



CCI Corporate Communication Practices and Trends 2011: United States – Final Report

Dr. Michael B. Goodman

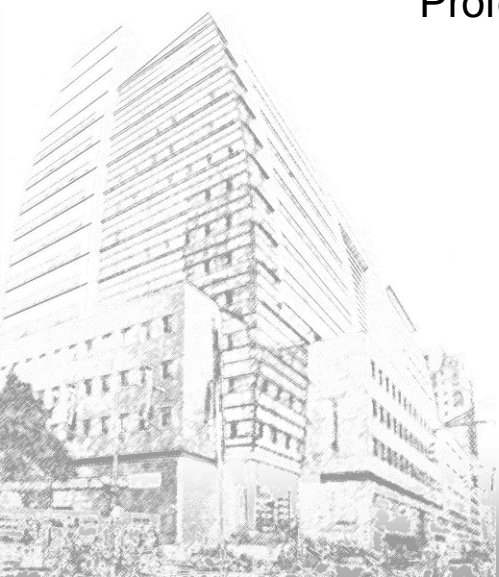
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Briefing Overview: Key Insights (1) -- CCI Study 2011

- 1 Transformation of the discipline through dramatic consolidation of internal & external functions -- marketing, PR, employee relations
- 2 Increased pressure as a result of continuing static budget & staff changes reflect continued global economic uncertainty
- 3 Increased attention to corporate culture & employee communication
- 4 Dramatic increases in complexity and speed in response to social media's role and importance in corporate practice
- 5 Communication executives continue to see their primary role as “counsel to the CEO” & “manager of the company's reputation”



Briefing Overview: Key Insights (2) -- CCI Study 2011

- 6 Dramatically decreased responsibility for the management of IR
- 7 Dodd-Frank Wall Street Reform Act (2010) aligns with leading practices
- 8 *Citizens United* decision -- leading practices re-enforce non-partisanship
- 9 Decreased use of vendors to help with critical functions; slight increases in Media Relations, PR, Community Relations, Intranet, Social Media
- 10 Expanded skill set -- even greater emphasis on business acumen & the ability to articulate ideas & to persuade others



Focus of this 2011 Briefing

- Key Insights (10) from the CCI Practices & Trends Study 2011
- Key corporate communication function & budget responsibilities
- Responses to three open-ended questions
- Interview responses to ten open-ended questions
- Survey Data 2000-2011 (64 Charts) for reference



Goals of the 2011 Study

- Outline & analyze the *state of the art* for Corporate Communication practice in public, multinational companies
- Continue the CCI Studies from 2000 - 2009
- Identify & analyze Corporate Communication practices
- Identify trends and determine leading practices in Corporate Communication
- Continue to build the database for further study
- Distribute Key Findings to the academic and professional communities

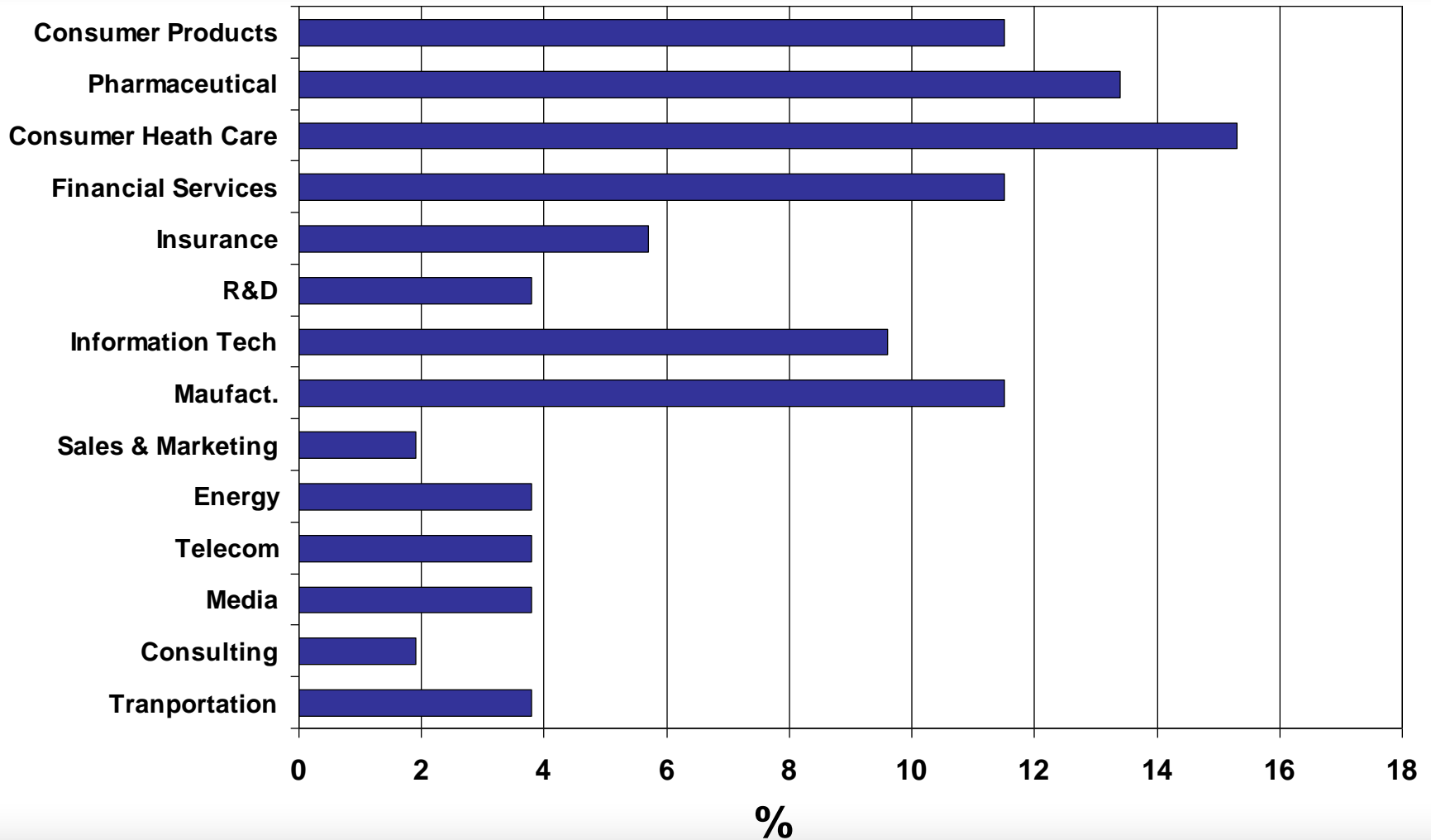


Methods of the 2011 Study

- Survey: 27 Questions
- Survey available online with password access
- Mailed to 1000 companies: Spring 2011
- Follow-up postcard reminder: April 2011
- Telephone calls and Email reminders: May-July 2011
- Response rate: 6.5%
- 13 Telephone Interviews (6.5 hours): May – September 2011

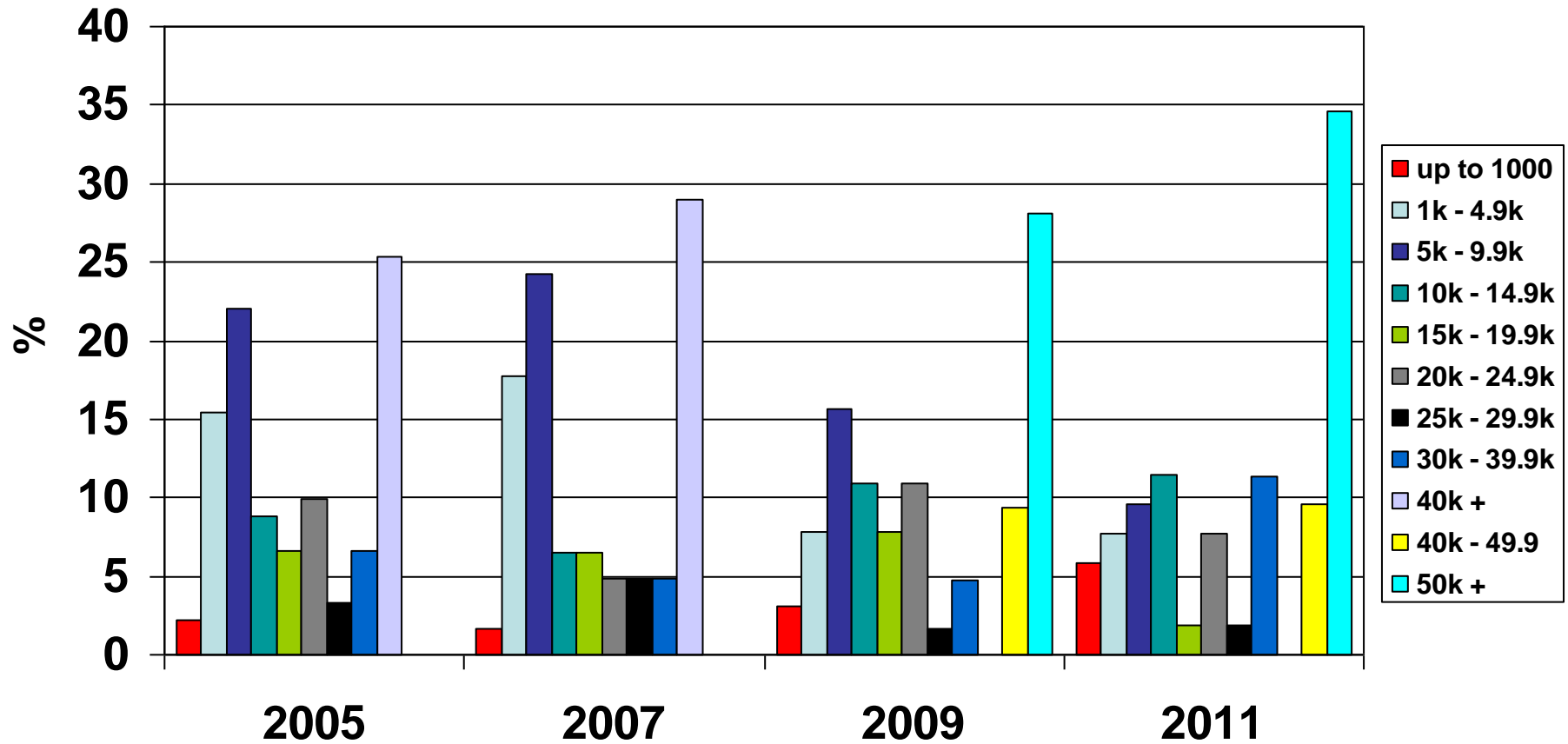


Industry Sectors for 2011 [Q #1]



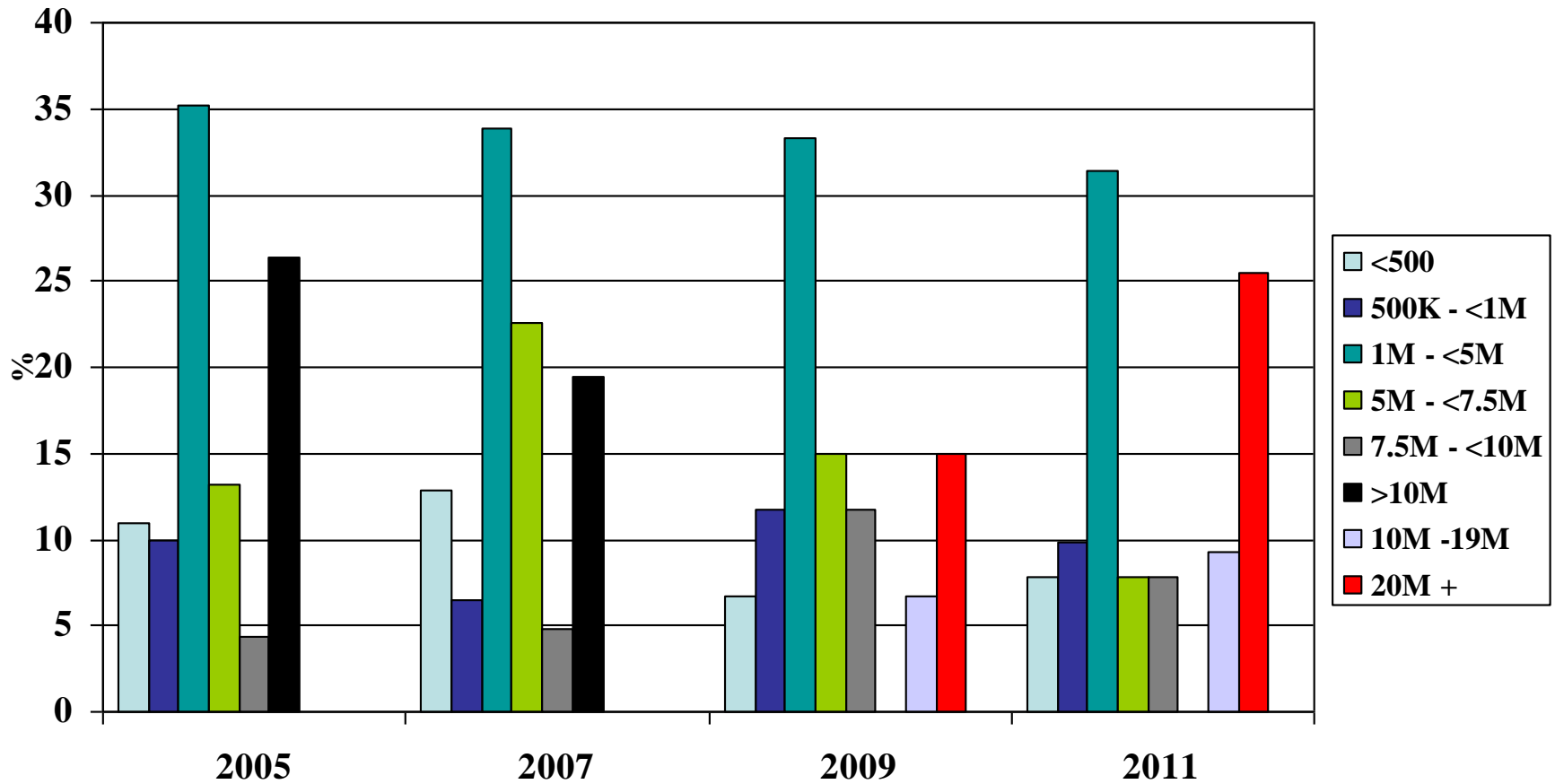


Number of Employees 2011 [Q#3]





Corporate Communication Dollar Value 2011 [Q#17]





Key Study Insights 2011 (1)*

Transformation of the discipline through a dramatic consolidation of internal & external communication functions -- marketing, public relations, employee relations

TREND: Increases internal focus through greater budgets for corporate culture, intranet, employee communication;

Increases in external focus through increased budget levels for reputation management, issues management, government relations, social media

OPPORTUNITY: Consider the importance of empowering employees and customers

* Q 13, 14, 15, 16; Interviews



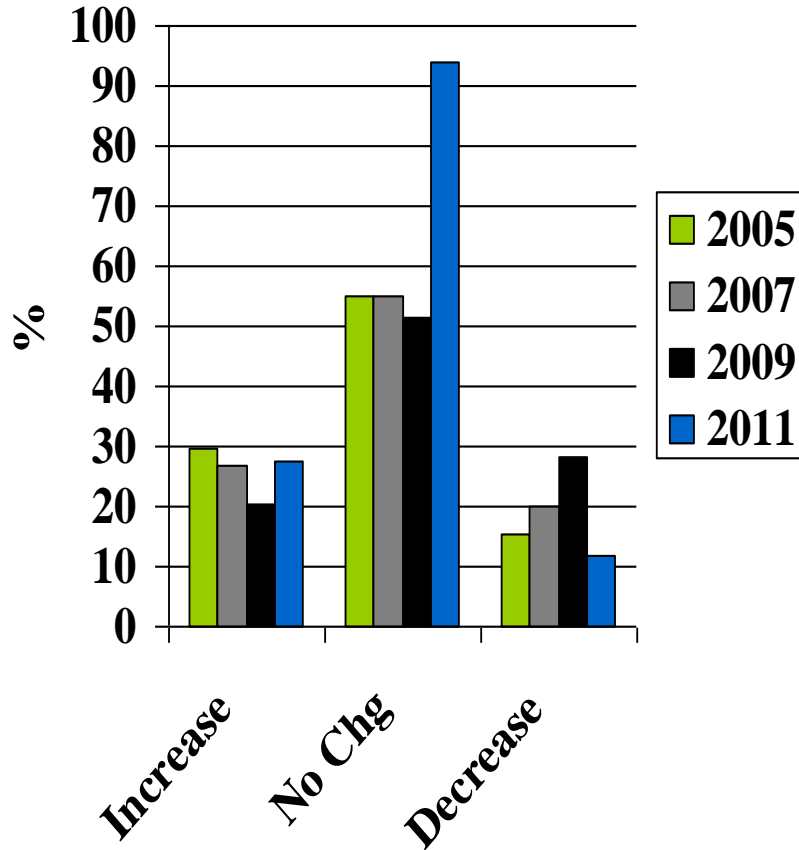
Key Study Insights 2011 (2)*

- Increased pressure as a result of continuing static budget & staff changes reflect continued global economic uncertainty;
- Modest budget (28%) and staff (27.4%) increases reflect overall corporate caution in response to the global economic downturn, contrasting sharply with decreases in 2009
- Nevertheless, communication executives remain optimistic that their budgets will **not be “among the first to be cut”** (88.2%), reflecting the value of the function
- TREND:** Decreasing resources continue to drive corporate communicators to accomplish even more with less
- OPPORTUNITY:** Leverage the corporation’s culture and its employee “ambassadors” through media technology to add strategic advantage and value

* Q 13, 14, 15, 16, 18, 22; Interviews



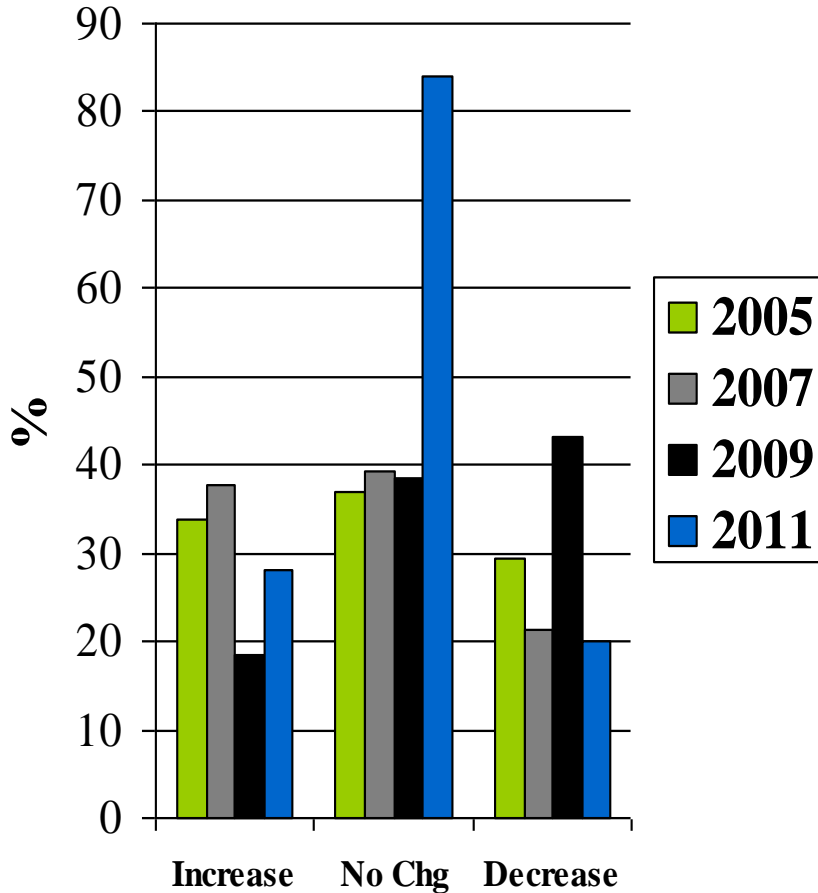
Staff Changes 2011 [Q#14]



INCREASED Staff			
2007	2009 (20.3%)	2011 (27.4%)	
21.7%	10.9%	15.6%	[5% incr]
1.7%	3.1%	3.9%	[10% incr]
0	1.6%	7.8%	[15% incr]
3.3%	4.7%	0	[15%+]
DECREASED Staff			
2007	2009 (28.1%)	2011 (11.7%)	
11.7%	12.5%	7.8%	[5% decr]
1.7%	3.1%	3.9%	[10% decr]
3.3%	3.1%	0	[15% decr]
3.3%	9.4%	0	[15%+ decr]



Budget Changes 2011 [Q#15]



INCREASED Budget

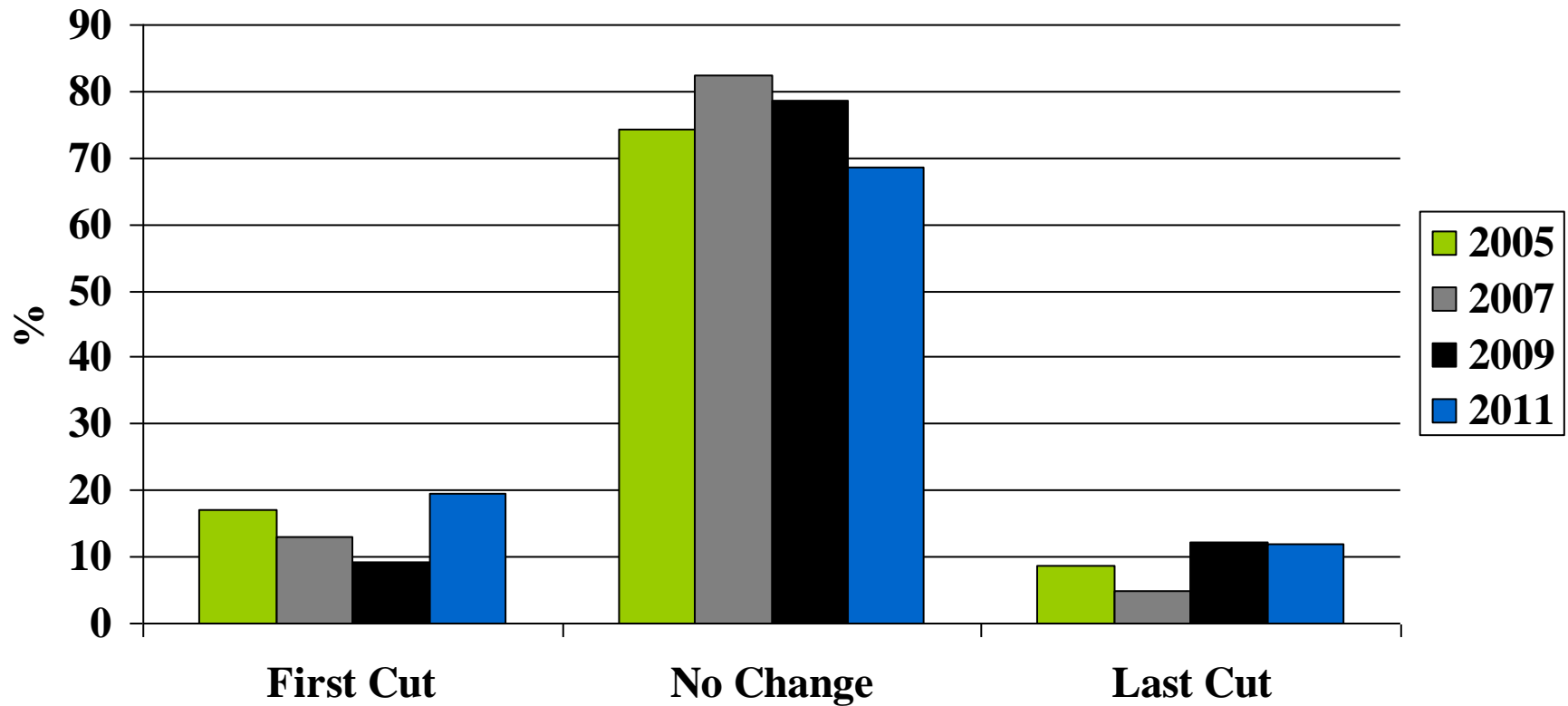
2007	2009 (18.4%)	2011 (28%)	
23.0%	9.2%	12%	[5% incr]
8.2%	4.6%	10%	[10% incr]
4.9%	3.1%	2%	[15% incr]
1.6%	1.5%	4%	[15%+]

DECREASED Budget

2007	2009 (43.1%)	2011 (20%)	
8.2%	10.8%	8%	[5% decr]
3.3%	15.4%	8%	[10% decr]
1.6%	4.6%	2%	[15% decr]
8.2%	12.3%	2%	[15%+]



Budget Cuts to Reduce Cost 2011 [Q#18]





Key Study Insights 2011 (3)*

Increased attention to corporate culture & employee communication in response to continued uncertainty in global economic conditions, business model transformation, & the networked enterprise

TREND: Renewed internal focus is driven by an understanding of the employees' essential role in the networked enterprise, the need to boost employee morale, and reflect a reluctance to commit resources to hiring additional staff.

OPPORTUNITY: Position for an economic recovery, or continued global economic weakness

* Q 13, 14, 15, 16; Interviews



Key Study Insights 2011 (4)*

Dramatic increases in complexity and speed in response to social media's role and importance in corporate practice

TREND: Communication officers' continuing increases in the responsibility for the social media function (84.3%, *up 6.3% from 2009*) and its budget (74.5% *up 10.5% from 2009*); increased use of vendors for social media (38.8%; *up from 28% in 2009*)

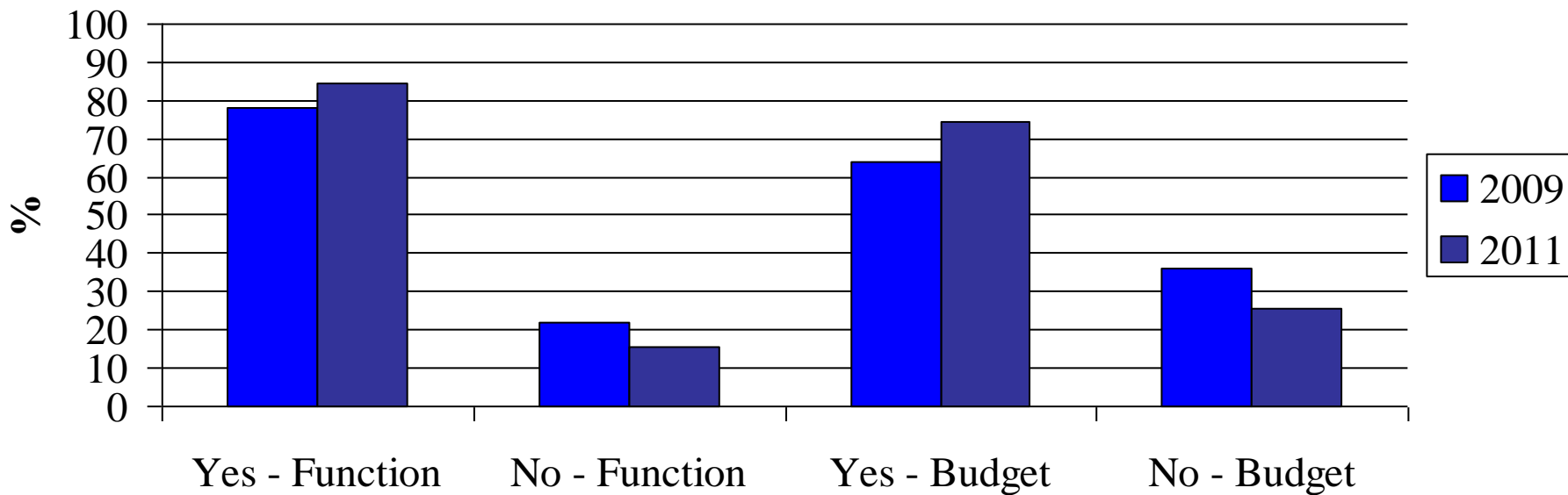
OPPORTUNITY: Focus new technology internally and externally for clearly defined strategic purposes

* Q 13, 16, 22, *Interviews*



Corporate Communication Functions & Budget 2011 (23) [Q13,16]

Social Media [new in 2009]





Key Study Insights 2011 (5)*

Communication executives continue to see their primary role as “counsel to the CEO” & “manager of the company’s reputation”

TREND: Reputation management continues to grow in importance and in budget allocation; Strategic communication counsel has been cited as the primary role for corporate communication officers since the first CCI Study more than a decade ago.

OPPORTUNITY: Reputation management requires a strategic partnership and counsel with the CEO

* Q 13, 16, 21, 25; Interviews



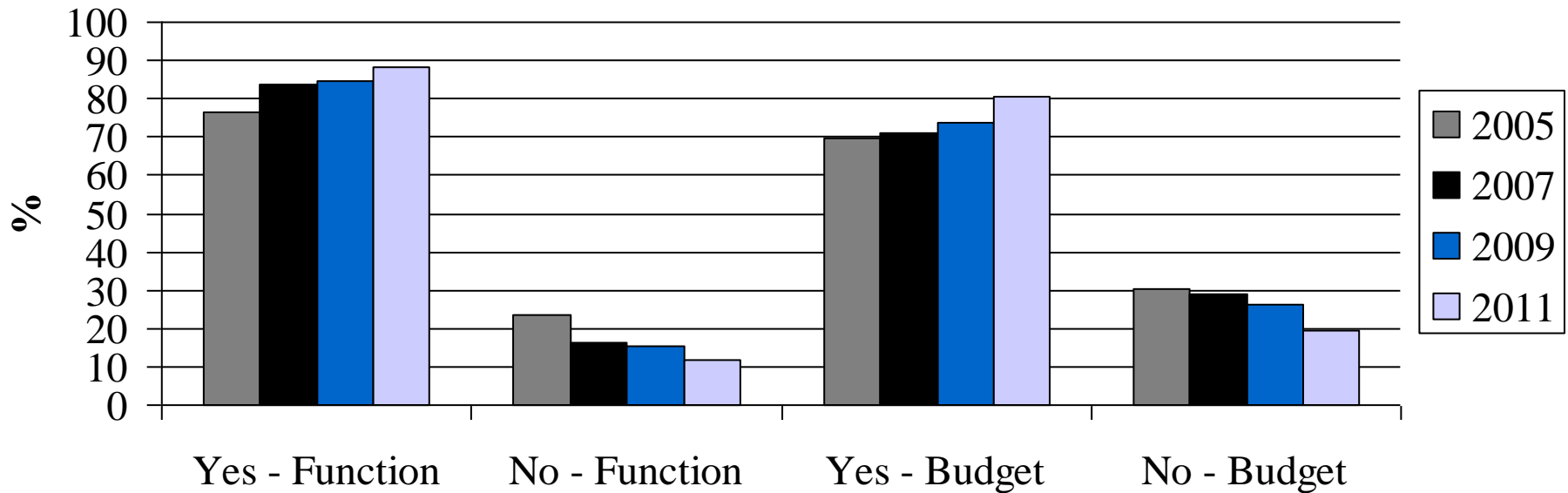
Corporate Officer Best Prepared to Manage Reputation 2011 [Q 25]

Corporate Officer	
Chief Executive Officer (CEO)	41.6%
Chief Communication Officer (CCO)	22.9%
CEO and CCO	25%
CEO & Chief Marketing Officer (CMO)	2%
CFO	2%
Corporate Counsel	2%
Other	4%



Corporate Communication Functions & Budget 2011 (22) [Q13,16]

Reputation Management





Key Study Insights 2011 (6)*

Dramatically decreased responsibility for the management of **Investor Relations**; Lowest responsibility for the management of the IR function (15.7%) & budget (7.8%) since the first CCI Study, reflecting corporate uncertainty

However, overwhelmingly engaged with the Annual Report function (70.6%) and budget (60.8%)

TREND: Communication with shareholders, the capital markets, & other stakeholders during a weak economy remains essential in maintaining positive relationships

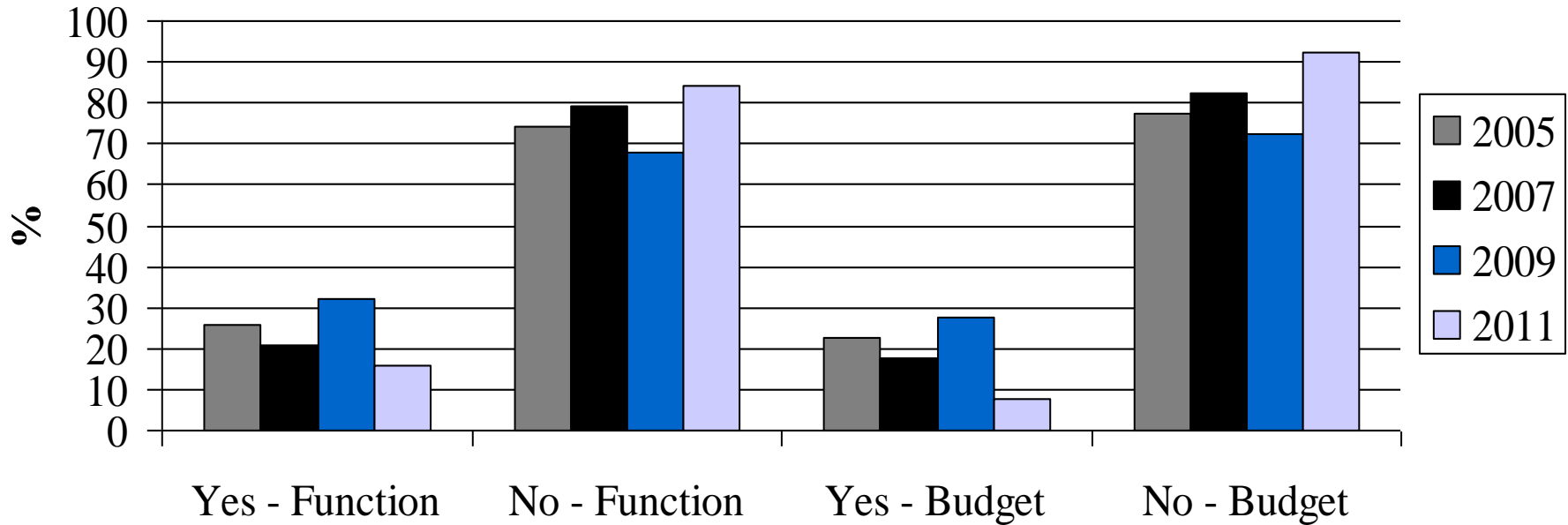
OPPORTUNITY: Develop and communicate strategic understanding of the volatile business environment

* Q 13,16,23,24; Interviews



Corporate Communication Functions & Budget 2011 (17) [Q13,16]

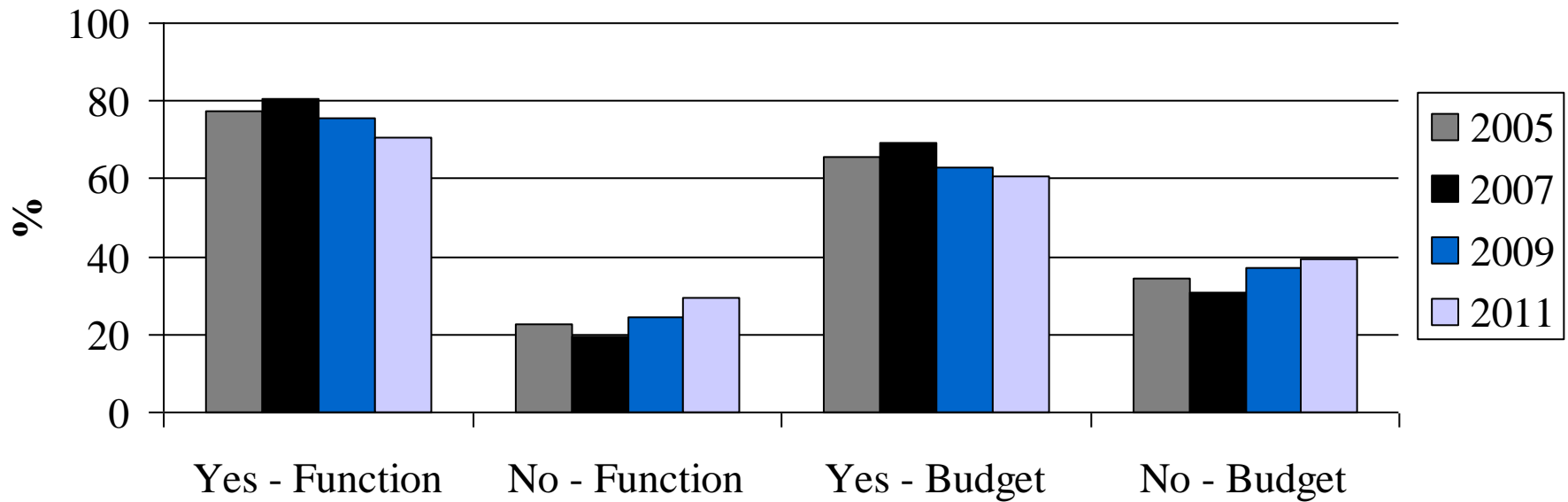
Investor Relations





Corporate Communication Function & Budget 2011 (2) [Q13,16]

Annual Report





Key Study Insights 2011 (7)*

Dodd-Frank Wall Street Reform and Consumer Protection Act (2010) aligns with leading practices

TREND: Most (75%) communication officers report that the new legislation has had “no,” “limited,” or “minimal” impact on corporate communication, adding that their transparency policies were in place before the legislation was passed.

