**Communication Management Plan**

[Agency Name]

[Project Name]

[Publish Date]

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# Using this Template

This template contains “suggested language” and assumes that the author of this document will make appropriate additions, deletions, and changes for their specific project needs.

To create a document from this template:

* Replace [bracketed text] on the cover page, in the header, and throughout the document with your project and agency information by filling in the [bracketed text] area in the document text. Filling in the information once, will propagate that field throughout the document.
* Complete the entire template making all necessary adjustments
* Each section contains abbreviated instructions (**Green Font**) and an example using (**Black Font**).
* Delete this “Using This Template” page.
* Update the Table of Contents by clicking on the “References” tab, selecting “Update Table”, then “Update Entire Table” and click “Ok”.
* Save.

To provide any suggested improvements or corrections, please email TBSM.info@tn.gov.

# Revisions

| Revision | Description of Change | Author | Effective Date |
| --- | --- | --- | --- |
| v1 | Initial document upload to TBSM intranet site | BSD Team | 09/28/12 |
|  |  |  |  |
|  |  |  |  |

# Introduction

The purpose of the Communication Management Plan is to define the communication requirements for the project and how information will be distributed to and feedback received from all stakeholders. The Communication Management Plan is a ***working document*** that defines the following:

* Stakeholder communication requirements
* Analysis, design, development and evaluation of communications
* Identification and best use of communication vehicles
* Handling recurring and triggered communications
* Communication standards for the project
* The Communication approval process
* Completion and use of the Communication Matrix

This Communication Management Plan sets the communications framework for the [Project Name] project. It serves as a guide for communications throughout the life of the project. ***This is a working document*** and will be updated as communication needs change. This plan identifies and defines the stakeholders of [Project Name] with whom it is critical to communicate. It also contains the ***Communication Matrix*** (Appendix A) which maps specific messages to stakeholders or stakeholder groups. The items captured on the Communications Matrix are then built into the [Project Name] Project Schedule.

To build a complete communication plan, it is highly recommended that the Project Director and/or team member responsible for communications planning (Organization Change Management team lead or other) guide the project team through several steps to ensure that the plan is as robust and effective as possible. These steps include:

* Clearly define the high-level purpose and objectives of Project communications
* Identify Stakeholder Communication Requirements
* Assessment and Analysis
* Design
* Development
* Delivery
* Evaluation

# Purpose and Objectives

The purpose of all [Project Name] communication is to:

* Promote awareness of and excitement for the [Project Name] project
* Ensure adoption of the responsibilities and actions assigned to each stakeholder, and
* Encourage two-way communication about the [Project Name] project between the project team and Agency stakeholder groups

# Stakeholder Communications Requirements

In the Communication Management Plan, it is important to identify all stakeholders and anticipate their communication needs. This section combines the stakeholders captured in the Stakeholder Register with the Project Roles & Responsibilities Template and adds each stakeholder’s or stakeholder group’s communication needs. The result is a Stakeholder Communications Requirements table (sample below).

The communication needs of [Project Name] stakeholders have been identified and are presented in the Stakeholder Communications Requirements table below. The analysis includes all project team member roles and responsibilities, including their communication responsibilities. In addition, the requirements of the non-project team stakeholders are also captured.

