

Audiobook companion

Localizing Employee Communications

A Handbook

Ray Walsh

Foreword by Val Swisher



The Content Wrangler
Content Strategy Series

Localizing Employee Communications

A Handbook

Ray Walsh



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Foreword

by Val Swisher, CEO Content Rules, Inc.

It's been a handful of years since my book, *Global Content Strategy: A Primer*, was released by XML Press. Since that time, the world has become smaller and more interconnected. And without a doubt, more companies translate more content into more languages every year.

The reason for the rise in translation is two-fold. First, to attract and keep global customers, most companies recognize that they must deliver content in the language of the customer. It is no longer a “nice to have.” Translation and localization of product information is a competitive imperative.

The second reason for the rise in translation is that the technologies used in the translation process have improved. Machine translation, once a hit-or-miss set of rules and statistics, is well on its way to becoming just as good as (and possibly more consistent than) human translation. More language services providers (LSPs) offer neural machine translation (NMT) solutions. And these artificial intelligence-based, machine learning enabled systems do a significantly better job than any previous algorithm that we've tried.

Even the smallest companies are realizing—and meeting—the demanding to translate product content. Product content includes the usual suspects:

- Sales and marketing materials
- User interface
- Documentation
- Training
- Knowledge base

But what about employee communications?

Unfortunately, employee communications, the internal content that the corporate headquarters shares with employees worldwide, seems to be stuck in the dark English ages.

In his book, *Localizing Employee Communications: A Handbook*, Ray Walsh explores the need for localizing and transcreating the final corporate content frontier. Ray makes a compelling case about the importance of providing corporate communication in local languages. After all, how can we boast about having a global team if we don't even bother to communicate important information in the language that each employee speaks?

The global job market is competitive. Companies vie to hire top talent all over the world. And once onboard, companies need to remain competitive to keep those employees from moving on to other, more compelling jobs.

One of the best ways to truly bond with your global teams is to provide information to them in their language(s). If you want your messages to be read, if you want your global team to function as a single company, then you must think globally and act locally. That is, consider your enterprise as a whole and provide content that is relevant in terms of words, imagery, and design to each locale.

In this book, Ray provides all the reasons to localize corporate communication. He discusses how to get buy-in for the localization effort. He discusses how to create content that can be localized. And he details how to manage the translation effort. This book is a true handbook on the who, what, where, why, and how of corporate communication.

Ray certainly understands the space and makes an eloquent case. But he does not do it alone. Instead, this book draws from numerous interviews, additional books, webinars, industry reports, even PhD theses to provide a comprehensive compendium backed by dozens of industry professionals.

If your company has locations worldwide, this handbook will provide you with invaluable information that will improve communication, morale, productivity, and dare I say, sales. As Ray describes, the money you spend on localizing internal communication will more than pay off in employee engagement, retention, and evangelism.

Table 1.1 – Four alternatives to English-only content

How it's done	Pro	Con
Re-creation		
Local staff decide what and when to translate without corporate knowledge or support.	It's already happening.	Higher risk of inaccuracy and low quality.
Translation		
Corporate translates content into target languages.	Professional communicators control the process, and it's faster than <i>localization</i> or <i>co-creation</i> .	The final product still sounds like corporate-speak.
Localization		
Corporate visually and verbally adapts a deliverable to local culture.	The content respects the audience and has a greater chance of getting noticed.	Localization takes more time, costs more, and adds complexity.
Co-creation or transcreation		
Trained local staff deliver relevant and unique content, key messages, and visual components.	Final content looks and feels local, relevant, and credible.	Co-creation and transcreation require investment, mutual trust, and local skills.

CHAPTER 2

The Context for Local and Global Content

You aren't the only source for company content and news. You may be shouting from a commanding height, but employees hear more often from local colleagues, local management, and local staff in global functions such as IT, human resources, or marketing.

Figure 2.1 shows a typical range of content types that employees see. I've plotted them on two dimensions: global and local relevance.



Figure 2.1 – Local versus global relevance

The horizontal axis in Figure 2.1 shows the degree of local relevance. The further to the right, the more likely it is that content will be in the local language, be in formats that can be managed locally, and have references that resonate with daily reality.