OPPORTUNITY: Demonstrate that your organization takes regulatory reform and consumer protection seriously; and help regulators and lawmakers understand your businesses

* Q 24; *Interviews*



Key Study Insights 2011 (8)*

Citizens United vs Federal Election Commission Supreme Court decision -- leading practices re-enforce non-partisanship

TREND: Communication officers report that U.S. Supreme Court ruling has had “no,” “limited,” or “minimal” impact on corporate communication, adding that their corporate political campaign contribution policies are long standing and transparent

OPPORTUNITY: Demonstrate that your organization exercises its financial and political influence responsibly

* *Interviews*



Key Study Insights 2011 (9)*

Decreased use of vendors to help with critical functions; slight increases in use for Media Relations (up 3.9%), PR (up 5%), Community Relations (3.6%), Intranet (1.5%), Social Media (10.8%)

TREND: Complexity and uncertainty drive the use of vendors, “interns,” and “contingent workers”; dependence on outside experts at the expense of developing internal capability and expert counsel

OPPORTUNITY: Global agencies offer experience and expertise without long-term commitment

* Q 22; *Interviews*



Key Study Insights 2011 (10)*

Expanded skill set with even greater emphasis on business acumen, as well as the ability to articulate ideas & persuade others

Demographic profile of top Corporate Communication officers – younger (56% 40 – 55; *in 2009 60% over 50*); better paid (48% above \$300k; *in 2009 33% above \$300k*) & better educated; mostly male (75%; *in 2009 66.7%*)

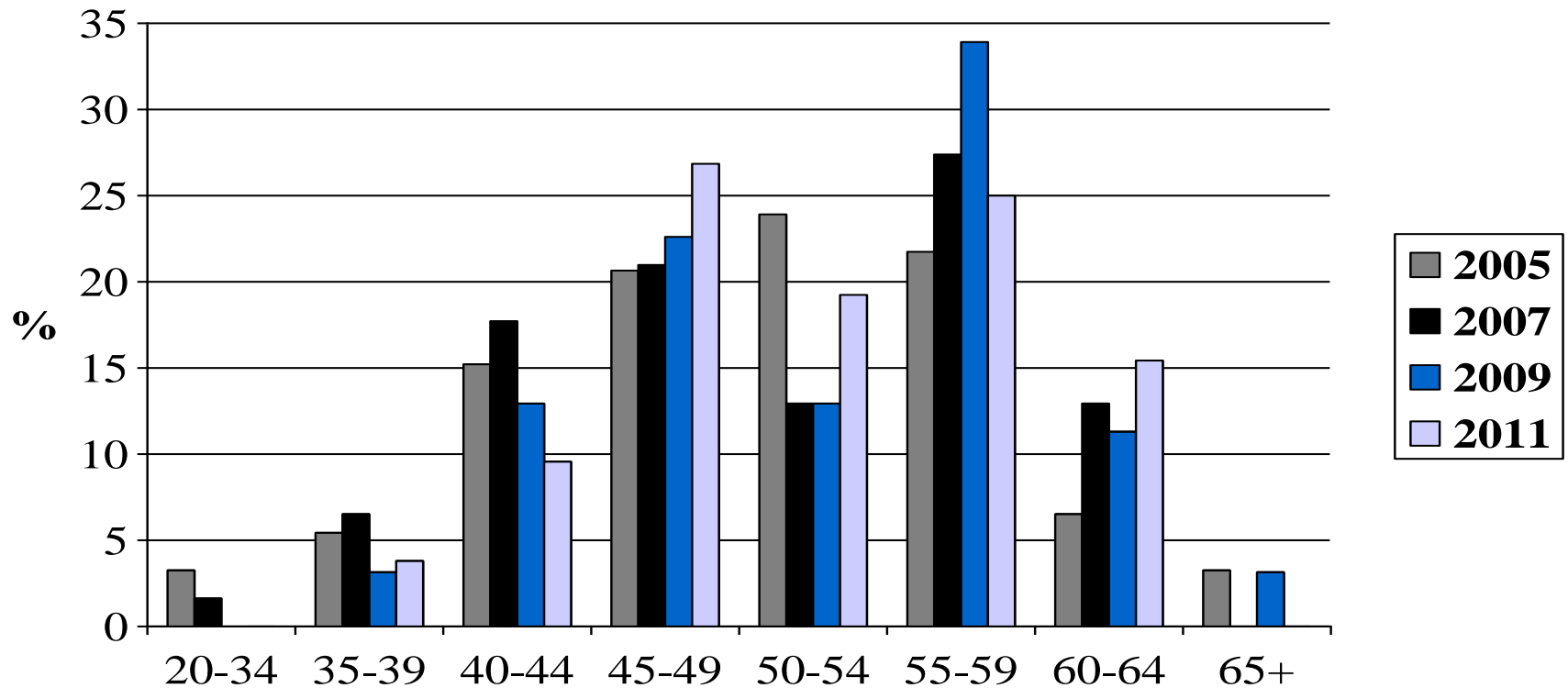
TREND: Corporate communication executive officers are “middle-aged”, and 1 out of 4 is paid over \$500K

OPPORTUNITY: Consider the different experiences between managers & their staff in employee communication; Develop the business competencies of new staff & leadership experience of managers

* *Interviews; Q 6,7,8,10*



Age - Corporate Communication Executives 2011 [Q#7]





Key Functions 2011 [Q13] (%yes)

• Communication Strategy	100.0%	• Mission Statement	60.8%
• Media Relations	98.0%*	• Corporate Culture	56.9%
• Public Relations	98.0%*	• Corporate Citizenship	56.9%
• Communication Policy	96.1%*	• Corporate Identity	54.9%
• Crisis Communication	94.1%*	• Brand Strategy	45.1%
• Executive Communication	92.2%*	• Marketing Communications	41.2%
• Reputation Management	88.2%*	• Advertising	35.3%
• Employee (Internal) Comm	88.2%*	• Government Relations	21.6%
• Intranet Communication	88.2%*	• Investor Relations	15.7%
• Social Media	84.3%	• Technical Communication	11.8%
• Internet Communication	80.4%	• Training & Development	9.8%
• Issues Management	78.4%	• Ethics	7.8%
• Annual Report	70.6%	• Labor Relations	2.0%
• Community Relations	62.7%		

* *Almost ubiquitous*



Role of Corporate Communication In Companies 2011 [Q21]

Respondents RANKED the following functions that best describe their role:*

1. Manager of company's reputation (4.06)
2. Counsel to the CEO & the Corporation (4.16)
3. Manager of the company's image (5.11)
4. Manager of employee relations (internal comm.) (5.17)
5. Advocate or "engineer of public opinion" (5.60)
6. Driver of company publicity (5.83)
7. Source of public information about the company (6.30)
8. Branding & brand perception steward (7.29)
9. Member of the company's strategic planning leadership team (7.46)
10. Manager of relationships -- co. & ALL key constituencies (7.83)
11. Support for marketing & sales (8.15)
12. Manager of relationships – co. & NON-customer constituencies (8.16)
13. Corporate citizenship champion (8.36)
14. Other (8.50)

** Response average – lower number equals higher ranking – 1 - 13*



Open-Ended Questions – Selected Responses [Q23]

Impact of executive compensation issue on the practice of corporate communication

“Minimal impact.”

“Managed as another significant issue.”

“Executive Compensation was a major issue for us 15 years ago, but it has not been a major issue or concern for us for many years. It is not a significant issue for us.”

“It hasn't to a great degree. My department is responsible for the annual proxy, and we've certainly changed a number of things to be more transparent and in line with new SEC regulations on compensation disclosure, but by and large they are minimal and haven't had an impact on the way we generally communicate.”



Open-Ended Questions -- Selected Responses [Q24]

Impact of the 2010 Dodd-Frank Wall Street Reform and Consumer Protection Act

almost 75% say, “No impact.” “Limited.” “Minimal.” but...

“Significant impact. Increased workload by about 20%.”

“It has impacted our financial reporting far more than it has corporate communications. During earnings times, we now have to be more specific in certain areas and report certain items in a way that Wall Street isn't used to, but other than adding some complexity to the process, it hasn't significantly changed the way we communicate.

“Communications plays a role in ensuring that our organization is characterized as taking seriously regulatory reform that protects the interests of consumers, while helping regulators and lawmakers understand our businesses.”



Interview 2011-- Ten Open-Ended Questions

Ten questions sent by e-mail – telephone interview followed:

- The **top three critical issues** in corporate communication
- Strategic importance of corporate communication
- **Top three trends** in corporate communication in companies
- Trends unique to the corporation's industry or sector
- Contribution to the overall success of the corporation
- Core competencies
- Impact of **Dodd-Frank** legislation
- Impact of **Citizens United vs the Federal Election Commission**
- The practice of corporate communication in the future
- Additional comments



Interview Questions 2011-- Selected Responses

The **top three critical issues** in corporate communication

“...the complexity of businesses, organizations, corporations, government....Our institutions have become incredibly complex and hard for the public to understand, hard for our stakeholders to understand, hard for our customers to understand. That in itself undermines confidence and leads to disengagement.”

“...better ways to communicate the fact that yes-it is a corporation...but really it's a band of people working toward a mission or set of goals.”

“...employee engagement...trust and credibility of corporate...being realistically optimistic INSIDE a company... can you be optimistic and realistic at the same time?”



Interview Questions 2011-- Selected Responses

Top three trends in corporate communication in companies

- “...growth in social media, focus on reputation management, and a greater emphasis on employee communications.”
- “...being less of a communication manager and producer and more towards communication advisor and counselor... more of dialogue... more emphasis on listening to the public... A lot more engagement with stakeholders.”
- “...immediacy, time required/allowed to respond is collapsing.”
- “...the breakdown of barriers between internal and external... Everything internal has the potential to go external... Everything gets leaked to the outside world in one way or another.”
- “...mobility. ...the interactivity that smartphones and other devices are offering again changes the way we can communicate and changes profoundly the way customers expect us to communicate.”



Interview Questions 2011– Selected Responses

Impact of *Citizens United vs the Federal Election Commission*

“Not much because we really don’t take a stand on any issues because it would get us in trouble with our customers so we are not very active in that area.”

“This hasn’t had a big impact on us. We’re already one of the nation’s largest lobbyists. ... Over time, we’ve made numerous changes around transparency...people can go and see what we’ve given to whom and why. “

“Minimal impact to us...Let me put it this way...a very small portion of my time would be spent on communication impacting legislation.”

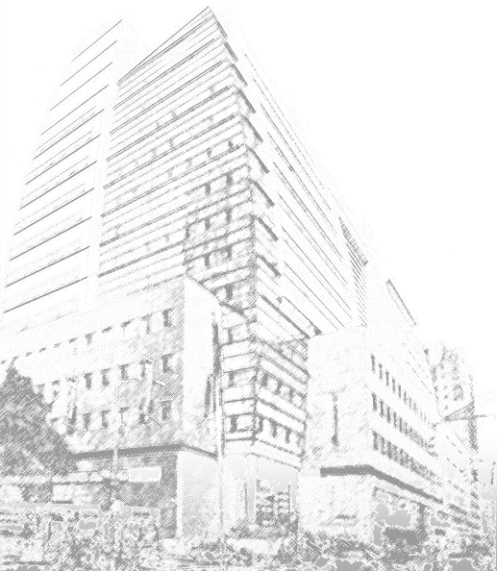
“Not at all. We don’t donate corporate money to those types of political campaigns.”



CORPORATE COMMUNICATION INTERNATIONAL at Baruch College/CUNY

CCI Corporate Communication Practices and Trends 2011: United States – Final Report

THANKS!



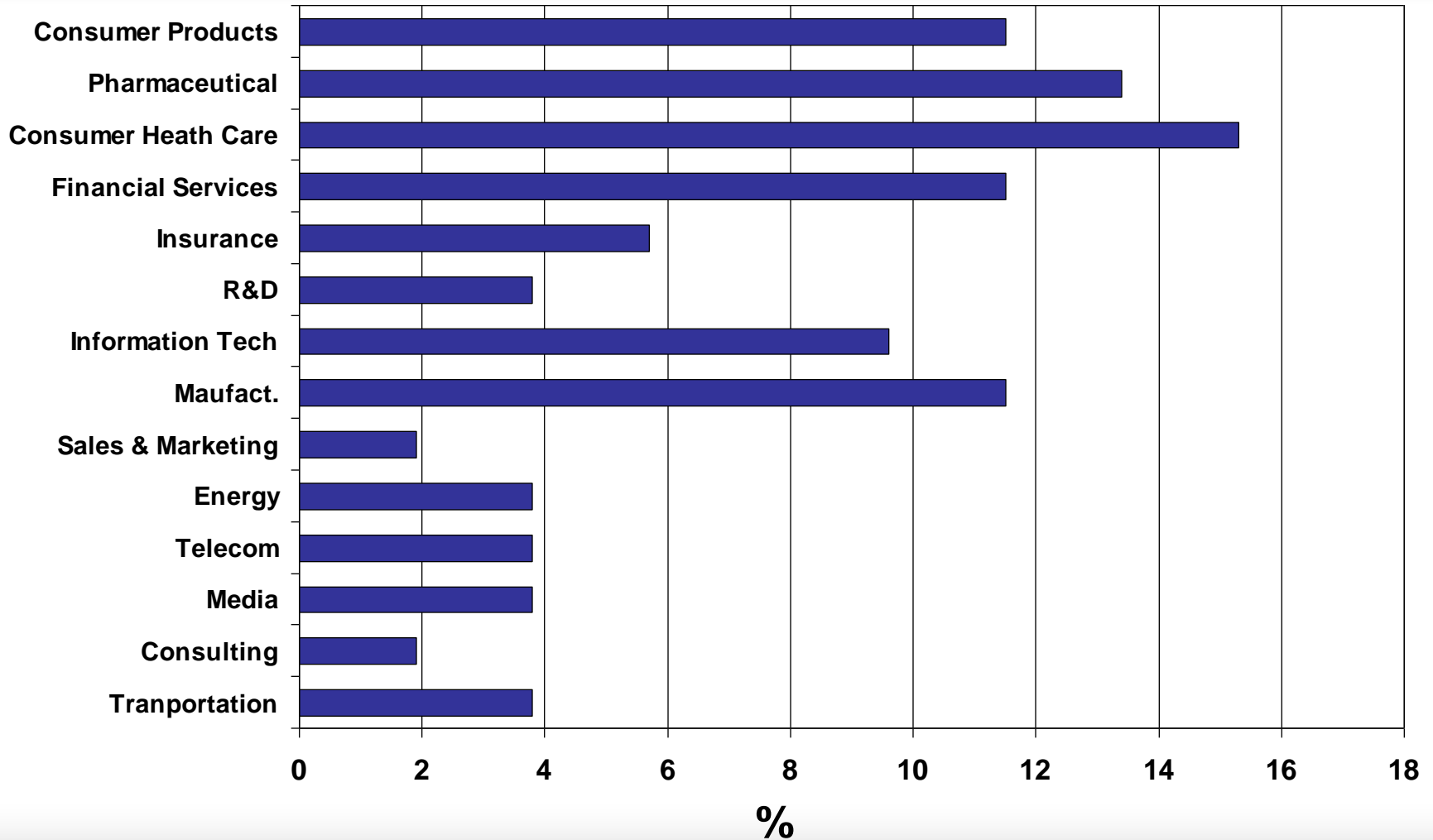


CCI Study 2011 Survey Data

*[Includes information from previous
CCI Studies --
2000, 2001, 2002, 2003,
2005, 2007, 2009, 2011]*



Industry Sectors for 2011 [Q #1]





Role of Corporate Communication In Companies 2011 [Q21]

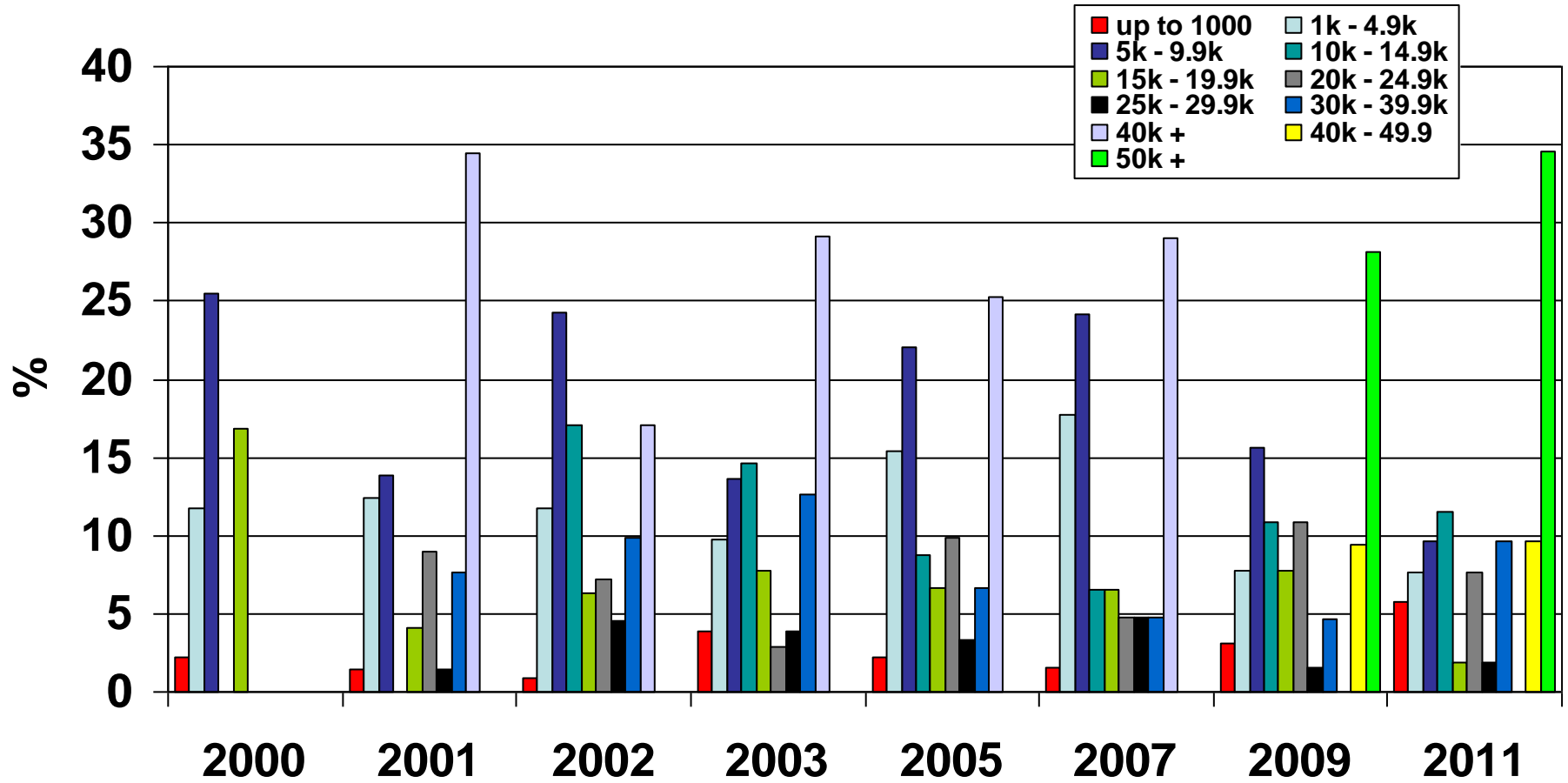
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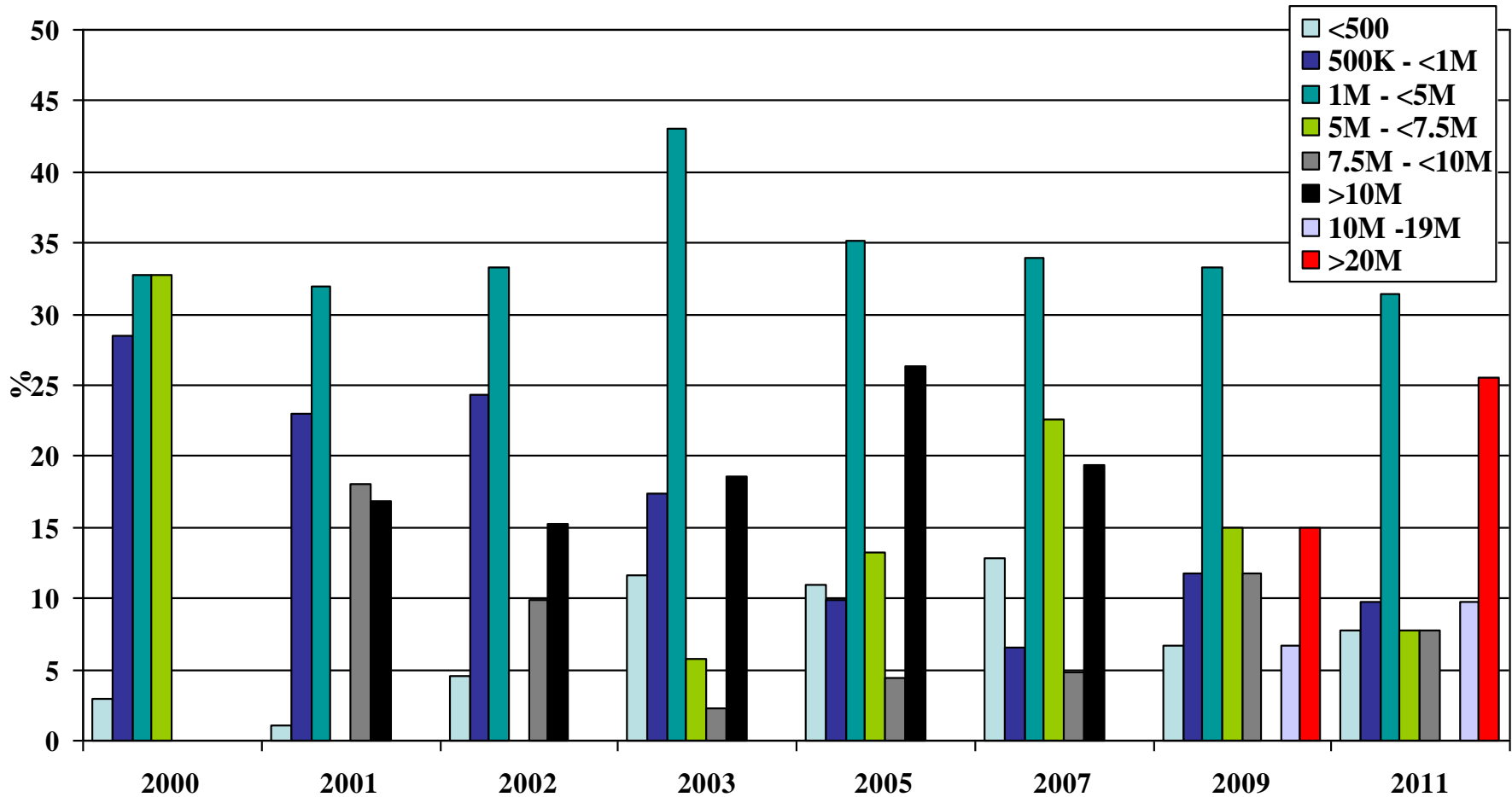


Number of Employees 2011 [Q#3]



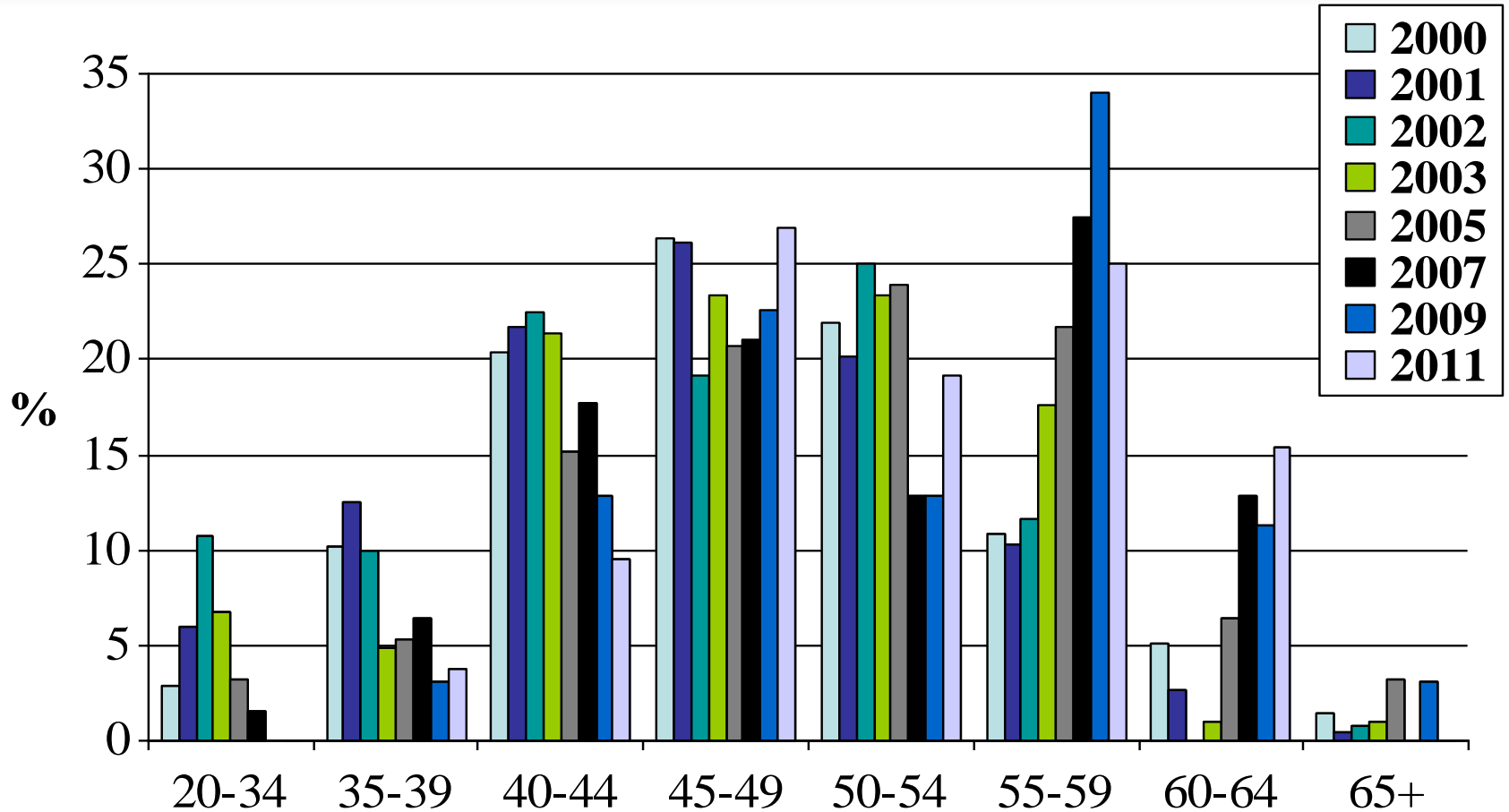


Corporate Communication Dollar Value 2011 [Q#17]



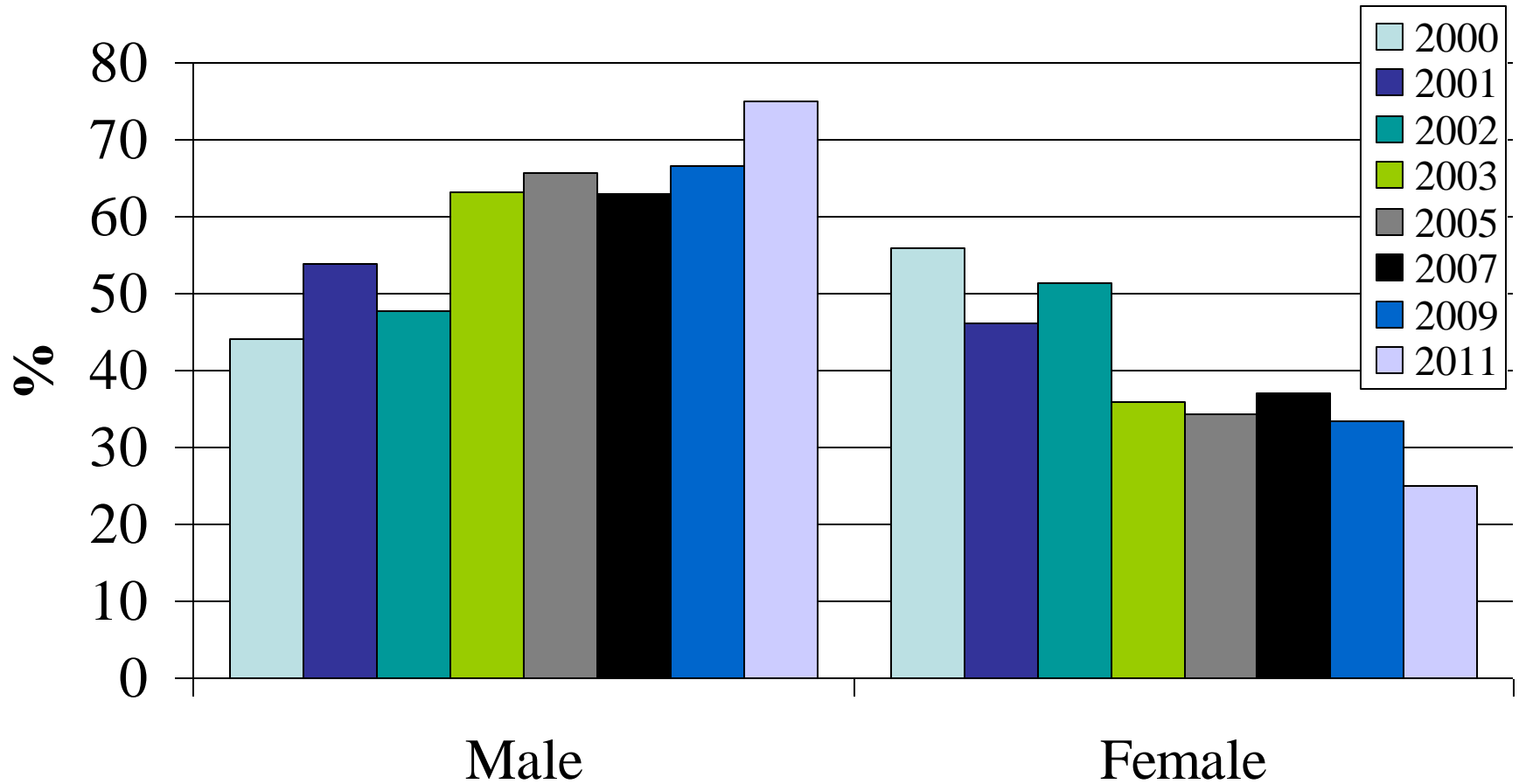


Age - Corporate Communication Executives 2011 [Q#7]



