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Communications Plan Template

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Template Guide

What is a Communications Plan?

A Communications Plan is a document that describes how you are going to communicate the right messages, to the right people, at the right time. It sets out the communications goals, stakeholders and strategies, as well as the communications activities and timeframes.

Your Communications Plan will describe:

- *The communications objectives*
- *How those objectives will be accomplished*
- *The timeframes and effort involved*
- *How you will measure success*

A clear Communications Plan is vital to the success of an organization. It is also critical to the success of projects, as it ensures that all of the staff, managers, suppliers and customers are kept properly informed of the progress of a project.

When to use a Communications Plan

If you have a wide variety of project staff, suppliers, customers and managers, then it will be worthwhile creating a formal plan for the communication of key messages to your stakeholders. By communicating in a more structured fashion, you will ensure that the communications needs of each stakeholder are properly met.

Of course, this plan does not negate the need to communicate informally on a project, or within a department, as well. You will still need to talk to your team about how they are doing with their assigned work, call managers and inform them of critical risks or issues, or schedule informal meetings to report on progress. Whichever way you do it, whether it be formal or informal, communicating properly can go a long way towards ensuring the success of your team objectives.

How to use this template

This document provides a guide on the topics usually included in a Communications Plan. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

Note: For smaller projects, your communications will be simple and may not require a lot of proactive effort. But as your projects become larger and more complex, communications events will need to be planned in advance, taking account of the needs of particular stakeholder groups. It is for larger more complex projects that a Communications Plan, such as the one stated in this document, will be required.

1 Summary

Summarize your Communications Plan by describing:

1. The basis for creating the plan
2. The current status of communications in your team
3. The communications objectives, events and responsibilities
4. The feedback measures and success criteria
5. Any planning risks and issues

2 Introduction

2.1 Background

Describe the context in which this Communications Plan has been created. The context is important as it “sets the scene” for the plan, helps you to get buy-in from stakeholders and builds enthusiasm from your team. Set the scene for your communications plan by describing the:

- Vision and objectives for the Organization
- Goals, timeframes and scope of your projects
- Current and past communications activities
- Existing communications staff and stakeholders
- Current communications tools, activities and events
- Means of reviewing communications effectiveness
- Results of past communications surveys
- Reasons for requiring more formal communications planning
- Desired outcome of the communications planning process

2.2 Situation Analysis

Now that you have set out the basis for creating the Communications Plan, the next step is to perform a “Situation Analysis” by describing the *strengths*, *weaknesses*, *opportunities* and *threats* that exist in your communications environment. For instance:

- **Strengths:** Your team may be particularly good at identifying the type of information that people need to receive and the timeframe in which it should be delivered.
- **Weaknesses:** But your team may for instance need to improve the frequency that the information is distributed, or make the information more selective to the target audience.
- **Opportunities:** There may be opportunities for improving project awareness, company profile or public knowledge. You may also be able to build support for your project activities, help gain funding or boost productivity.

- **Threats:** Threats which may exist can include; messages not being interpreted as expected, changes to your team culture depending on how they are portrayed or other departments not reacting positively to the communications sent out.

It is important that you clearly identify all strengths, weaknesses, opportunities and threats, so that you can gain a complete picture of the environment in which you are about to issue formal communications.

2.3 Lessons Learned

Now that you have described the environment within which formal communications are made, the next step is to describe the current status of communications within your team:

- List the generic communications activities which have taken place to date
- Describe how those communications were made and the key messages portrayed
- Identify the level of success of those messages
- Document any lessons learned

By describing how prior communications were undertaken by your project / team and any lessons learned, you can further “set the scene” for the communications activities that are needed to keep the right stakeholders informed, with the right information, at the right time.

3 Objectives

So far, you have set out the *current state* of communications within your team. The next step is to describe the *future state*, which will be achieved through the execution of this plan.

3.1 Communications Objectives

List here, the top 3 objectives that are to be achieved by the execution of this Communications Plan. Try and make your objectives: *Specific, Measurable, Actionable, Relevant* and *Timely* (S.M.A.R.T) where possible. For instance, your objectives may be related to:

- ✓ Increasing stakeholder awareness
- ✓ Improving team efficiency and productivity
- ✓ Gaining management sponsorship and buy-in
- ✓ Changing the perception of your team
- ✓ Improving team culture and behaviour.