The vertical axis shows the degree of global relevance. Content that is higher on this axis is more strategic and more relevant to greater numbers of business units. The higher on the global relevance axis a deliverable is, the more likely it was created at corporate. These messages align with global strategy and have a more long-term outlook. But they also tend to be abstract, in English, and lacking in local examples.

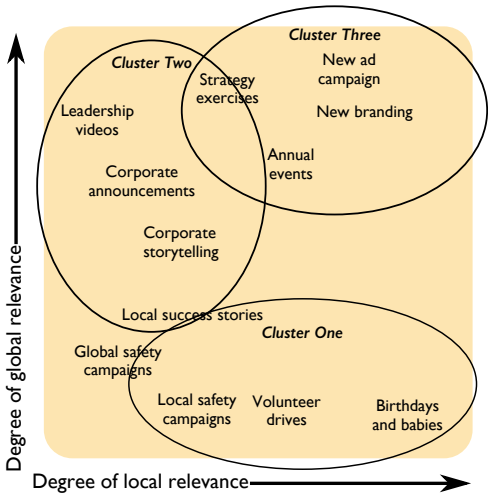


Figure 2.2 – Local versus global relevance: clusters

Although the details may vary, if you graph any organization’s mix of local and corporate deliverables in this way, they will tend to form three clusters, each with its own strengths and weaknesses (see Figure 2.2).¹

¹ Graphing your organization’s mix of global and local content is a good exercise to evaluate opportunities and your readiness for localization and co-creation. For more preparatory steps, see Part II, “Leadership, Governance, and Budget.”

Table 7.1 – Four models of brand management

Centrally Managed		Autonomous Teams	
Limited Flexibility	Greater Flexibility	Strong Guidance	Minimal Guidance
← Greater central control — Greater autonomy →			

Each model requires different preparation and investment, and each might succeed or struggle depending on your size, industry, and brand standards. In practice, a system for global communication will likely be a mix of these. A decentralized model might be better for mature business units, while centrally sourced content might be better for newer, smaller business units.

Localization practices vary by location and evolve over time, so knowing the strengths and weaknesses of each model can help you anticipate risks and get the most from what you implement.

Centrally managed teams with limited flexibility

Centrally Managed		Autonomous Teams	
Limited Flexibility	Greater Flexibility	Strong Guidance	Minimal Guidance
← Greater central control — Greater autonomy →			

Whenever I talk to designers experienced in global campaigns, the first localization option they describe involves multiple language versions created centrally at Corporate, perhaps supplemented by simple templates for commonly needed deliverables. The extent to which local business units can alter these templates depends on the program’s maturity.

The primary benefit to this approach is a sense of unity. It’s a controlled model that’s a logical starting point for traditionally minded businesses that want some global control. It’s often deployed by bigger companies and those that became global over time.

APPENDIX A

Interviewee Biographies

Arlene Birt

Arlene is founder and chief visual storyteller at Background Stories, an information design consultancy that works with organizations in the US, EU, and UK to translate complex ideas, systems, and metrics into clear visuals that help people understand sustainability. Since 2008, Arlene has been a public artist and professor at the Minneapolis College of Art and Design, teaching courses on infodesign, data visualization, and sustainability.

Deborah S. Bosley

Dr. Deborah S. Bosley is owner and principal in The Plain Language Group. She also is professor emeritus of English (Technical Communication) at UNC Charlotte. As an international expert in the use of plain language, she has spent the past twenty years working in regulatory environments helping attorneys, corporations, government agencies, and non-profits create written information that exceeds compliance standards and that's easy for people to understand and use.

Dr. Barbara Gibson

Barbara is the principal of Cultural Resolution, a global business consultancy focused on helping companies that operate internationally achieve greater success when working across cultures. She is a lecturer in intercultural business communication at a number of universities and business schools in the UK and around the world.

Rosie Halfhead

Rosie is the founder of R-Co, a niche consultancy working internationally with start-ups, privately owned companies, and non-profits across a range of sectors on strategy and brand, marketing and sales, and stakeholder engagement and loyalty. She has broad international and multicultural exper-

ience in the B2B sector, having lived and worked in Belgium, Hong Kong, and the UK. Rosie is a former member of the executive committee of SWIFT, a global financial messaging provider, and she is an advisory board member of Echo, experts in communication, brand, and reputation research.