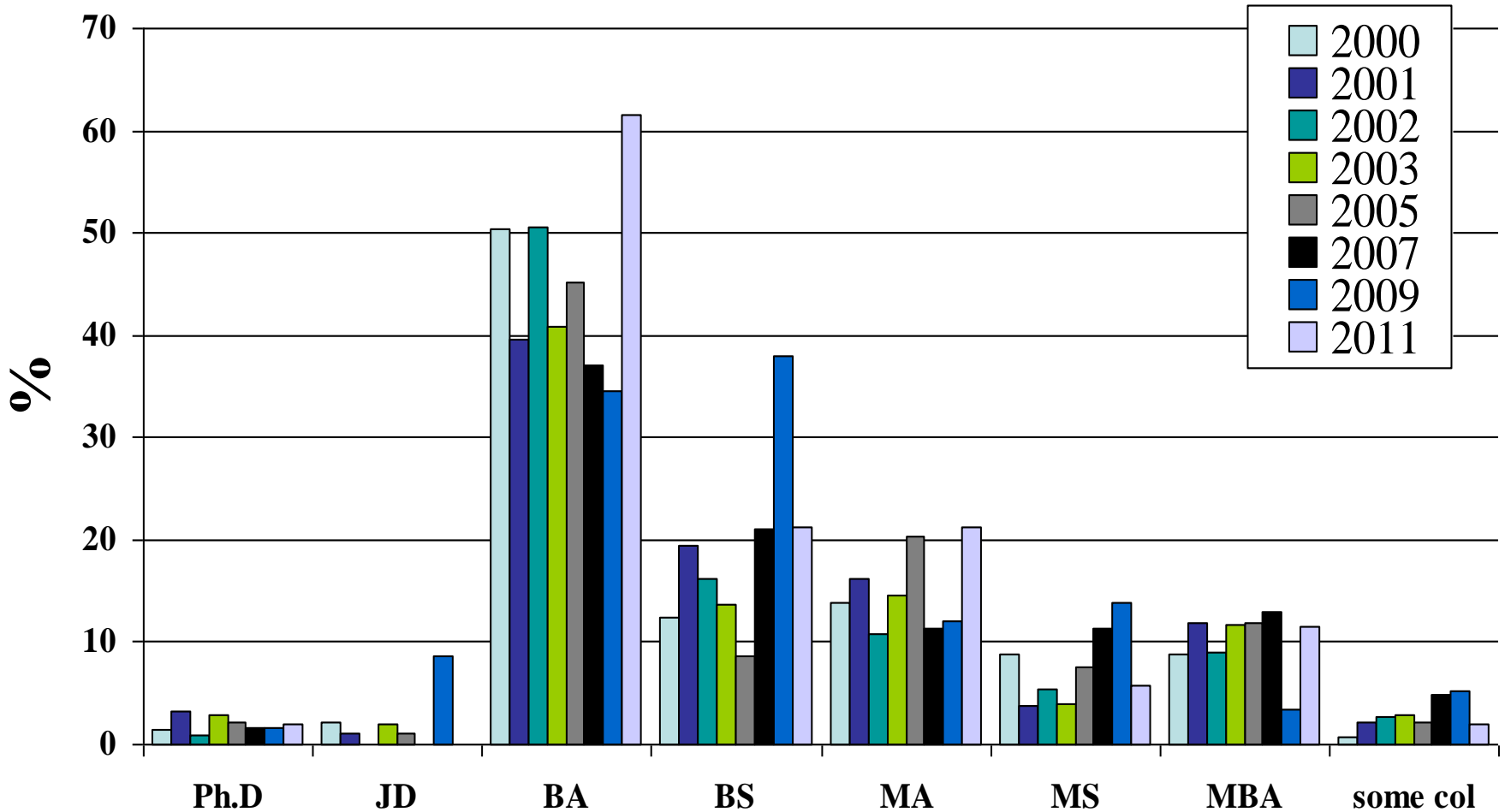


Gender -- Communication Executives 2011 [Q# 6]



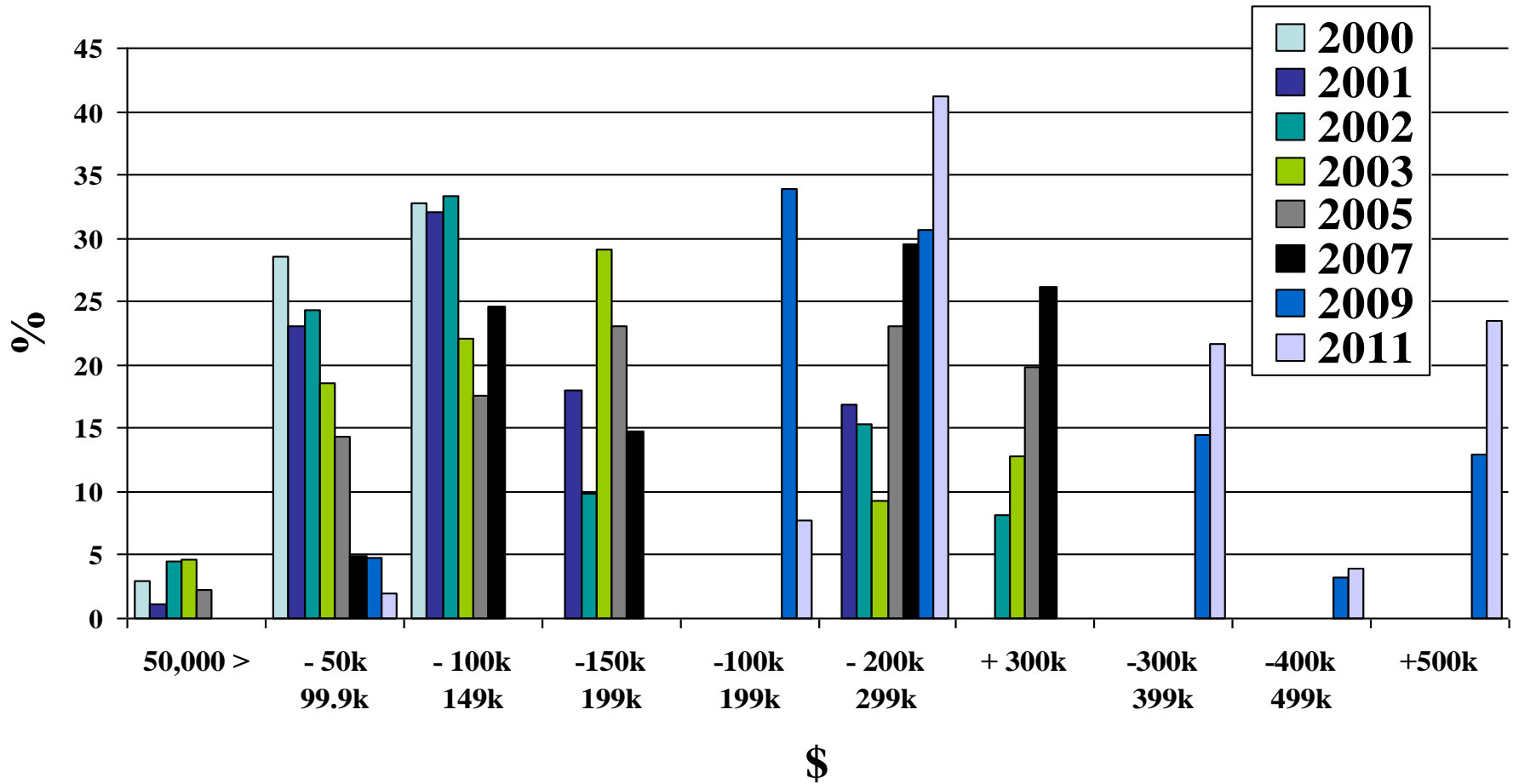


Education - Communication Executives 2011 [Q#8]



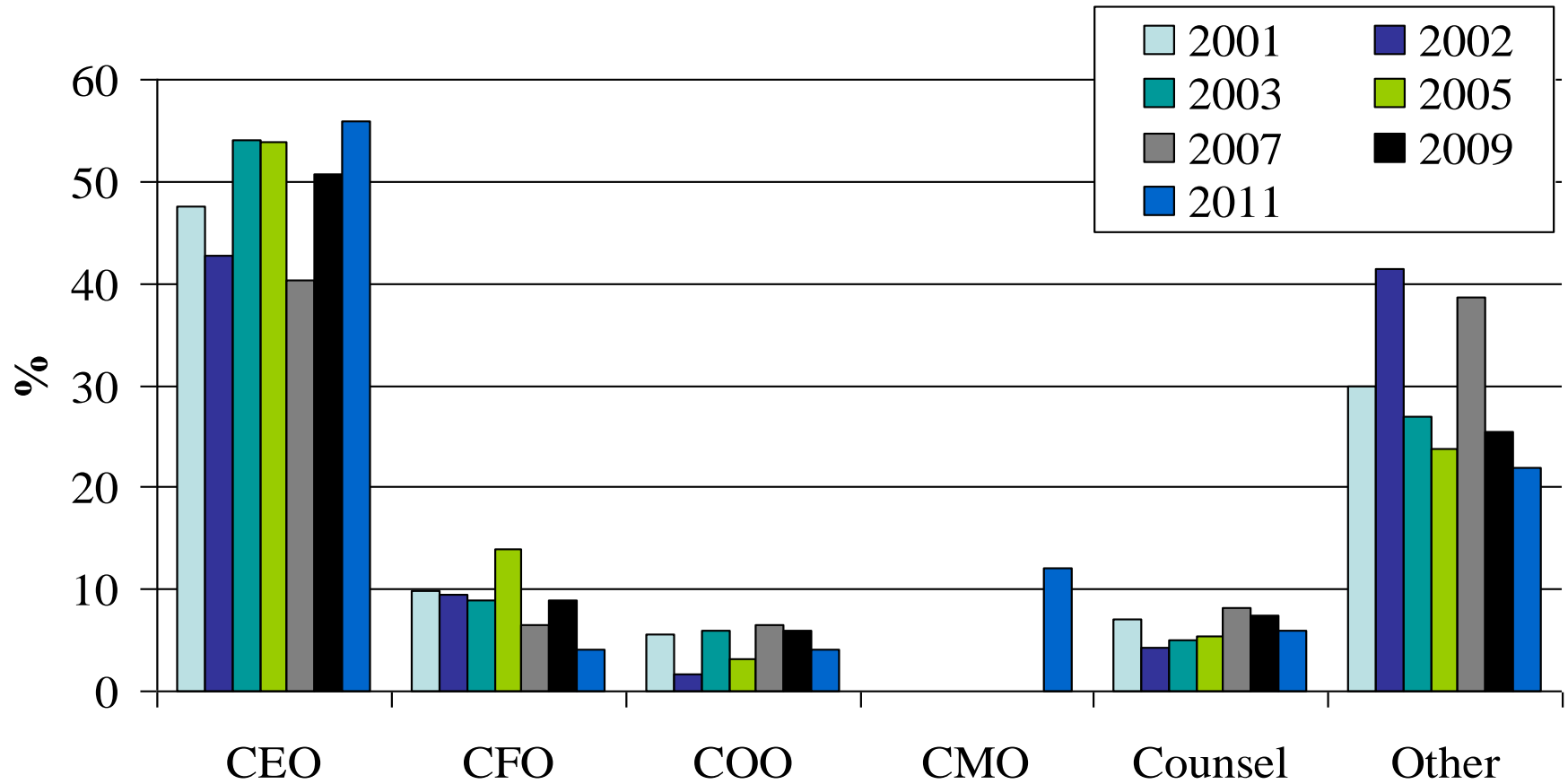


Salary 2011 [Q#10]





Reporting Lines 2011 [Q#12]





Communication Officer Reporting Line 2011 [Q 12]

Top Communication Officer Reports to:	
Chief Executive Officer (CEO)	56%
Chief Financial Officer (CFO)	4%
Corporate Counsel	6%
Chief Operating Officer (COO)	4%
Chief Marketing Officer (CMO)	12%
Other	22%



Titles for Top Communication Officer 2011 [Q 5]

Titles for Top Communication Officer:	
VP, Corporate Communication	34.6%
Director, Corporate Communication	5.8%
SVP, Corporate Communication	26.9%
Chief Communication Officer	13.4%
VP, Corporate Affairs	3.8%
VP, Public Affairs	3.8%
Corporate Communication Manager	5.8%
Other	7.6%

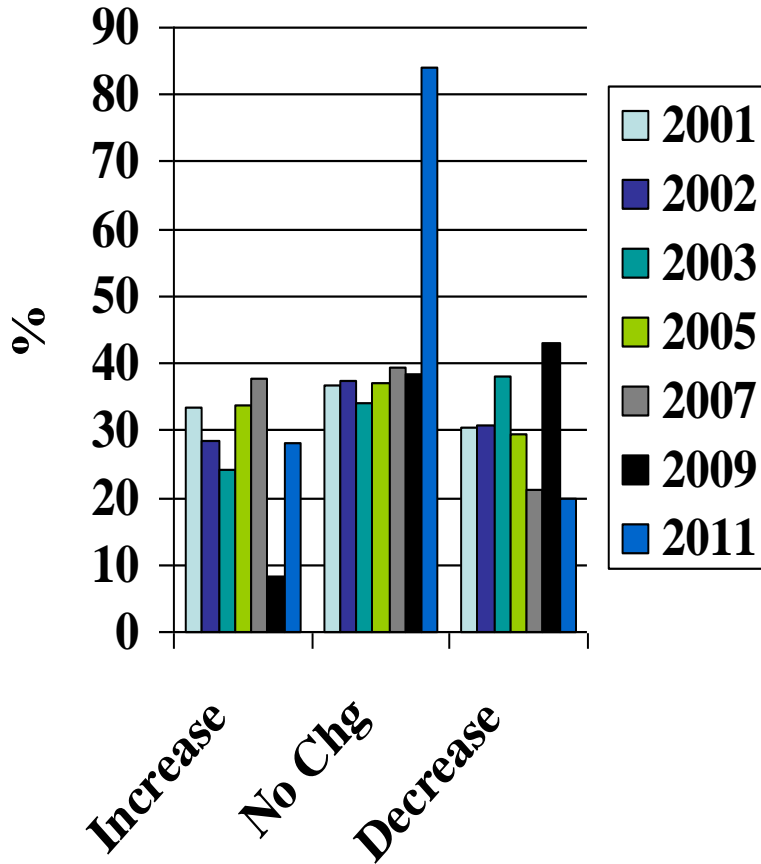


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Budget Changes 2011 [Q#15]



INCREASED Budget

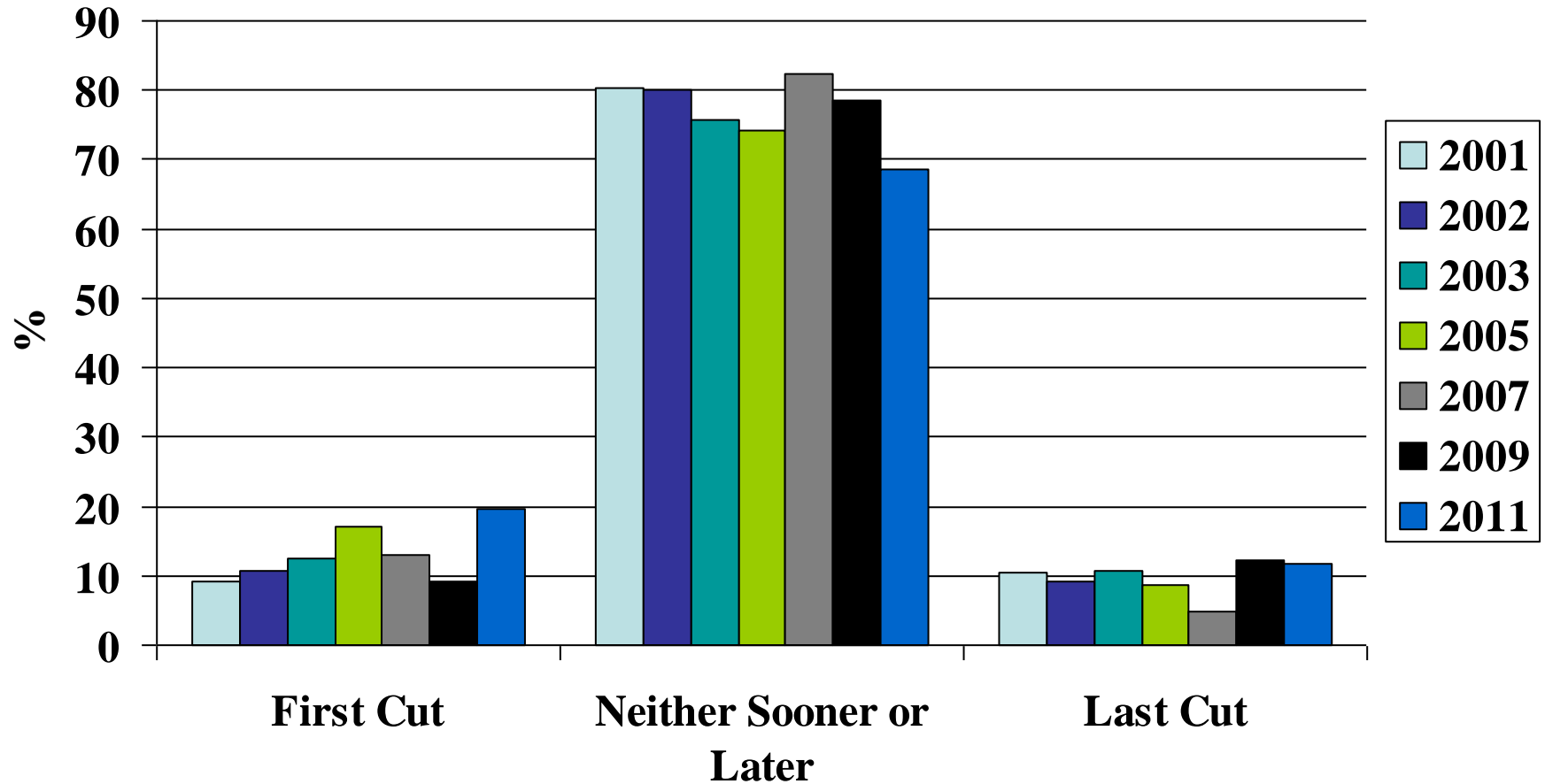
2007	2009 (18.4%)	2011 (28%)	
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DECREASED Budget

2007	2009 (43.1%)	2011 (20%)	
8.2%	10.8%	8%	[5% decr]
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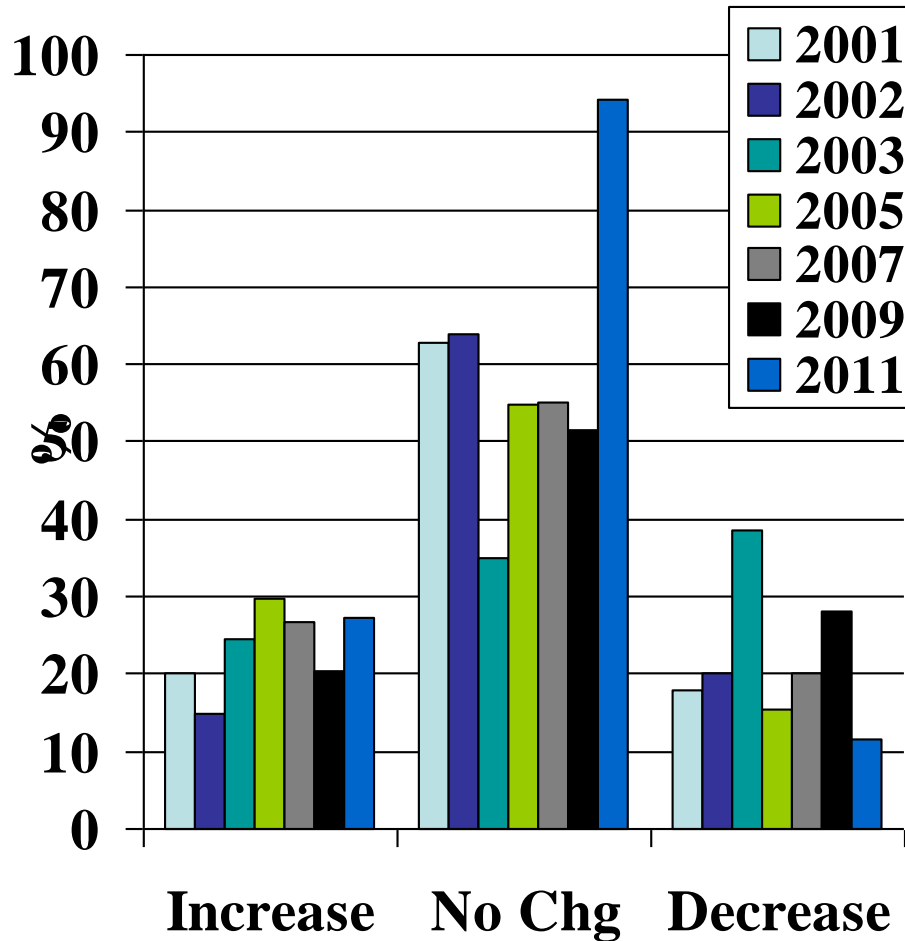


Budget Cuts to Reduce Cost 2011 [Q#18]





Staff Changes 2011 [Q#14]



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3.3%	4.7%	0	[15%+]
DECREASED Staff			
2007	2009	2011 (11.7%)	
11.7%	12.5%	7.8%	[5% decr]
1.7%	3.1%	3.9%	[10% decr]
3.3%	3.1%	0	[15% decr]
3.3%	9.4%	0	[15%+ decr]



Key Functions 2011 [Q13] (%yes)

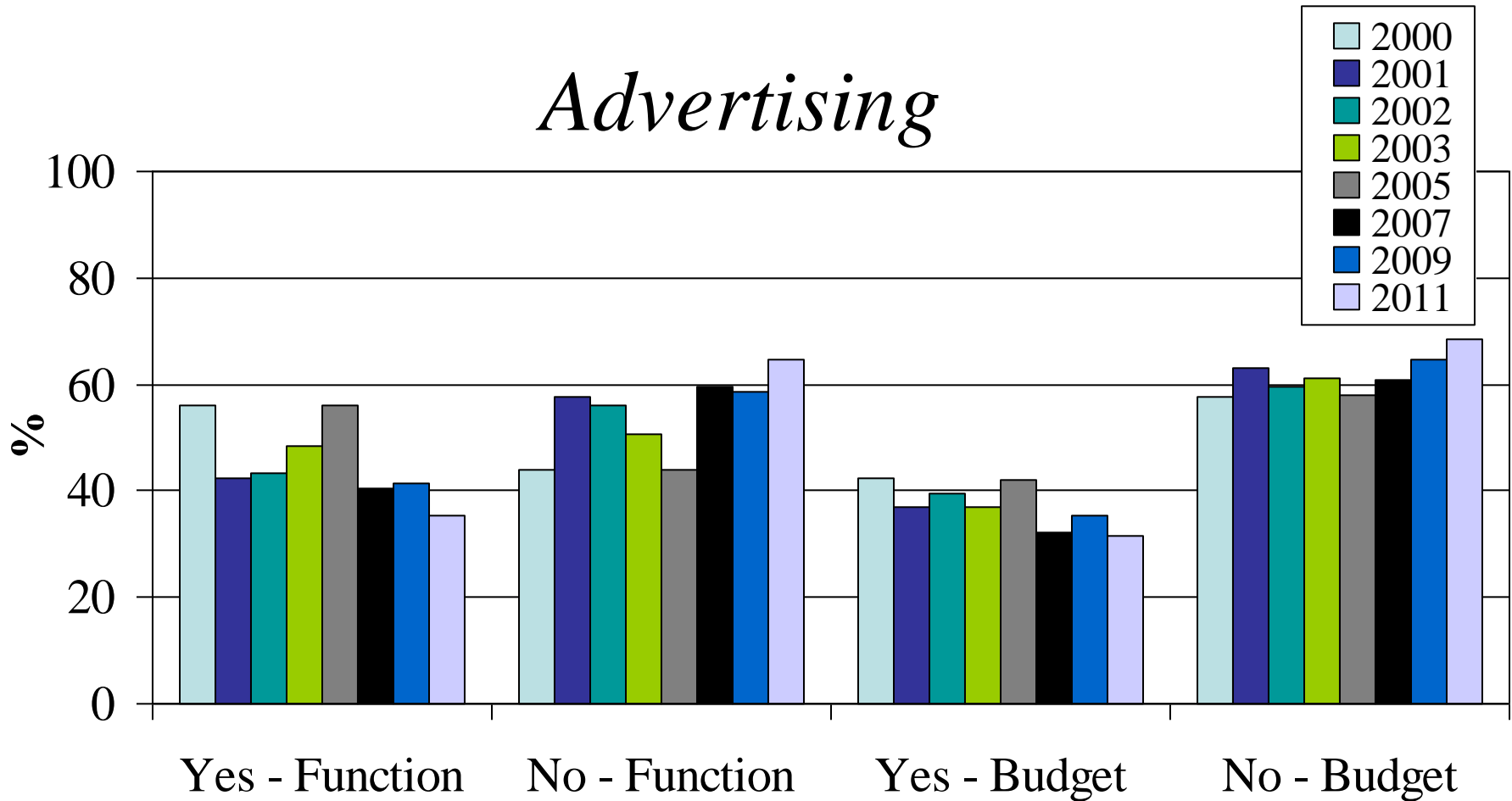
• Communication Strategy	100.0%	• Mission Statement	60.8%
• Media Relations	98.0%*	• Corporate Culture	56.9%
• Public Relations	98.0%*	• Corporate Citizenship	56.9%
• Communication Policy	96.1%*	• Corporate Identity	54.9%
• Crisis Communication	94.1%*	• Brand Strategy	45.1%
• Executive Communication	92.2%*	• Marketing Communications	41.2%
• Reputation Management	88.2%*	• Advertising	35.3%
• Employee (Internal) Comm	88.2%*	• Government Relations	21.6%
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• Internet Communication	80.4%	• Training & Development	9.8%
• Issues Management	78.4%	• Ethics	7.8%
• Annual Report	70.6%	• Labor Relations	2.0%
• Community Relations	62.7%		

* *Almost ubiquitous*



Corporate Communication Function & Budget 2011 (1) [Q13,16]

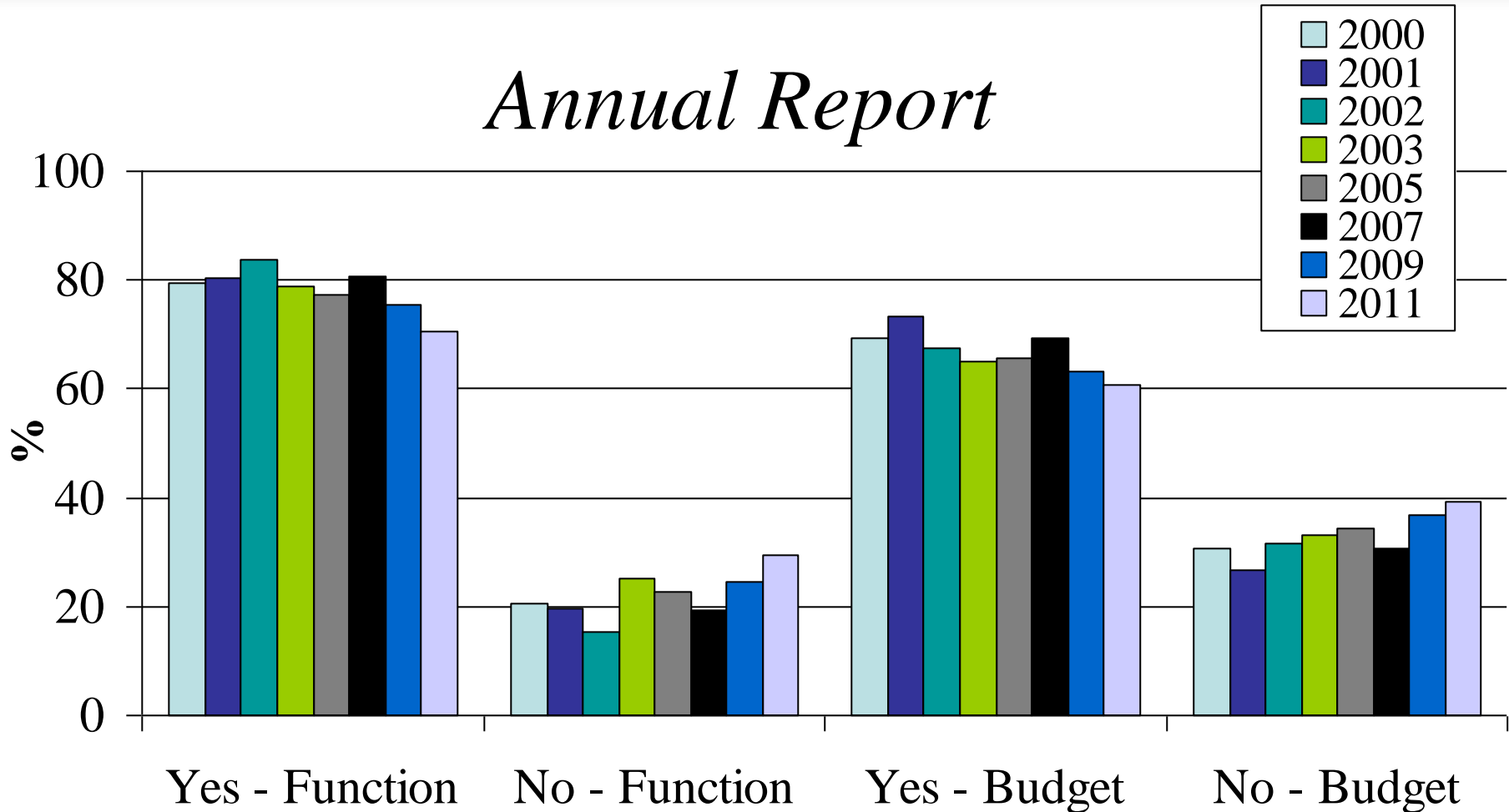
Advertising





Corporate Communication Function & Budget 2011 (2) [Q13,16]

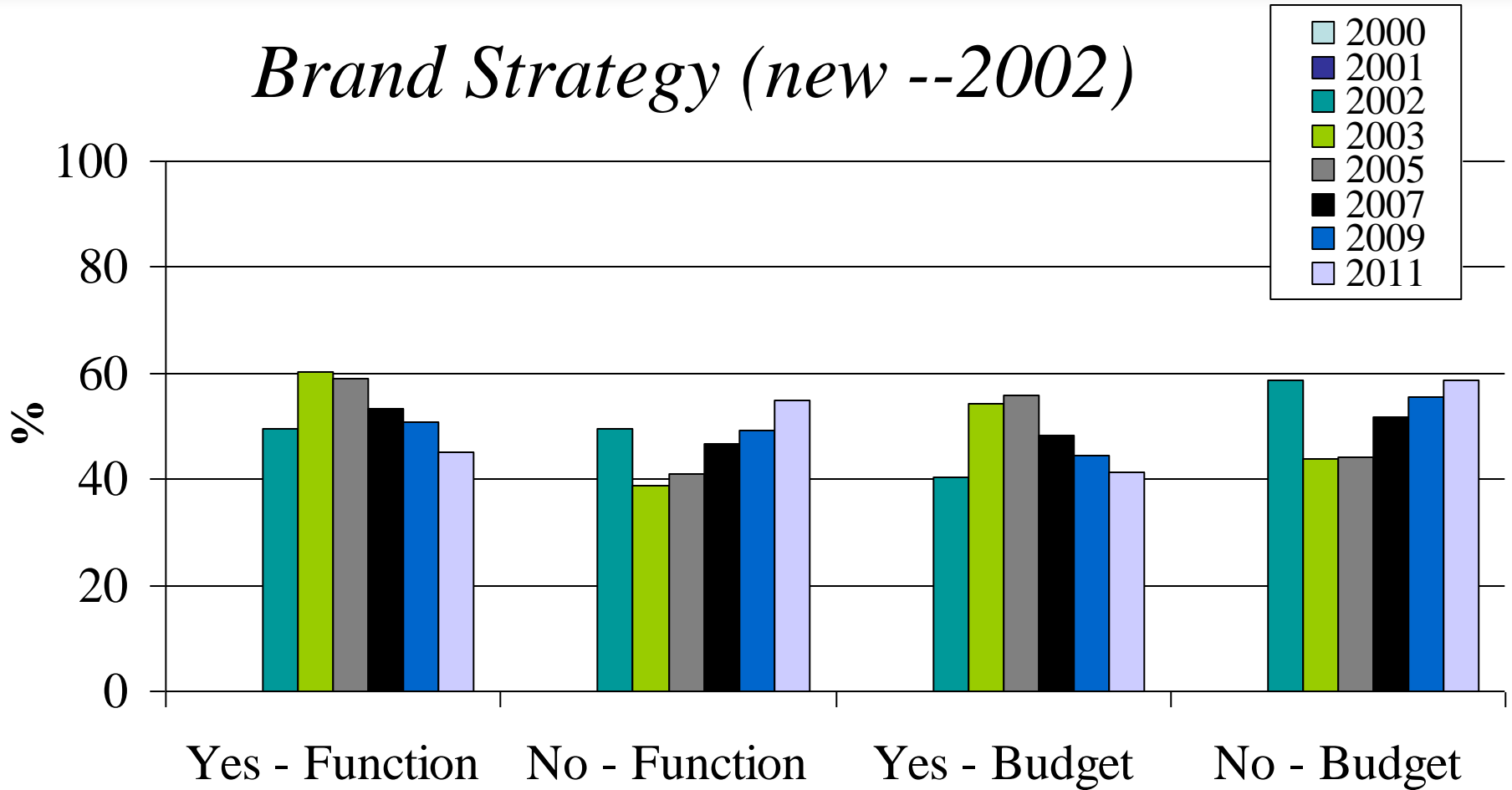
Annual Report





Corporate Communication Functions & Budget 2011 (3) [Q13,16]