**Sample Stakeholder Communications Requirements**

| Role | Description | Communication Needs | Communication Responsibilities | Name/Group |
| --- | --- | --- | --- | --- |
|  Project Team Stakeholders |
| Executive Sponsor | Champions the project; provides high level vision | Thorough understanding of Project Charter and Project Management PlanUp-to-date Project StatusProject Risks and ResponsesProject issues and obstaclesSponsorship-specific communications tactics/techniquesCommunications should be presented in summary format unless the Project Sponsor requests more detailed communications | Provides guidance and direction for key communication strategiesCommunicates business visionCommunicates high-level issue resolution decisionsApproves and/or delivers strategic project communications  | Joe SmithAnn WalkerRita Rogue |
| Business Sponsor | The role of the Business Sponsor is to provide guidance and direction for key business strategies. The Business Sponsor answers the business-driven question, "Why are we doing this?" and ensures that all stakeholders know and understand the answer. | Thorough understanding of Project Charter and Project Management PlanUp-to-date Project StatusProject Risks and ResponsesProject issues and obstaclesSponsorship-specific communications tactics/techniquesCommunications should be presented in summary format unless the Project Sponsor requests more detailed communications | Communicates the resolution of business policy issuesCommunicates issues needing escalation and business decisions to executive levelsProvides input into issues resolution alternatives before they are brought to executive levelsDeliverablesProvides Agency communications resource | Joe SmithCarl Numenth |
| Senior Project Director | The Senior Project Director owns and drives the solution delivery process. He/she mobilizes and uses the project team to complete the project successfully. This role is responsible and accountable for the overall planning, execution and control of the project, including communication. | Business vision from Executive SponsorImmediate notice of business decisions, policy changes, etc. that could impact execution of the projectStatus from project team leadershipCommunication initiatives, artifacts, review and approval processes | Oversees the implementation of the project on a daily basis, working with the project work stream leads (such as OCM Lead) to ensure consistent communicationResponsible for clear, timely, documented, correct communication with project team and executive leadershipCommunicates project progress and directions to the project team and Sponsors | Sara Project |
| Non-Project Team Stakeholders |
| Customer Service Representatives | Customer Service Representatives are responsible for efficient and accurately answering questions about the XXX program. They use the XXX system constantly and are evaluated on their speed of response to customer questions.  | Project progress updatesBenefits of new systemSystem implementation datesTraining datesAccess to [Project Name] intranet site | Participates in CSR focus groups and new system demonstrations.Provides feedback to project team members.Reads communications and performs tasks accordingly. | Agency CSRs and Supervisors |
| Claims Processors | Claims Processors are responsible for efficient and accurate program claims processing, including verification and validation of submitted information, determining eligibility, and processing payments. This group is responsible for and evaluated on speed and quality of data, which is entered in XXX system.  | Project progress updatesBenefits of new systemSystem implementation datesTraining datesAccess to [Project Name] intranet site | Participates in Claims Processor focus groups and new system demonstrations.Provides feedback to project team members. Reads communications and performs tasks accordingly. | Agency Claims Processors and Supervisors |

# Communications Assessment & Analysis

The purpose of this step is to gather data about the effectiveness of the Agency’s existing communications, the existing communication flow, and what infrastructure the Agency has in place to support communication planning and delivery.

Existing communications are documented in the Communications Matrix (Appendix A). The project team can then use this analysis to determine whether or not to use existing communication vehicles for project-related communications. As the project progresses, new communication vehicles related to the project itself will be added to the Communications Matrix and, eventually, to the Project Schedule.

**Communications Matrix**

The Communications Matrix provides structure to identify all types of communications: Project Team, Stakeholder, Recurring and Triggered. It is recommended that the matrix begin with Project Team communication items followed by Stakeholder communication items. As unanticipated or anticipated trigger events occur, the communication response should be added to the matrix.

The [Project Name] Communication Management Plan includes an assessment and analysis of the Agency’s existing communications that impact the project’s stakeholder populations. The result of this assessment and analysis is recorded in the ***Communication Matrix*** (Appendix A), along with a numerical rating of the effectiveness of each communication item based on feedback from Agency personnel. This rating allows the [Project Name] project team to take advantage of existing Agency communication vehicles for project-related communication.

Once the existing communication deliverables have all been documented and evaluated, analyze the results using the following questions:

* Is the information clearly communicated? Written without slang and at a level that employees can understand (i.e., not overly technical or complicated)?
* Is the information delivered on a schedule that makes sense? Do communications come too far in advance, too late for action, too sporadically, etc.?
* Is the communication item concise and its purpose clear? Is the information unnecessarily wordy? Is it written with the employee’s needs and perspective in mind? Is the action the employees need to take clearly outlined?

