**Communications Plan**

Version 1.0

Month dd,yy

Communication Plan

Table of Contents

Document Overview 2

Communications Goals & Objectives 4

Goals 4

Objectives 4

Project Theme / Slogan / Motto 4

The Audience 5

Core Team 5

<Project Name> Extended Team 5

Internal <Company Name> 5

External <Company Name> 5

The Information Categories 7

Project Execution 7

<Project Name> Project Status 7

Project Awareness Information 7

<Project Name> Generic Information 7

Levels of Information / Communication 8

Communications Matrix 9

Communications Media / Venue Description 13

Meetings 13

Web Page 17

Company Publications 17

Team Building Events 18

<Project Name> Hot Line 18

Employee Feedback 18

Storage of Information 19

Appendix A: Detailed description of Information Categories 20

Project Execution 20

<Project Name> Project Status 21

Project Awareness Information 21

<Project Name> Generic Information 21

Appendix B: Detailed Description of Communications Tools 22

#

# Document Overview

The <Company Name> <Project Name> Communications Plan will provide an approach for communications and support for the <Project Name> project.

The purpose of this document is to facilitate centralized communications between all identified project audiences. Combining the audience’s needs with methods for standardizing communications, will enable processes for conveying project awareness, status, issues and provide a means for feedback.

Various types of information are being communicated throughout the life of the <Project Name> project. For the purpose of this project four types of information categories have been determined:

* Project Execution
* Project Status
* Project Awareness Information
* Generic Information

The <Project Name> audience has been broken into four broad categories:

* Core Team
* Extended Team
* Internal <Company Name>
* External <Company Name>

A detailed matrix has been created to match audiences with the appropriate type of information. Frequency and media have also been identified for each type of communication. The communications matrix will serve as the foundation of who, what, where, when, why and how the <Project Name> project team will communicate with project stakeholders.

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# Communications Goals & Objectives

##

## Goals

The goal of the <Project Name> Communications Plan is to:

* Facilitate communication between all identified audiences and the <Project Name> Project Team.
* Build awareness and understanding of the potential impact of the <Project Name> project throughout the organization.
* Clearly convey the <Project Name> project status and coordinate efforts.
* Promptly address the <Project Name> issues and concerns.
* Continuously improve the process by incorporating suggestions and recommendations.
* Communicate in a timely manner any problems affecting the <Project Name> project, including the potential impact of the problems.
* Ensure that all <Company Name> employees, external vendors and any other parties who will be affected by this project (whether greatly or insignificantly) must be aware of its existence and its business rationale.
* Reinforce the project’s value and maintain enthusiasm about the project.

## Objectives

The objective of this document is to provide support to the <Project Name> Project team by:

* Positioning senior management as “champions” – enthusiastic supporters and drivers – of the <Project Name> efforts.
* Communicating to stakeholders – employees, vendors, distributors, etc. – the value and necessity of cooperating in <Project Name> initiatives.
* Establishing and maintaining momentum among stakeholders to keep <Project Name> efforts moving forward.

## Project Theme / Slogan / Motto

The motto of the project is: xxxxxx

The **<Project Name>** project has been designed with xxx major objectives in mind.

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# The Audience

Four broad audiences have been identified for the purpose of communications: the Core Team, Extended Team, Internal <Company Name> and External <Company Name>.

## Core Team

The Core Team consists of individuals that comprise the <Project Name> Project Team. This audience communicates <Project Name> project specific information on a daily basis. In addition, this audience category is often the *source* of <Project Name> information needed for communicating with the other audience categories. The <Project Name> Team includes a number of sub-categories. These sub-categories represent the ways in which the <Project Name> Core Team organizes itself to accomplish various activities.

The <Project Name> Core Team sub-categories include:

## <Project Name> Extended Team

The <Project Name> Extended Team consists of individuals who spend time on the <Project Name> project, but maintain full time positions elsewhere in <Company Name>.

The <Project Name> Extended Team sub-categories include:

<Project Name>Leadership Committee

External Project Leadership

## Internal <Company Name>

The Internal <Company Name> audience consists of all <Company Name> employees. This audience is primarily concerned with <Project Name> education and general information related to action that they need to take. In addition to addressing the category as a whole (all <Company Name> employees), a number of sub-categories exist to meet specific communication needs.