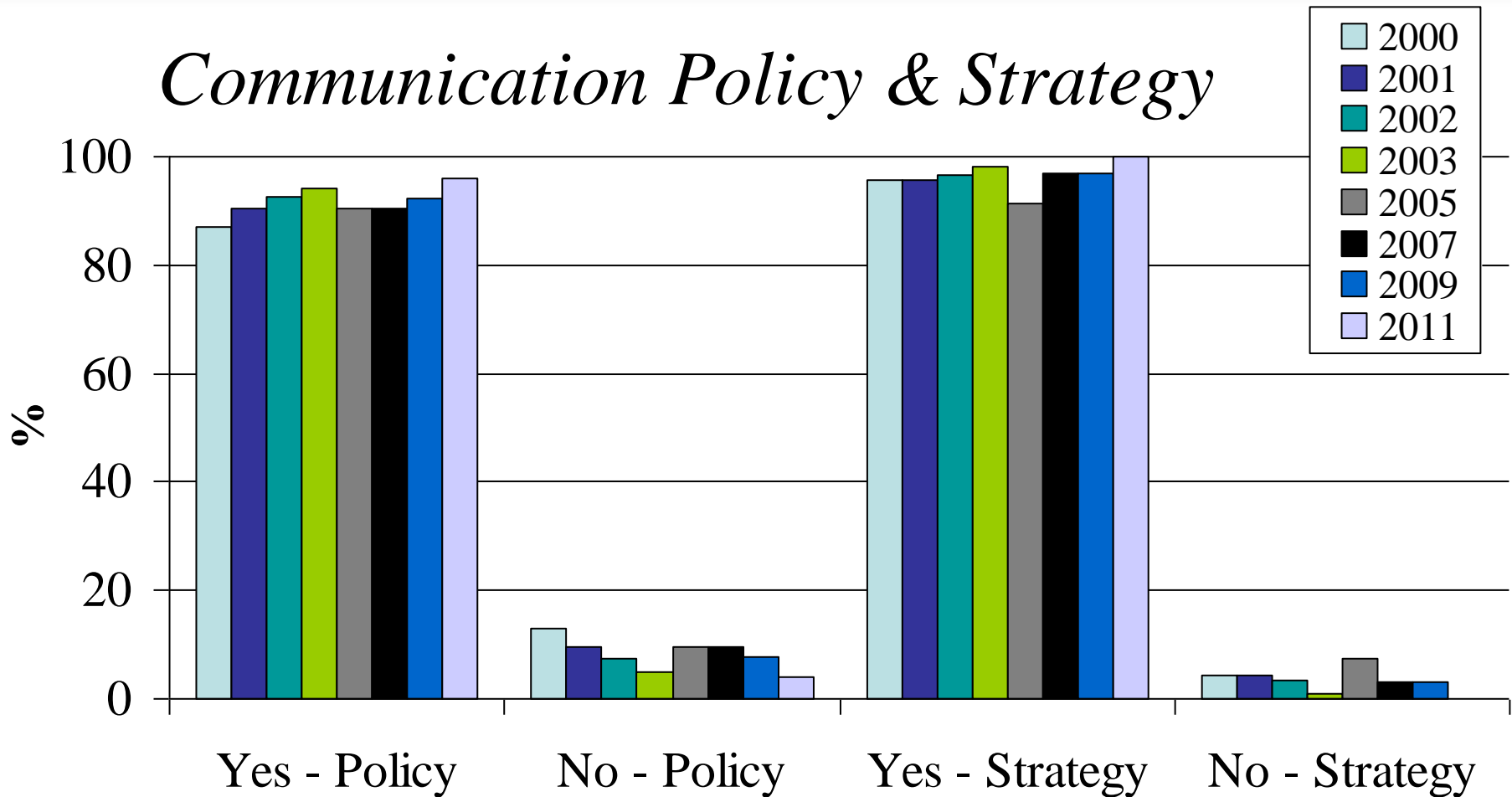
Brand Strategy (new --2002)





Corporate Communication Functions 2011 (4) [Q13]

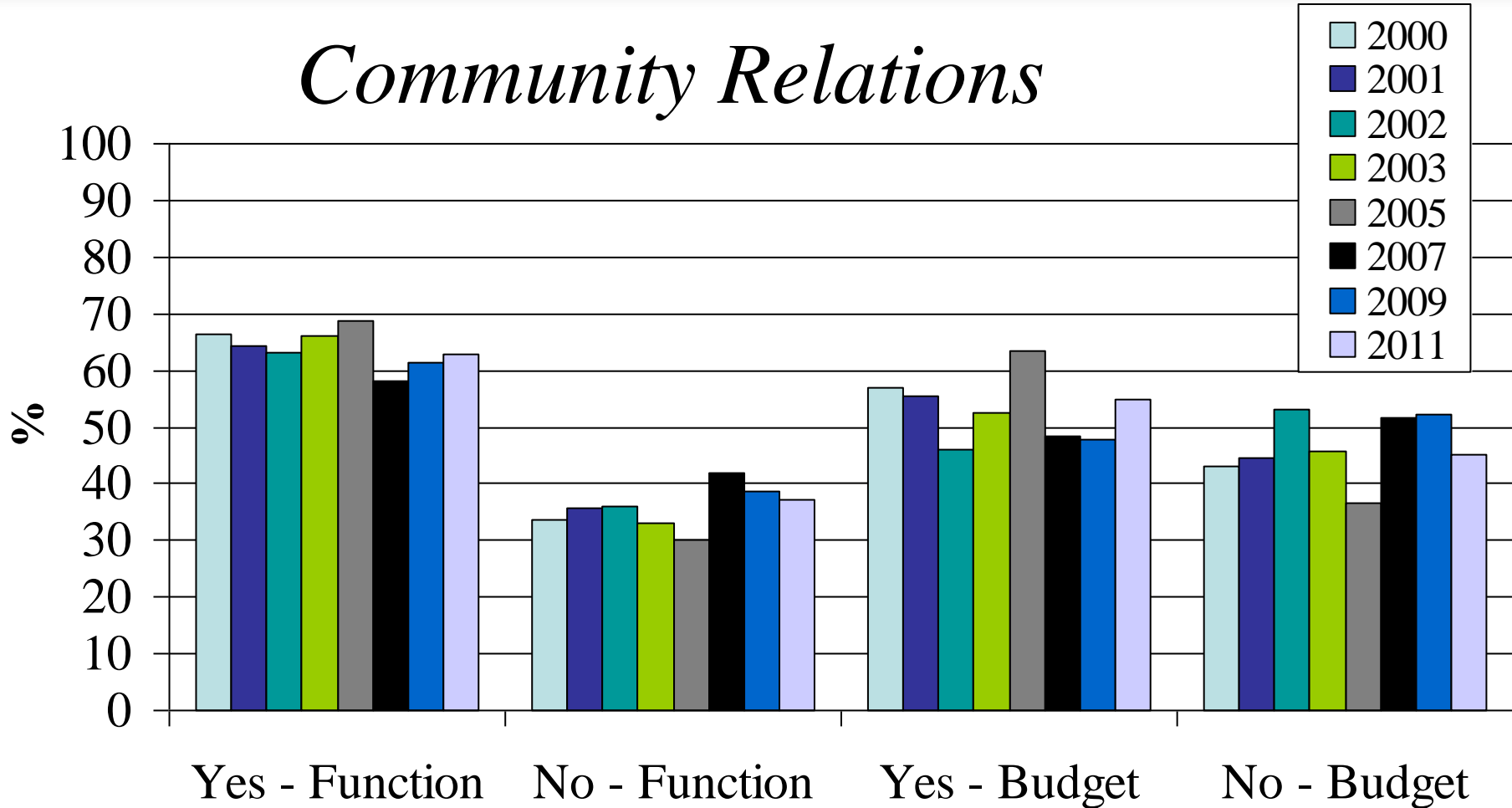
Communication Policy & Strategy





Corporate Communication Functions & Budget 2011 (5) [Q13,16]

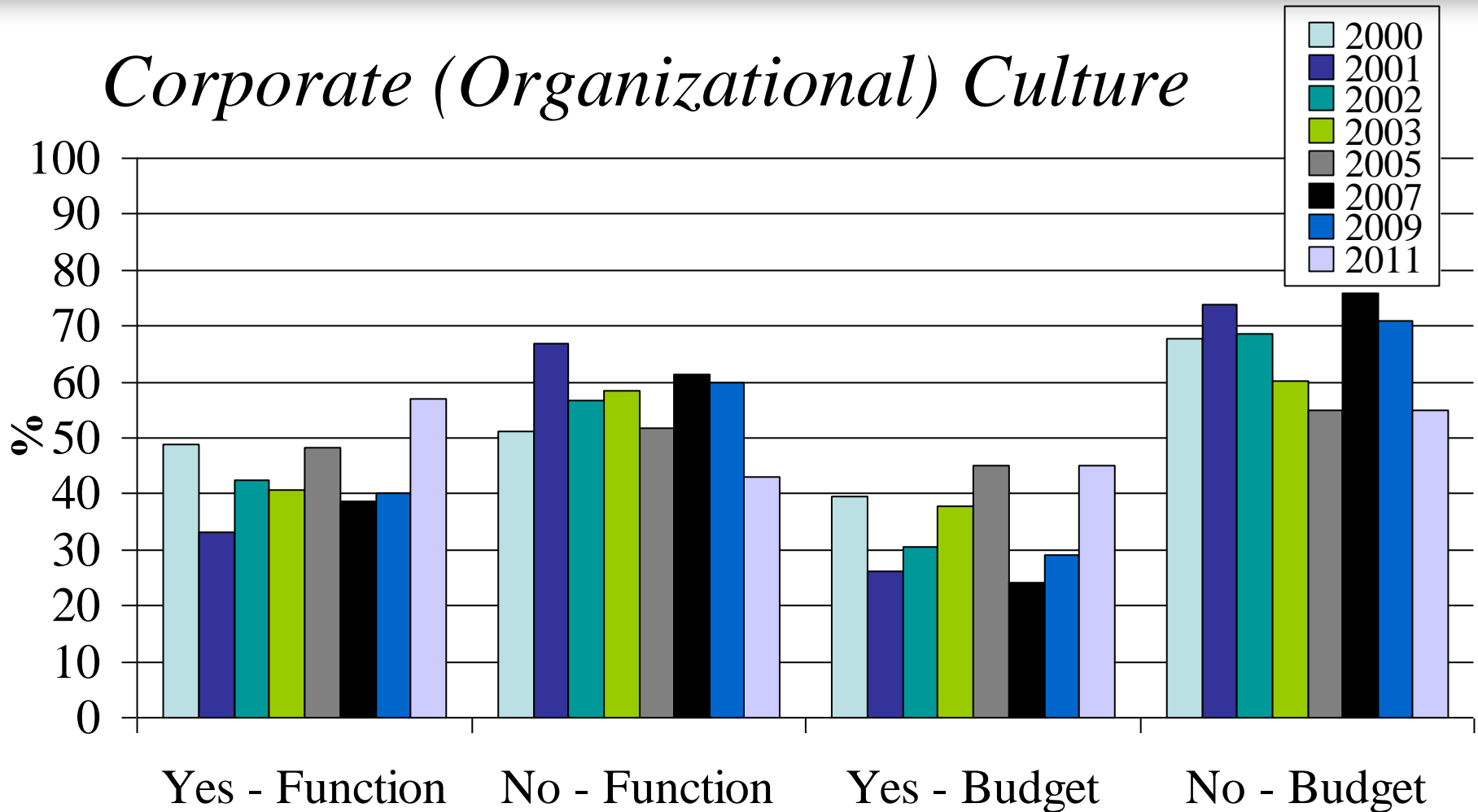
Community Relations





Corporate Communication Functions & Budget 2011 (6) [Q13,16]

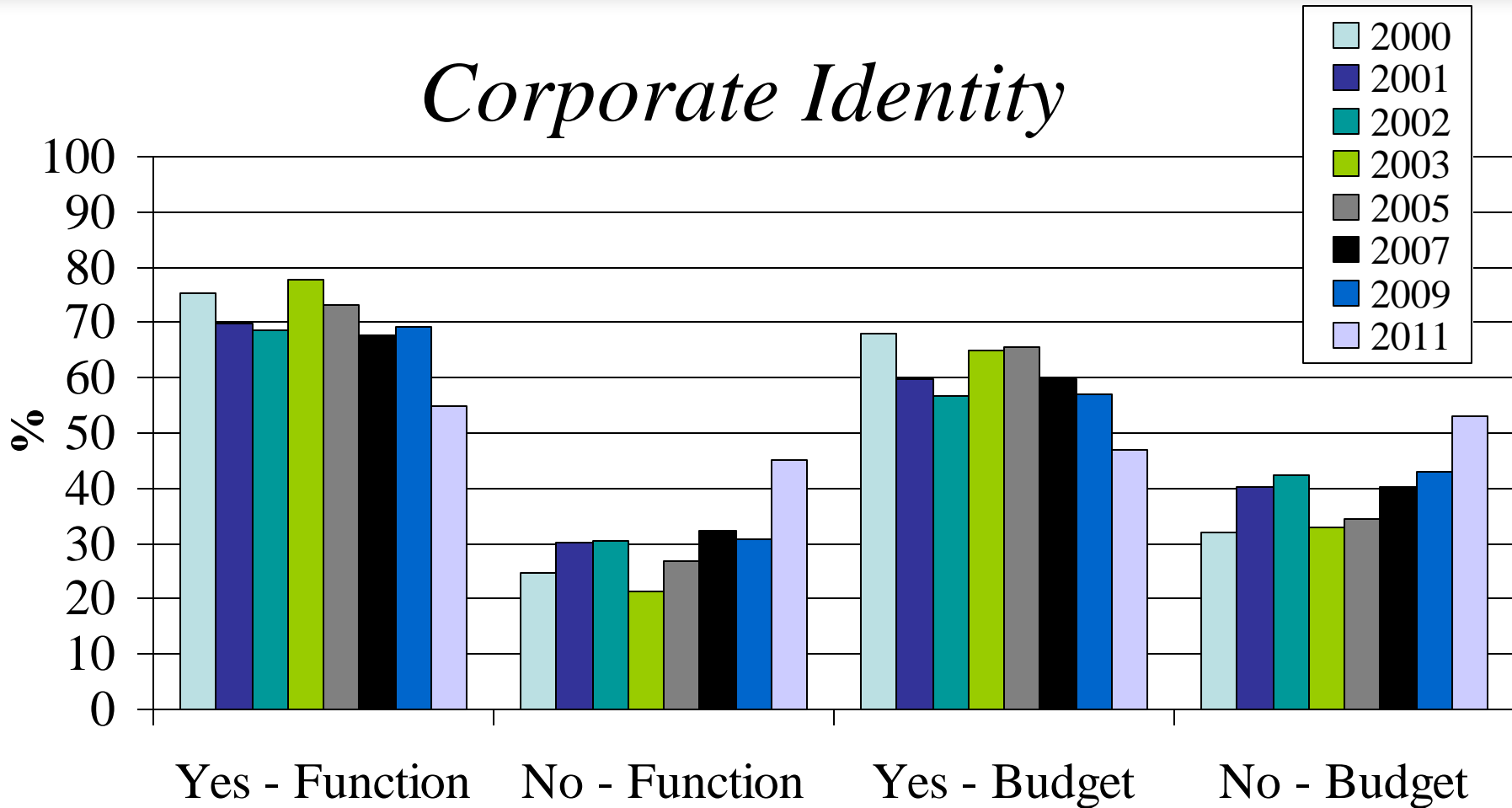
Corporate (Organizational) Culture





Corporate Communication Functions & Budget 2011 (7) [Q13,16]

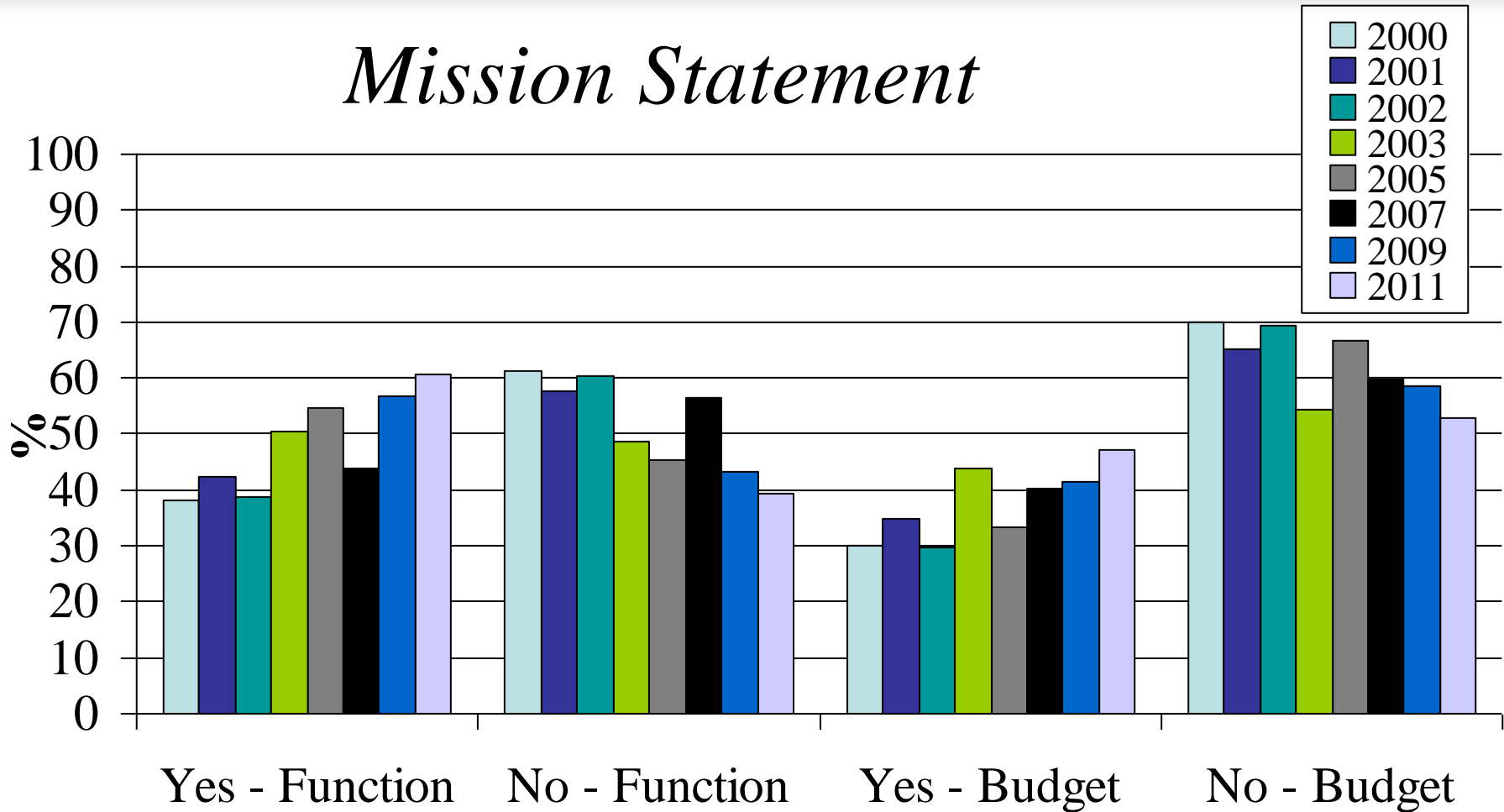
Corporate Identity





Corporate Communication Functions & Budget 2011 (8) [Q13,16]

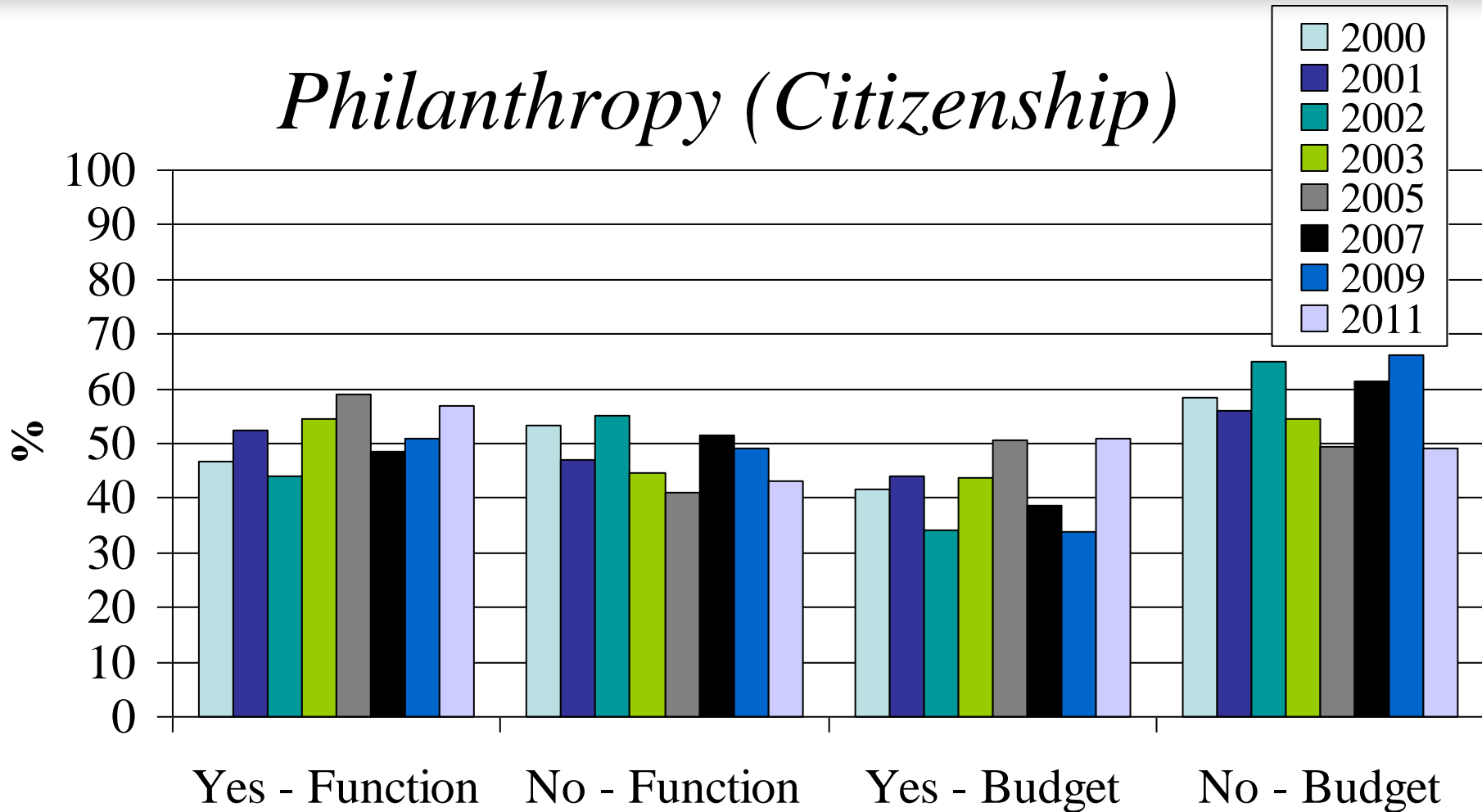
Mission Statement





Corporate Communication Functions & Budget 2011 (9) [Q13,16]

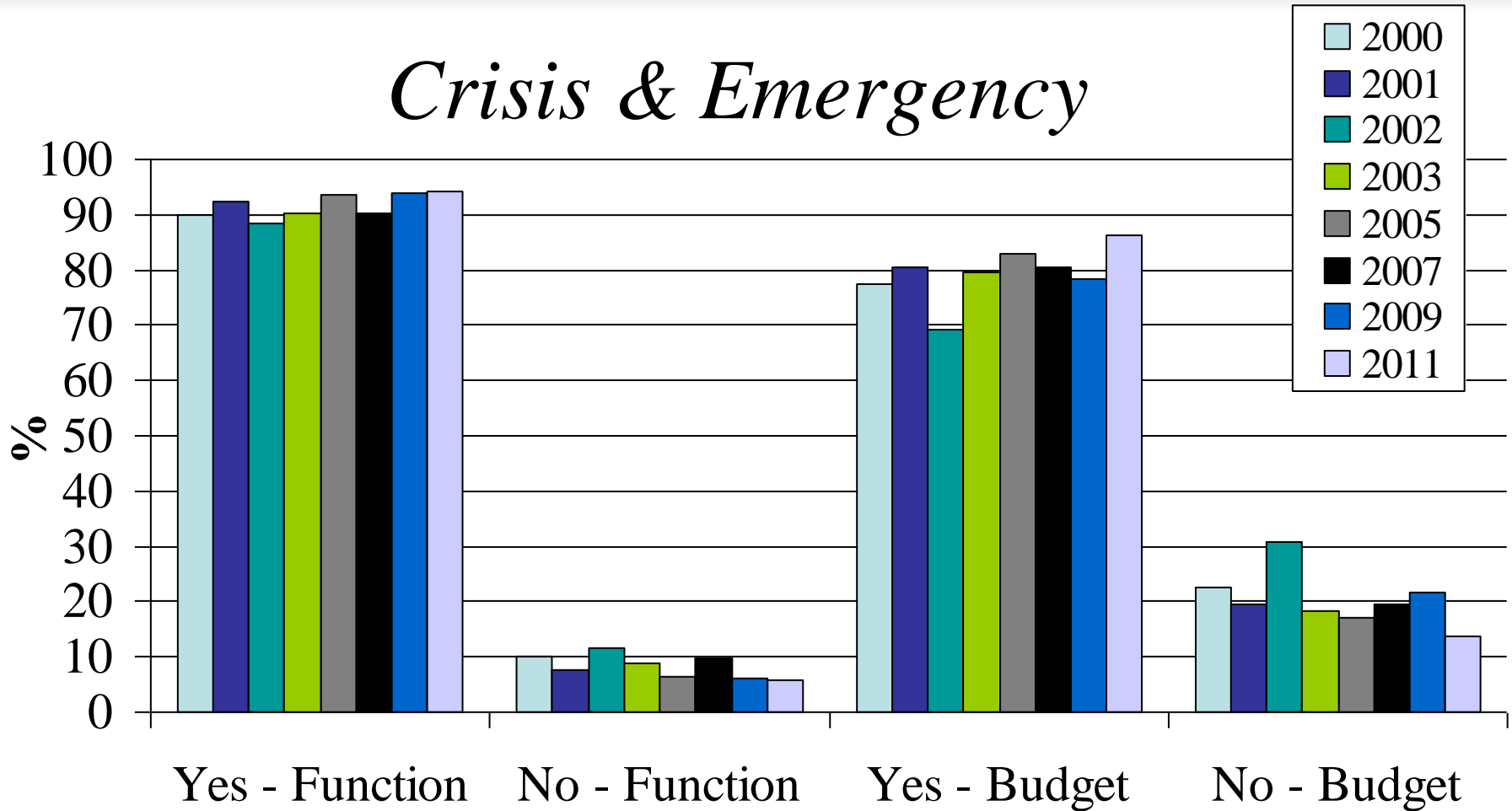
Philanthropy (Citizenship)





Corporate Communication Functions & Budget 2011 (10) [Q13,16]

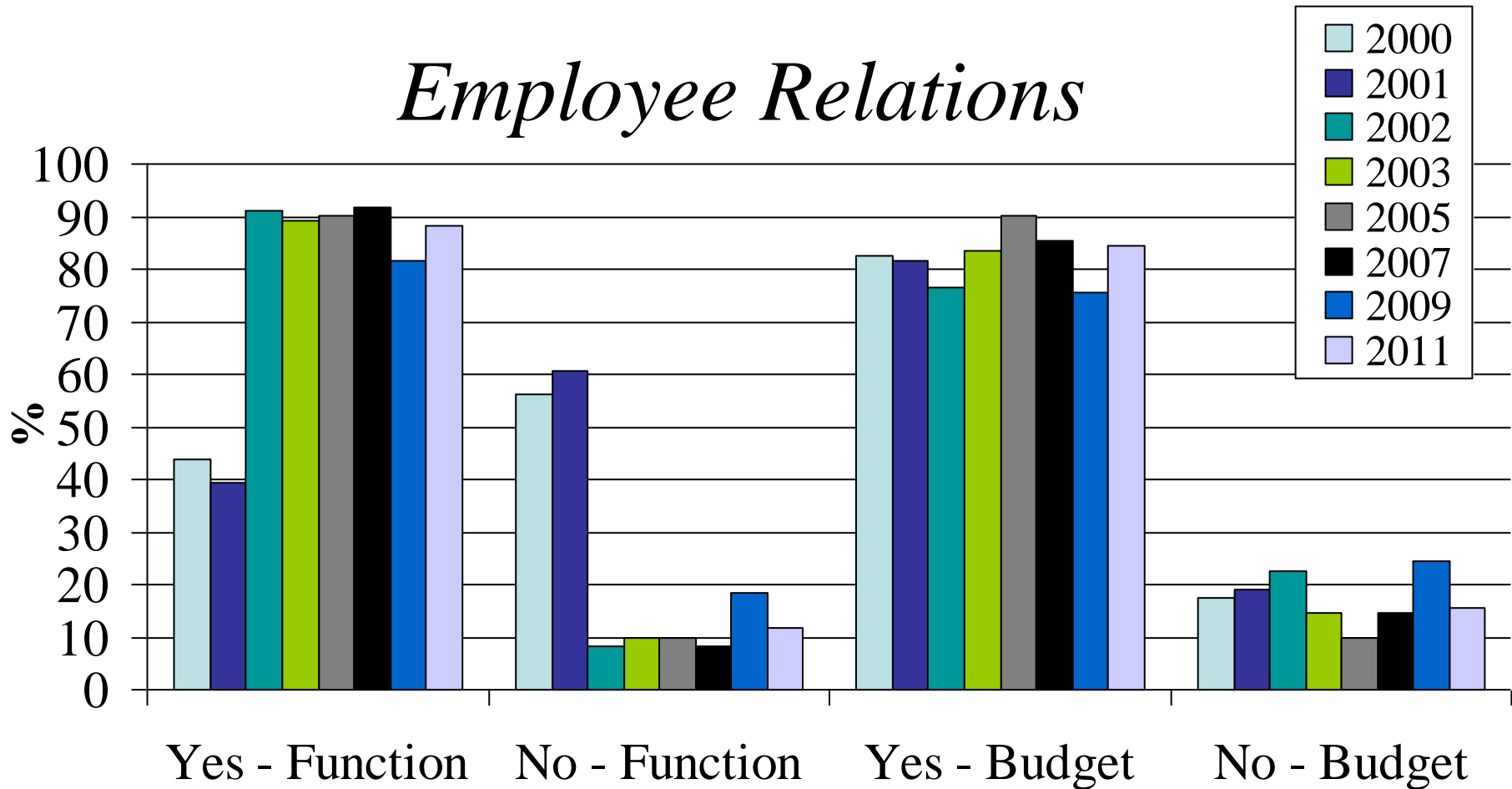
Crisis & Emergency





Corporate Communication Functions & Budget 2011 (11) [Q13,16]

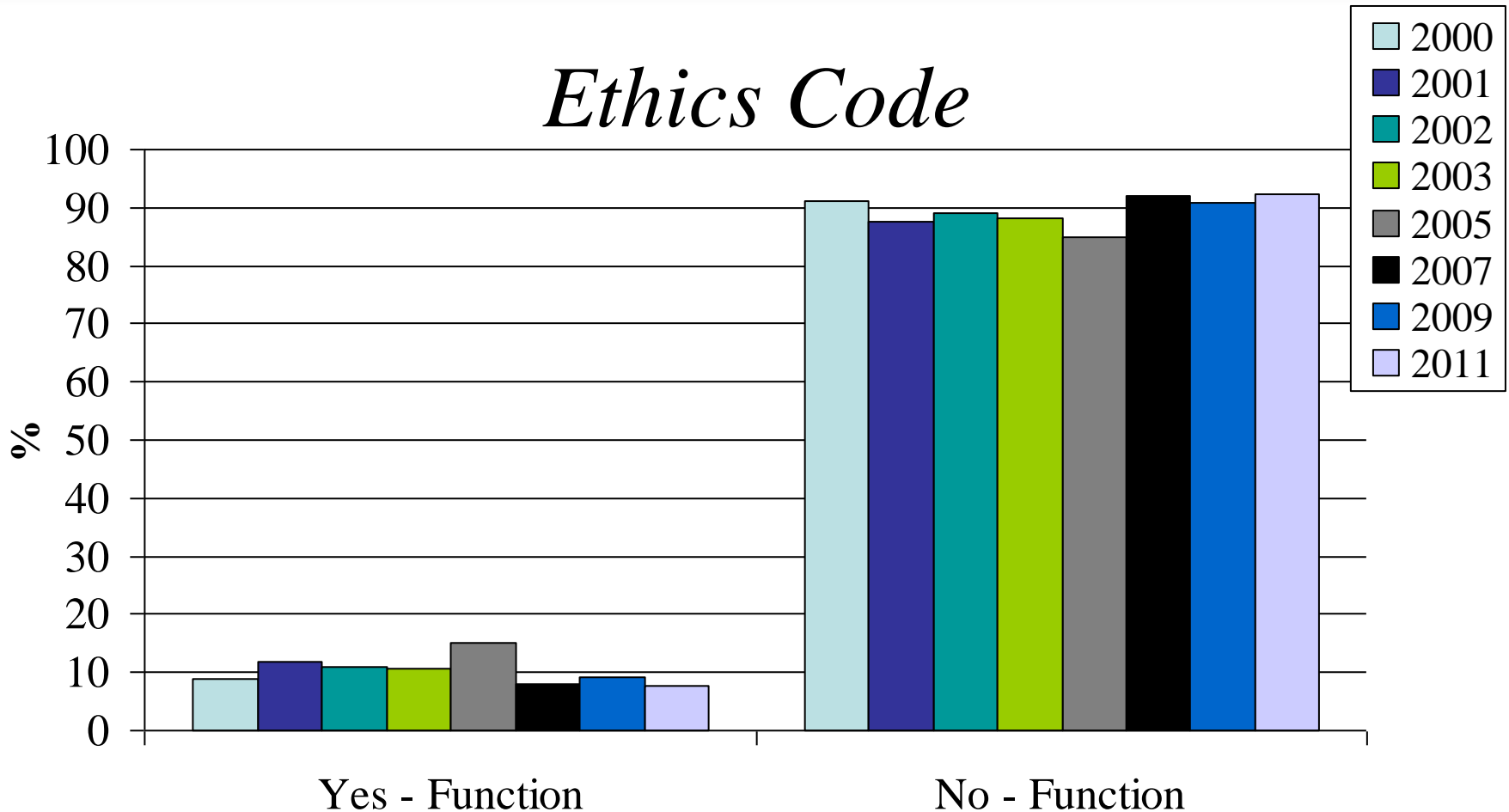
Employee Relations





Corporate Communication Functions & Budget 2011 (12) [Q13,16]