The analysis of [Agency Name] communications found that communications are delivered mainly orally and are undocumented. This causes some confusion in the employee population since word-of-mouth is the least effective means of delivering messages. Since there is no one person dedicated to ensuring Agency-wide communication effectiveness, most of the information the employee base needs to be successful is left to Agency leadership to “trickle down” through the management/supervisory level. Often these leaders, managers and supervisors forget to share the information or fail to provide context for the message due to their own workloads.

To help the Agency’s leaders disseminate information about the project more effectively, the [Project Name] Project Director or Organizational Change Management (OCM) team lead will ensure careful documentation of all meetings and be responsible for editing and ensuring consistency in project communication. They will also provide leader talking points for critical updates to Agency employees regarding project progress.

The analysis of current Agency communications also found that both Agency leader meetings and the Agency’s intranet site were the most effective as delivery vehicles for disseminating messages that invite positive action and behavior. The [Project Name] will take advantage of these methods to disseminate project-related information.

The [Project Name] communication needs will also require development of new communication vehicles to ensure that critical project-related messaging reaches the appropriate stakeholder groups. As the project identifies and creates these vehicles, they will be added to the Communication Matrix (Appendix A).

# Communications Design

After concluding the assessment and analysis, the data gathered is used to populate the ***Communication Matrix*** (Appendix A). In this step, the Project Director or OCM team lead will identify the project’s communication needs, create Agency ownership for the messaging, and add communication deliverables to the Communication Matrix.

There are two broad stakeholder groups and two categories of communication in any project:

* Project Team Communications
* Stakeholder Communications
* Recurring Communications which are regularly-scheduled and generally provide updates and status on project activity
* Triggered Communications which are created when certain events occur. These trigger events can be anticipated (e.g., milestone dates met) or unanticipated (e.g., project delays caused by changing legislation). The anticipated trigger events are entered into the Communication Matrix. Unanticipated trigger events are only added to the Communication Matrix after the communication response has been delivered for project documentation purposes.

Thoroughly considering the messages the project needs to deliver over the course of the project life cycle, the stakeholder groups’ needs for information, and ensuring consistency in messages delivered via training and change management initiatives is critical to reducing confusion, non-productive tasks/activities, and resistance to change.

The Communication Matrix for [Project Name] (Appendix A) includes a solid structure for project team communication, as well as a framework for non-project team stakeholder communications.

**Project Team Communication Design**

The Project Director is responsible for the smooth, efficient execution of any project. Key to his or her ability to ensure timeliness and quality before, during and after a project is effective and planned project communications. The Project Director sets the guidelines and “rules” for project communications. These guidelines could include directions for how/when to report status, the process to escalate risks and/or questions for project leadership consideration, meeting rules such as requiring agendas and meeting minutes, the approval process for non-project team stakeholder communications, etc.

It is important for the Project Director to fully understand the communication needs of the project team stakeholders, including the Project Steering Committee (PSC). The Project Director should also explore every available delivery vehicle to take advantage of the abundance of media currently on the market. The more variety of message delivery, the better it will be absorbed and remembered.

The Project Director will take a proactive role in ensuring effective communications for the [Project Name]]. The communications of [Project Name] team members will include status reporting, “all-hands” team meetings in which the health of the project and requests/requirements of the Project Steering Committee or project leadership are reviewed, and ad hoc communications, via email, meetings, reports and/or conference calls as appropriate.

The Project Director also ensures that the communication infrastructure for the project team is created. For example he/she will ensure that the Agency establishes an email distribution list of all project team members, appropriate Agency intranet access is provided, and a project team contact list is created.

**Non-Project Team Stakeholder Communication Design**

In a large, complex IT project, communications, change management initiatives and training are inextricably bound. Depending on the skills of the resources and the complexity of the project, these functions often work together within one Organizational Change Management team. Smaller projects may not warrant a full OCM team, in which case the Project Director is responsible for design and development of communications to non-project team stakeholders.