The Internal <Company Name> sub-categories include:

Department Heads from Targeted Business Units

* IT Organization
* External Project Managers
* Manufacturing Organization
* Sales
* Operations
* Marketing
* Legal

Front Line Employees

## External <Company Name>

The External <Company Name> audience includes groups that exist outside the <Company Name> organization that may have an interest in <Company Name> <Project Name> project.

The External **<Company Name>** sub-categories include:

Suppliers (Product-related)

Information Technology Vendors

Out-tasking Vendors

Non-Product Suppliers / Vendors

Customers

1. Distributors
2. Retailers
3. End Consumers

Competitors

Investors

Regulatory Agencies (SEC, IRS, PUC)

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# The Information Categories

The information needs of the specific audiences determined the types of information that needs to be communicated. Given the large number of identified audiences, it was difficult to find universal information that would satisfy the communications needs of all audience categories. A number of different types of information were identified and then categorized by the nature of the information (see Appendix A for a detailed outline of each information type). The communication information list describes the type of information, but does not necessarily define the specific forms (i.e. layout) or message. Specific message definition and form will be developed for each identified communications type. In addition, as the need arises, new types of information will be added to the communication plan. The following is a detailed list of the types of information:

## Project Execution

The information pertaining to the day to day project procedures (work plans, testing strategy, administrative activities, project staffing, team building activities, etc.).

## <Project Name> Project Status

The project progress and those issues and risks that may impede progress.

## Project Awareness Information

Information pertaining to the <Project Name> project as well as other related projects.

## <Project Name> Generic Information

 Information regarding <Project Name> efforts outside of <Company Name> (ex. popular press articles).

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# Levels of Information / Communication

Depending on their level of involvement in the project and its impact on their work, all <Company Name> employees from top management to front line associates; as well as wholesalers, suppliers and other business partners should be provided with the appropriate level of project detail. Two levels of information have been established: ***For your Information (FYI)*** and ***For Your Action (FYA)***.

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# Communications Matrix

The communications matrix matches the various types of information with the appropriate audiences. In addition, the matrix identifies the communications frequency and medium for the information, by audience. The matrix format is dynamic in that it allows for changes in types of information received, how often and in what format.

A significant amount of the information communicated is focused within the <Project Name> Project Team. The reason for this focus is predicated on the fact that a well-informed team is better prepared to effectively communicate the strategy, goals, objectives and status of the <Project Name> efforts. In addition, the majority of the communications information originates within the team. Therefore, effective communications within the <Project Name> Project Team contributes to the success of the communication efforts with the other audiences.

The following key identifies the various frequency and media options for communications.

|  |
| --- |
| *COMMUNICATIONS FREQUENCY* |
| *Daily* |
| *BI-Weekly* |
| *Weekly*  |
| *Monthly* |
| *Quarterly*  |
| *Upon Document Publications* |
| *As needed* |
| *Upon Joining Project* |

|  |
| --- |
| *COMMUNICATIONS MEDIA* |
| *Company Publications* |
| *Documents / Presentations* |
| *Electronic Mail* |
| *Web Site* |
| *Meetings* |
| *Training*  |
| *Voice Mail* |
| *Tele/Video meeting* |

<Project Name> Core Team

Audience: Project Team Leads, …

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Topic** | Information | Venue / Media | Frequency | Purpose |
| Project Execution / Status | Core team project accomplishments, project progress, issues and challenges | Project Team Lead Meeting / Individual Team Meeting | Daily | FYA |
| Status | High-level project status / progress (Weekly Highlights) | Electronic Mail | Weekly | FYI / FYA |
| Project Execution | Issues and challenges | Project Office Meeting | Weekly | FYA |
| Status  | Detailed project progress | Status Report (written document) | BI-Weekly | FYI / FYA |
| Status  | Overview of project progress | Monthly Extended Team Status Meeting / e-mail | Monthly  | FYA / FYI |
| Status | High-level project progress | All Hands Meeting | Quarterly | FYI |
| Generic Information / Status | Popular Press Articles on the industry progress related to <Project Name> | <Project Name> Web Page / e-mail | On going | FYI |