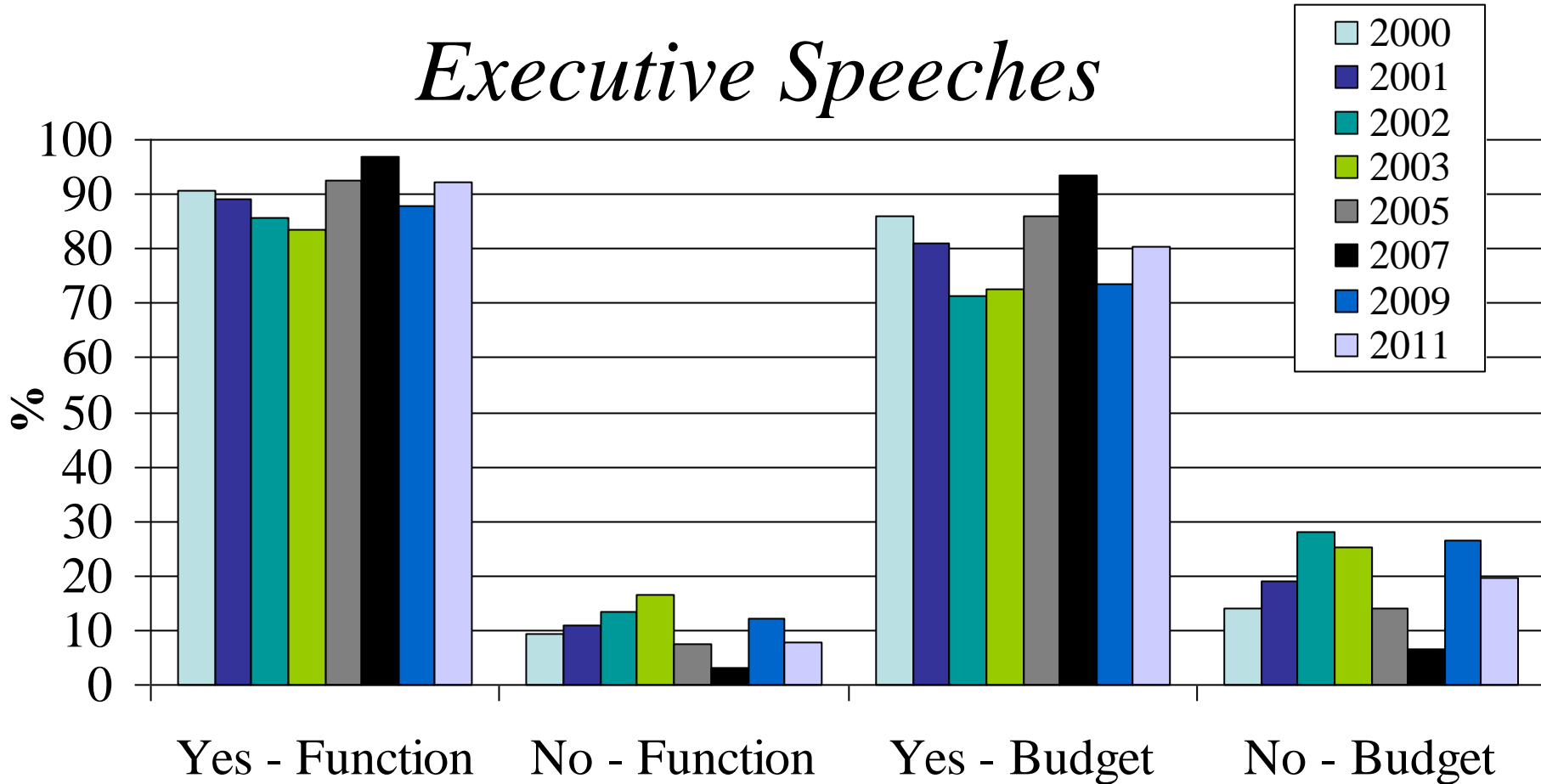
Ethics Code





Corporate Communications Functions & Budget 2011 (13) [Q13,16]

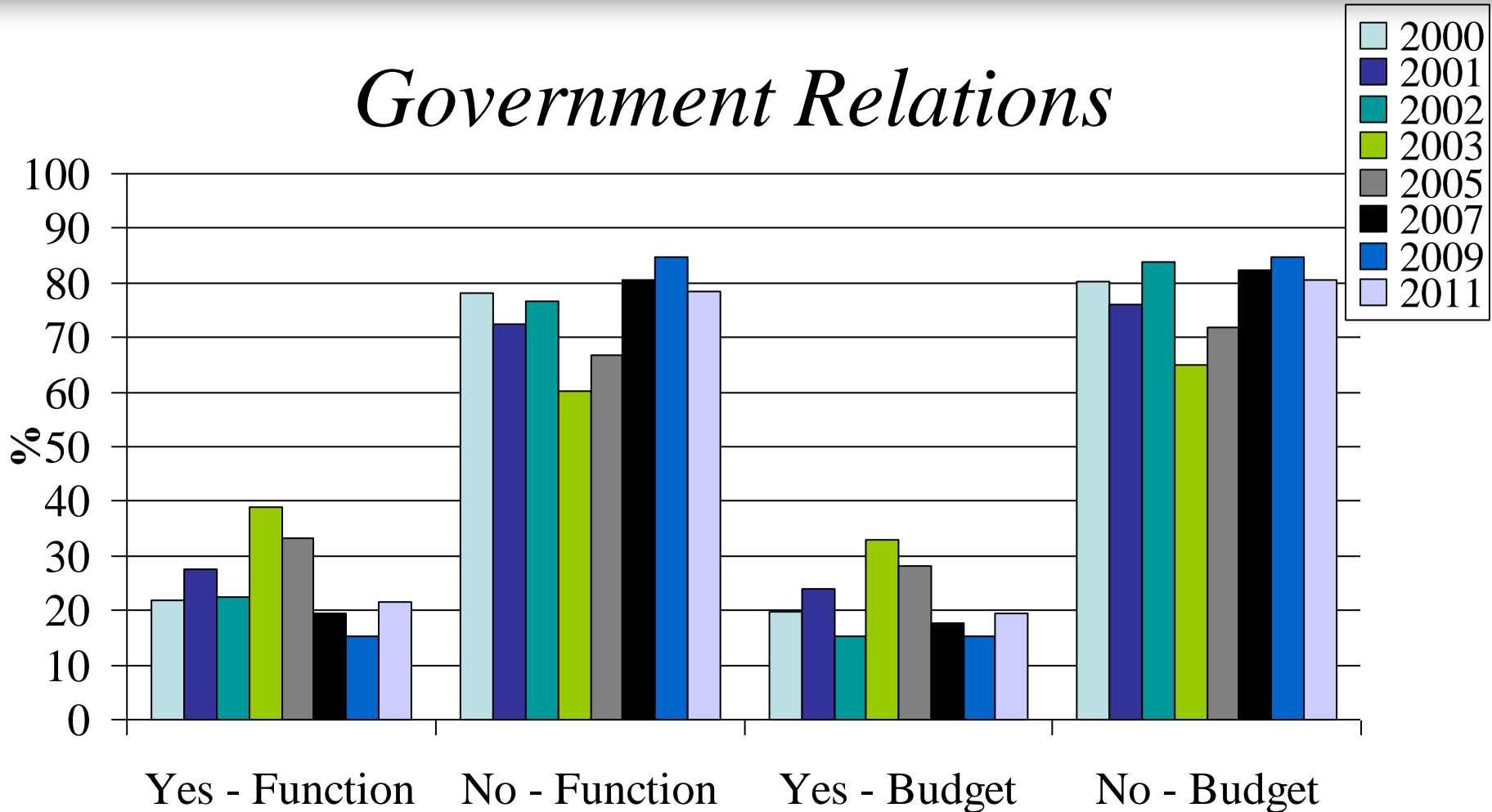
Executive Speeches





Corporate Communication Functions & Budget 2011 (14) [Q13,16]

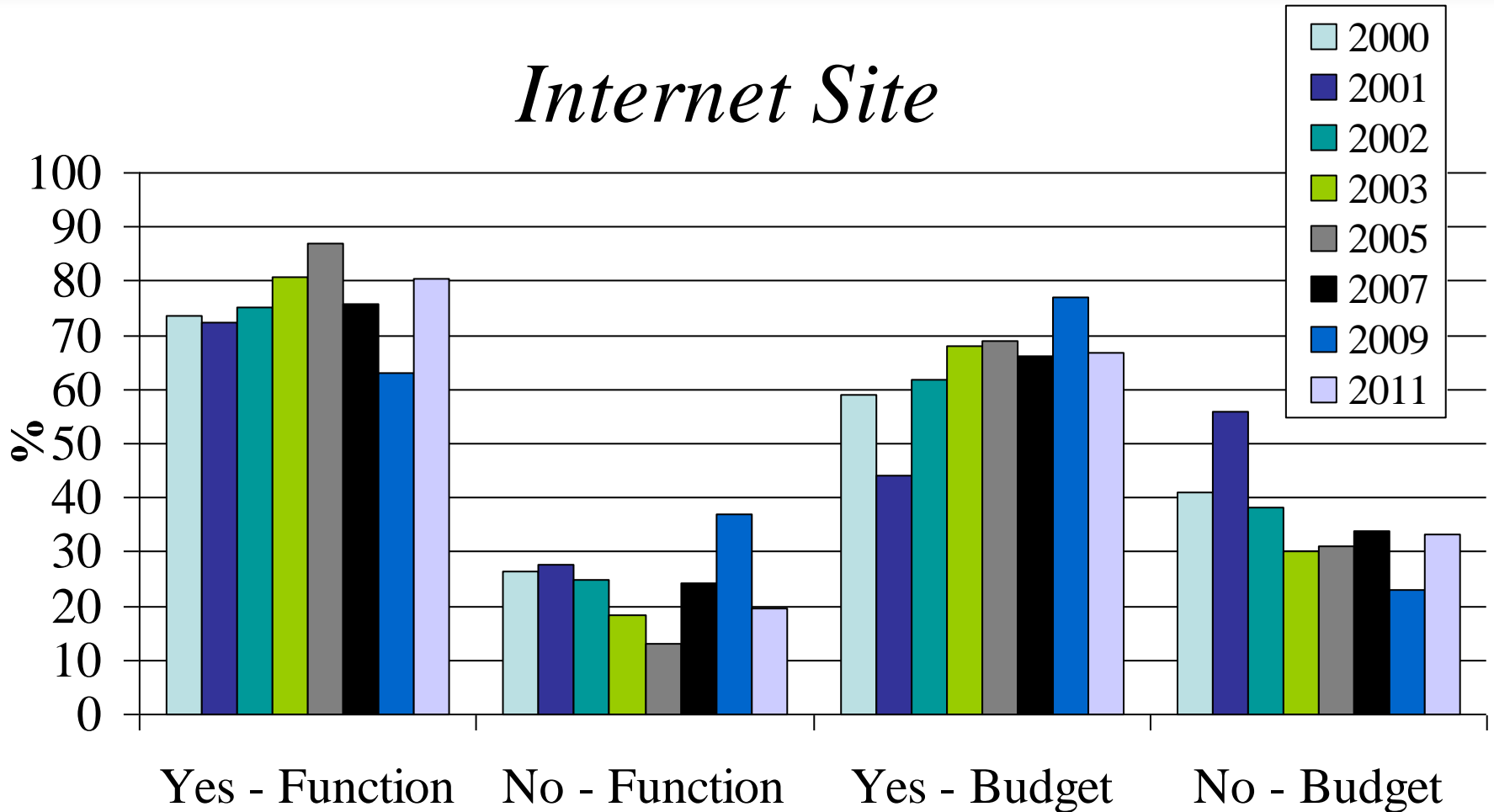
Government Relations





Corporate Communication Functions & Budget 2011 (15) [Q13,16]

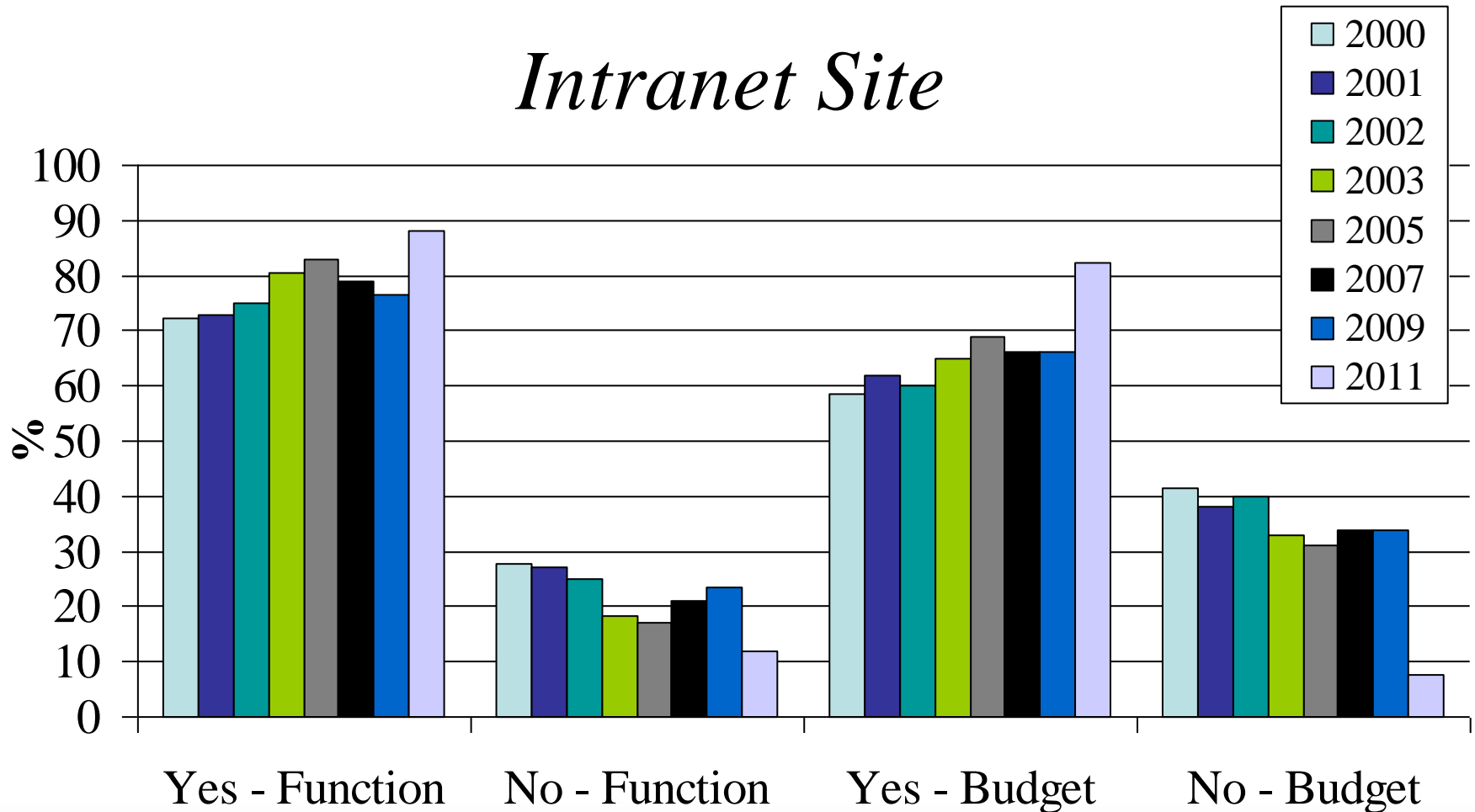
Internet Site





Corporate Communication Functions & Budget 2011 (16) [Q13,16]

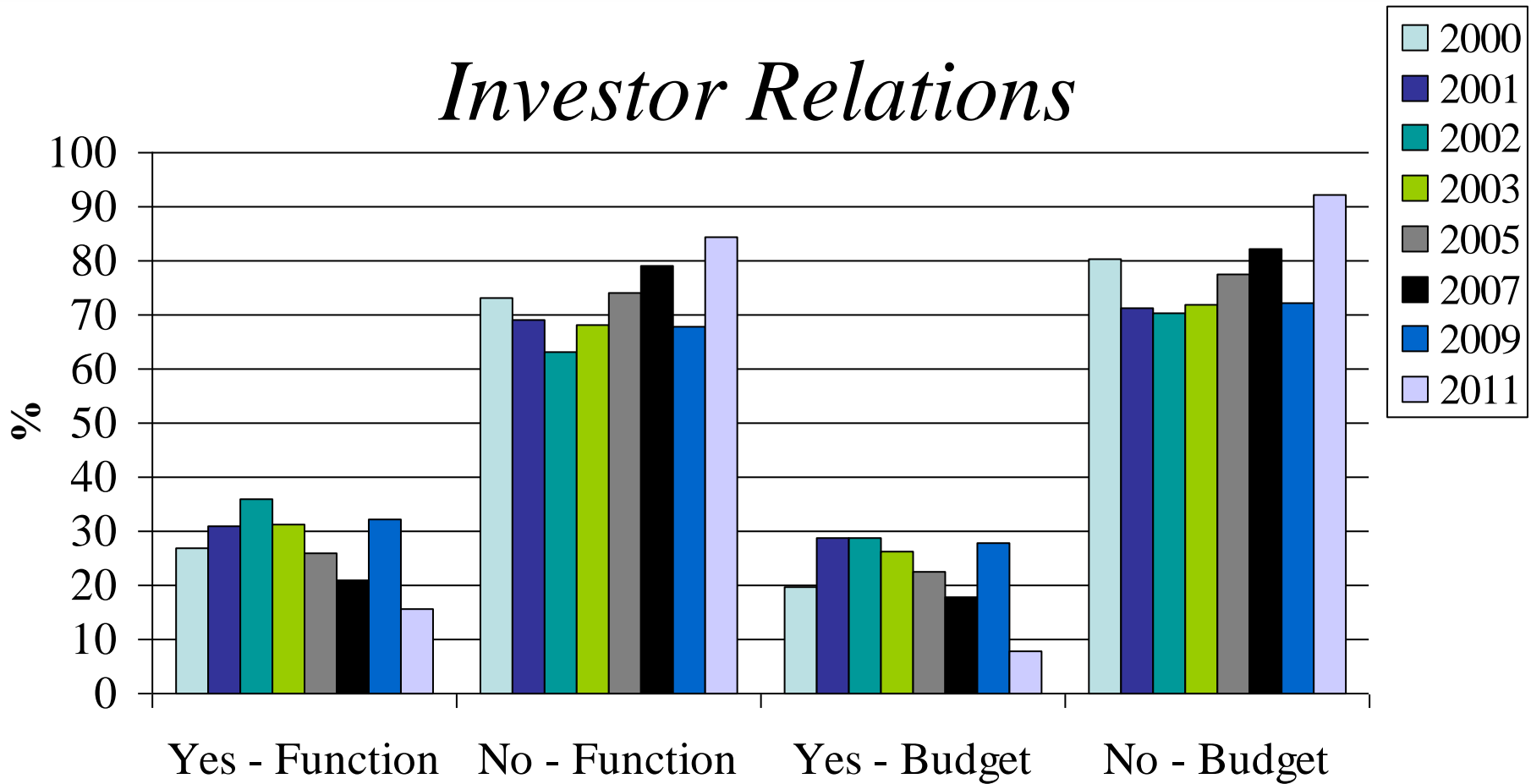
Intranet Site





Corporate Communication Functions & Budget 2011 (17) [Q13,16]

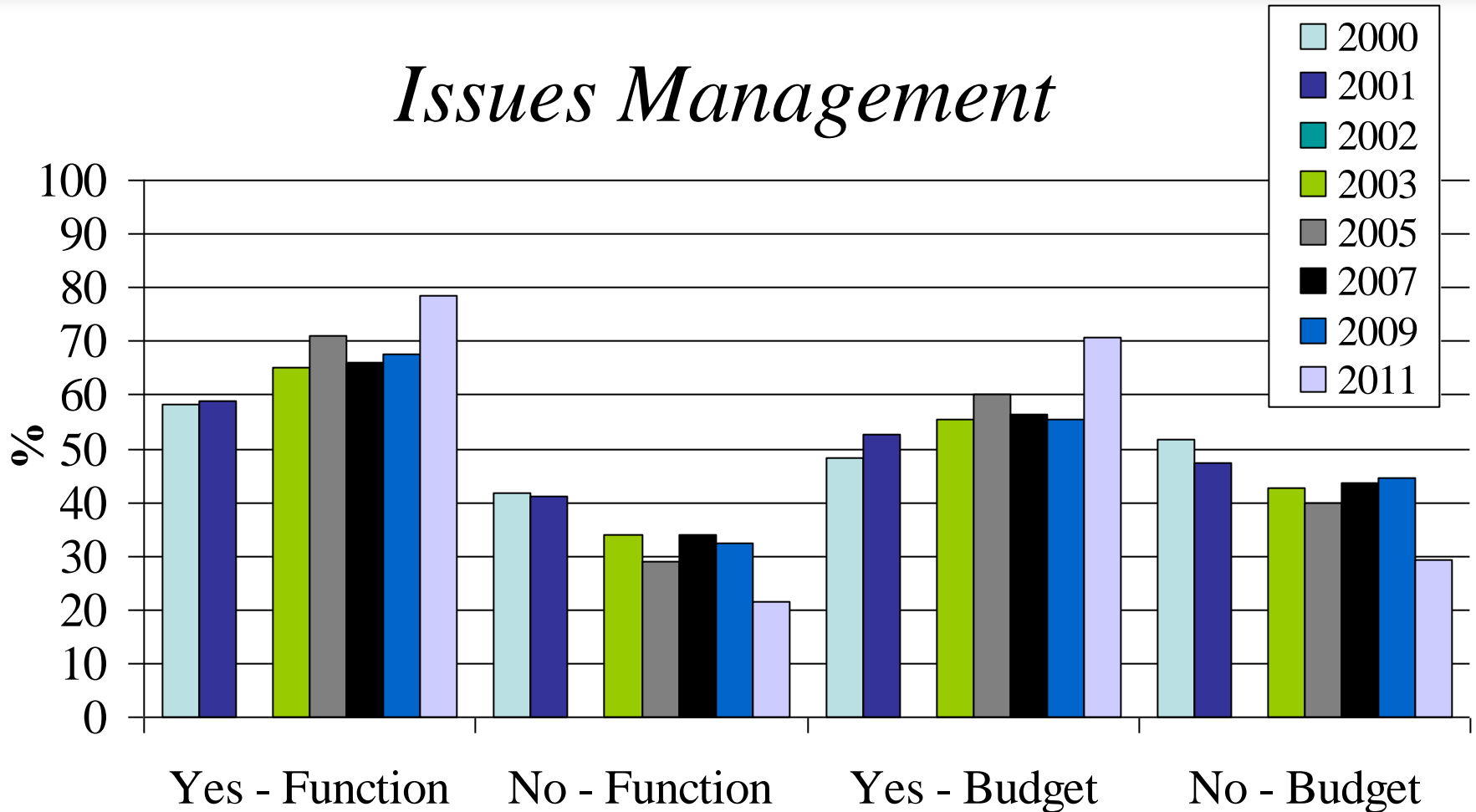
Investor Relations





Corporate Communication Functions & Budget 2011 (18) [Q13,16]

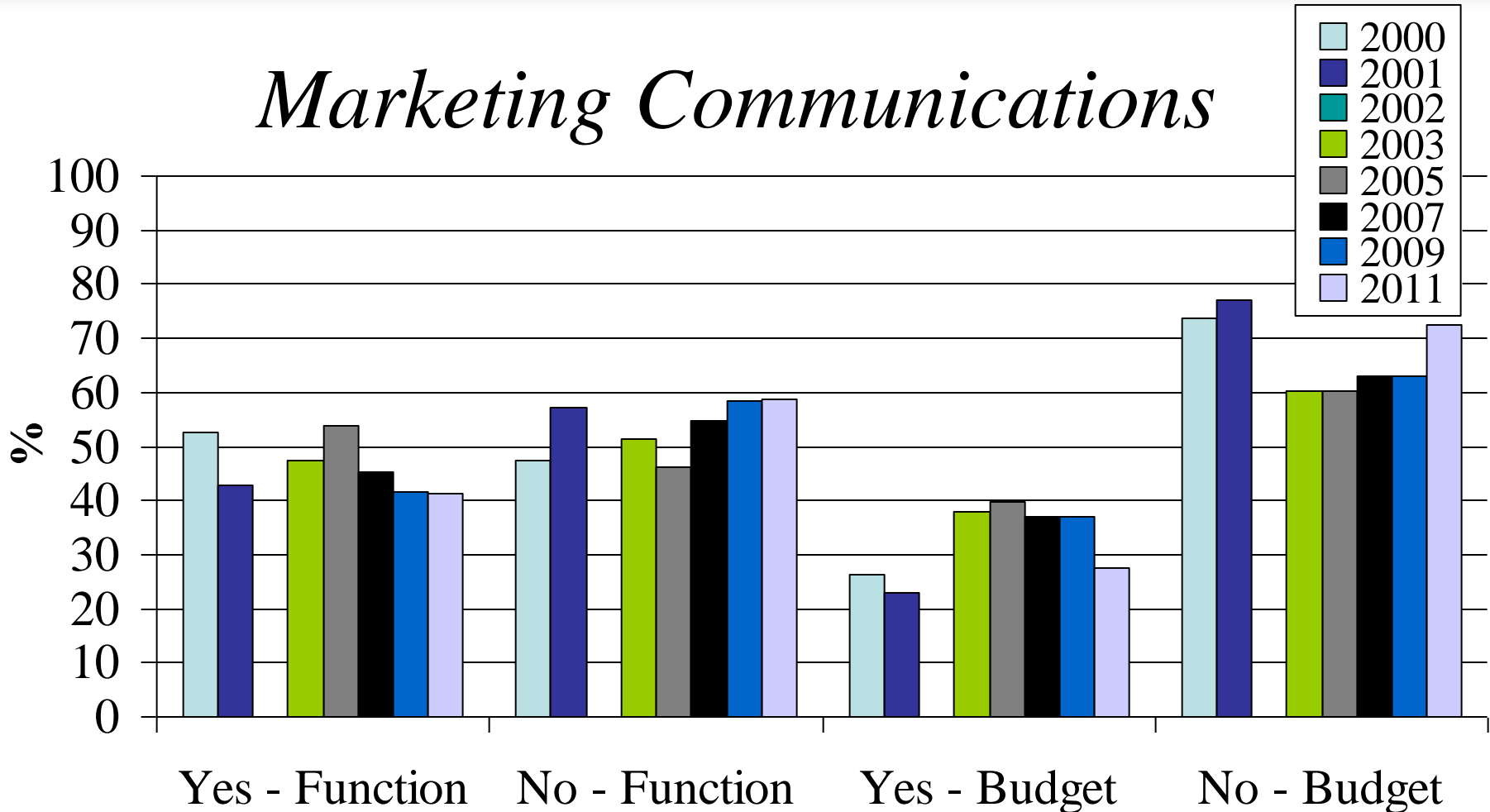
Issues Management





Corporate Communication Functions & Budget 2011 (19) [Q13,16]

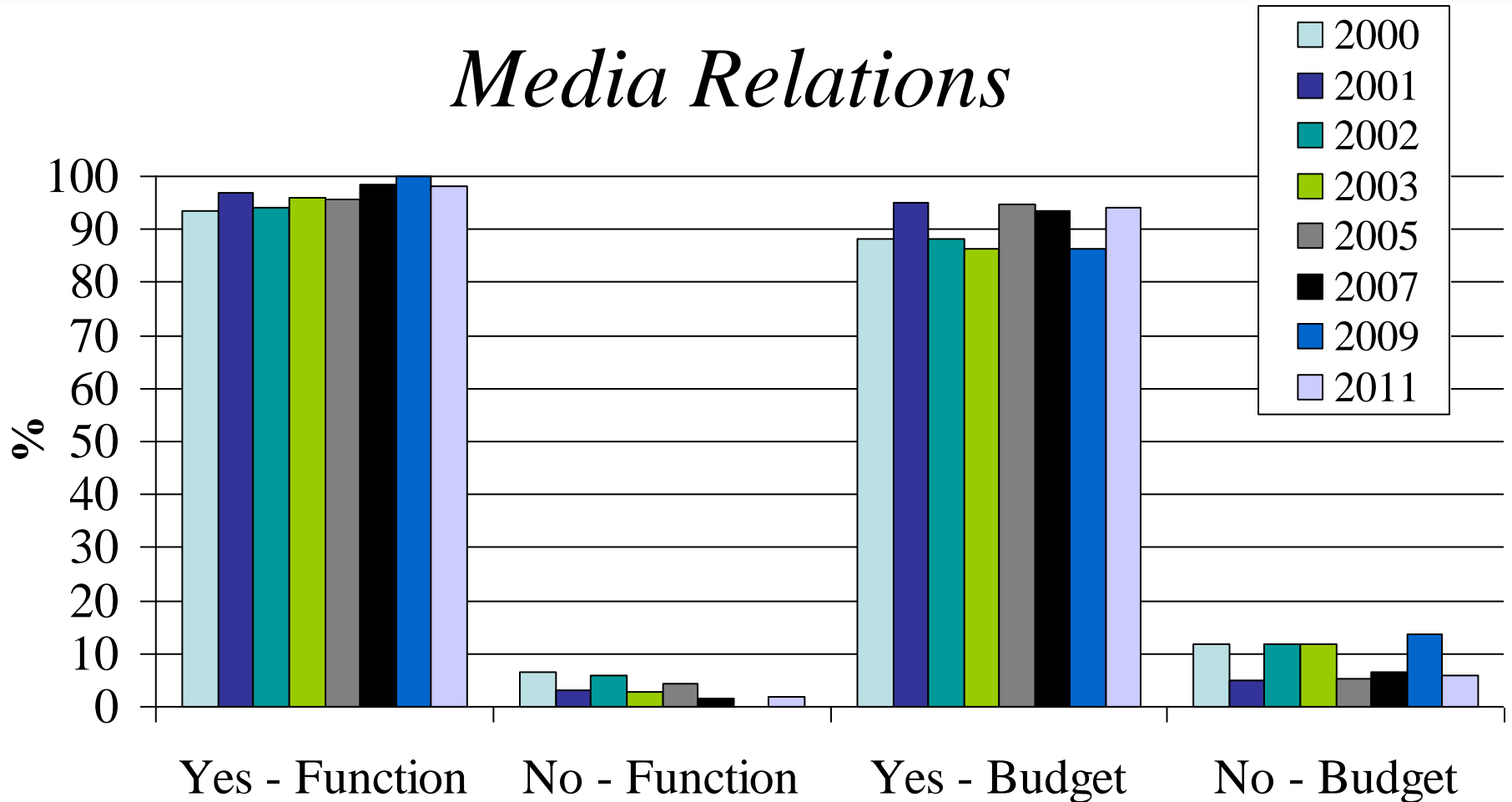
Marketing Communications





Corporate Communication Functions & Budget 2011 (20) [Q13,16]

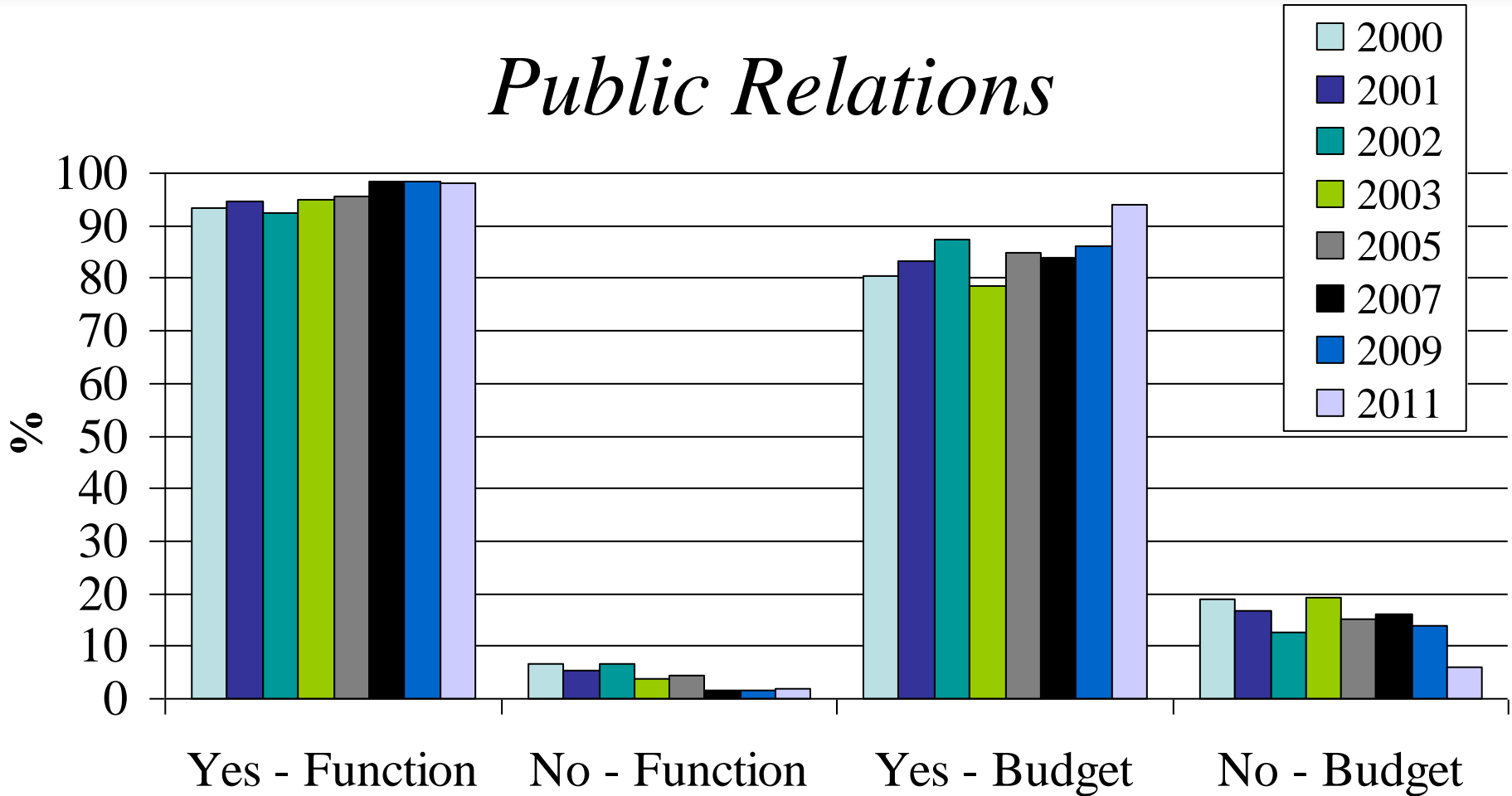
Media Relations





Corporate Communication Functions & Budget 2011 (21) [Q13,16]

