear functional
division of labour

“
Building coherence between team
members working from
different locations

“
Increase engagement within an
organisation in transition

“
How do I keep the talent in my
team challenged enough?

“
Transparency – managing teams
from a distance

“
Lack of resources and distance
from leadership

EXISTING SKILLS, UPSKILLING AND RECRUITING, PARTICULARLY IN RESPONSE TO A CONSTANTLY CHANGING BUSINESS ENVIRONMENT

“
How we manage to keep skills
of employees aligned with fast
changing needs

“
Skills development to keep up with
exponential change

“
Enough skilled resources to get
the job done and make progress
at the same time

“
Speed of developments and
how to manage this with limited
time and resource

“
Lack of expertise in team.
Transformation of team and
organisation

“
Team capabilities, finding
the right staff

PROVING THE ROI OF COMMUNICATIONS

“
The continuous need to
prove our impact

“
Measuring effectiveness of the
communications activities to
demonstrate the added value
of our activities

“
Function’s reputation internally

**In bringing these statements
together, it is clear that
managing agile teams
spread over various
locations, making sure
these teams have the right
skills to meet the changing
demands of the business,
and continuously
demonstrating the value
that the communications
function adds to the
business are the crucial
areas to focus on.**

CHANGES TO FUNCTION/TEAM WITH THE BIGGEST IMPACT

Although budget was cited by
some, it did not occur often.

THE ROLE OF COMMUNICATIONS IN SUPPORTING WIDER BUSINESS STRATEGY

“
Clarity on the role of corporate
communications within strategic frames,
mission and vision

“
Clear direction and accountability
to company priorities

“
Better input/participation on strategy and
needs/concerns from management”

“
Becoming part of the management board

“
Governance with clear mandates

“
Direct connection to leadership,
not just seen as executors

“
Easier and faster access to CEO

INVESTMENT IN NEW TECHNOLOGY AND DIGITAL SKILLS TRAINING

“
Upskilled team – more training for
senior team members in digital

“
Digitalisation - further implementation
of digital tools and agile working

“
Further digital transformation

“
Better compatibility of processes and
applications in the organisation

“
Social media at full speed

“
Implementation of digital tools
to support agile working

STRUCTURE OF THE COMMUNICATIONS FUNCTION AND INTEGRATION WITH MARKETING

“

Having communication colleagues
in the countries where we operate.

“

The ability to connect communication,
marketing, business development
and sales into a funnel approach

“

Integration of corporate and
marketing communications

“

Better alignment and definition of specific tasks
and areas of expertise

“

True inbound marketing
throughout the team

“

Integration within Marketing

ABILITY TO DEMONSTRATE AND PROVE ROI

“

More impact measurement

“

Get high quality data to ensure we can better
plan, measure and steer our communication
strategies and tactics

“

Senior stakeholder appreciation that mindshare
gains through thought leadership programs
is done over the long term and should not be
equated with quarterly sales cycles

“

Better use of big data

**These statements indicate
there is still work to be done on
ensuring the communications
function is seen as a driver of
strategy, and proving value-add
through ROI is part of that.**

**Embracing new technologies
and intensifying integration with
marketing are seen as key drivers.**

**THERE IS STILL WORK TO BE DONE
ON ENSURING THE COMMUNICATIONS
FUNCTION IS SEEN AS A DRIVER OF
STRATEGY, AND PROVING VALUE-ADD
THROUGH ROI IS PART OF THAT**

SURVEY RESULTS: CHALLENGES AND TRENDS

WHAT VISION OF THE ORGANISATION'S FUTURE EVOKES PASSION

While personal achievements, organisational changes and achieving stated growth goals were common responses, corporate social responsibility and having a social purpose featured prominently in the responses to this question.

“

As a company and communication function we can make a big impact on the sustainability challenges of the world

”

“

The industry at large to become more feminine in its communications

”

“

Achieving sustainable energy goals with limited resources

”

“

Green Developments, sustainability, energy transition towards a sustainable future

”

“

A leading brand name coupled with a company that has a strong purpose

”

“

Keeping our position as front runner in CSR... fundamentally change society through IOT and digitalization

”

“

Fully transparent open dialogue with the general public about our work and contribution to feeding the world population in a sustainable manner

”

“

Innovation, collaboration and greater societal focus

”

GAPS BETWEEN VALUES AND CULTURE

The responses here indicate that many organisations in Belgium and the Netherlands still find it a challenge to achieve true alignment between their stated corporate values and actual cultural behaviours. In today's world where trust and authenticity are continually questioned, the importance of employee engagement through effective internal communications is more important than ever in helping organisations to 'live and breathe' their values.

“

Predominantly behavioural gaps to avoid silo's and boundaries

”

“

The values that the organisation has set out are certainly strongly recognisable as cultural carriers in the organisation, but at the same time, they are more ambitious than how the culture is actually experienced in daily practice by employees

”

“

Gap between brand promise and organisational delivery

”

“

Teamwork and 'care for customers' remains a challenge sometimes. We are still quite focussed on internal processes and think in silo's

”

“

Lack of leadership and recognition makes it hard for people to live the values and leads to different interpretations and therefore behaviour of the values

”

“

The promise of 'meaning' versus our focus on sales and conversion

”

“

The gap is limited, although there are some differences between the older and younger generations of colleagues

”

“

From the outside we present ourselves as innovative and sustainable, from the inside we have still some work to do to be really innovative and sustainable

”



MANY ORGANISATIONS IN BELGIUM AND THE NETHERLANDS STILL FIND IT A CHALLENGE TO ACHIEVE TRUE ALIGNMENT BETWEEN THEIR STATED CORPORATE VALUES AND ACTUAL CULTURAL BEHAVIOURS. IN TODAY'S WORLD WHERE TRUST AND AUTHENTICITY ARE CONTINUALLY QUESTIONED, THE IMPORTANCE OF EMPLOYEE ENGAGEMENT THROUGH EFFECTIVE INTERNAL COMMUNICATIONS IS MORE IMPORTANT THAN EVER IN HELPING ORGANISATIONS TO 'LIVE AND BREATHE' THEIR VALUES.