<Project Name> Extended Team

Audience: Leadership Team, Steering Committee, Various Company business areas

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Topic | Information | Venue / Media | Frequency | Purpose |
| Status | High-level project status / progress (Weekly Highlights) | Electronic Mail | Weekly | FYI / FYA |
| Project Execution | Review project focus and gain guidance from team | Leadership Team Meeting | Weekly – Specify day/time | FYI / FYA |
| Status  | A reporting session covering key points in the project. Confirm direction; cultivate sponsorship and report status, findings and issues. | Steering Committee Meeting –  | Monthly Specify time/day of the month | Update / FYI |
| Status | Senior Executives high-level update of the project progress | Existing executive meeting | Monthly | FYI |
| Status | Overview of project progress | Monthly Extended Team Status Meeting / e-mail | Monthly – Specify day/time | FYA |
| Status  | A high-level update of project status | All Hands Meeting | Quarterly | FYI |
| Generic Information / Status | Popular Press Articles on the industry progress related to <Project Name> | Web Page / Bulletin Boards | On going | FYI |

Internal <Company Name>

Audience: Department Heads and Managers of Key Departments, All other <Company Name> Employees

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Topic | Information | Venue / Media | Frequency | Purpose |
| Awareness | Status and upcoming events | Monthly Extended Team Status Meeting | Monthly | FYI |
| Awareness | Questions related to the <Project Name> Project | <Project Name> Hotline / e-mail | Ongoing | FYI |
| Awareness  | General <Project Name> information | Company Publications  | Monthly | FYI |
| Status | Senior Executives high-level update of the project progress | Existing executive meeting | Monthly | FYI |
| Generic Information / Status | Popular Press Articles on the industry progress related to <Project Name> | Web Page / e-mail | On going | FYI |

External <Company Name>

Audience: Suppliers, IT Vendors, Out-tasking Vendors, <Company Name> Customers, Non-Product Suppliers and Vendors, Competitors, Investors and Regulatory Agencies

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Topic | Information | Venue / Media | Frequency | Purpose |
| Awareness / Status | High-level project status  | One page update (flyer format) – mailed or electronically sent.  | Quarterly | FYI |
| Awareness | High level project accomplishments / progress / issues | Meeting / Conference call with IT vendors project managers | As needed | FYI |
| Awareness | <Project Name> progress information as required by regulatory agencies | As requested | Quarterly | FYI |
| Generic Information | Popular Press Articles on the industry progress related to <Project Name> | Mail / FAX copy of the article | As needed | FYI |

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# Communications Media / Venue Description

## Meetings

As a result of the magnitude of meetings necessary to manage the <Project Name> project, the following section has been designed to outline the meetings necessary for effective project coordination.

The following formal meetings will be used:

1. Team Leads Meeting (daily)
2. Individual Team Meeting (daily)
3. Project Office Meeting (weekly)
4. Leadership Committee Meeting (weekly)
5. Steering Committee Meeting (monthly)
6. Monthly Extended Team Status (monthly)
7. Executive Update (monthly)
8. All hands meeting (quarterly)
9. Orientation meeting (one time)
10. Team Training Meeting (one time)

Meeting Plan

This section describes each meeting type, its objective, format and expected duration.

#### Daily / Weekly Meetings

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Meeting** | **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** |
| Team Leads  | Specify time | Time | Time | Time | Time |
| Individual Team Meetings are Scheduled by the Team Leads (daily) |  |  |  |  |  |
| Project Office |  |  |  |  |  |
| Leadership  |  |  |  |  |  |

#### Additional Meetings

|  |  |
| --- | --- |
| Meeting  |  |
| Extended Team Status | Specify day/time |
| Steering Committee | Specify day/time |
| Executive Update | Specify day/time. Content is due the week prior  |
| All Hands Meeting | Quarterly |
| Orientation | As needed |
| Team Training | As needed |

**1. Team Leads Meeting**

Description: A daily meeting in which the team leads review their progress and any outstanding issues

Objective: To resolve issues and update team on the project status

Format: A brief meeting.