3.2 Communications Guidelines

To help you meet your objectives, list all of the *guidelines* that are applicable to the dissemination of communications messages within your team. For instance, your communications guidelines might be that:

- ✓ All messages will be audience-specific
- ✓ Every key message will be communicated formally
- ✓ Messages will be distributed through an appropriate channel
- ✓ The team will communicate what people need to know *before* they need to know it
- ✓ Communication will be tailored, based on what people need to know
- ✓ All critical communications must be approved by management prior to distribution
- ✓ Only the communications team will be able to distribute official press releases
- ✓ Project-wide meetings will be held at all important milestones
- ✓ Regular, unbiased reporting will be undertaken
- ✓ The project team will listen and act on feedback

4 Stakeholders

So far, you have described the communications environment and set 3 key objectives for communications within your team. The next step is to identify who it is that will be involved in the dissemination and receipt of communications issued by your team i.e. who is going to create, send out and receive the formal communications messages.

4.1 Target Audience

List and describe each of the audience groups (i.e. stakeholders) that your team will communicate with. Remember that this is a *formal* Communications Plan. Therefore, you will only wish to list audience groups whom your team will want to communicate formally with.

For example, a project may have the following target audiences:

- ✓ Project board (sponsor, director, other board members)
- ✓ Project management team (project manager, project leaders)
- ✓ Project team members
- ✓ Related project teams
- ✓ Project management office
- ✓ Related business unit managers
- ✓ Internal audit or strategy staff
- ✓ External suppliers and contractors
- ✓ Governance and regulatory bodies

4.2 Stakeholder Requirements

You now know exactly who it is that you are going to formally communicate with. The next step is to identify the information that they need to receive. List each stakeholder in the table below then describe the information that they need to receive and the timeframe in which they need to receive it.

Name	Role	Information	Timeframe
Carol Anderson	Project Sponsor	✓ Summary project status ✓ Critical risks and issues ✓ Budget & timeline performance	Monthly
James White	Project Manager	✓ Detailed project status ✓ All risks and issues ✓ Resource, supplier, procurement budget & timeline performance	Weekly
Sam Dean	Safety Auditor	✓ Level of safety compliance of all deliverables produced	1 st each month

You will want to check with each stakeholder that the above information requirements meet their needs before you continue.

4.3 Key Messages

Most teams distribute a wide range of communications messages to their stakeholders. There are usually however, a handful of key messages that are communicated to the majority of stakeholders on a regular basis.

If there are regular messages which are critical to the success of the team, then state those messages here. For instance, in the case of a project team, the key messages may be the:

- ✓ **Project status:** Whether the project is currently operating within the agreed schedule, budget and quality targets.
- ✓ **Project issues:** The impact of the issues currently affecting the project and the actions taken to resolve them.
- ✓ **Project risks:** The high level risks which may affect the project and the actions taken to mitigate, avoid or reduce them.
- ✓ **Project deliverables:** The deliverables completed to date and the items which are scheduled for completion within the next reporting period.
- ✓ **Project resources:** The overall level of resourcing in relation to the Resource Plan and any resource constraints currently affecting the project.

These key messages will be woven into the communications events that you are about to schedule for your team.

5 Channels

The next step is to identify the core *communications channels*.

5.1 Delivery Channels

“Delivery channels” provide the mechanism for disseminating information to your stakeholders. For instance, if you are managing a team, your primary *communications channel* may be email or a regular newsletter.

The most important consideration when determining the appropriate delivery channel is to use whatever channel your audience prefers to use. For instance, project staff would rather hear about the status of their project through internal email than in an external press release.

Therefore, using the right channel is as important as drafting the right communications message for the right stakeholders at the right time.