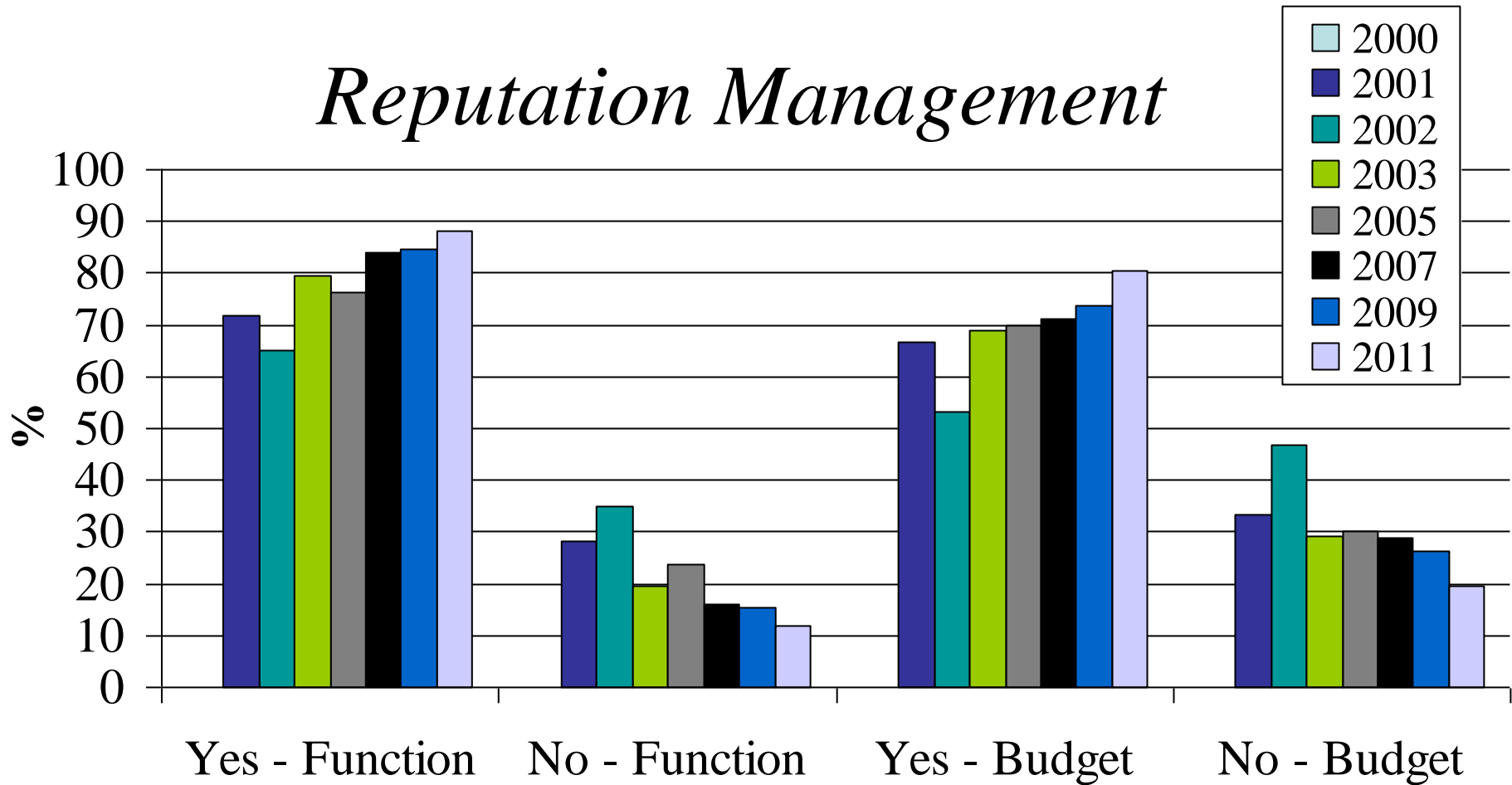
Public Relations





Corporate Communication Functions & Budget 2011 (22) [Q13,16]

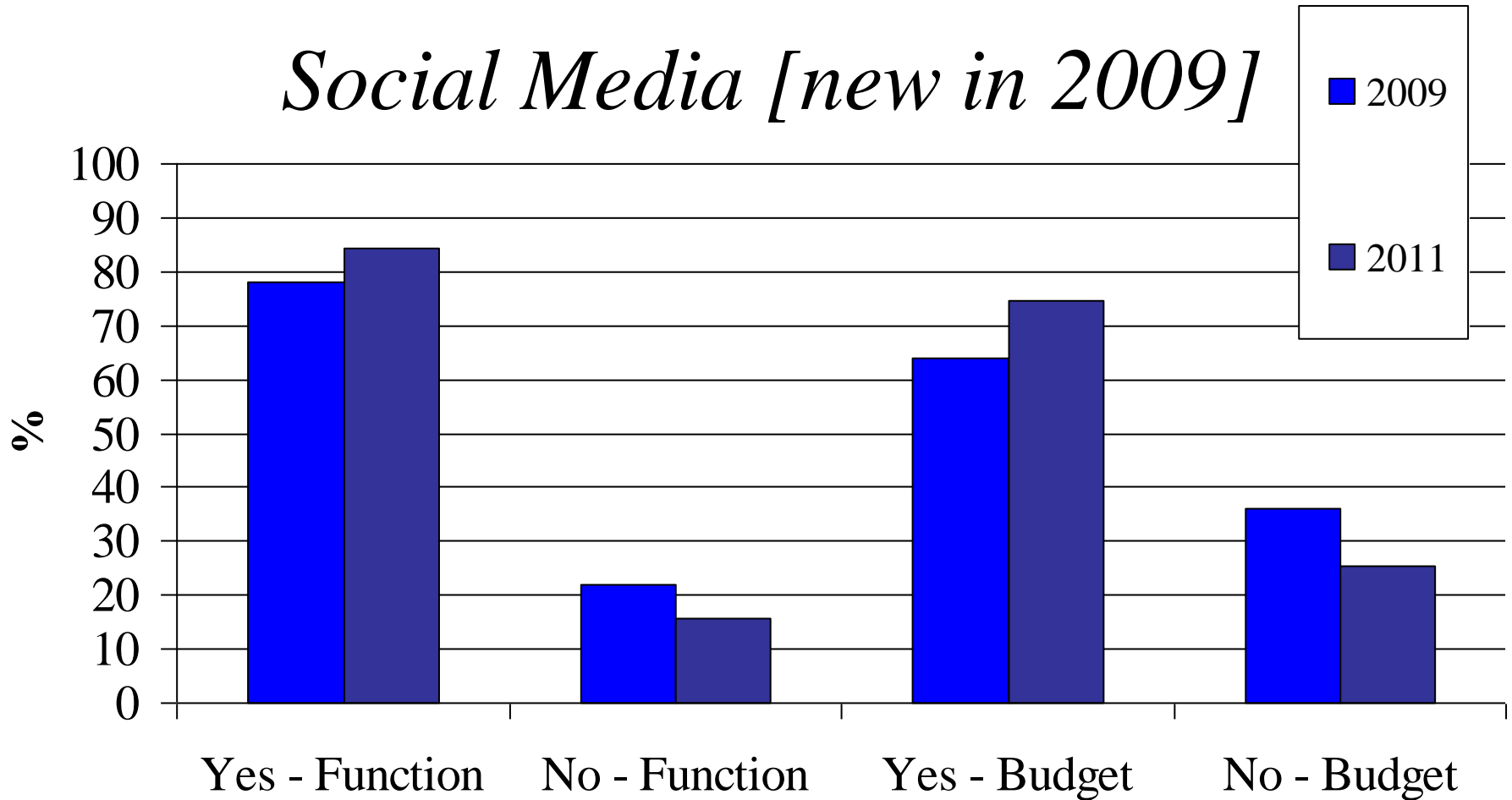
Reputation Management





Corporate Communication Functions & Budget 2011 (23) [Q13,16]

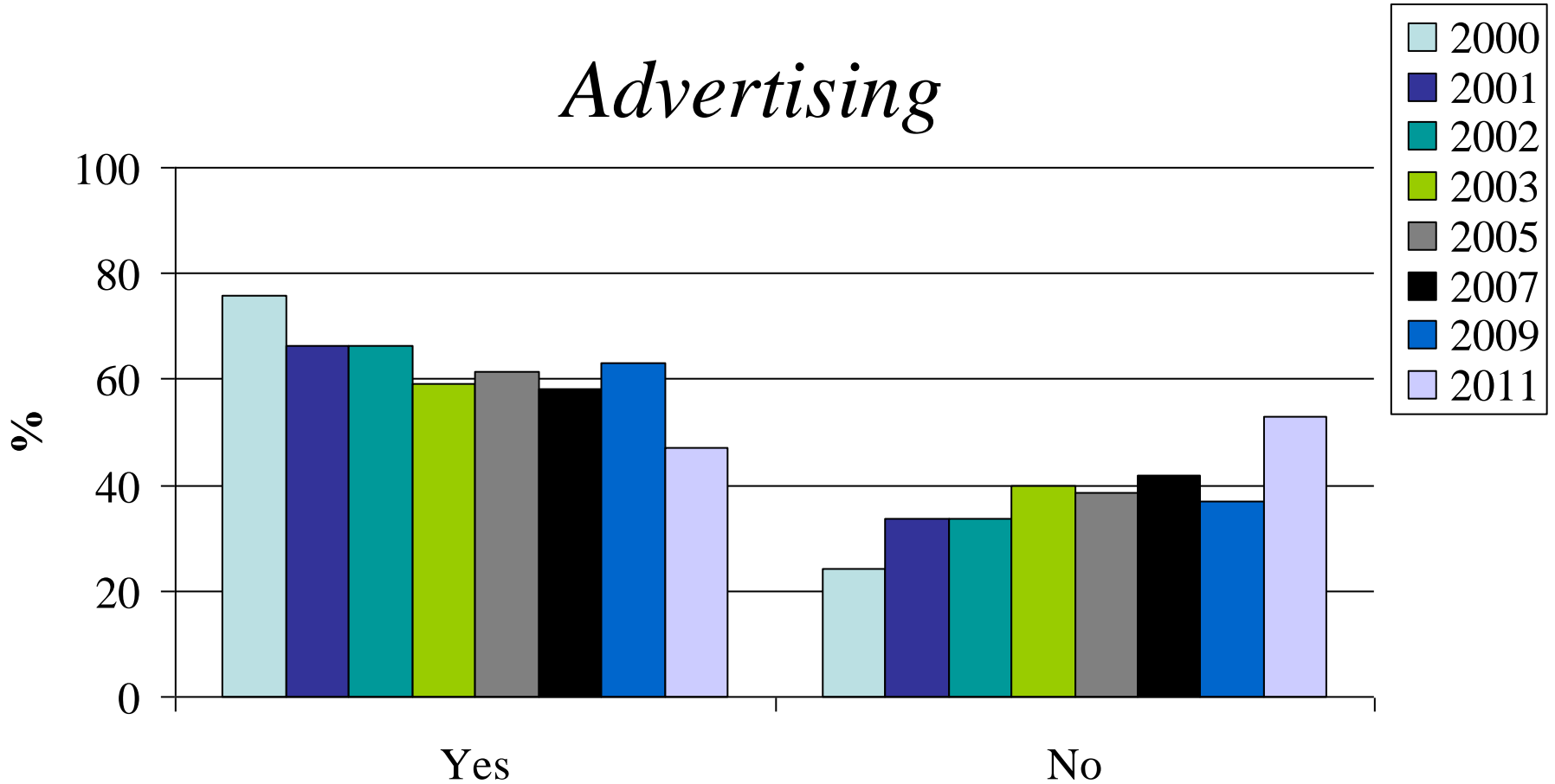
Social Media [new in 2009]





Agency or Vendor Use 2011 (1) [Q22]

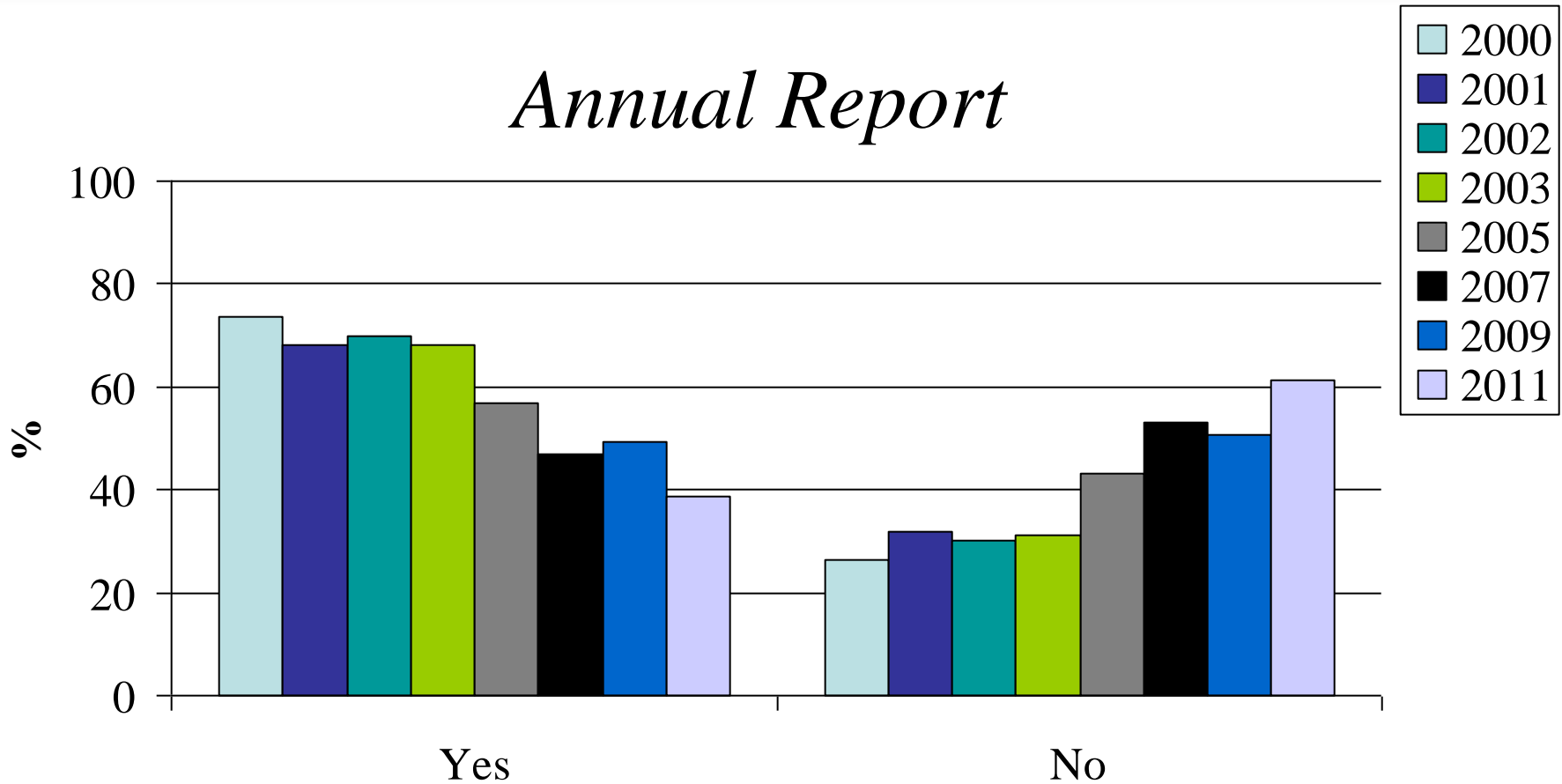
Advertising





Agency & Vendor Use 2011 (2) [Q22]

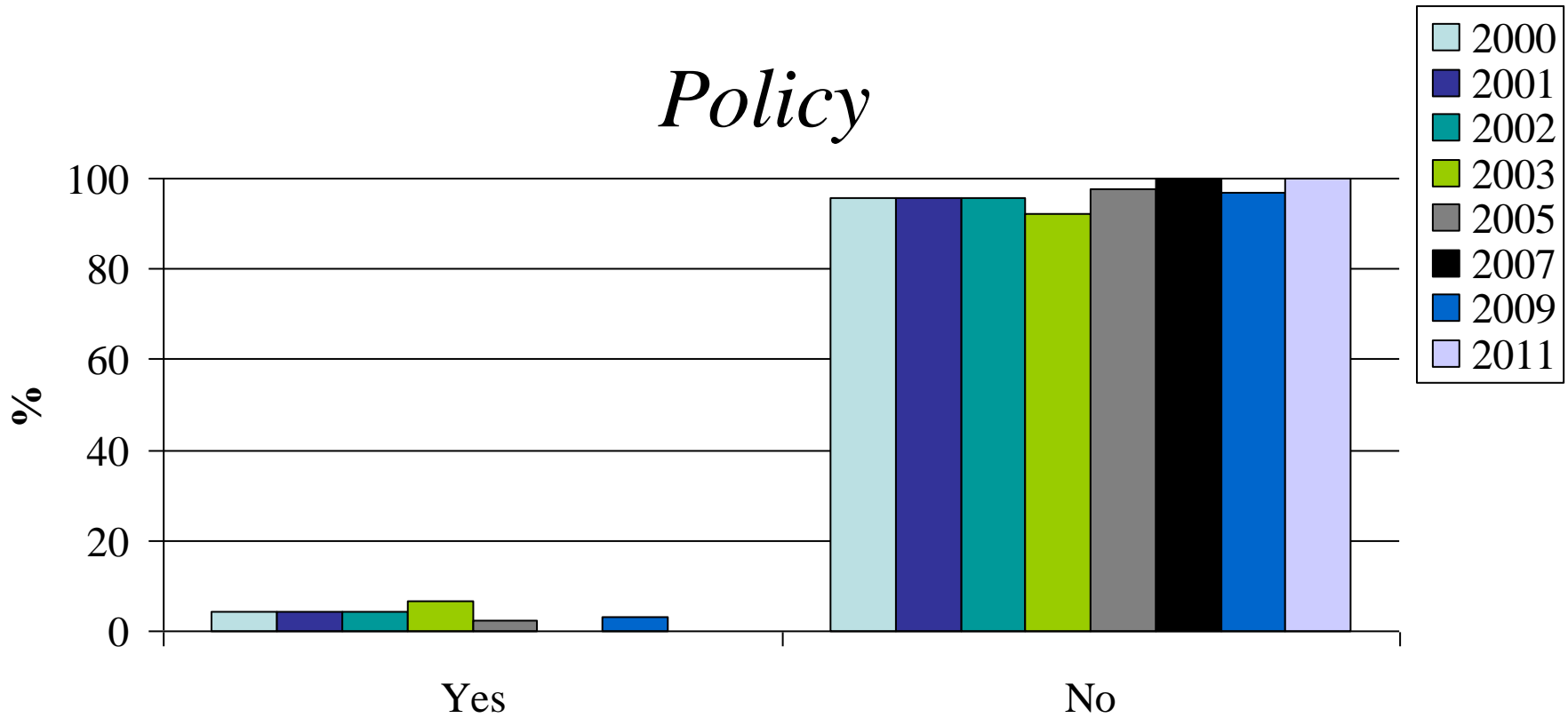
Annual Report





Agency & Vendor Use 2011 (3) [Q22]

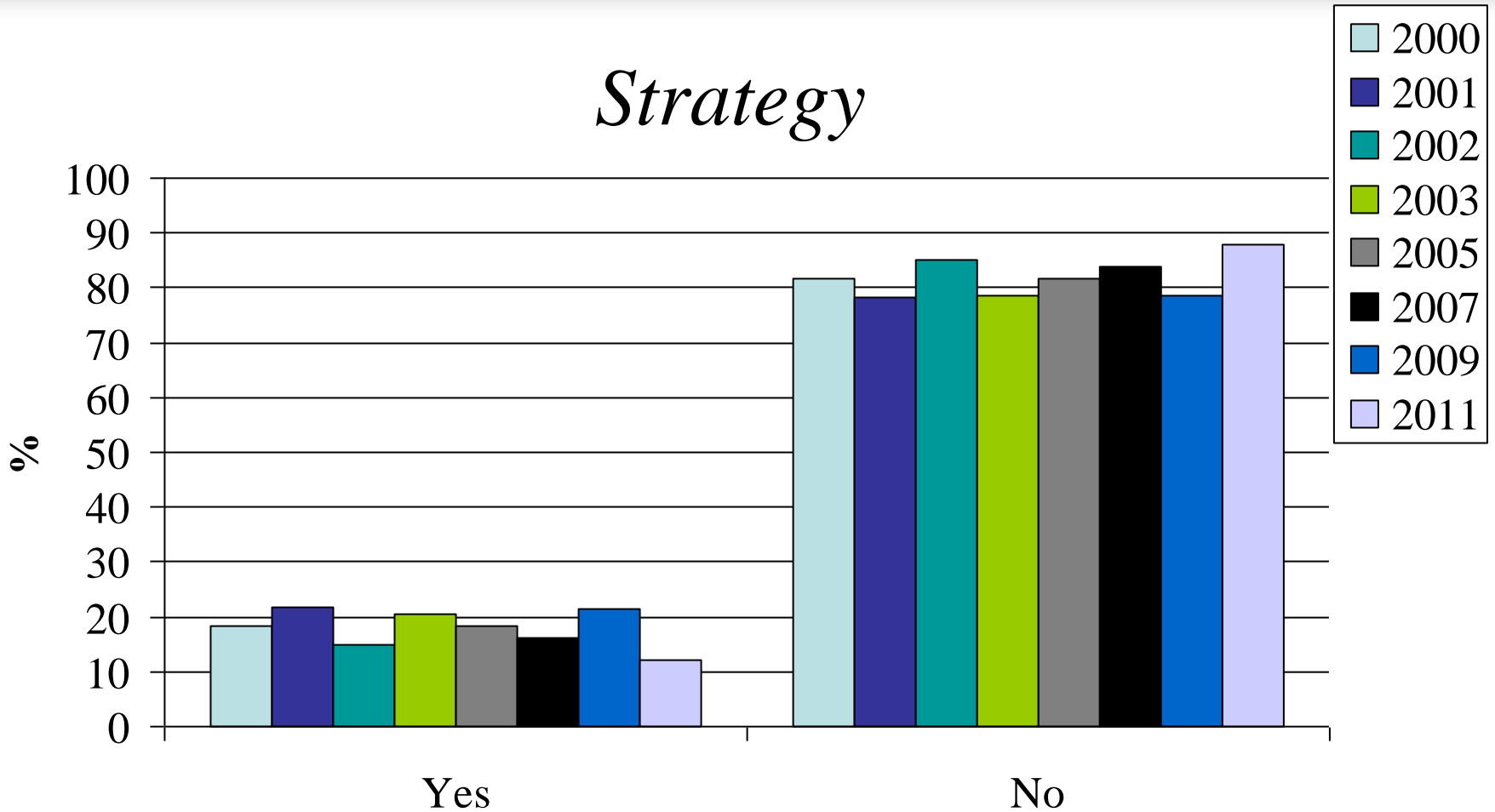
Policy





Agency & Vendor Use 2011 (4) [Q22]

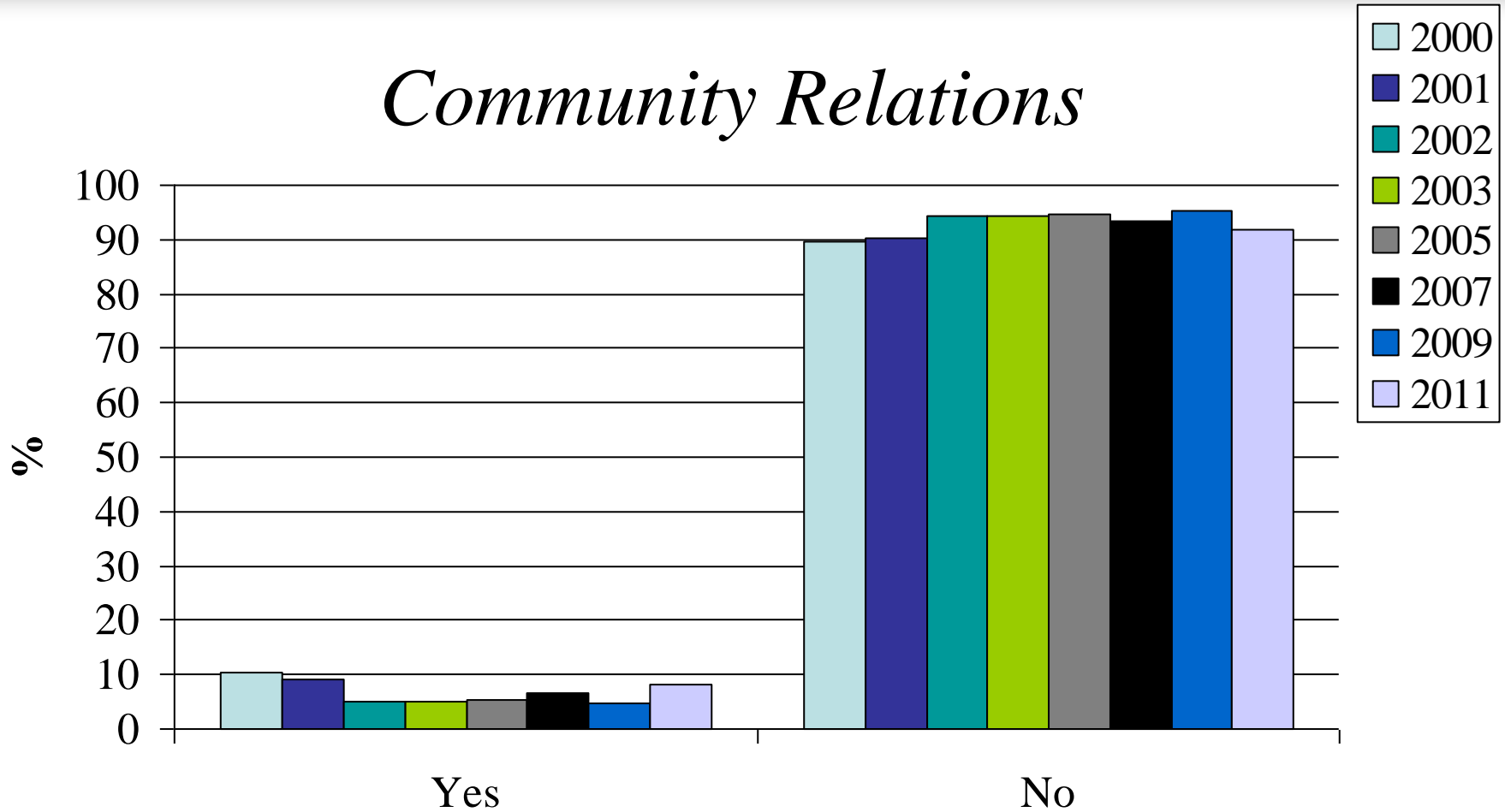
Strategy





Agency & Vendor Use 2011 (5) [Q22]

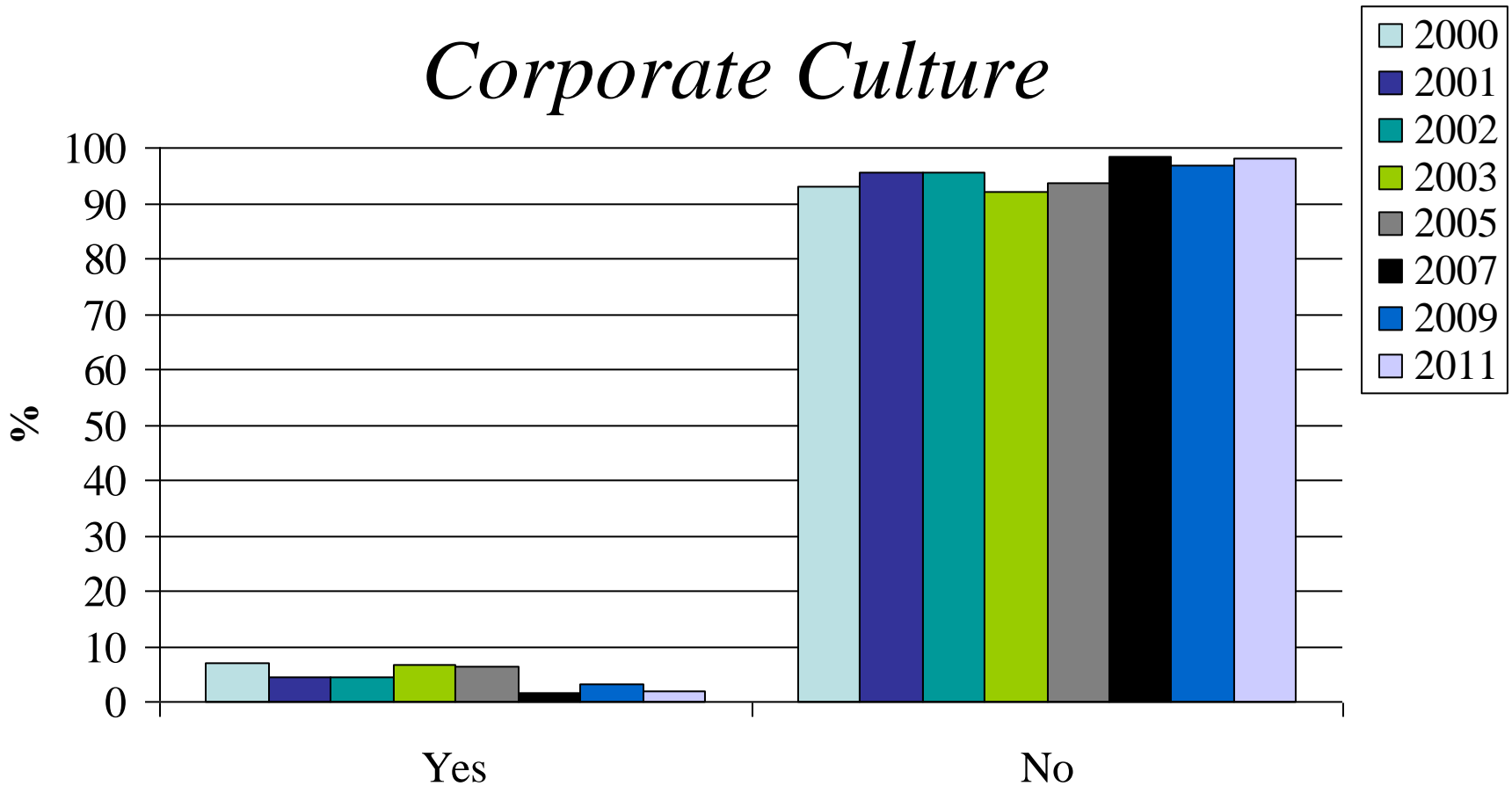
Community Relations





Agency & Vendor Use 2011 (6) [Q22]

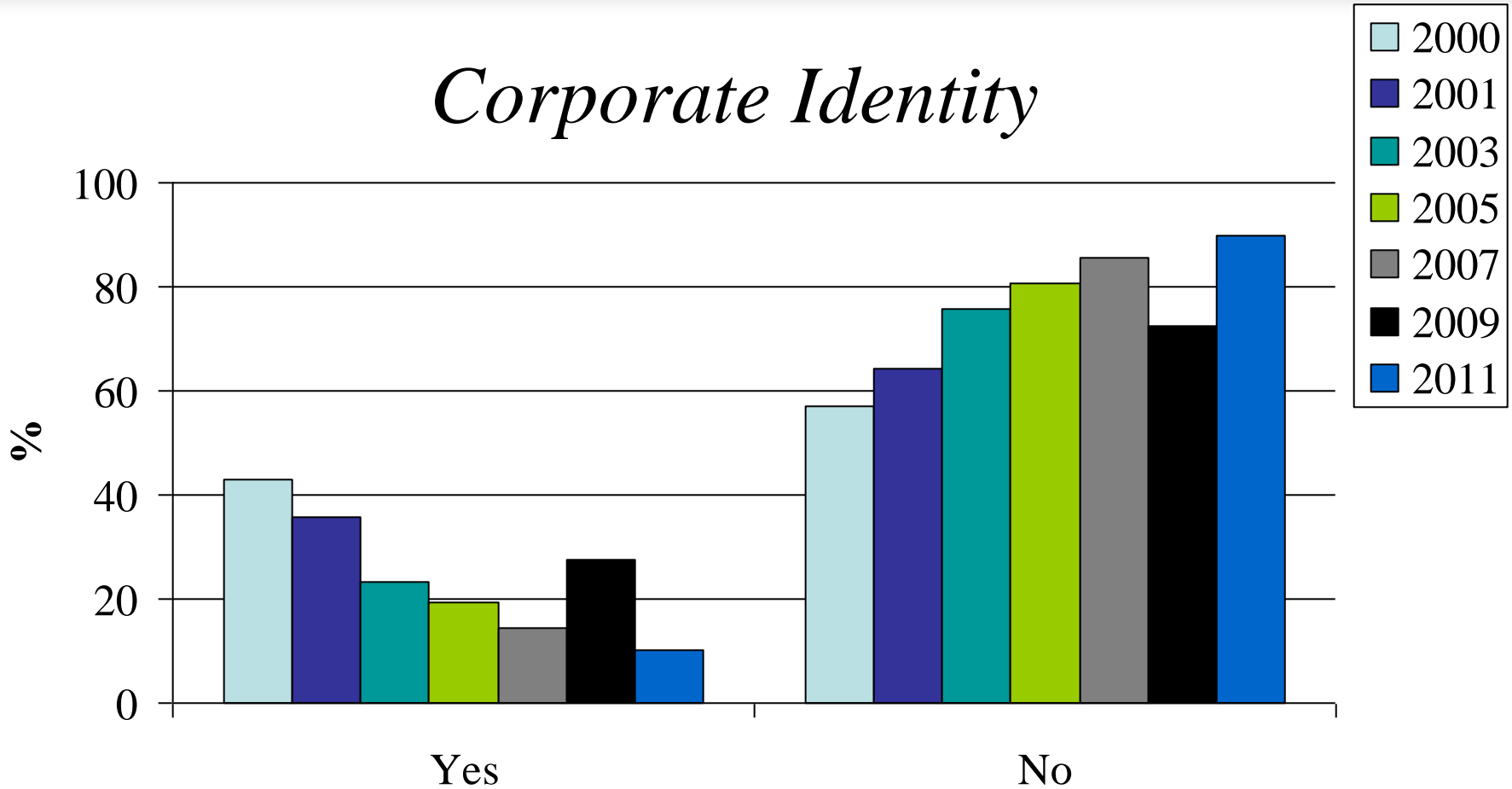
Corporate Culture





Agency & Vendor Use 2011 (7) [Q22]