Participants: Leads from :

Frequency: Daily

Duration: 30 minutes

Owner: Project Manager

**2. Individual Team Meeting (daily)**

Description: An opportunity for each sub team to discuss the outcome of the team lead meeting.

Objective: To resolve issues and update team on the project status.

Format: A brief meeting

Participants: Team members from:

Frequency: Daily

Duration: 15 to 30 minutes

Owner: Team Leads

**3. Project Office Meeting (weekly)**

Description: A discussion regarding project management, administration and personnel related issues.

Objective: Resolve any staffing, work order, personnel related issues

Format: Meeting

Participants: Project Office Leadership Team

Frequency: Weekly

Duration: 1.5 to 2 hours

Owner: Project Manager

4. Leadership Committee Meeting

Description: Receive weekly focus and guidance from the leadership committee.

Objective: Make decisions regarding issues and priorities and refine strategy, direction and focus.

Format: Roundtable with a predefined but free form agenda focused on issues.

Participants: PM’s, PE’s and Leadership Committee

Frequency: Weekly

Duration: 1.5 hours

Owner: Project Office Manager and Project Managers

5. Steering Committee Meeting

Description: A reporting session for the steering committee at key points in the project.

Objective: To confirm direction, cultivate sponsorship, report on status, findings and issues.

Format: Formal presentation to the committee.

Participants: PE’s and PM’s.

Frequency: Monthly.

Duration: 2 hours.

Owner: Project Office Manager.

6. Monthly Extended Team Status Meeting

Description: An opportunity for all members of the Core Team to discuss progress and project related issues.

Objective: To rapidly communicate both direction and feedback and to ensure that all team members are focused and working toward a common objective.

Format: Brief presentation from team leads followed by announcements, questions and comments.

Participants: The entire Core Team

Frequency: Monthly

Duration: 2 hours

Owner: Project Office Manager / Project Manager

1. Executive Update Meeting

Description: A high level report on key points in the project based on latest Steering Committee Meeting.

Objective: To confirm direction, cultivate sponsorship, report on status, findings and issues.

Format: Discussion of <Project Name> issues.

Participants: PE’s, PM’s, Senior Leadership of <Company Name>.

Frequency: Monthly.

Duration: 30 minutes.

Owner: Project Manager / Project Executive

1. All Hands Meeting / e-mail

Description: An update on the <Project Name> project and any related projects

Objective: To give all <Company Name> employees an opportunity to ask questions regarding the key IT projects.

Format: A large meeting

Participants: Anyone who is interested in <Project Name> and the related projects.

Frequency: Quarterly.

Duration: 2 hours.

Owner: Project Office Manager.

1. Orientation Meeting

Description: Formal launch of the project for team members.

Objective: To convey the project mission and schedule, educate on administrative matters and build a sense of “team”.

Format: Small group(s)

Participants: Project Office representative and team leader from specific work group.

Frequency: As new members join the team

Duration: 8 hours.

Owner: Project Manager

1. Team Training Meeting

Description: Formal classroom style team training.

Objective: Educate the team on the project methodology.

Format: Classroom formats multiple instructors.

Participants: New team members.

Frequency: As needed when new members join the team.

Duration: 4 hours.

Owner: Project Manager

Aside from meetings, the <Project Name> team is leveraging numerous media / venue forms to communicate with individuals both inside and outside of <Company Name>.

## Web Page

Description: The <Project Name> project will have a web page on the <Company Name> intranet which contains high level information regarding project status, progress, accomplishments and issues. The <Project Name>home page will be linked to sub-pages maintained by leads from each area.

Objective: An easy venue to access data repository for project status, upcoming dates and specific applications data.

Format: The <Project Name> home page is linked to the <Company Name> intranet home page.

Participants: All content must be approved by the communications manager (the project office) and then sent to corporate communications for final approval prior to posting to the web page.

Frequency: Team leads will make updates weekly from each of the major areas

Duration: On going.

Owner: Communications Manager / Project Manager / Corporate Communications and the individual team leads.

## Company Publications

Description: A high-level, non-technical overview of the <Project Name> project and its impact on <Company Name>.