The OCM team leader, if applicable, works closely with the Project Director to set communication standards, analyze stakeholder communication needs, determine the approach for communicating ad hoc information, identify available delivery vehicles, and determine standard responses to triggered events. *All formal project communications to stakeholders must be approved by the Project Director and the Executive Sponsor.*

There are several communication opportunities to reach, educate, and gain buy-in and support from stakeholders of the [Project Name]. Since the project team is also a stakeholder group, they are sometimes recipients of the same communications as non-project team stakeholders. Taking advantage of these opportunities and timing the release of communications appropriately is vital to insuring a successful project. For [Project Name], following are some of the ways that [Project Name] will achieve information sharing, action and project acceptance from its stakeholders:

* [Project Name] Branding
* Role-Specific Communications
* Multi-media Supported Communications (video/audio, social media)
* Mini polls and surveys
* Newsletter articles
* Change Champion talking points and presentations
* Frequently Asked Questions
* Sponsor/Leader talking points and presentations

**Recurring Communication Design**

The Project Director and OCM team leader, if applicable, should identify recurring communication needs and use branded templates to provide consistency of messaging across all stakeholder groups. Unfounded rumors can negatively impact many well-conceived projects. Project leadership must determine the information that they will gather and disseminate on a regular basis. This information sharing can include weekly status reports, processes for reporting risks, processes for obtaining answers to questions and issues vendor/contract processes, reports, etc.

The recurring communications identified for [Project Name] are described below and documented in the Communication Matrix (Appendix A).

* Project Steering Committee Meetings – status updates, risks and responses, issues and resolution, budget updates, etc. To be held bi-weekly throughout the life of the project.
* Project Leader Team Meetings – status updates, schedule slippage, new risks and responses, issues, etc. To be held weekly throughout the life of the project.
* Project All-Hands Meetings – high-level project reviews, issues, sponsor messages. To be held monthly throughout the life of the project.
* [Project Name] News – stakeholder updates, schedule updates, progress report, frequently asked questions, etc. Published via Agency and [Project Name] intranet sites monthly, then weekly closer to implementation.

**Triggered Communication Design**

Though not all communication needs can be identified at the beginning of a project, there are some “trigger” events that can be anticipated. For instance, moving from development into pilot can be classified as a trigger event. The Project Director or OCM team lead can build the communication framework for anticipated triggered events, leaving blanks for detailed data, so that when a pilot date is set, the team needs only fill in the blanks, send the communication through the appropriate approval process and execute. Early communication of trigger events helps manage stakeholder expectations.

Other trigger events cannot be anticipated; for example, there may be an unavoidable delay in “go live” or a risk is suddenly uncovered and needs a response. These unanticipated trigger events can add delay to a project schedule, increase resistance or mistrust among the stakeholder population or ruin the reputation of the system solution. As much as possible, solid response plans should be in place for these types of events.

The Project Director or OCM team lead will document all anticipated trigger events for [Project Name] and build appropriate shell communications to deliver agreed-upon messaging about the trigger event. Similarly, the Project Director or OCM team lead will create the processes necessary to quickly execute responses to unanticipated trigger events. Being prepared in this way can prevent project delay or reputational damage caused by a delayed response or lack of response. Known trigger events are documented in the Communications Matrix with processes to handle non-anticipated trigger events documented in the Communications Standards.

# Develop Communications

In this step, the Project Director or OCM team lead creates the Communication Standards that will be used for all project communications. Generally these standards include: Project logo, presentation/documentation templates, document management guidelines, file naming conventions, etc. The standards may also include a process for requesting communications creation and/or delivery and a communication review and approval process. The Project Director or OCM team lead completes the rough outline of the communication needed in every phase of the Project and populate the Communication Matrix (Appendix A). The contents of this matrix then become tasks within the overall Project Schedule.

The [Project Name] project’s Communication Objectives are:

* To promote awareness of and excitement for the [Project Name] project
* To ensure adoption of the responsibilities and actions assigned to each role
* Reduce negative effects of rumors and/or misinformation about the project in the stakeholder populations
* Increase stakeholder population participation in the project

To ensure smooth information flow within the project team itself, the following SharePoint site has been created as the project’s document management software. In addition, the project will adhere to the Communication Standards documented below.