Here are some examples of delivery channels:

- | | |
|------------------|---------------------|
| ✓ Advertising | ✓ Media packs |
| ✓ Awards | ✓ Newsletters |
| ✓ Banners | ✓ Newspaper ads |
| ✓ Billboards | ✓ News conferences |
| ✓ Branding | ✓ Packaging |
| ✓ Brochures | ✓ Posters |
| ✓ Business cards | ✓ Press conferences |
| ✓ Competitions | ✓ Prizes |

- √ Conferences
- √ Shows
- √ Demonstrations
- √ Direct mail
- √ Directories
- √ Endorsements
- √ Email
- √ Exhibitions
- √ Flyers
- √ Fact sheets
- √ Displays
- √ Launches
- √ Leaflets
- √ Letterheads
- √ Public meetings
- √ Quotes
- √ Radio
- √ Samples
- √ Seminars
- √ Signage
- √ Social events
- √ Speaking engagements
- √ Television
- √ Team meetings
- √ Video presentations
- √ Website
- √ Workshops

5.2 Information Collection

Once you have identified the channels that you are going to use to disseminate your information, you need to think about where the information is going to come from to populate your channel. For instance, where is the news information going to come from to populate your weekly newsletter?

Complete the following tables to specify the information source for each channel that you have listed above.

Channel	Weekly Newsletter
Information Requirement	Project Status, progress, key interest items.
Information Provider	Project Manager, Project Administrator
Collection Timeframe	Friday afternoons.

Channel	
Information Requirement	
Information Provider	
Collection Timeframe	

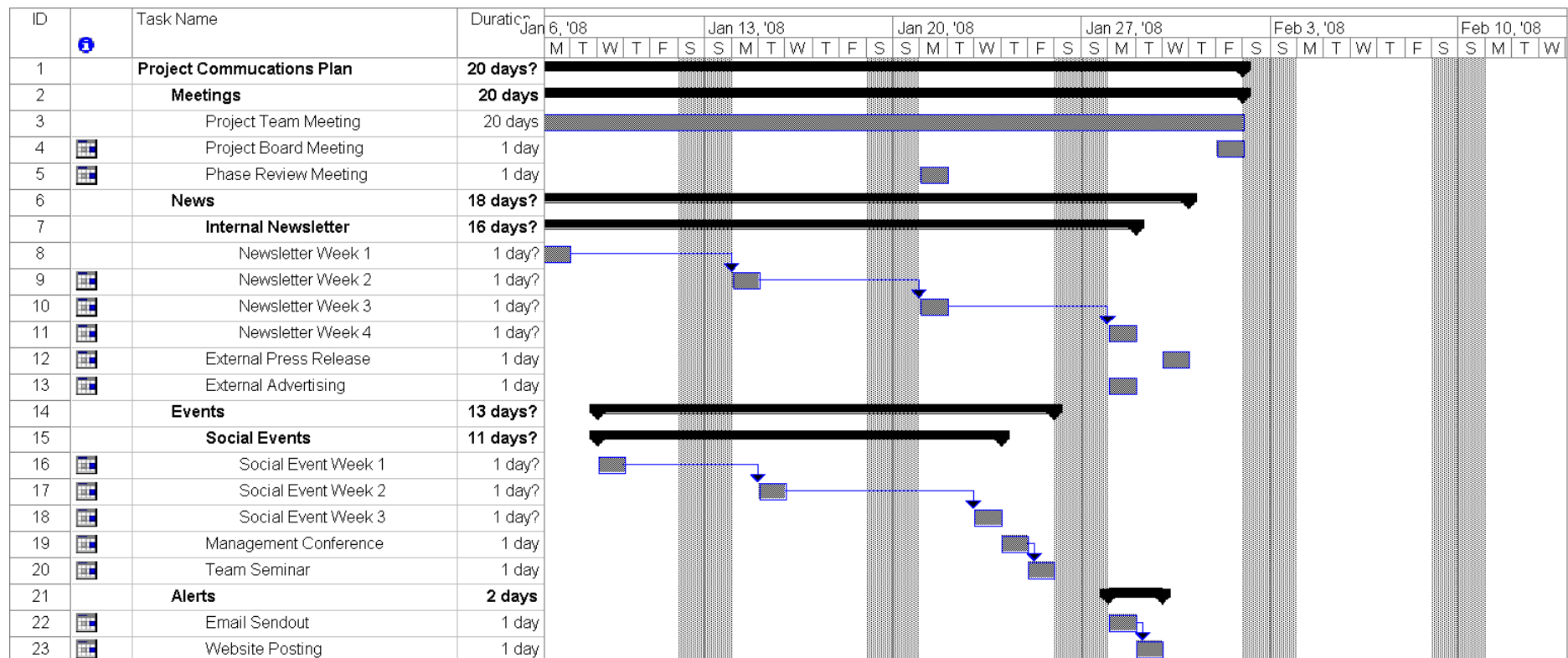
Channel	
Information Requirement	
Information Provider	
Collection Timeframe	

6 Communications Plan

You are now ready to schedule the communications activities that are required to keep the right stakeholders informed with the right information, at the right time.