The article will discuss issues such as:

* An overview of the <Project Name>
* The impact of <Project Name> on <Company Name>
* The status of <Project Name>
* An overview of activity in a particular area

Objective: An easy way for all “front line” employees to understanding the <Project Name> project from a non-technical perspective.

Format: A brief article in the <Company Name> company newspaper.

Participants: All <Company Name> employees who choose to read the Company newsletter.

Frequency: As needed

Duration: N/A.

Owner: Communications Manager / Project Manager / Corporate Communications for approval.

##

## Team Building Events

Description: An opportunity for team members to “hang out” in an informal atmosphere.

Objective: Have fun and build the team cohesiveness.

Format: Activity typically off-site (e.g. happy hour, bowling, lunch out, skiing, etc).

Participants: All core and extended team members.

Frequency: Monthly or BI-monthly

Duration: 4 to 6 hours

Owner: Project Manager

## <Project Name> Hot Line

Description: A phone mail extension where <Company Name> employees can call to inquire about <Project Name> related questions. All inquires will be assigned to a <Project Name> Core Team member and responses will be generated within one week.

Objective: Give all <Company Name> employees a quick and easy way to get <Project Name> related questions answered.

Format: A phone numbers where individuals can call to inquire about their <Project Name> related questions.

Participants: Extended team and internal <Company Name>.

Frequency: Continuously updated

Duration: On going

Owner: Communications Manager.

## Employee Feedback

Description: An opportunity for employees to comment on the effectiveness of the <Project Name> communications efforts.

Objective: Get feedback from Core team members, Extended team members, Internal <Company Name> and those individuals external to <Company Name> on the effectiveness of the communications regarding the <Project Name> project. The feedback will be leveraged to improve the communications process and content.

Format: An e-mail address where individuals can send communications feedback and suggestions.

Participants: All <Company Name> employees are eligible to contribute.

Frequency: On going.

Duration: Continuous feedback.

Owner: Communications Manager / Project Manager.

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# Storage of Information

The <Project Name> project will store electronic information that is not “sensitive” in nature on the corporate local area network at the following location: xxxx\xxxx. All employees have read access to this directory. The project manager is responsible for maintaining the storage of all project hard copy information throughout the duration of the project. Confidential information will be secured accordingly. Upon project completion, the project electronic and hard copy files will be archived to xxxxxxxxxx.

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# Appendix A: Detailed description of Information Categories

## Project Execution

Project Procedures/Standards For:

Partition Packet

1. Project Plan Development
2. Work Order Development (By Project)

Project Log Entry (e.g., Issues, Change, Action, Risk)

Time Recording

Time Away from Project Procedures

Expense Reporting

Status Reporting (e.g., Status Report Production Process and Schedule)

Project Change Requests & Contract Management Procedures

Issue Escalation Procedures

Standards for Deliverables

Work Environment Procedures

Project Orientation

Team Member Education Plan / Skills Development

Resource Request Procedures

Project Roll-off Procedures

Project File Development/Update Procedure

The majority of the above procedures and standards are captured in the <Project Name> Project Office Definition Document. A printed copy is available for review by new team members and an electronic document is also available for periodic reference.

**People & Organization:**

Project Organization Charts

Project Contacts List (e.g., <Project Name> Team, Leadership Team, Steering Committee, etc.)

Team Roles & Responsibilities

Resource Acquisition (e.g., <Project Name> Resource Requirements Forecast Report)

Resource Allocation

Resource Requisition Reports

Staffing Models

New Hire Documentation

Business Function Matrix

**Project Plans & Estimates:**

Project Master Schedule Work Plan

Individual Project Plans (By Area)

Project Current Tasks Reports

**Project Progress/Status:**

Time Recording Reports/Time Analysis Charts

Actions Items from Meetings (e.g., Action Log Reports)

Project Team Meetings (e.g., Progress, Issues, Direction, etc.)

External Projects Impact Analysis

Extended Enterprise Components Status

Issue Log Reports

Identified Project Risks List

The <Project Name> Project Status Reports contain a number of the information types listed above. Each of these pieces of information is created separately by various team members and are summarized and combined for the formal status reports.

