Communications Plan
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Communication Plan
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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.

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

- **Distributors**
- **Retailers**
- **End Consumers**

Competitors

Investors
Regulatory Agencies (SEC, IRS, PUC)

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).

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)***.

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

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

7. 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

8. 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.

9. 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

10. 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.

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.

Appendix A: Detailed description of Information Categories

Project Execution

Project Procedures/Standards For:

Partition Packet

- **Project Plan Development**
- **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

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.