In the SharePoint site, project team members can access presentations, the Project Charter, the Project Management Plan and other project-related documentation to inform their work.

[Add SHAREPOINT SITE LINK]

A [Project Name] intranet site has been created for all stakeholders and is easily accessed from the Agency’s intranet home page. It will contain the following:

* Introduction to the project
* Project team directory
* Frequently asked questions
* Glossary
* Future-state business process flows
* [Project Name] monthly newsletter

As stakeholder communication needs grow other items will be added to the page (implementation schedule, conversion instructions, etc.).

[Add [Project Name] INTRANET SITE LINK]

# Communication Standards

Communication Standards for the project should be created during the Initiation or Planning Phases of a project. The standards generally include templates, logos, intranet/project team site development, processes and forms for project team leadership or team members to use to communicate messaging needs to the Project Director or OCM team lead, etc. These standards are documented and available through the [Project Name] intranet site.

**Approved Templates**

The PSC and Project Leadership have approved the following set of templates and other artifacts for [Project Name] stakeholder communications:

* [Project Name] logo
* [Project Name] email signature
* [Project Name] MS Word Document template
* [Project Name] MS PowerPoint Slide design template
* [Project Name] SharePoint site: [SITE URL]
* [Project Name] Share Drive and file naming conventions
* [Project Name] Intranet Site (internal to project team): [Add SITE URL]
* [Project Name] Intranet Site (external stakeholders): [Add SITE URL]

**Communications Approval Process**

The following communications approval process has been approved by project leadership and is also documented in the Communications Standards document.

1. Project Team member identifies needed message, target audience, preferred delivery method and timing.
2. Project Team member completes Communication Request Form (in Communicator’s Guide).
3. Project Team member forwards completed Communication Request Form to OCM team leader via [Project Name] COMMUNICATIONS INBOX: [EMAIL LINK HERE].
4. OCM team leader assigns editor and validates message, audience, delivery method and timing.
5. Once message is completed and prepared for delivery, OCM team leader presents draft communication to Project Director, other project team leaders, and/or the PSC for approval.
6. Project Leadership approves publication.
7. OCM team leader publishes, sends or arranges for delivery of communication.

All of these items, in addition to more specific instructions for their use, can be found under the Communications folder on the [Project Name] SharePoint site.

**Approved Delivery Vehicles**

Every Agency has its own communication vehicles, norms and guidelines. A delivery vehicle is simply the medium through which communication is delivered (newsletter, email, web-based training, focus group, town hall, etc.). There are numerous delivery vehicles available and each has its purpose, advantages and disadvantages. A list of delivery vehicles, in what situations to consider using them, their benefits and disadvantages is provided in the Delivery Vehicles chart (Appendix B). It is up to the Project Director and others on the project leadership team to determine which delivery vehicles the project will use. The OCM team leader or Project Director will work with the Agency communications personnel, if applicable, to assess all available vehicles and to create guidelines for how the Agency can handle project communication most effectively.

[Project Name] anticipates using several delivery vehicles for effective communication. Below is a list of the delivery vehicles this project will employ to educate, inform and solicit input from stakeholders.

* Conference calls using a bridge line and NetMeeting for requirements elicitation, team updates, testing planning, etc. where not all essential participants are centrally located
* Emails from the [Project Name] mail box to make general announcements and to solicit just-in-time feedback, receive and answer questions from stakeholders
* Electronic collateral will include on-line “how to” pdf files, Frequently Asked Questions and Answers, toolkits, newsletters, certificates, links to web-based training, etc. These will be accessible via the [Project Name] intranet site as well as the Agency intranet site(s) as applicable.
* Multi-media products to include videos, animation, podcasts, web-based training, training environment, UAT environment, demo environment
* Events including [Project Name] Sandbox exercises, Kick-off events in large geographic offices as rollout progresses, executive/leadership presentations during road shows or town halls, lessons learned sessions

# Evaluate Communications

This last step in developing the Communication Management Plan should include a method of evaluating whether or not project communications are working; whether or not the target audience is responding to the messages. In general messages can be used to:

* Change thinking or beliefs
* Encourage the recipient to take an action
* Influence feelings or behavior

This is why it is important, especially for new system implementations, to measure how the messages are changing behavior or increasing awareness.