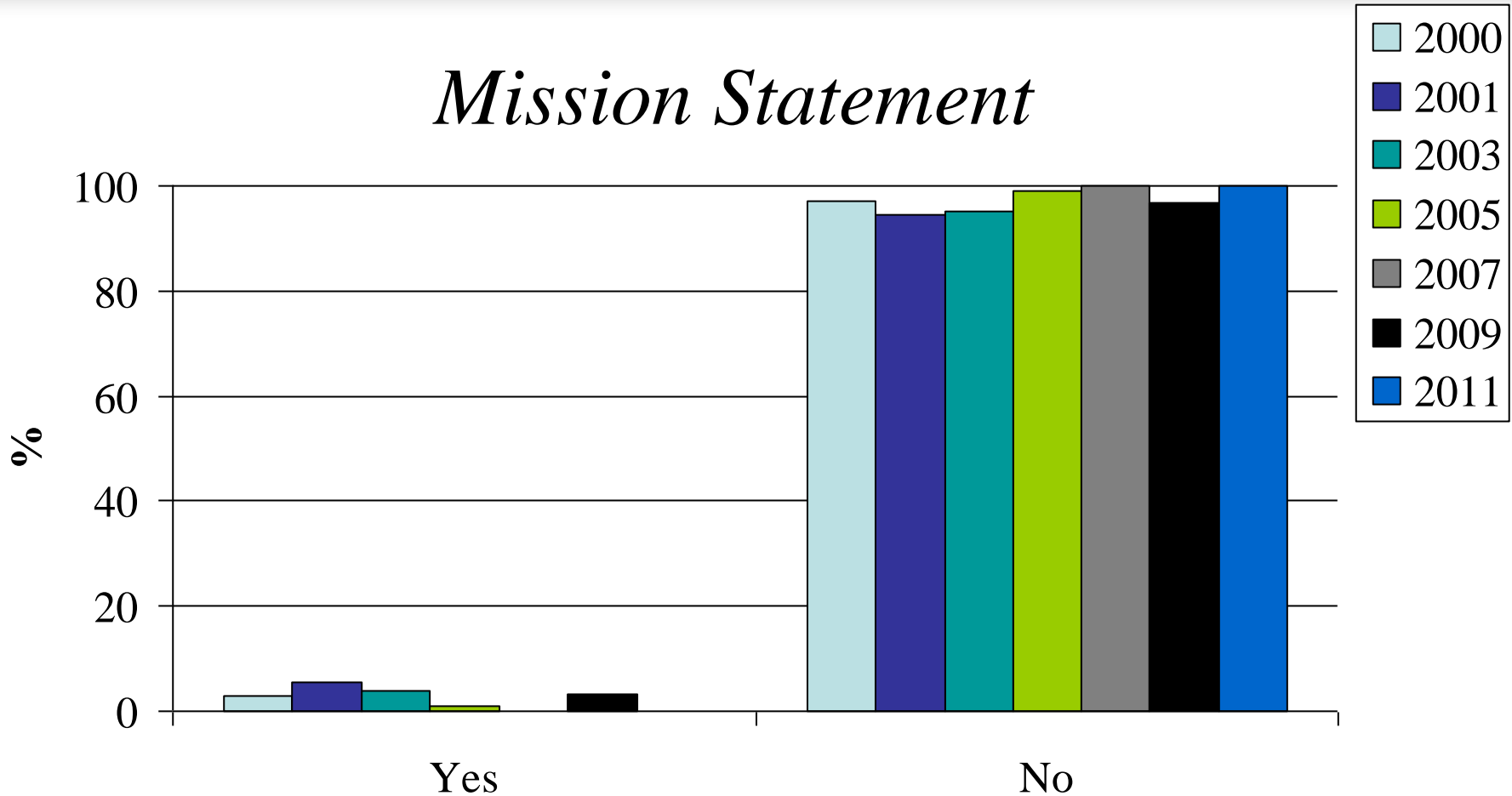
Corporate Identity





Agency & Vendor Use 2011 (8) [Q22]

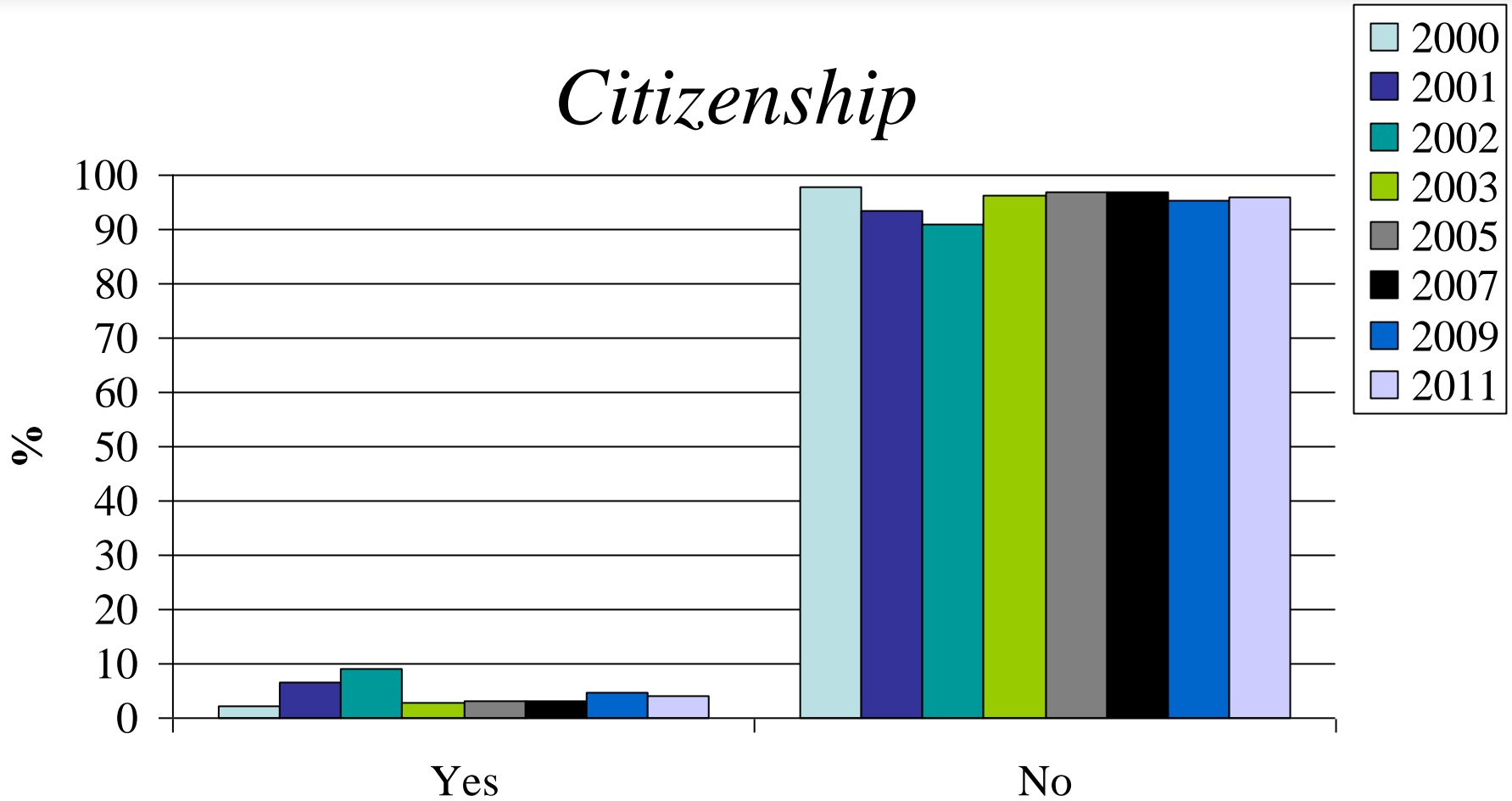
Mission Statement





Agency & Vendor Use 2011 (9) [Q22]

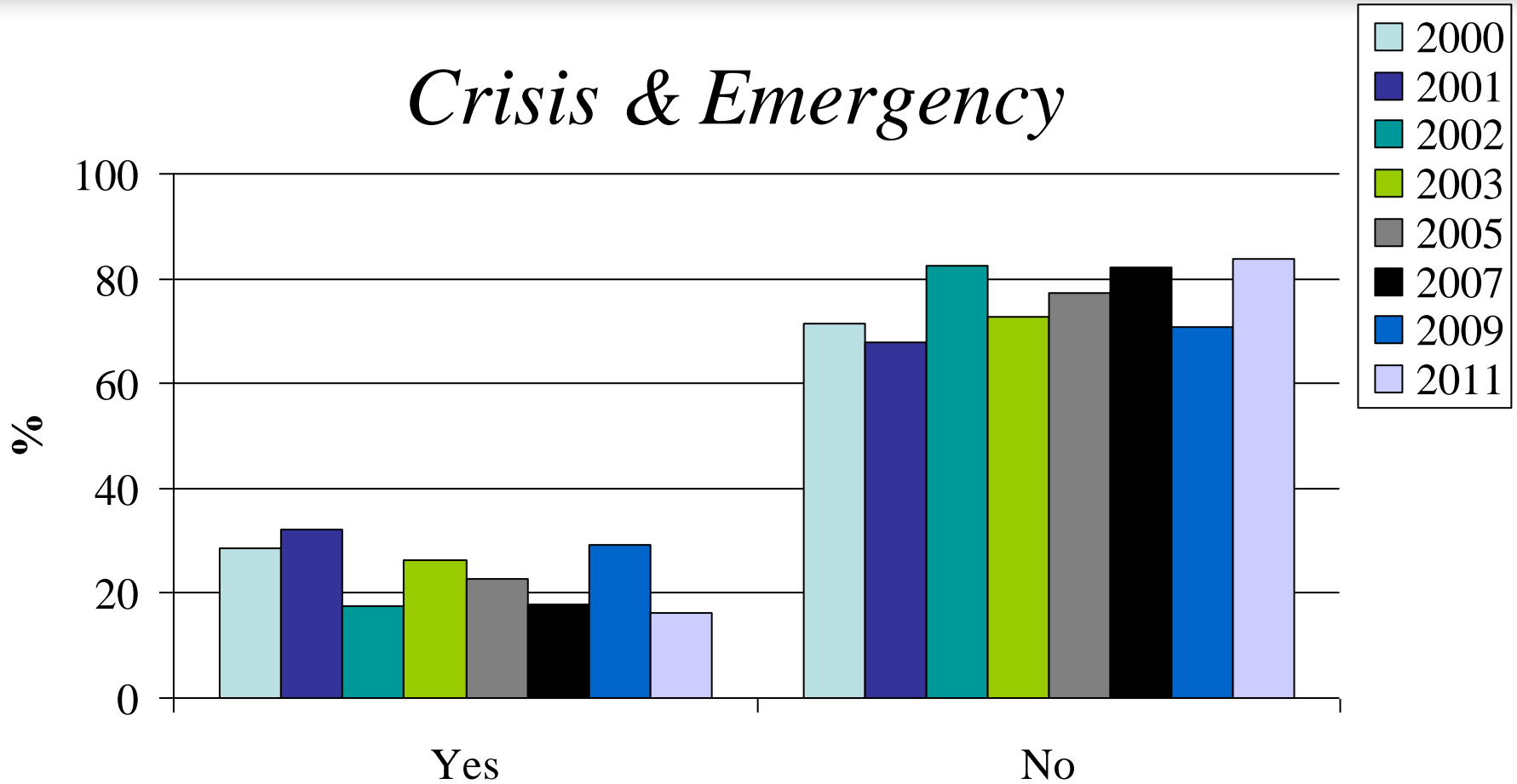
Citizenship





Agency & Vendor Use 2011 (10) [Q22]

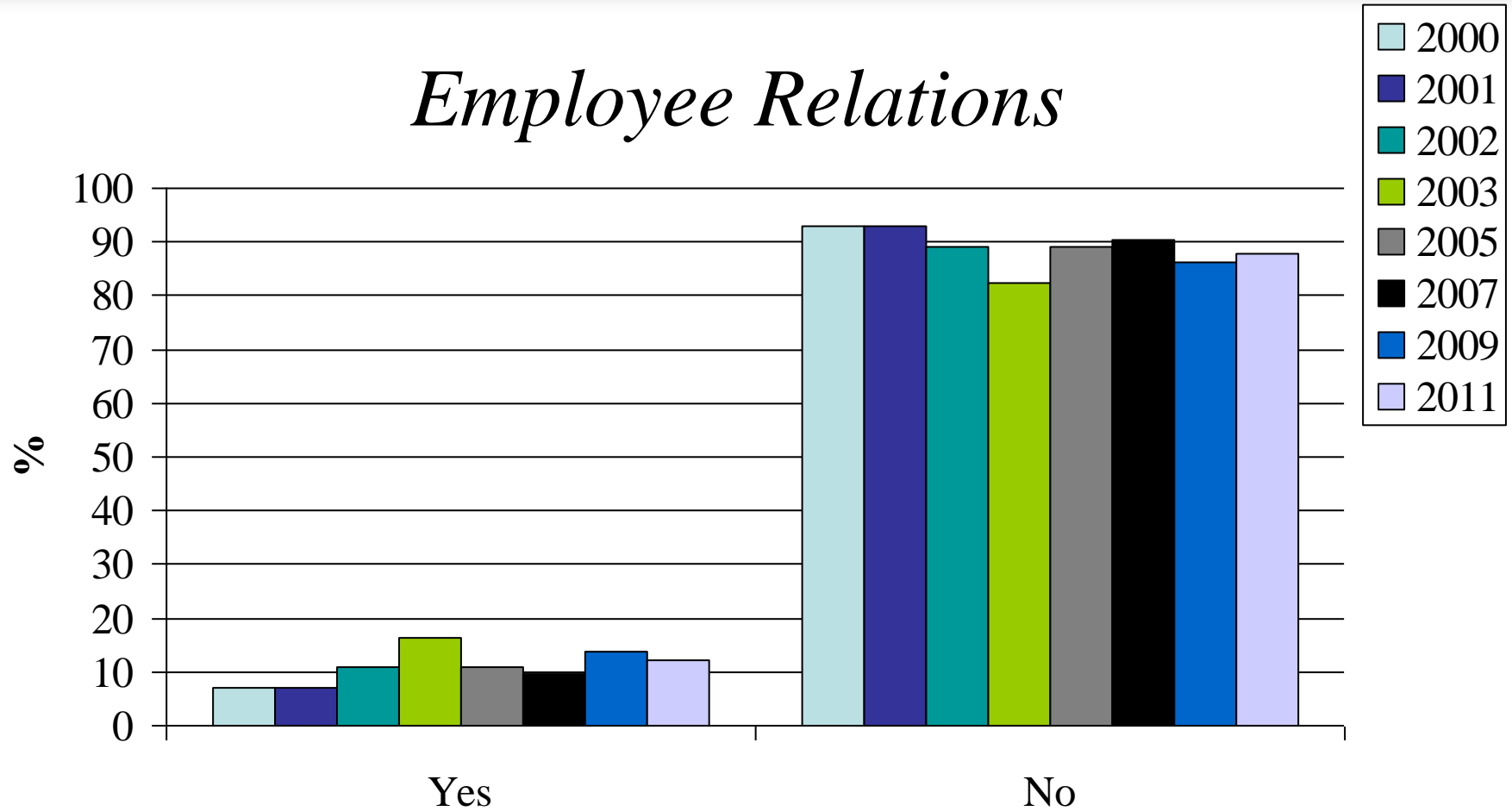
Crisis & Emergency





Agency & Vendor Use 2011 (11) [Q22]

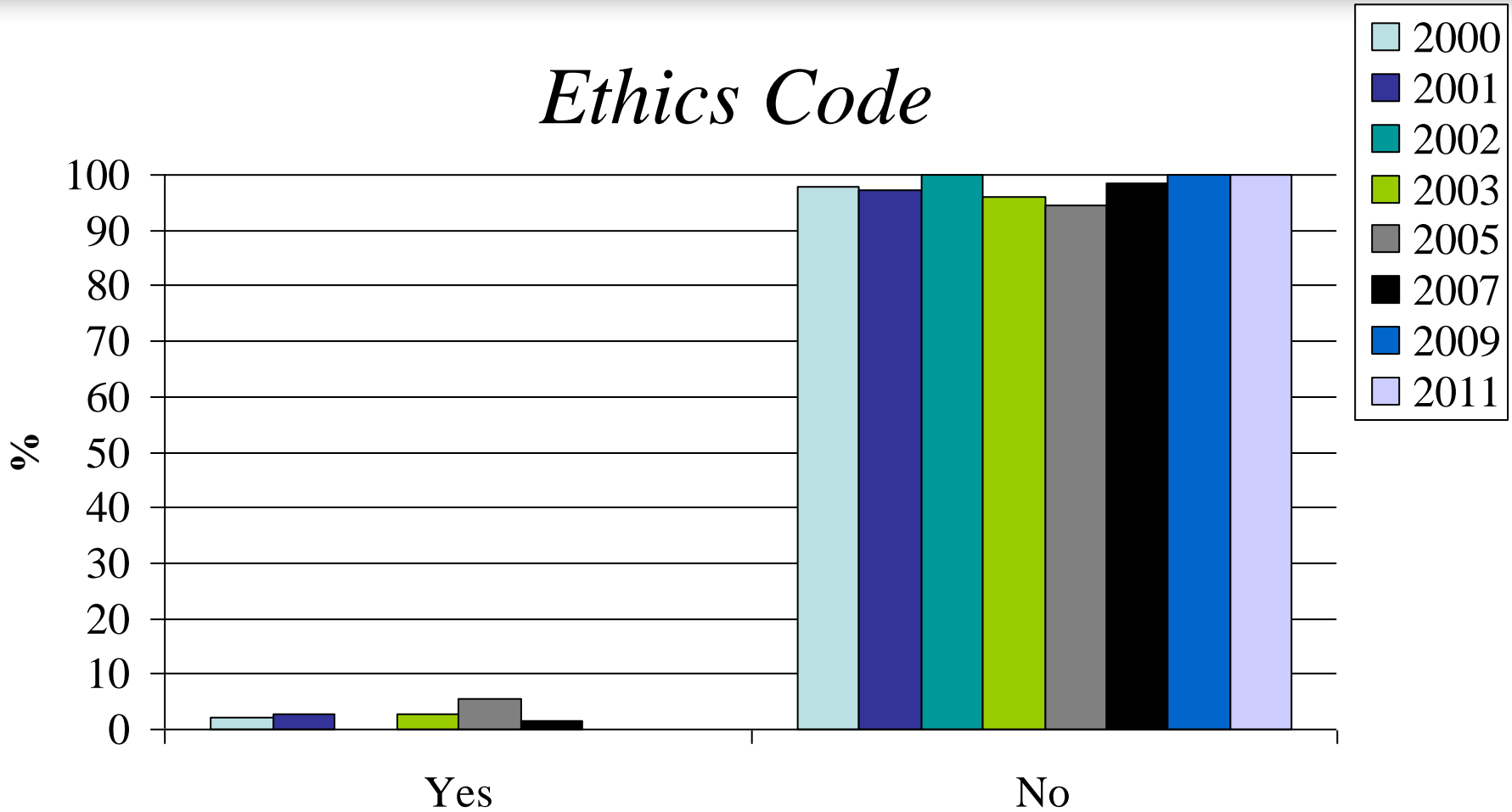
Employee Relations





Agency & Vendor Use 2011 (12) [Q22]

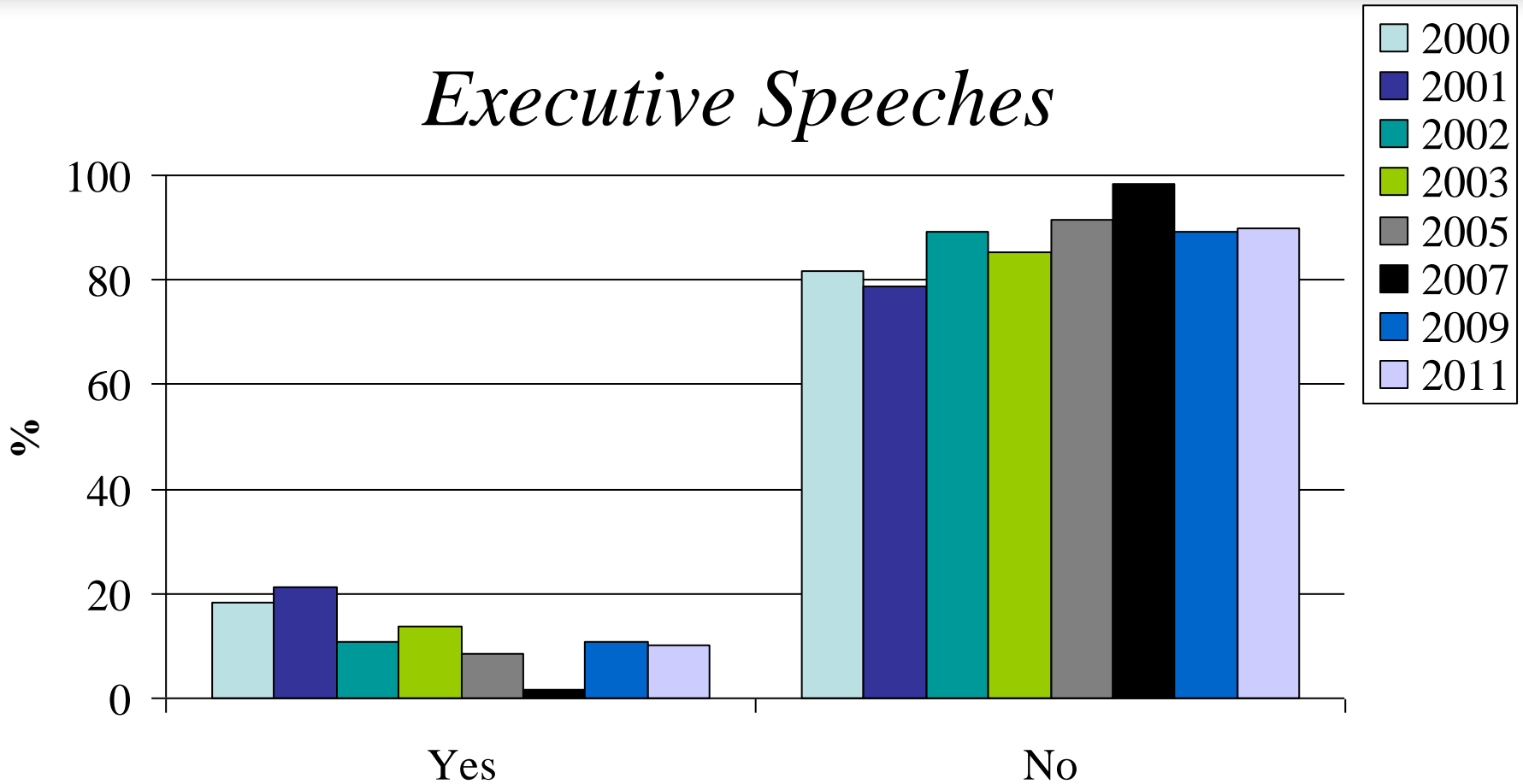
Ethics Code





Agency & Vendor Use 2011 (13) [Q22]

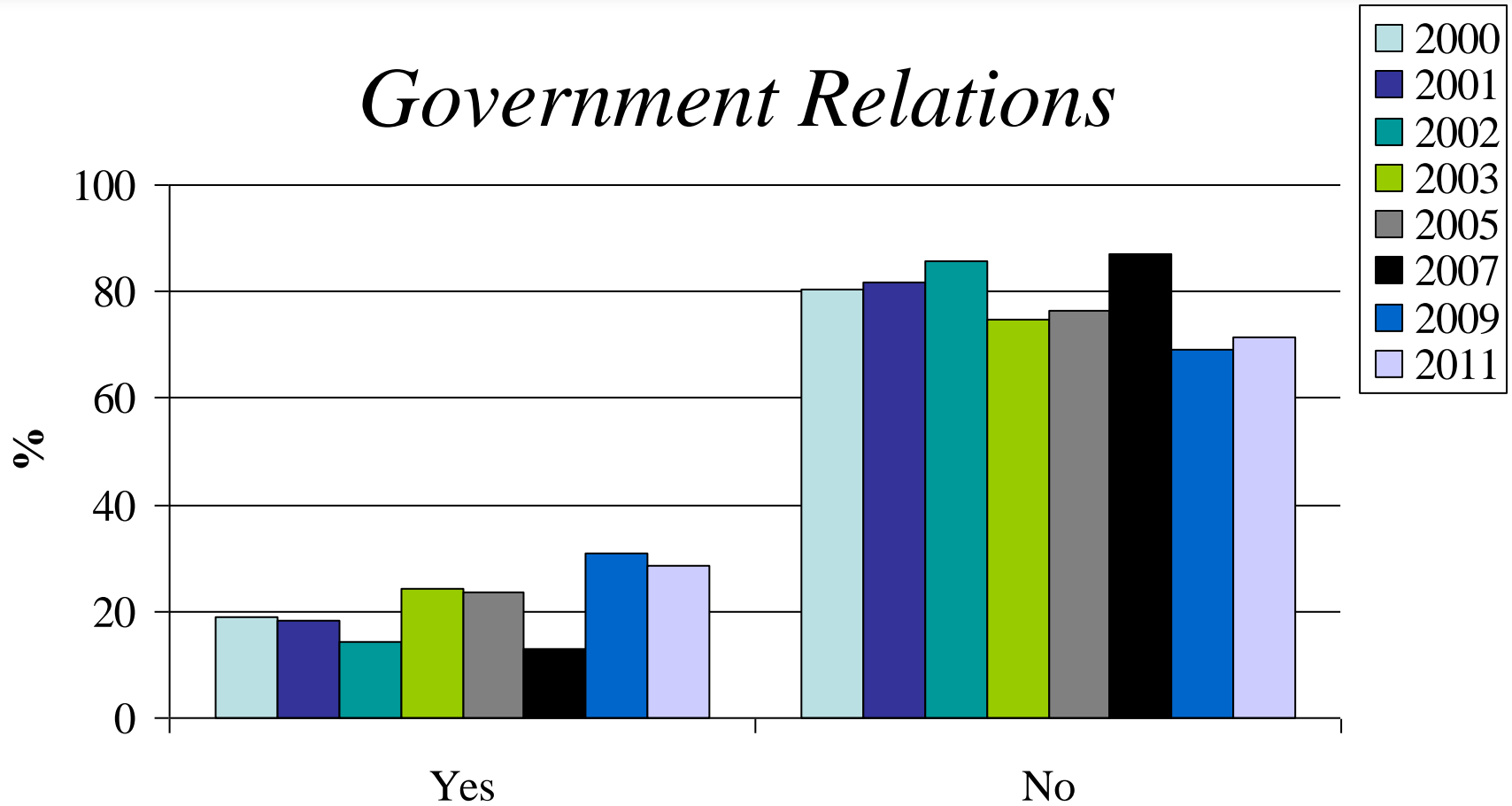
Executive Speeches





Agency & Vendor Use 2011 (14) [Q22]

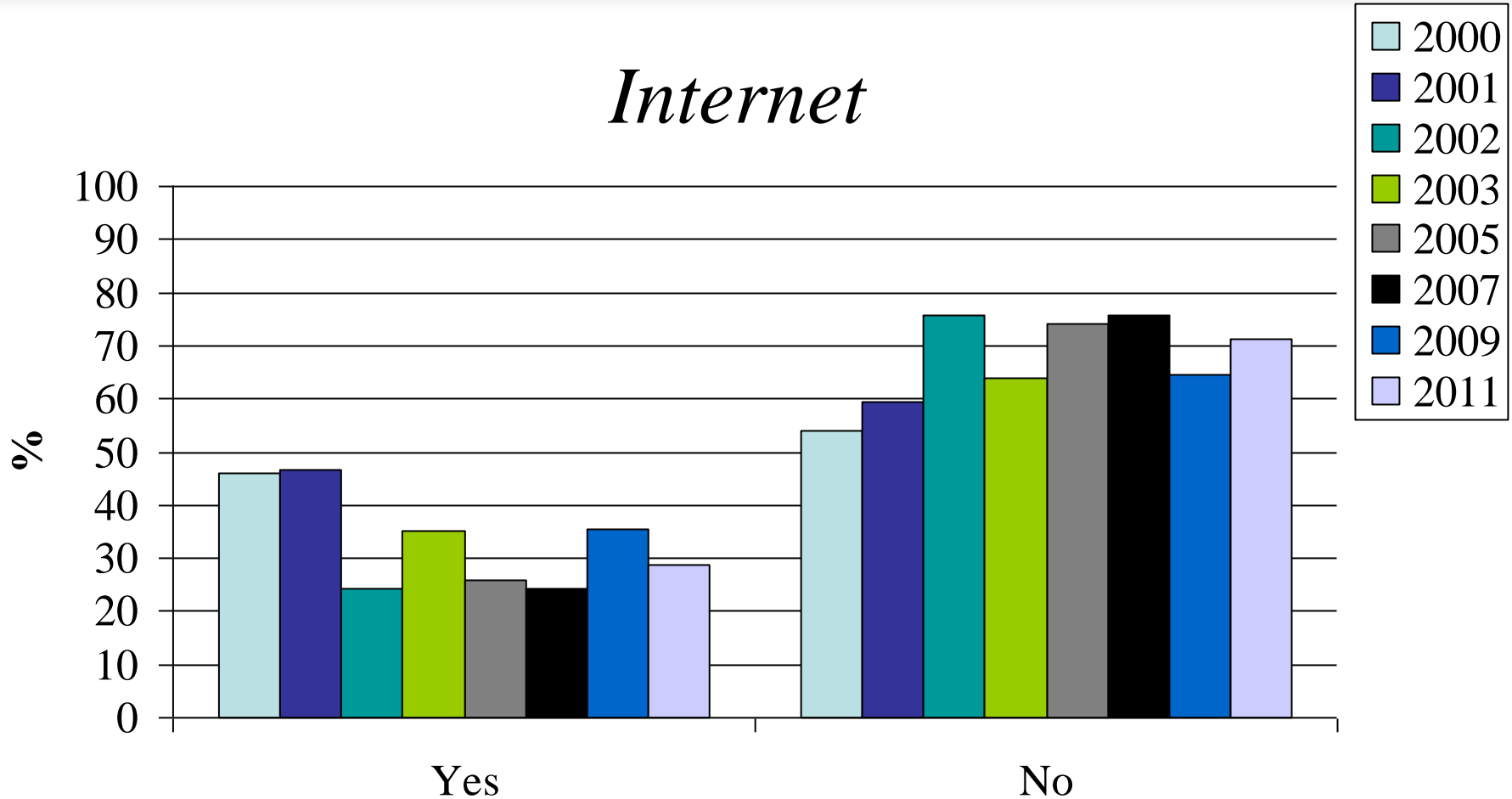
Government Relations





Agency & Vendor Use 2011 (15) [Q22]

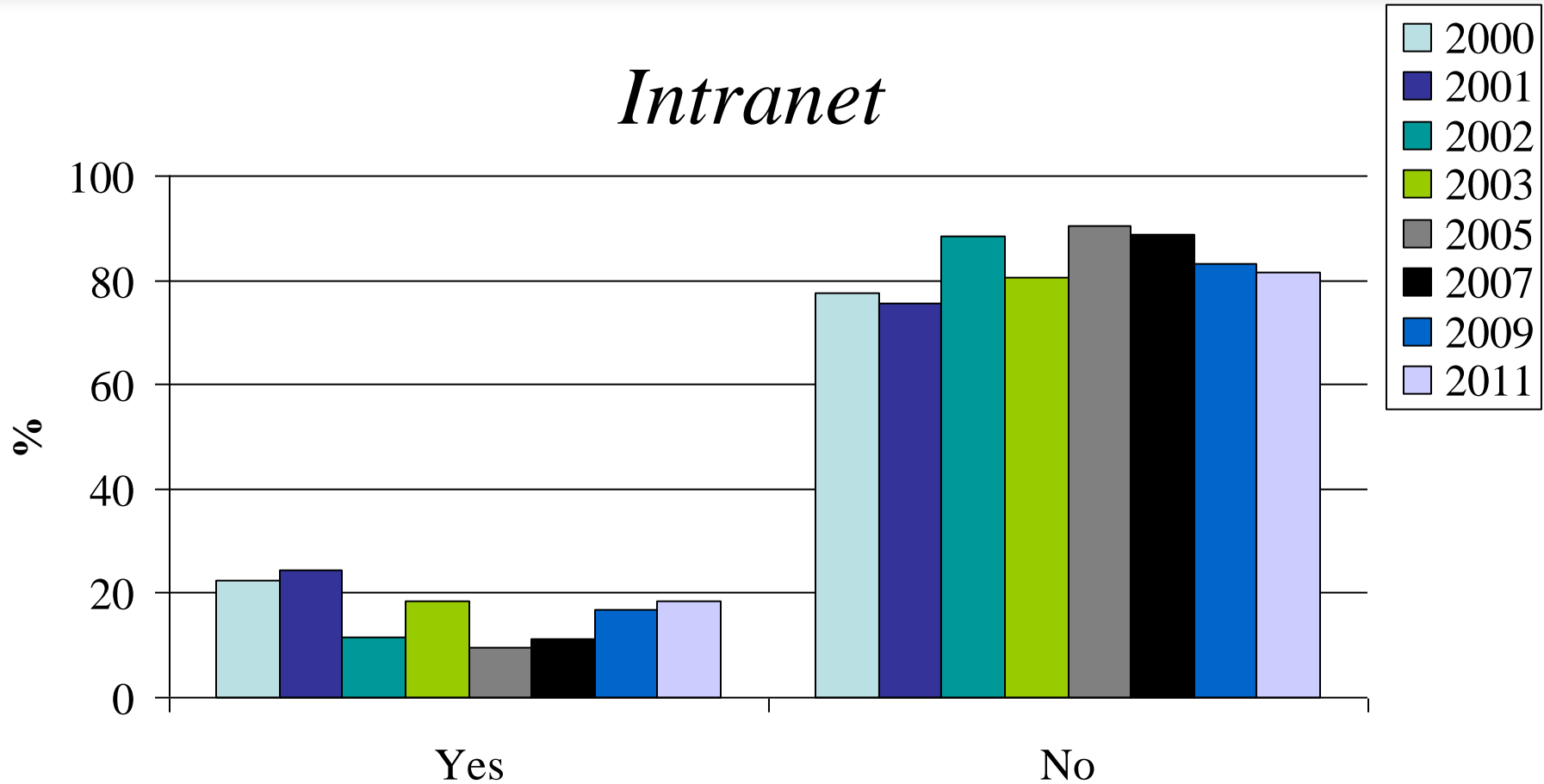
Internet





Agency & Vendor Use 2011 (16) [Q22]