**Project Management:**

Financial Tracking and Reporting

Project Change Requests (Change Log Reports - impact descriptions and requirements)

Project Forecasts

## <Project Name> Project Status

Project Completed Tasks Reports

Project Status Reports

Project Status and Schedule

<Project Name> Project Milestones/Accomplishments

Project Metrics

## Project Awareness Information

<Project Name> Project Milestones/Accomplishments

## <Project Name> Generic Information

<Project Name> Problem Definition

<Company Name> <Project Name> Readiness Statement

<Project Name> Process Overview / <Project Name> Methodology Training

Testing Strategy Overview

Vendor Information

<Project Name> Upgrade Impacts (interfaces & bridges)

Extended Enterprise Description

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# Appendix B: Detailed Description of Communications Tools

Project Communication Tools –

Statement of Work

The Statement of Work (SOW) is the contractual agreement that defines the project objectives, expectations and scope. Each project member should be familiar with the SOW particularly as it relates to project scope and the definition of completion for each major deliverable. An overview of the SOW will be provided during the orientation meeting and review of timely points will be included in the All Hands Meeting.

Work Plan

An effective project work plan is the foundation and backbone of a successful project. The work plan defines the tasks in order of completion. It is also a tool for tracking and communicating project status, schedule and budget expectations. The work plan is an integral part and the central feature of most status reporting meetings and tools used during the project.

The work plan will be maintained in <Tool Name> under the direction of the Project Manager on a weekly basis. This weekly update will take place every xxxxxx afternoon. An updated plan will be published every week in connection with the weekly status report.

Task Assignment Sheets

Where applicable, the PM will provide a detailed outline of the specific steps required to complete an assigned task. The Task Assignment Sheet provides much greater detail and specificity than the project work plan. In some cases a single work plan task may be broken down into fifteen or more steps to complete.

Where practical this Task Assignment Sheet will be developed in MS Word and distributed in hard copy prior to opening the new task. In addition, the PM will hold a coaching session at the start of each task to review the task assignment.

Action Log

The action log is a direct extension of the work plan. The action log reflects specific actions to be completed. Generally, these actions are small enough in both impact and duration to be handled on the Action Log rather than requiring a special revision to the project plan. Any item that requires more than one day to complete should be on the action log.

The action log is a living document that will be updated frequently and serves as an ongoing “To Do List” to insure that action items are not left uncompleted. Actions will be captured during meetings and at other times by means of an action-input form. This form will be submitted to the PM for entry into the log. The log will be maintained as a table in MS word. Closed actions will be moved to an archive.

Issues Log

Similar to the action log, the issues log is an extension of the project work plan. The issue log will be updated as needed throughout the week. An issue differs from an action in severity and the amount of effort required to resolve. An issue, if left unresolved would have a significant adverse impact on the project. Typically the resolution to an issue is not known at the time it is created and the issue owner must develop a solution.

The project issue log will be updated as needed by submitting an update form to the PM. The issue log will be maintained in a MS word table.

Change Management Log

The change management log lists the current status and project impact of each planned or enacted project change request. The log shows at a glance the current impact of change on the project.

The PM in a MS Word table format will maintain the change management log. The log will be updated when a proposed or approved PCR is received. The log will be reviewed at the weekly Leadership meeting and reported on in the Weekly Status report.

Project Change Request forms

A PCR (Project Change Request) is a request for change on the project. It has two parts, one for estimating the cost to investigate the PCR, the other to determine how much the PCR will cost to implement. All project changes require an approved PCR. Typically this involves a change to the project schedule, budget, assumptions, or scope.

Time Sheets

The project team in capturing will utilize weekly time sheets and reporting the actual time worked on a task and the estimate to complete that task. The PM will maintain this information in an Excel spreadsheet.

At the beginning of each week a blank time sheet will be distributed. Each member of the project team shall submit a complete time sheet to the PM no later than 12:00 noon on Friday. Part-time project staff may not be required to complete this form. The Project Managers will make this determination on a case-by-case basis.

The time sheet will be loaded into an Excel spreadsheet. This spreadsheet will be used to track project actuals and estimates to complete. This total actual work as compared to the total estimated work requirement shall yield the percentage complete for each task on the project.