John Kohl

John is the author of *The Global English Style Guide: Writing Clear, Translatable Documentation for a Global Market*[28], widely recognized as the clearest and most extensive set of sentence- and phrase-level guidelines for writing for global audiences. John worked at SAS Institute as a technical writer, technical editor, and linguistic engineer for 25 years before retiring in 2017. As a linguistic engineer, he customized and supported Acrolinx software, as well as other tools and processes that helped make SAS documentation more consistent, easier to translate, and easier for non-native speakers of English to understand.

Prof. Élise LeMoing Maas

Élise is head of the public relations department at the Institut des Hautes Études des Communications Sociales (IHECS) in Brussels. After twenty years of experience in communications agencies and international companies, she now focuses on teaching and research in organizational communication at a number of universities in France, Belgium, Morocco, and Canada. She is also a communications consultant with Ganéos SPRL.

Sean Matthews

Sean is president and CEO of Visix, Inc., a provider of digital signage software, content designs, and meeting room signs, headquartered in Atlanta, US. He has over thirty years of sales and marketing experience in the audiovisual and digital signage industries. Sean is a graduate of the College of Charleston and Georgia State University. He served in the United States Marine Corps and the Marine Corps Reserve between 1985 and 1992.

Gerry McGovern

Gerry helps large organizations deliver a better digital customer experience. Gerry has developed Top Tasks, a customer experience management model, as a result of fifteen years of research and experience. Top Tasks is a research and management model that helps organizations improve customer experience through identifying and optimizing customer top tasks.

A highly regarded speaker, he has spoken on digital customer experience in more than thirty-five countries. He has written seven books on digital customer experience. His latest is called *Top Tasks*, which is a detailed how-to implementation guide.

Mark Ohlsen

Mark is the owner of LRS Recording, a specialist in foreign language media production. LRS has 35 years of experience working with more than 130 video production companies, translation companies and A/V departments of Fortune 100 and Fortune 500 companies. LRS was founded on the idea of helping business decision makers expand their ability to reach across language barriers with successful media localization training and campaigns.

Alan Oram

Alan is a co-founder of Alive With Ideas, a creative agency in the UK that blogs frequently on employee communications. With over twenty years' experience in creative communications for organizations of all shapes and sizes, he is on a mission to make work a better place to be through great communication. He supports the comms community with initiatives that shape understanding of the needs of employees and more broadly the constantly evolving workplace.

Jonathan Phillips

Jonathan is a co-founder at Lithos Partners and an independent digital strategy consultant, focusing on communication, collaboration, and digital workplace technologies. With twenty years' blue-chip experience, he is a regular keynote speaker, a contributor to the digital community, and a re-

cognized global expert. He is a communication advisor to the UK government and the University of Bristol, charity chairman, non-exec director, and co-founder of Intranetizen.com.

Alan J. Porter

Alan is driven to educate, inform, and entertain through content. He is an industry leading content strategist, author of *The Content Pool*[70] and *WIKI*, and a regular conference speaker, workshop leader, and writer on content marketing, content strategy, customer experience, brand management, and content and localization strategy. In 2016 and 2017, MindTouch named Alan as one of the Top 25 Content Strategy Influencers, and CMSWire named him a Digital Strategy thought leader.

Leonard Rau

Leonard has been helping clients author and implement a winning brand strategy for more than twenty years in partnership with corporate communications agencies. He is a brand and marketing leader with extensive integrated marketing and multi-channel experience working across advertising, retail, brand, internal, corporate communication, and B2B and B2C sales activation projects. Leonard's work balances customer desires with the needs of the business.

Ann Rockley

Ann Rockley is CEO of The Rockley Group, Inc. She has an international reputation for developing intelligent content strategies for multichannel delivery. She has been instrumental in establishing the field in content strategy, content reuse, intelligent content strategies for multichannel delivery, and structured content management best practices. Rockley is a frequent contributor to trade and industry publications and a keynote speaker at many conferences in North America, Europe, and Asia-Pacific.