All communications should be two-way, giving the target audience an opportunity to respond. Candid feedback from the target audience is critical to successfully revise communication delivery vehicles, messages or senders to more effectively meet stakeholder needs.

As noted in the Communications Matrix, regular, candid feedback from the target audience and Agency leadership is critical to successfully executing the overall Communication Management Plan. Therefore, the following evaluation plan was developed to measure the value of the project’s communication efforts. The project will use three methods to extract feedback from target audience members receiving communications in order to measure and evaluate the effectiveness of the communications.

1. Real-time Agency leadership, Project Steering Committee (PSC), SME feedback
2. Formal surveys/evaluations to the target audience members
3. Quick Pulse survey to obtain feedback from target audience members immediately after a communication is released

# Guidelines for Meetings

Included in this template is a resource to help project team members conduct and participate in project meetings (Appendix C).

# Project Team Directory

If possible, it is always preferable to tie Project Team directories to the email system at the organization so that information is continually up-to-date as changes are made via the already-existing email system administration function. It is especially helpful if the Project Team Directory is available, via a link, on the Project Team intranet site. A directory is critical to a comprehensive communications strategy. One that is automatically updated and can be accessed electronically is preferable to a paper copy.

# Acceptance

(This section should be modified for best application to specific projects. Include all project team members that should have some level of authority regarding document review and approval.)

Approved by:

 Date:

<Approvers Name>

[Project Name] Executive Sponsor

 Date:

<Approvers Name>

[Project Name] Business Sponsor

 Date:

<Approvers Name>

[Project Name] Project Director/Manager

 Date:

<Approvers Name>

[Project Name] Stakeholder

# Appendix A – (Sample) Communication Matrix

***Column Heading Definitions/Descriptions***

Communication Deliverable: The communication artifact/message itself

Target Audience: The receivers of the communication

Objective: The reason for delivering the communication

Frequency: Indicates reoccurring or one-time-only communication delivery

Delivery Vehicle: Indicates the method of providing the information

Owner: The originator of the communication content

Effectiveness: Audience perception of the effectiveness of the communication (its content, delivery, clarity, etc.)

