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Creating a Communications Plan

FINAL

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1. Description

The Communications Plan details the actions to be taken to fulfill the communication role identified in the Governance Implementation Plan.

The Communications Plan is comprised of a communications strategy and a campaign structure. It identifies the messages needed to accompany and support the project and the media to use to bring specific information to people in the using organization as well as other stakeholders who need information.

In addition to detailing the individual communication mechanisms, the Communications Plan has a work plan that details timing and responsibilities for preparation (including approval) and delivery.

1. Purpose

Communications are a key success factor for any project: they get the organization connected and updated before, during, and after the implementation of Process and Service Governance Transformation initiative (Transformation.) The information becomes a foundation for training and other roll-out activities, helping to ensure that these activities take place given a solid understanding of the project and its implications.

It is important for stakeholders to receive timely, meaningful information to feel part of the Transformation. The more that people know about and understand how and why changes are happening, the more likely they are to feel committed to the change efforts.

Communications are strongly linked to a stakeholder/participation management plan and are supported by change leadership activities, because executives and other members of management are often the most credible message carriers.

Impact of Not Having a Communications Plan

The rumor mill is often one of the strongest and potentially most destructive forces in an organization planning a change. Lack of correct understanding about change initiatives can be one of the greatest producers of resistance to any change effort.

If the resistance is strong enough within an organization, the change initiatives risk failure. The Communications Plan is designed to provide the right information, at the right time, to the right audience.

Reasons for Not Needing a Communications Plan

A detailed or extensive communications plan may not be necessary when the changes are very minor in scope or they affect a contained area of IT. A contained area means relatively few people, usually fewer than 10, are involved or the area is tightly controlled and managed.

1. Format

The Communications Plan is usually laid out in tables with accompanying notes. It is a matter of taste whether they are in a spreadsheet, a presentation, or a word processing document. The materials selected to convey the messages may vary widely by project.

The following Commitment Model is used extensively and is referred to in the Communications Plan work product (the Communications Plan Matrix.)

Figure 1: Change Commitment Model

1. Development Approach

A structured communication approach is required for the successful deployment of large, complex systems that involve significant business change. Use the following steps to develop the Communications Plan:

* Select communications team and communication owner.
* Review current and past information and communication processes and the high-level strategy defined in the Program Communications Strategy.
* Develop an in-depth project communication strategy.
* Create the Communications Campaign Definition (note that this step will be iterative through the various campaigns as they roll out).
* Develop a Communication Project Plan (note that this step will be iterative as the campaigns roll out).
* Manage the feedback process; refine and redesign approach, as required.
* Execute the plan and measure the results.

Select Communications Team and Communication Owner

The communications team should include representation from the Incubator, the Process Manager Council or the Service Owner Council and the corporate communications function. The Incubator will provide the communication plan framework and facilitate the development of the communication plan and materials. The Process Manager or the Service Manager should be selected as the communication owner for their respective Process or Service. The communication owner will have overall plan responsibilities that include overseeing the production of the communications strategy, campaign, project plan, and implementation of the Communications Program.

While the communications owner does not deliver all communications alone, he or she is the focal point for ensuring continuity, responsiveness, and consistency in execution of the communications plan.

Review Current and Past Information and Communication Processes and the High-Level Strategy Defined in the Project Strategy

Before developing the communication plan, review the project scope and project plan together with the campaigns as defined in the Project Strategy and the Project Plan, in order to align all future messages with the Requester's vision and project milestones.

A review of the Requester's current and past communication process and practices will provide a starting point for identifying communications channels and feedback processes to use with various members of the Requester organization.

Develop an In-Depth Communication Strategy

There are 4 steps to developing an in-depth communication strategy. They are:

* Develop communications Guiding Principles
* Define your audiences
* Create a communication road map
* Define the communication media

### Develop Communication Guiding Principles

Communication guiding principles help to ensure consistency and effectiveness in a communication process. Communication guiding principles should be set out at the beginning of the communications work so that no matter how lengthy and complex the change initiative gets, there is are clear directives that the entire communications team has agreed upon and that management has approved. (See the Appendix for sample communications Guiding Principles.)