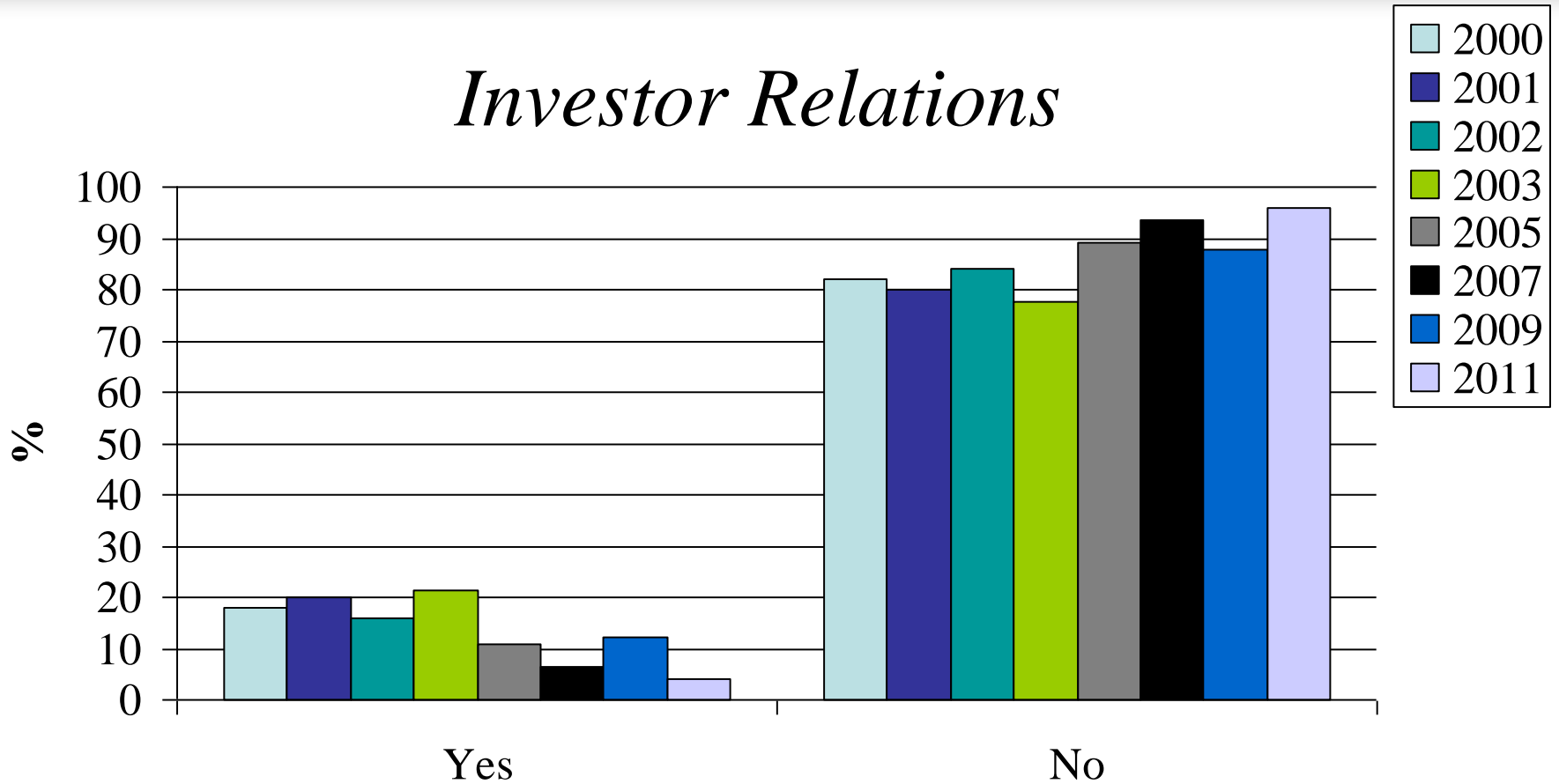
Intranet





Agency & Vendor Use 2011 (17) [Q22]

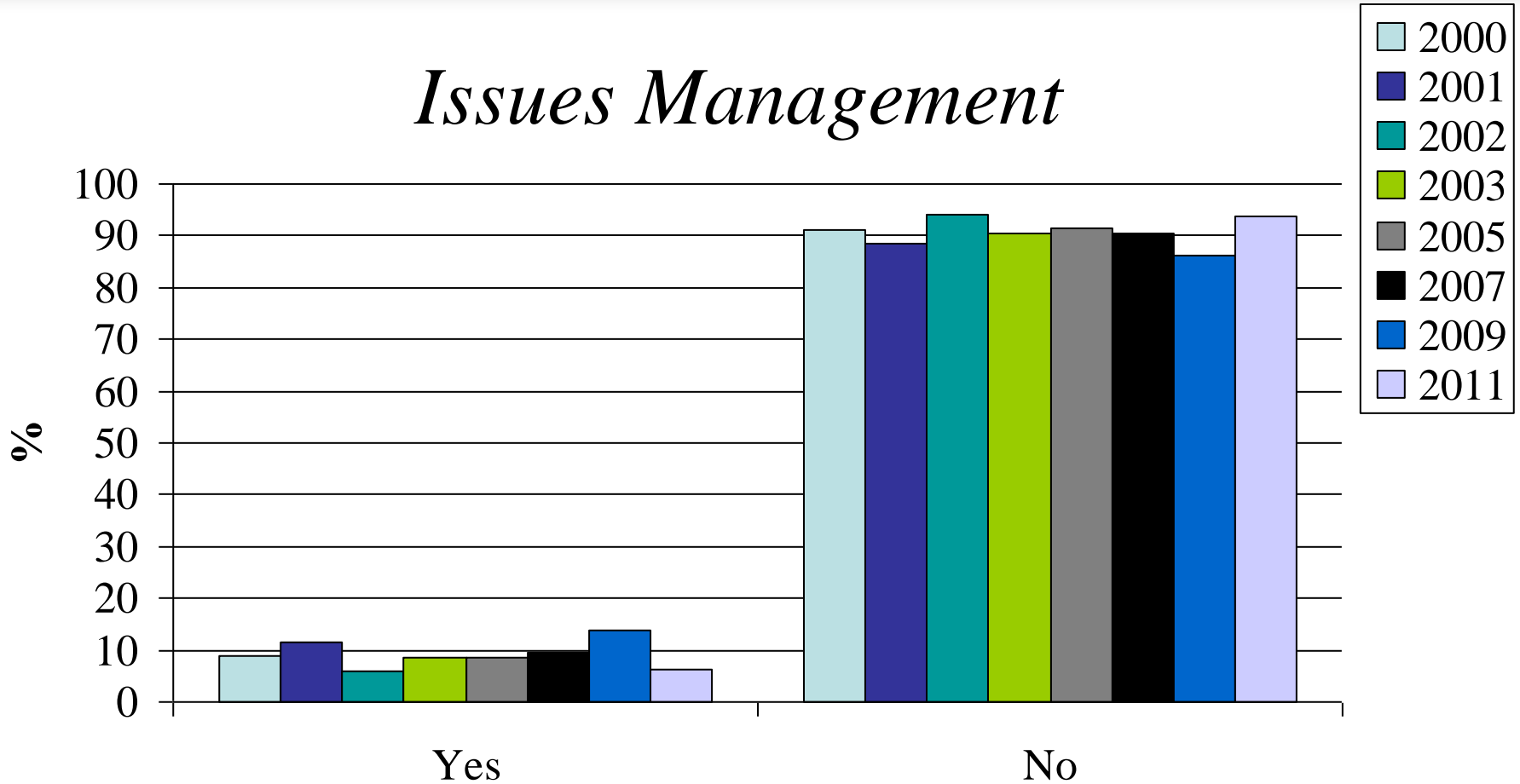
Investor Relations





Agency & Vendor Use 2011 (18) [Q22]

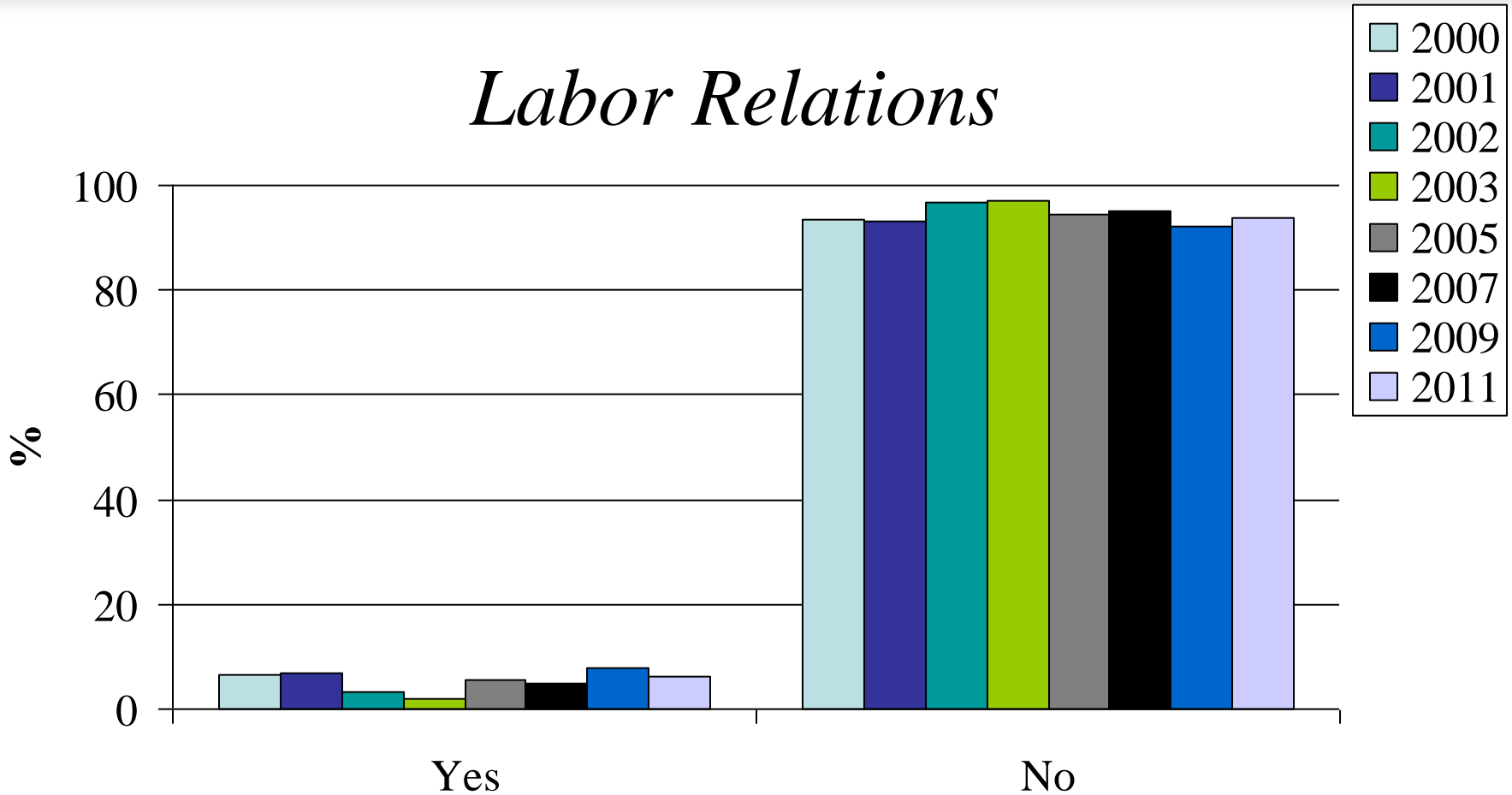
Issues Management





Agency & Vendor Use 2011 (19) [Q22]

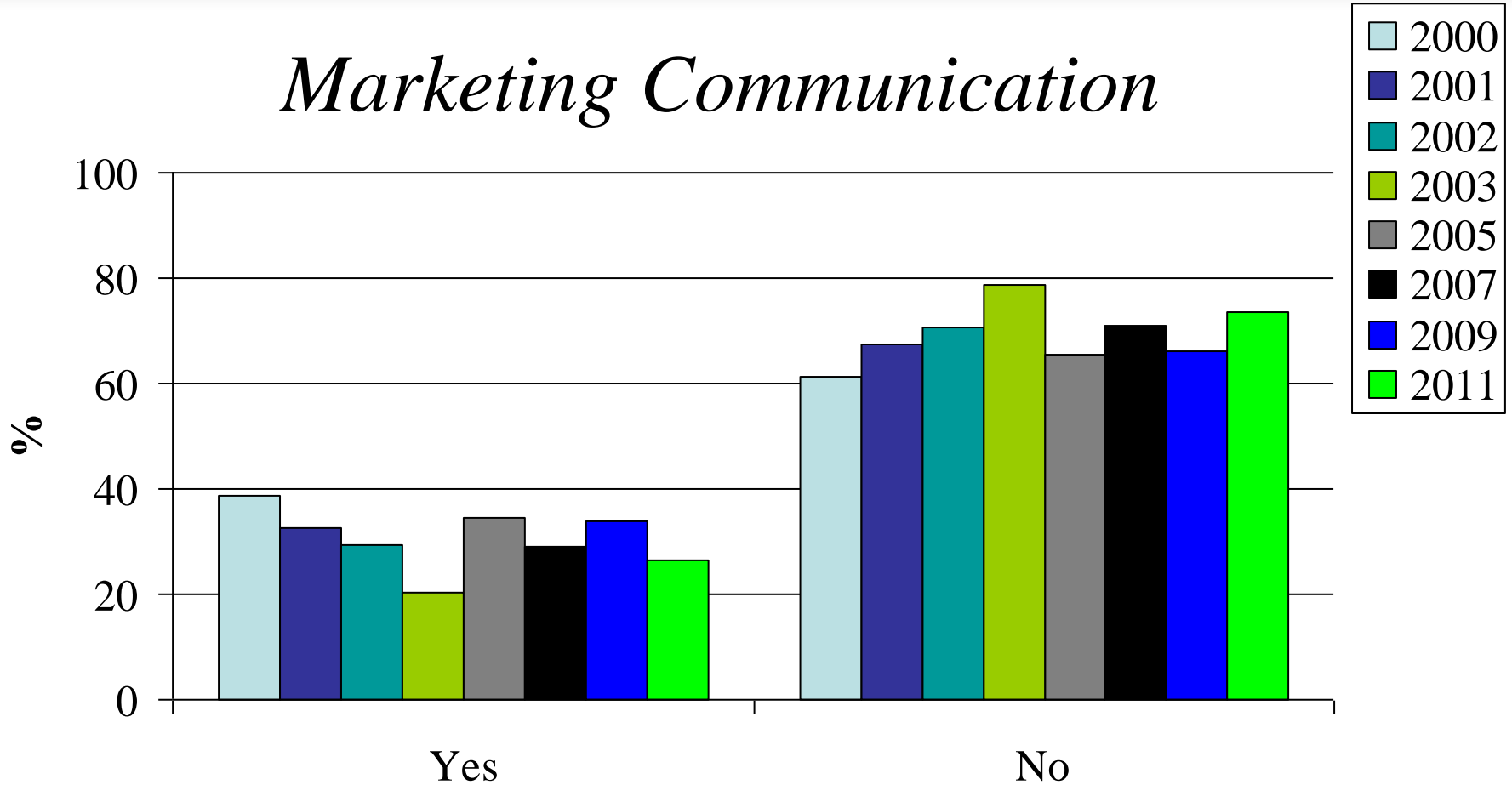
Labor Relations





Agency & Vendor Use 2011 (20) [Q22]

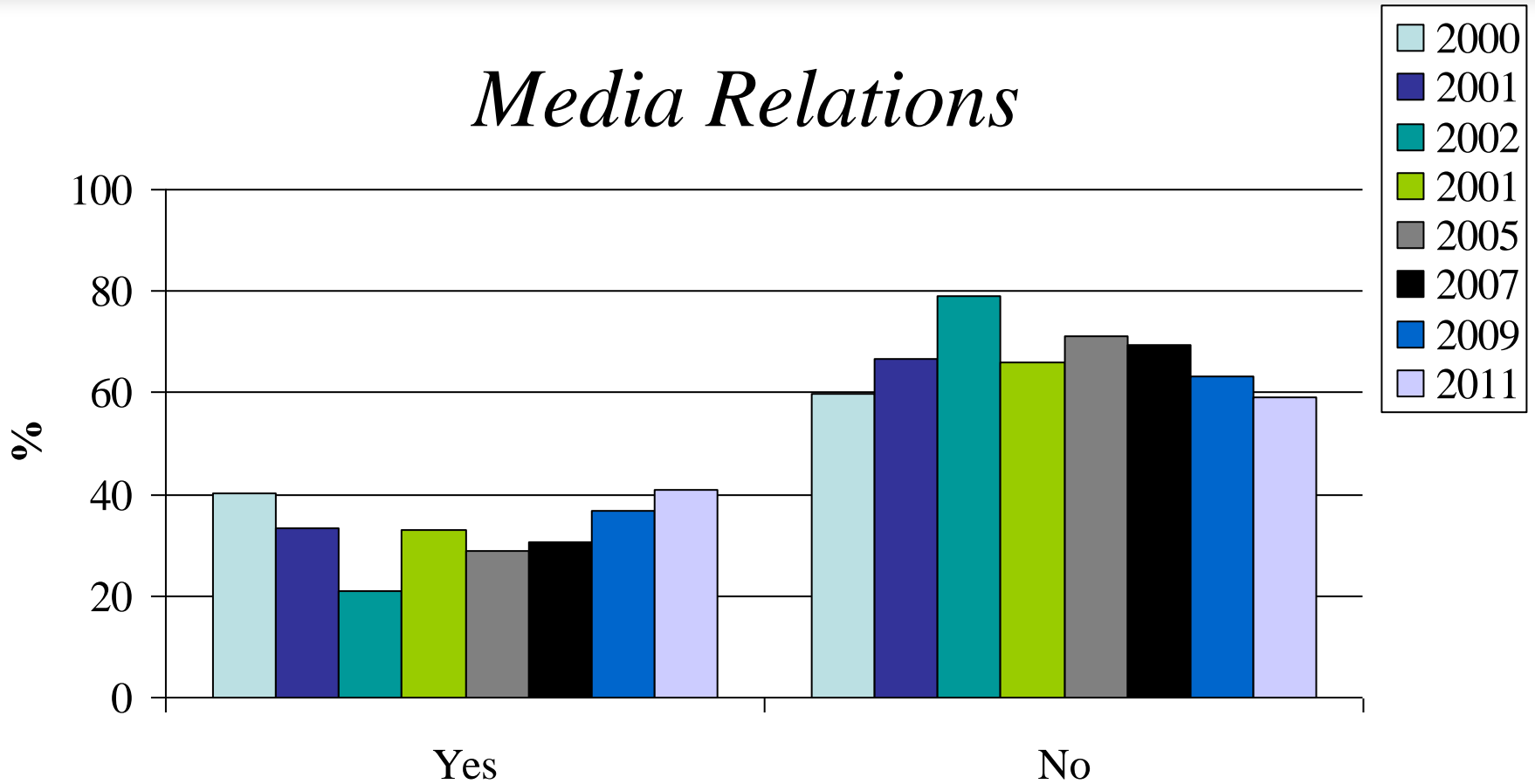
Marketing Communication





Agency & Vendor Use 2011 (21) [Q22]

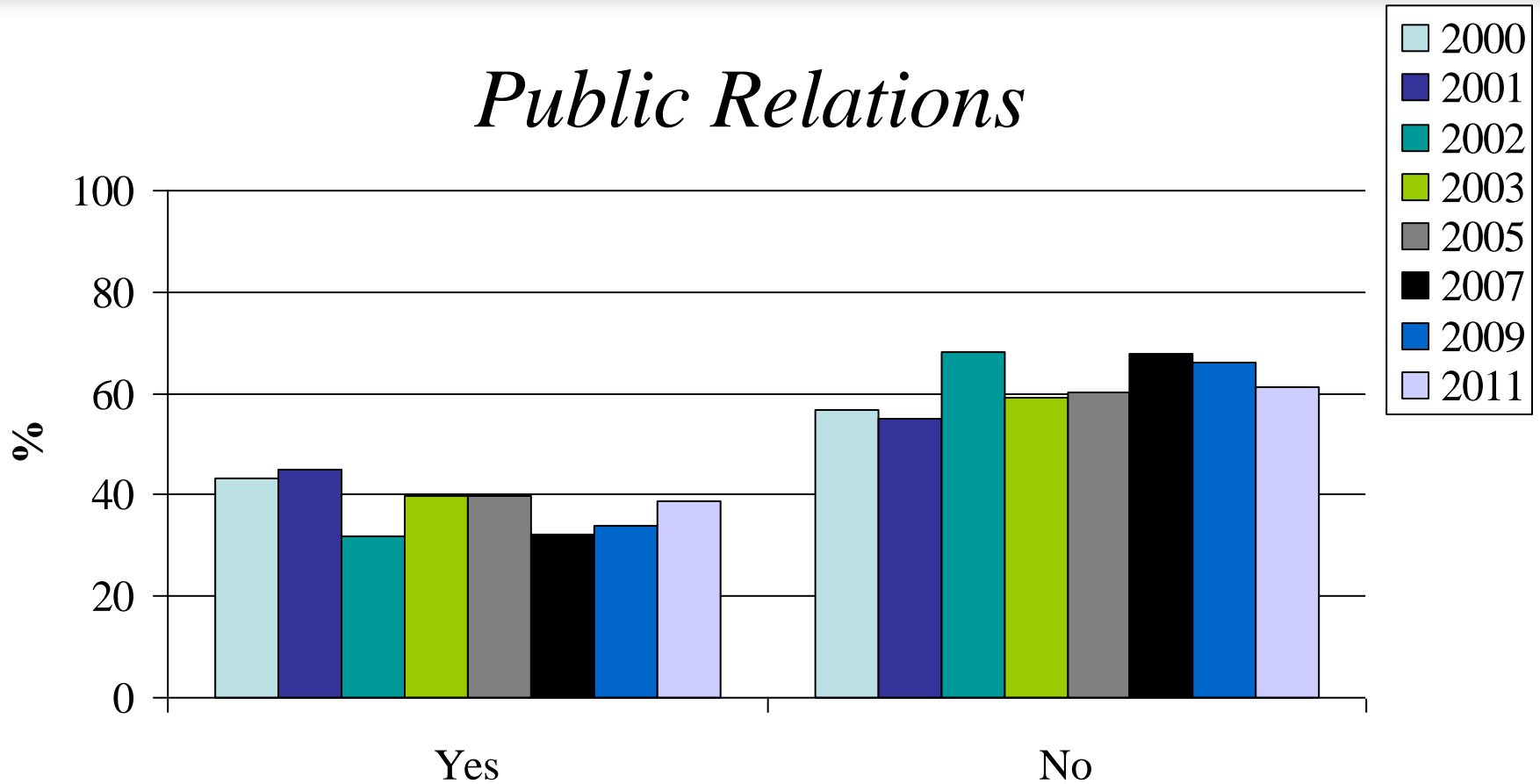
Media Relations





Agency & Vendor Use 2011 (22) [Q22]

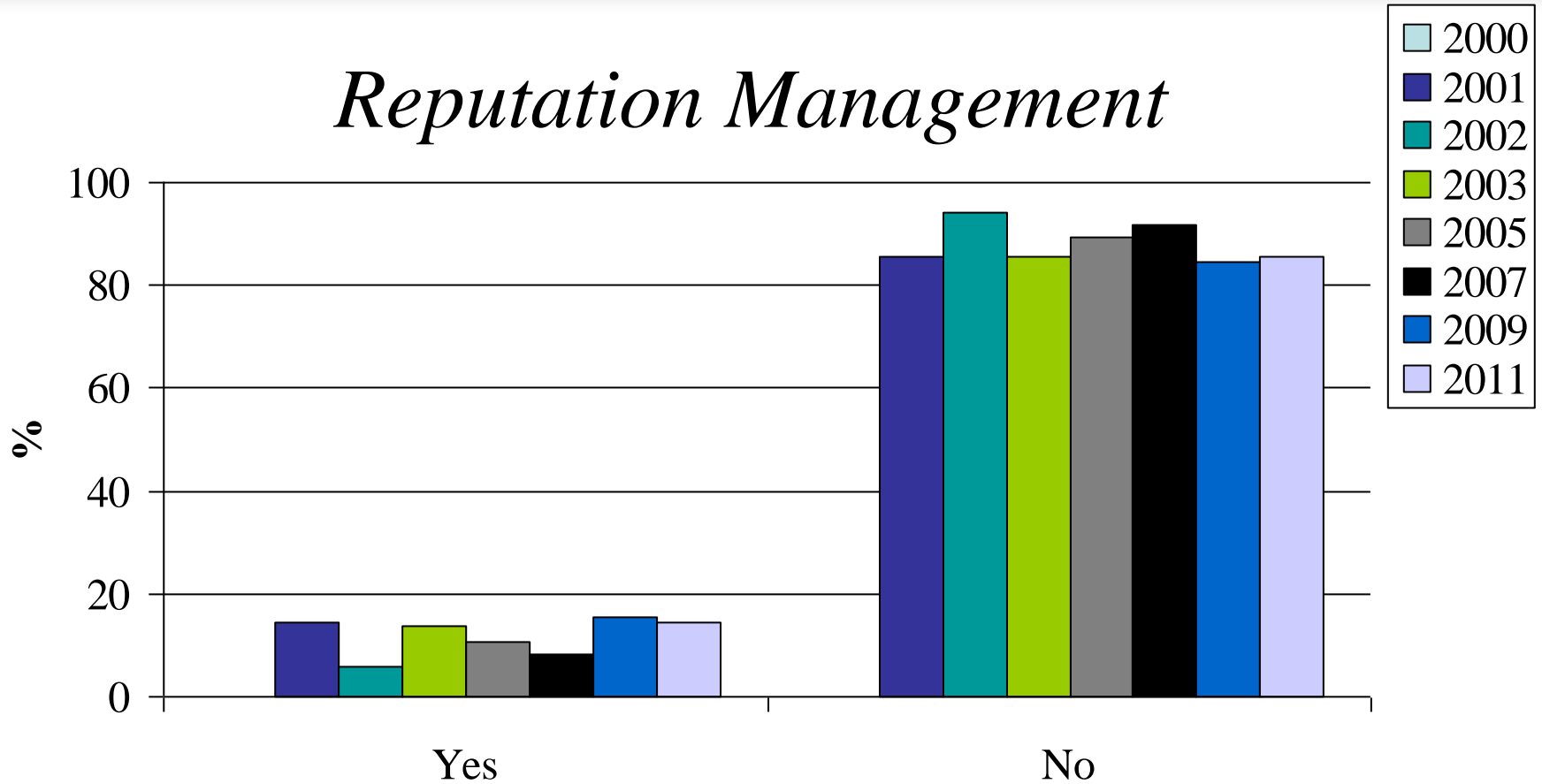
Public Relations





Agency & Vendor Use 2011 (23) [Q22]

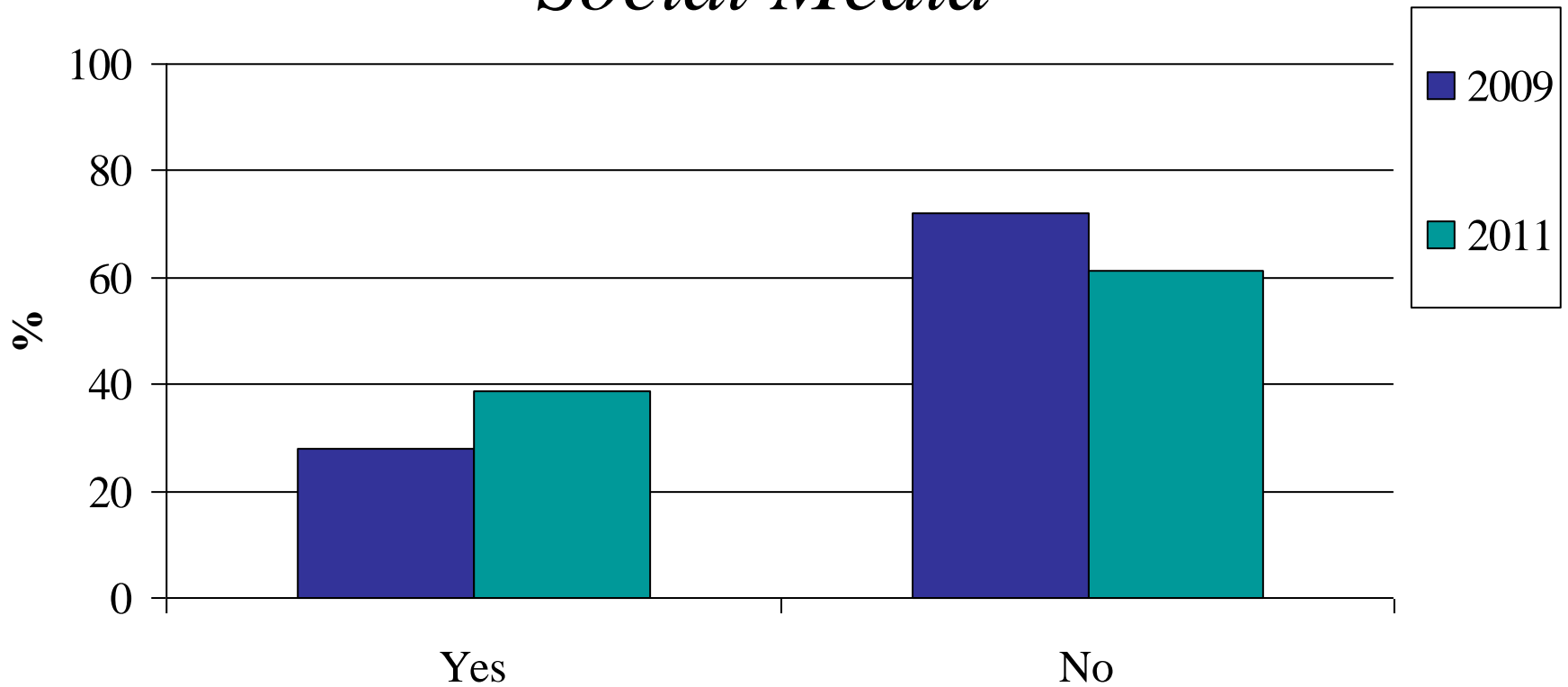
Reputation Management





Agency & Vendor Use 2011 (24) [Q22]

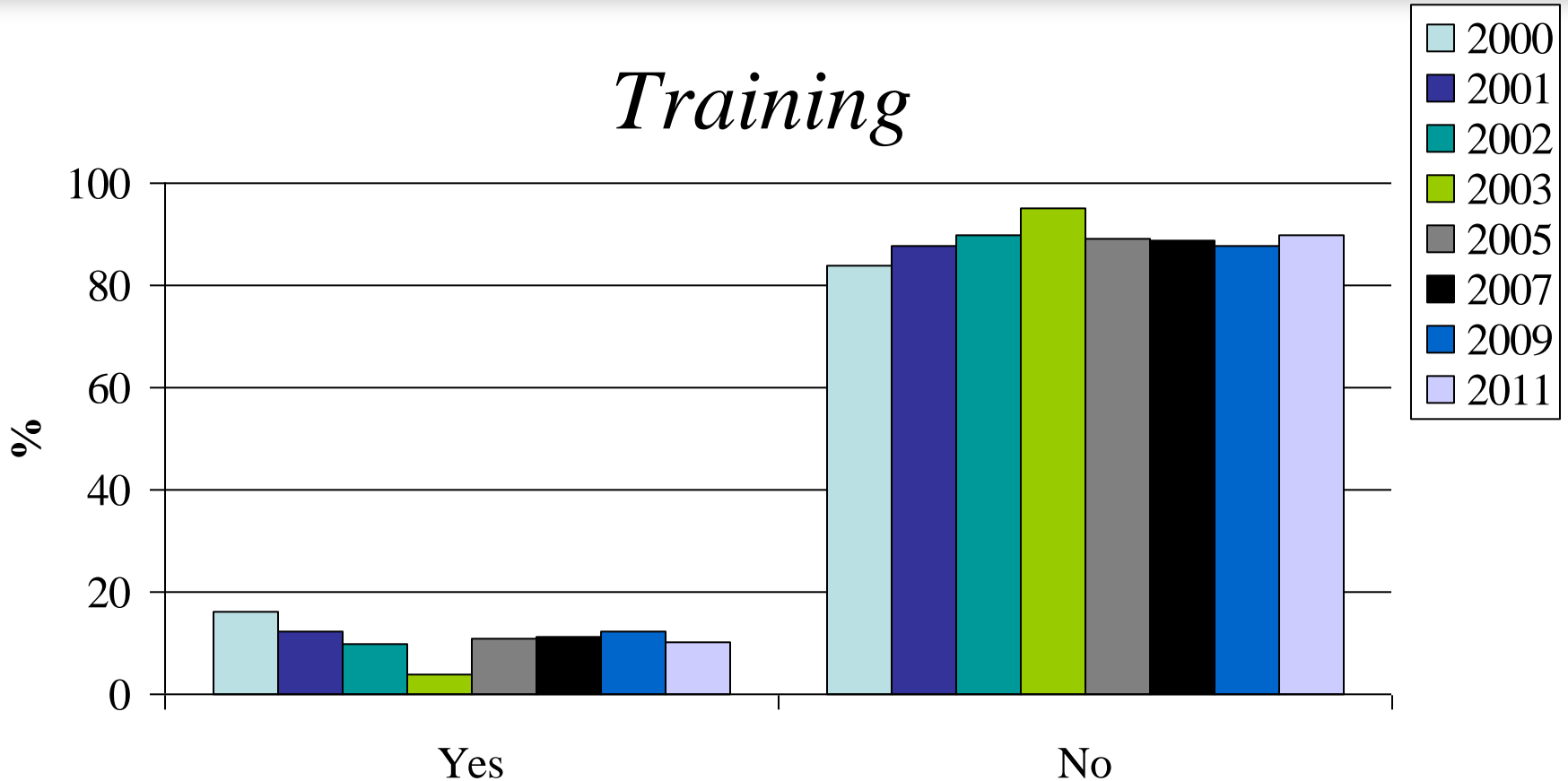
Social Media





Agency & Vendor Use 2011 (25) [Q22]

Training





CORPORATE COMMUNICATION INTERNATIONAL at Baruch College/CUNY

CCI Corporate Communication Practices and Trends 2011: United States – Final Report

Dr. Michael B. Goodman

Director, Corporate Communication International
Professor and Director, MA in Corporate Communication
Baruch College, City University of New York

with

Christina Genest, CCI Associate Director
and

Research Assistants

Annie Keller, Darnide Cayo, Samantha Gouy