Known as the “mother” of content strategy, she introduced the concept of content strategy with her ground-breaking book, *Managing Enterprise Content: A Unified Content Strategy*[44], now in its second edition. Ann is

also the primary author of *Intelligent Content: A primer*, *DITA 101: Fundamentals of DITA for Authors and Managers*, and *eBooks 101: The Digital Content Strategy for Reaching Customers Anywhere, Anytime, on Any Device*. Ann is the creator of the concept of intelligent content and founded the Intelligent Content Conference.

Ann has a Master of Information Science from the University of Toronto and is a Fellow of the Society for Technical Communication. Ann is an adjunct professor at the Cork Institute of Technology, teaching Information Strategy in the MSc in Information Design and Development program.

Carmen Simon

Dr. Carmen Simon is a cognitive neuroscientist, author, and founder of Memzy, a company that uses brain science to help corporations create memorable messages. Carmen's book *Impossible to Ignore: Create Memorable Content to Influence Decisions*[48] has been selected as one of the top international books on persuasion. Carmen holds two doctorate degrees, and she also teaches at Stanford University. Dr. Simon holds frequent workshops for corporate audiences on the importance of using brain science to craft communication that is not only memorable but sparks action. After all, what's the use of memory if people don't act on it?

Val Swisher

Founder Val Swisher runs the content strategy, global content strategy, and content transformation service lines for Content Rules. Val has more than two decades of experience and is a well-known expert on global readiness, intelligent content, content development, and Acrolinx software. In her view, content should be easy to read, cost-effective to translate, and efficient to manage. Val is the author of three books: *Global Content Strategy: A Primer*[54], *Mastering Network Management*[53], and *The Comprehensive Guide to Computer Telephony Integration*[52]. Val is on the advisory board for the University of North Texas Technical Communications Program.

References and Further Reading

We use a link shortener in print because some of the links are extremely long. If you go to <https://xmlpress.net/lec/references>, you will find a list of references with the complete, un-shortened URL for each.

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Glossary

Active Directory

A Microsoft product that maintains a database of devices (computers, printers, storage, etc.) and users on a Windows domain network. It manages authentication, enforces security policies, and controls access to devices and information.

babies and birthdays

Idiomatic description among communications professionals to refer to the kind of content relevant only at a specific workplace, usually produced locally about human-interest events among colleagues.

brand

A sweeping term, sometimes defined as the overall experience with a specific product or offering. The concept of brand includes every aspect of a company's effort to distinguish a product from the competition. Often confused with the visual aspects brand identity, a brand includes not just a company or product name and logo, but also its reputation, positioning, the promise it makes to customers, its way of doing business, and more.

brand champion

Also known as a brand ambassador, someone who advocates for a brand and urges others to adopt it. In an internal context, brand champions encourage proper expression of the brand in all its aspects. For many companies brand champions are part of a formal program, with training and support from global marketing.

brand guidelines

A set of standards that describe how to express the brand. These standards are often shared with employees and vendors to prevent inconsistent use of brand identity elements. Such guidelines detail how to use the logo and other elements in documents, websites, trade-fair booths, equipment, and more, but they can also articulate abstract concepts—such as the desired personality for a brand or its promise/mission—and verbal aspects like voice and tone.

brand identity

Generally understood to be the visual elements of a brand, including its name, logo, tagline, and color palette, but a comprehensive identity can also include tone and voice and more. Most brand identities are a suite of visual elements created by professional designers, and the use of these elements is governed by a set of rules (see *brand guidelines*).

change management

A broad term describing actions companies take to help their employees through the process of change. Change management has emerged as its own business discipline, and its methodologies are often applied during mergers and acquisitions, new technology adoptions, new ways of working, relocations, or job losses. Change managers often work with Communications to create content related to the transition.

co-creation

A process where trained local communicators draw from shared visual and text assets to create content translated into their local language and modified to work well in their locale.

component content management system (CCMS)