### Define Your Audiences

Different groups of people within the organization need different types of information during a change initiative. In the planning stages it is important to identify the people who will be affected by the change, how they will be affected, and how best to communicate with them throughout the change process. Once this list is developed, it will be possible to understand the different requirements of each audience segment. Be sure to consider both internal and external audiences.

### Create a Communication Road Map

The Communication road map defines the specific phases (referred to here as campaigns) to be conducted during the change initiative and their relative timing. A road map helps in understanding the Communication Campaign Definition step in the development approach.

The campaigns map to commitment stages identified in the commitment model. For example, the second stage of commitment in a change initiative is the Awareness of Change: simply knowing that a change is going to happen. Usually one of the first communication campaigns is making people aware that their organization is going to undergo a change initiative and the reasons for it.

|  |  |
| --- | --- |
| Campaign (Example) | Dates (Example) |
| Awareness and Understanding | 7/1/99 - 10/15/1999 |
| Understanding and Positive Perceptions | 10/16/99 – 4/31/1999 |
| Installation | 5/1/99 - 12/31/2000 |
| Follow-up | 1/1/00 - 3/31/2000 |

Figure 2: Define the Communication Media

There are various methods for delivering and receiving messages to and from audiences ranging from "non-personal," such as e-mails, memos and posters, to "personal," such as staff meetings.

You will need to select media depending on what messages you are attempting to deliver and to whom you are delivering them. You will probably change the media mix during the project, but it is important to identify the media you have available and start to target appropriate media to messages and audiences.

Create Communication Campaign Definitions

Once you have completed the overall, in-depth Communication Strategy, you should move to creating Communication Campaign Definitions for each campaign you have identified for the change initiative. These campaigns are designed to guide the identified stakeholders through one or more stages of commitment, as shown in the commitment model.

A Communication Campaign includes:

* Campaign Objectives
* Audience Requirements
* Message Definition

### Campaign Objectives

Specify the goals of each Communication campaign. At the end of each campaign, these will be used to determine if the campaign has been successful.

See the following Communication Objective examples:

* Campaign: Awareness and Understanding
* 100% of directly affected personnel will be aware of the ABC project
* The majority of directors and managers will be able to explain the ABC project in their own words
* 100% of executives and directors of indirectly affected organizations will be aware of the ABC project

### Audience Requirements

Specifically consider the needs of each audience grouping. Notice that the definition of audiences and Audience Requirements are specific to a particular campaign. The Audience Requirements are helpful to consolidate groups of people into a single audience, to ensure that the messages for each campaign can help achieve the communication requirements for all audiences, and to identify common communication requirements that may be appropriate for mass communication media. Keep in mind that in identifying audiences the following characteristics may apply:

* Members of an audience often need the same kinds of information
* Members of an audience may be affected in a similar way during that particular campaign
* For example:

| Audience | General Information Requirements | Specific Information Requirements |
| --- | --- | --- |
| Executives | * Overview of project * Project goals and timing | * Interrelationship or effect on other corporate initiatives and financial position * Project priority * Project leadership and staffing * Project status and issue discussion |
| Managers and supervisors of affected departments | * Overview of project * Project goals and timing | * Their personal and departmental responsibilities * Impacts on their position and timing * Impacts on their departments and timing * Impacts on their personnel and timing * Who to contact for answers |
| Associates | * Project assignments * Project goals and timing * Escalation path | * Design specifications * Support requirements * Impacts on infrastructure or other projects |
| Customers | * Overview of project * Project goals and timing | * Implementation Dates * Education Availability |

Figure 3: Audience and Message Profile

### Message Definition

Each campaign should be focused on delivering a relatively small number of key messages.

Different messages will be applicable to different audiences at different times on the basis of their information requirements. Also, different messages lend themselves to different types of communications media. For these reasons, it is important to specifically consider the messages for each campaign along with their audiences, media, frequency, and timing.

Campaign Communication Definition needs to be created for each campaign defined in the Communication Strategy.

Develop a Communication Project Plan

The Communications Plan is the document used to direct the actual preparation and delivery of the communications materials. It defines the specific communications to be prepared and delivered, the timing for each communication, and the budget for the overall communications program. The three main tools in the Communications Project Plan are:

* Communication Delivery Planner -- For each campaign, it identifies the media, timing, applicable messages for that media, and the audience to be targeted. The person who prepares the media will use this planner.
* Work plan -- Used to schedule the production, approval, and delivery of communications, usually a Gantt chart.
* Budget -- Used to determine the total cost, and should follow the format and content requirements of the client.