6.1 Communications Schedule

Schedule each of the Communications events that you intend to hold, to disseminate your communications messages to your stakeholders. To show you what a sample schedule looks like, we have created an example Communications Schedule for a small project below. The communications events include running a suite of team meetings, publishing a regular newsletter, having regular social events, a conference for managers, a seminar for team members and various project news alerts.



6.2 Communications Events

Then complete the following table with the Communications events listed in the schedule above. Link the events by the common “ID” used. By describing these events in as much depth as possible, you can help your team members to complete the events on time.

ID	Event	Description	Purpose	Frequency	Date(s)
3	Project Team Meeting	Meeting involving all team members, to discuss the work in-progress / recently completed / coming up	To keep the team informed of the project status and ensure that issues, risks or changes are raised early on.	Weekly	xx/yy/zz
4	Project Board Meeting	Formal meetings held with the Project Board to assess the overall status of the project.	To determine whether the project has been completed and met the final requirements of the customer.	End of project	xx/yy/zz
5	Phase Review Meeting	Formal meeting held at the end of each phase, to determine whether the quality of the deliverables produced is satisfactory.	To control the progress of the project through each phase in the lifecycle and boost its chance of success.	End of each major phase	xx/yy/zz

6.3 Communications Responsibilities

Complete the following responsibilities matrix. In this matrix, list each of the people responsible for the communications events above and describe their *responsibilities* in taking part in these events using the key provided. Again, use the unique ID to link the participating parties to the communication events listed above. The table has been partly completed for the above project example.

Key:

A = *Accountable* for communication event (as marked in green)

R = *Receives* communications materials, takes part in meetings (as marked in yellow)

M = *Monitors* communications process and provides feedback (as marked in orange).

ID	Project Sponsor	Project Manager	Project Leader	Project Member	Quality Manager	Procurement Manager	Communications Manager	Profit Office Manager	Other Project Resource	Other External Body
3		A	R	R	R	R	M	R	R	
4	A	R	R					M		
5	A	R	R	R	M					

7 Feedback

After the completion of each communications event, you need to get feedback on whether or not it was successful. The success criteria you will measure against are listed in the next section.

7.1 Feedback Measures

You need to implement a suite of feedback measures to gain feedback on the level of success of the event to determine whether the right information was distributed to the right people at the right time.

If the feedback was positive and all of the criteria were met, then the event was a success. However in some cases, the feedback may show that certain success criteria were not met, and an alternative communications event or message distribution may need to take place to correct any issues raised.

Describe here each of the measures you will put in place to gather feedback on communications events you have scheduled. Some examples include:

- Questionnaires
- Feedback forms
- Complaints forms
- Telephone surveys
- Independent audits

7.2 Success Criteria

Once you have described the measures you will implement to gather good quality feedback, the next step is to list the criteria that determine whether the communications event (or activity) was successful. It is important that you specify clear, precise criteria in this section. This will ensure that once the communications activity is completed and you have received feedback about it, you can easily compare the feedback to the criteria listed here and determine whether the activity was completed satisfactorily.

Here are some examples:

- ✓ The message reached its intended audience
- ✓ The message was distributed through the planned channel
- ✓ The output reached the intended audience on schedule
- ✓ The distribution was effective
- ✓ The message achieved the desired effect
- ✓ The message addressed the information requirements of the audience
- ✓ The message was received as honest and trustworthy
- ✓ There were no complaints received

8 Appendix

Attach any documentation you believe is relevant to the Communications Plan. For example:

- Existing Newsletters
- General correspondence
- Corporate Communications Policies, Standards or Guidelines

8.1 Assumptions

List any planning assumptions you have made during the creation of this Communications Plan. For example, it may be assumed that:

- There are adequate resources available to complete the assigned tasks.
- The timeframes listed in the Communications Schedule are satisfactory.
- The required budget is available to complete the tasks needed.

8.2 Risks

List any risks identified during the creation of this Communications Plan. For example:

- Key communications resources leave during the project.
- The requirements for communication change during the project.
- The list of project stakeholders changes throughout the project.