A software application that manages content as re-usable components rather than fully finished documents. It can be paired with a traditional CMS. Components can be long blocks of content, but they are more likely to be re-usable assets such as a text paragraph, an image, or a definition. A CCMS provides structured content and can be combined with a terminology management system (TMS), machine translation, and translation memory tools to produce, adapt, manage, and deliver content in multiple languages.

content

Any text, image, video, decoration, or user-consumable elements that contribute to comprehension.

content management system (CMS)

A software application that supports information capture, editorial, governance, and publishing processes with tools such as workflow, access control, versioning, search, and collaboration.

content model

A formal representation of structured content as a collection of content types and their interrelationships.

corporate social responsibility (CSR)

A public disclosure mechanism of a company's ethical business practices. In recent years, public companies have begun issuing annual CSR reports in addition to, or integrated with, their annual earnings reports. CSR reports seek to explain the status of a company's relationships with various stakeholders, but especially among its employees and in the communities where it operates. Typical CSR reports include descriptions of activities and measurement of impact in three areas: community involvement, environmental impact, and evidence of behaving as a responsible employer.

DAM

Digital asset management. The process and technology used to store and manage digital assets such as images.

design system language

A single standard for designers to follow as they create and update deliverables. Although similar to traditional design guidelines, a DSL can also be a tool that designers use regardless of location. It includes not just standards but also assets and components from them to draw from. With the proliferation of channels and products in global organizations, a DSL can clarify brand standards for designers and anyone else responsible for visual treatment of a brand. A DSL is helpful in multiplying compliant expressions of a brand in internal systems, in managing local variety, and in transferring design knowledge to local business units.

design thinking

Design thinking originally described the preparation and processes that designers use to devise, propose, and create new products. In recent years it has also become synonymous with innovation and, as such, something of a movement. The term has been adopted by IT professionals and others who feel that process steps such as analyzing

context, discovering user behaviors and needs, and generating ideas also have relevance for their areas of work.

digital asset management

The process and technology used to store and manage digital assets such as images.

digital signage

LCD or LED displays mounted on walls or stands to provide visitors with up-to-the minute information, promotions, and directions. Multiple screens can be networked to facilitate the management and delivery of content. Digital signage systems are becoming increasingly sophisticated, with features such as user interactivity. In the workplace, digital signage can be used to reach employees in areas such as break rooms and reception areas.

editorial calendar

A schedule for the publishing of content over a given time period, often annually or during a given campaign period.

font family

A collection of related fonts. A font family may contain variants such as italics, bold, and bold italics. It may also contain versions optimized for larger print, such as titles, or smaller print. Some popular font families offer typefaces for non-Latin alphabets such as Arabic, and some have variants for non-alphabetic languages such as Chinese, Japanese, and Korean. Many corporations specify a font family for branded, external materials so that content has a consistent look and feel. Depending on the availability of that font in standard tools, they may also use it for internal communications.

General Data Protection Regulation (GDPR)

A European Union (EU) regulation designed to protect and ensure privacy of personal information for EU citizens. Although enforceable only in Europe, many global companies have overhauled their data management policies to comply with the GDPR. GDPR mostly applies to the storage and use of personal data, making it an IT and security issue. However, because photos of people are considered personal

data, GDPR also affects employee communications. Many companies require written consent (such as a *photo release*) from those depicted before a photo can be shared on internal web sites or social media.

glocal

A combination of globalization and localization, glocal means “reflecting or characterized by both local and global considerations” (according to Lexico.com,¹ powered by Oxford University Press). A communication in a local language that has both global key messages and local examples would be a glocalized communication.

Health and Safety (H&S)

H&S is an internal designation for activities focused on reducing and eliminating accidents at work and promoting general well-being among employees. Its methods are based on the multidisciplinary field of Occupational Health and Safety. Depending on the industry and region, practices and methodologies can be regulated by law, and companies often use their H&S measurements as part of their CSR reporting. H&S is typically a specialization that is overseen by the human resources department.

in-country review

A step in the content workflow, after translation and prior to publishing, where the content is reviewed by a person who is intimately familiar with the target audience—usually a person who lives and works for the client in the target market. That person does not have to be a professional translator.

interpreting

The act of converting verbal (spoken or signed) communication from one language into another.