| **[Project Name] Communication Matrix**  |
| --- |
| **As of [DATE]** |  |  |  |  |  |  |  |  |
| **Communication Deliverable** | **Audience**  | **Description** | **Desired Outcome or Behavior** | **Delivery Vehicle** | **Author** | **Review and Approval** | **Sender/ Facilitator** | **Timing** | **Effective-ness (scale of 1-5 with 5 being most effective)** |
| **REOCCURING – CURRENT STATE** |
| Agency business status, updates and decisions | All Agency personnel | Information on Agency metrics, goals, objectives, progress toward goals, project news, etc. | Leaders share best practices, settle issues, identify risks and responses, improve processes  | Agency Leadership Meeting | Commissioner or Assistant Commissioner | n/a | Commissioner or Assistant Commissioner | Bi-Weekly | 4 |
| [AGENCY NAME] News | All Agency personnel | Information on Agency metrics, goals, objectives, progress toward goals, project news, human interest stories, information on process changes, legislative changes, etc. | Agency’s leadership team provides content; Agency personnel read news and stay up-to-date on project progress; increased excitement | e-Newsletter on Agency website | Agency leaders (assistants) | Commissioner or Assistant Commissioner | Agency Communication Leader | Monthly | 5 |
| Agency Employee Dialogue | Agency members | Executive-level information sharing sessions on "hot topics" | Group informed and involved; incorporates new regs into daily work; increases employee morale | Town Halls and/or WebEx | Agency Communication Leader | Agency Leaders | Agency Leaders | Quarterly | 3 |
| **TRIGGERED – CURRENT STATE** |
| Legislative Updates | Agency members | Detailed updates on legislation and changes in processes | Agency members follow revised processes | Alerts in email and posted on Agency Intranet Site followed by team meetings | Agency Communication Leader and regulation SME | Agency legal team and Commissioner | Agency Communication Leader | As needed | 5 |
| **REOCCURING – PROJECT** |
| Project Steering Committee Meetings | PSC members, PD, Executive Sponsor, Business Sponsor | Executive-level leadership meeting to share status, seek answers or help | Challenge status, provide resources, offer decisions, remove barriers | PSC meetings; sometimes pre-read documents | PD | Exec Sponsor | PD | Bi-Weekly |  |
| Project Team Leader Meetings | Project leads, PD | Team leads share status, challenges, concerns, obstacles, etc. | Team seeks solution to problems, issues | Project Leader Team Meetings; reports | PD | n/a | PD | Weekly |  |
| Project All-Hands Meetings | All project team members | Status updates, celebrate progress, discuss next steps, review upcoming changes | Team members take responsibility to maintain or increase progress toward milestone goals | Project All-Hands Meetings; status reports; celebratory certificates | PD or OCM team lead | Project team leads | PD | Quarterly |  |
| [PROJECT NAME] News | All project team members and non-project stake-holders | Project status, system benefits, human interest stories, etc. | Project team provides content; non-project stakeholders read news and stay up-to-date on project progress; increased excitement | e-Newsletter on Project and Agency websites | PD or OCM team lead | Exec Sponsor or proxy | Project and/or Agency webmaster | Monthly |  |
| **TRIGGERED – PROJECT** |
| Project Milestone Met | All project team members | Milestone description; congratulatory content; implications/impacts; next steps | PD and appropriate team lead/PM provide content; project team members energized by success or organized for risk response | PowerPoint deck; talking points | PD or OCM team lead | PD, Exec Sponsor or proxy | PD, Exec Sponsor or proxy | date anticipated from project schedule |  |
| Two-week plan to pilot “go live” | Project team members supporting pilot “go live”; pilot stake-holders; PSC | Instructions, timing, logistics of all pre-pilot activities | Pre-pilot tasks completed | Pre-Pilot Instruction Manual(s) | PD or OCM team lead | PD, Exec Sponsor or proxy, pilot site leader | PD, Pilot site leader | date anticipated from project schedule |  |

# Appendix B – Delivery Vehicles & Media

There may be many options as to what types of vehicles and media can be used to deliver the messages. Listed below are some suggestions that can also be used to create the communication matrix.