CONCLUSIONS

At VMAGROUP we sit at the heart of the communications profession. The conversations we have with senior level communications leaders – whether they are looking to build or restructure their teams, are looking for advice and support as they take the next step in their own career or participate in round table discussions we organise – provide us with great insight into the latest trends and developments in the profession and the challenges communicators face.

Our understanding has been further enhanced through our CEO survey by speaking to the CEOs who Communication Directors often report into.

This survey confirms what we have learned and defines some additional steps to be taken to further enhance the value that the communications function can add to a business.

First of all, Communications Directors in Belgium and the Netherlands have stepped up to the challenges they have been confronted with. They have been involved in recent business changes and with the expectation that more change is to come – whether from changing leadership, M&A or restructuring processes – managing the corporate reputation is high on the agenda of Communications Directors.

Secondly, they have adapted to the digital challenge, collaborating more closely with IT colleagues to drive forward digital transformation enhancing the integration of internal and external communications.

Thirdly, they have absorbed the expanding scope of the communications role, and while their team numbers may not have grown, the management of those teams has become more complex – more international spread, agile and multi-functional.

Most importantly, they have a bond with their CEO based on trust and respect.

However, the road to take-up the leadership mantle, that is both expected of and aspired to, is a challenging one:

- Despite the best of intentions, day-to-day activities in constantly changing structures make it difficult to develop the proactiveness required for effective leadership.
- Safeguarding brand authenticity and leadership transparency are still challenges, and as such, the evolution from trusted advisor to transformation leader, and from reputation manager to change driver is still work in progress.
- The level of involvement in defining business strategy can still be improved.

- The changing dynamic in today's workplace, including more agile and remote working, calls for much greater internal engagement and a strong employer brand. There is a clear need to close the gap between an organisation's stated values and the reality of day-to-day life.

- There is a clear call for the development of new team skills to handle the changing requirements of the function and/or the hiring of additional staff to bring these new skills into the organisation.

Communications Directors do see increased strategic support, implementing the benefits of new technologies and enhanced cooperation with marketing as key development areas. In addition, they realise that proving ROI is essential to demonstrate the value of communications to the bottom-line.

The passion Communications Directors have shown to grow beyond current direct responsibilities is clear and essential in order to invest in a thorough understanding of critical business processes and handle a diverse range of challenges, from new technologies to sustainability and from consistency with marketing to labour market communications.

It is clear that where a communications function has not grown in size, the need for Communications Directors and their teams to be experts in both strategy and operations is undeniable.

CONTACT US

For more information about the findings of this report, or if you would like us to present the results to your organisation, please contact:

Willem de Ruijter

Executive Director

T: +31 (0)20 808 3990

+32 (0)2 808 9016

E: wderuijter@vmagroup.com

Ruben van den Boer

Senior Consultant

T: +31 (0)20 808 3990

E: rvandenboer@vmagroup.com

If you would like to talk to us about how we can help you with your recruitment and executive search needs, please contact:

BELGIUM

14b Rue de la Science,
1040 Brussels

T: +32 (0)2 808 9016

E: belgium@vmagroup.com

NETHERLANDS

De Entree 232,
1101EE Amsterdam

T: +31 (0)20 808 3990

E: netherlands@vmagroup.com

FRANCE

19 Boulevard Malesherbes,
75008 Paris

T: +33 (0)1 79975010

E: france@vmagroup.com

UNITED KINGDOM

23 Bedford Square, Bloomsbury
London WC1B 3HH

T: +44 (0)20 7436 4243

E: marketing@vmagroup.com

GERMANY

Meseturm, 25th Floor, Friedrich-Ebert-Anlage 49,
60308 Frankfurt

T: +49 (0)69 9675 8227

E: germany@vmagroup.com

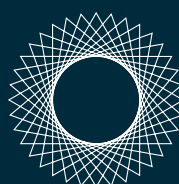
This research was carried out by means of VMAGROUP's electronic questionnaire and supplemented with information that VMAGROUP has access to. The information in this report may be useful in anticipating trends in the Belgium and Netherlands communications sector. However, VMAGROUP does not make any warranties regarding the use, accuracy, validity or reliability of the data or information provided here. We do not accept liability for any damages relating to the use of the information contained within this report. VMAGROUP is the licensed trading name of VMA Global Resourcing Group Limited which is a private limited company registered in England and Wales with registered number 06473593. Our registered office in the Netherlands is at De Entree 232, 1101EE Amsterdam. ©VMAGROUP 2019.

in /vmagroup

🐦 /vmagroup

f /vmagroup

vmagroup.com



VMAGROUP
COMMUNICATIONS | DIGITAL | MARKETING
INTERIM | PERMANENT