ISO 45001

According to ISO.org,² “ISO 45001 sets the minimum standard of practice to protect employees worldwide...ISO 45001 enables organizations to put in place an occupational health and safety (OH&S)

¹ <https://www.lexico.com/en/definition/glocal>

² <https://www.iso.org/files/live/sites/isoorg/files/store/en/PUB100427.pdf>

management system. This will help them manage their OH&S risks and improve their OH&S performance by developing and implementing effective policies and objectives.”

localization

Adaptation of content to make it more meaningful, appropriate, and effective for a particular culture, locale, or market.

machine translation

A software-based process that translates content from one language to another.

material disclosure

A regulatory requirement governing any information that could affect a public company’s stock price, such as earnings, changes in leadership, plant closings, etc. In 2000 the US Securities and Exchange Commission (SEC) began requiring companies to make market-sensitive information available to all parties at the same time, and requirements became more stringent two years later with the Sarbanes/Oxley legislation. Since employees are often stockholders, material disclosure requirements can affect how companies distribute material announcements internally.

metadata

Attributes of content you can use to structure, semantically define, and target content.

native speaker

Someone who has naturally used a language from an early age as a primary means of concept formation and communication rather than acquiring the language later in life.

network

The people in-country who help cascade and possibly adapt content for local audiences. In this context, *network* is an entirely human concept and has nothing to do with the company’s technology systems. In many companies, network members are assigned locally and are not formally part of the communications department.

photo release

A release form, signed by the people depicted in a photo or video, that details how the organization can use their image.

postmortem

Project managers borrowed the term from the medical profession, where it refers to a procedure to determine a person's cause of death. When used in a project management context, it means a formal assessment at the conclusion of a project about what was successful and what wasn't. Also known as lessons learned.

privileged information

Information that an organization considers confidential. Privileged information can remain within a limited group of people indefinitely, or it can remain privileged until the moment it is disseminated publicly (see *material disclosure*). For example, internal discussions about a proposed merger may be privileged to select executives and people in the legal and finance departments.

recognition

Formal or informal statements from management or peers that are meant to thank individuals or groups of employees for their work. Recognition can range from an informal thank you to a written letter to a formal program.

sketch

For designers, a sketch is a quick, visual rendering of a product or other deliverable. During the ideation phase of a project, it communicates the broad outlines of a concept. Designers use sketches to present concepts to clients and get early feedback.

storyboard

Originally referring to illustrations that depict a specific sequence in a film, the term has been adopted by businesses to describe early-stage efforts to develop presentations or design solutions. Analogous to a sketch, a storyboard proposes a sequence of slides for a presentation or the sequence of the user experience with a specific tool.

style guide

A set of guidelines and standards covering areas such as vocabulary, editing, tone, and voice. May extend to structural aspects of content.

town hall

A political tradition where a representative holds a meeting in a local town hall so that constituents can ask questions directly. Similarly, many corporations organize periodic meetings for large groups of employees to hear from and directly address corporate leadership. In the digital era, the meetings are often a mix of a live event with people in an auditorium combined with a videoconference option for employees in other locations.

translation

Conversion of content from one language to another.

translation memory

A repository that contains translated source and target language pairs. Used by human translators to speed translation and reduce costs by reusing previously translated content.

user-centered design

Also known as user-oriented design, a design framework that considers how, why, and in what circumstances users will experience a product. User-centered design researches user behavior to avoid having to train users or develop workarounds for design flaws. It is applied in many areas of business, including product design, technology, and tools.

wireframe

A schematic page layout, especially for proposed web content, depicting the interface and navigation. It is normally rendered without color, graphics, or typeface, focusing instead on functionality.

Workplace

Internal social-media platform developed by Facebook that enables informal collaboration and information sharing. The functionality mirrors that of other social media platforms, with groups, instant messaging, and posts that appear on user news feeds. Participation is normally limited to employees. Workplace is an example of an enter-

prise social network or social intranet. *Yammer* is a similar platform developed by Microsoft.

works council

A representative body of employees. Works councils are not unions; however, in many European countries, the works council must be consulted by management for any change in working conditions. Companies operating across several countries in the European Union must also maintain a European Works Council, an inter-country council.

Yammer

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