| Delivery Vehicle/Media | Advantages | Disadvantages |
| --- | --- | --- |
| Meeting & Conference Materials | Brands messaging to large audience; advertising | Paper-based and easily discarded |
| Speeches | Shows support for initiative if delivered by Sponsor or respected Influencer; can motivate/inspire | Temporary “high”; if not delivered by respected individual, can fall flat and be counter-productive |
| Road Shows | Offers non-project team stakeholders the opportunity to see something tangible rather than just read information; reduces anxiety if done well; best if done in context of a business process | Can be expensive, technically challenging, risk of instability if script not thoroughly tested prior to implementation; could make the change about the system rather than a change in business process with the system as a tool |
| Employee Forums | Offers the opportunity for employees to assuage their curiosity with questions; promotes inclusion in the change and thus can promote trust | If not well facilitated, the forum could become a “gripe session”; all questions/comments cannot be scripted nor anticipated; risk of creating, rather than decreasing, anxiety and erode trust |
| Brochures | Graphics appeal to visual learners; can tell a story and be more memorable than a large communication; color and movement in graphics can create excitement | Paper-based and easily discarded; graphics or messages can become confused if not concise enough |
| Electronic manuals/help | If searchable and intuitive to use, can help new users feel more confident | If not written within context of the job end users are trying to do, is less than helpful; avoid overly-technical language |
| Videos | Can be watched on individual’s personal time table; multi-sensory experience enhances message retention; can provide motivation and a sense of fun to relieve anxiety | Can be expensive to produce a quality product; some end users might not be capable of watching videos on-line and producing DVDs can be time consuming; professional graphics, music and concise messaging are critical for the message to be retained |
| Audio | Can be listened to on individual’s personal time table; good for travelers who need quick updates | Can be expensive to produce a quality product; some end users might not be capable of listening to audio files on-line and producing CD’s can be time consuming; voice-over talent can be expensive; future direction is to deliver via ipod  |
| Newsletters | Consistently delivered updates covering wide variety of business related, as well as technology related content; graphics can cause excitement; if “pushed” may have enough readership for message to be accepted; can be delivered in paper or on-line | If not already consistently delivered, may not get noticed; should not be the only delivery vehicle for messages |
| Fact Sheets | Appeals to those who need more rather than less information; can be delivered via paper or on-line | Sometimes difficult to gather timely, correct facts; must be continually updated; if in paper, facts can become obsolete quickly, leading to false information out in the field |
| Frequently Asked Questions | Way to proactively answer questions that can be anticipated; non-threatening way for any stakeholder to ask a question and have it answered without repercussion; answers can reach entire stakeholder population; project team can use the questions to determine topics about which the end users might be anxious | If published in paper, quickly obsolete, leading to outdated information out in the field; if questions are not answered in a timely fashion, can erode trust in the project and cause anxiety |
| Signs/Posters | Excellent, inexpensive, constant reminders that the change is coming; can be motivating; picture can evoke emotion and tie current project to overall strategy | Though relatively inexpensive, excellent graphics/photos can add costs; all stakeholders may not be in a workplace with walls upon which to hang signs |
| Facilitated Group Meetings | Promotes inclusion and ownership among stakeholders; allows discussion of sensitive issues in a safe environment; promotes decision-making and action planning; promotes understanding of all stakeholders’ perspectives | If not facilitated tightly by an impartial, objective, trained facilitator, can devolve into conflict and/or non-action; can waste time and damage the reputation of the project |
| Brown Bag Lunches | Often used as learning sessions, creates an atmosphere in which individuals generally offer more comments, questions due to its informality; quick; stakeholders can feel that the session is a productive use of their time since they eat as well (multi-tasking); can promote inclusion and motivation | Should be single-subject targeted as it can be frustrating for stakeholders to try and tackle too many subjects while trying to eat; provide a facilitator/leader to get things started; can devolve into “fun lunch” and accomplish nothing but a good, collegial feeling with no resulting action items or evaluation of the effectiveness of the learning |
| Project Team Intranet Site | Promotes open, documentable communication among project team members; large announcements can be distributed real-time; depending on content, can be motivational and promote high performance team behaviors; content does not have to become obsolete | If not kept up-to-date, becomes a liability; cannot force the project team members to review the site frequently |
| Stakeholder Intranet Site | Perfect for sending change messages, project status, calls for participation, lessons learned, frequently asked questions, benefits achieved, problems resolved, etc. | If not kept up-to-date, becomes a liability; cannot force the project team members to review the site frequently |

# Appendix C - Guidelines for Meetings

**Meeting Agenda**

Meeting Agenda will be distributed at least 1 business day in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

**Meeting Minutes**

Meeting minutes/notes will be distributed within 2 business days following the meeting. Meeting minutes/notes will include the status of all items from the agenda along with new action items and the Parking Lot list.

**Action Items**

Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting. The review of the new action items will include identifying the owner for each action item.

**Meeting Chair Person**

The Chair Person is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chair Person will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

**Note Taker**

The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will give a copy of their notes to the Chair Person at the end of the meeting as the Chair Person will use the notes to create the Meeting Minutes.

**Time Keeper**

The Time Keeper is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Time Keeper will let the presenter know when they are approaching the end of their allocated time. Typically a quick hand signal to the presenter indicating how many minutes remain for the topic is sufficient.

**Parking Lot**

The Parking Lot is a tool used by the facilitator to record and defer items which aren’t on the meeting agenda; however, merit further discussion at a later time or through another forum.

A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. The Parking Lot list should be included in the meeting minutes.