Execute the Plan and Measure Results

This step is the actual delivery of the message to the specific segment and the physical capturing of their feedback for future analysis.

Manage the Feedback Process; Refine and Redesign Approach as Required

Throughout the delivery of the Communications Plan work product, members of the project team and the extended communications process team need to capture feedback and measure the campaign’s success based on the Campaign Objectives of the Communications Strategy.

The following approach to capture this feedback will enable the project team to quickly assess and respond to issues as they arise. The communications project team should prepare a master feedback file to hold feedback captured via survey results, interviews, meeting notes, focus groups, etc.

The feedback collected should be reviewed weekly, or at some other appropriate interval, with the project team to determine the need for immediate action. Periodically the feedback should be consolidated for formal review at project intervals to assess the effectiveness of the communications plan, identify unanticipated points of resistance or concern, and determine the need to update/refine the plan. Also in this step, the communications process team should create a log for tracking communication plan implementation activities.

Some of the feedback mechanisms that may be used for assessing the impact of the delivered communications to the stakeholders are:

* Feedback survey questionnaire
* Notes taken by presenter (or scribe) summarizing issues, answers, and questions
* Responses by participants after delivering package or message
* How the campaign performed relative to its stated objectives

1. Validation and Verification

Communications effectiveness can be partially determined by the levels of organizational resistance to and acceptance of the project.

Appoint an individual or process team (who could be an extension of the core Change Team) to review the communications plan and to monitor its effectiveness.

A formal review cycle at key milestones of the project will help to ensure the execution of the communications plan, as well as maintain its harmony with project objectives, which may change.

1. Advice and Guidance

Choose the project communications owner carefully. This person should be able to focus on execution and know about and be experienced with existing channels of communications.

1. Estimating Considerations

Project size, determined by number of Business Units, functions, departments or employees affected, will influence the breadth and effort required for communications. Communications effort will also vary based on the number of stakeholders affected by or interested in the initiative, as well as the degree of change that the initiative entails.

Estimate taking 5-10 days to draft and revise a communications plan. The majority of communications plan management time and effort will be spent executing the plan, monitoring its effectiveness, and adjusting it for better results.

Appendix: Sample Guiding Principles

Statement of the Principle – Alignment with Corporate Standards

All formal communications will be in alignment with the corporate Communications Strategy and Standards

Motivations

* Facilitates a single look and feel of the communications
* Imparts a sense of authority because of the discipline in the format
* Easy to read because the formats are familiar and consistent

Implications

* Instills discipline in the communications process
* Makes it easy for readers or auditors to determine authenticity of the message
* Communications target audience may be widened without the need to rework the format

Statement of the Principle – Communications Coverage

Vehicles and channels will be chosen for each intended audience to maximize the chance the communication is viewed by each member of the intended group

Motivations

* Inability to view an intended communication is a de-motivator
* Efficiency in not using inefficient or incorrect communication vehicles
* Employees will become accustomed to receiving communications on the designated channel

Implications

* Predefined communication vehicles and channels make the communication process more productive
* Consistent, expected vehicles and channels will make the messaged easier to absorb

Statement of the Principle – Communications Effectiveness

Each communication from the Communications Working Group will be measured for its cost, timeliness, effectiveness and impact

Motivations

* Adds discipline into the communications process
* Identifies inefficient or redundant communications channels and vehicles
* May be used as a measure of the quality of the CWG’s oversight of the Communications process

Implications

* Metrics and measures will have to be identified and benchmarked
* Some disruption in the communications process may be experienced by dropping inefficient or adding new communications channels or vehicles

Statement of the Principle – CWG Oversight

The Communications Working Group is responsible for the content, effectiveness and coverage of all communications issuing from it.

Motivations

* Identifies accountability for the communications process
* Provides a rationale for executive involvement in the communications process
* Makes the escalation path crystal clear for communications

Implications

* Enhanced scrutiny of the communications within the purview of the CWG
* May require additional resources to represent CWG executives in carrying out their responsibilities