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# PROJECT COMMUNICATIONS GUIDE and WORKSHEETS

## OVERVIEW

### PROJECT COMMUNICATIONS AND CHANGE MANAGEMENT AT UC BERKELEY

A key component of successful project management at UC Berkeley is a clear and concise communication and change management plan. Just as no two projects are the same, no two communication and change management plans follow the same playbook. However, there are many tools, techniques, and channels that make communicating and conducting change management more effective at UC Berkeley, and all project teams should consider these when developing their plans.

The following pages offer worksheets and templates for developing communication and change management plans. If you choose, you can use your own planning template. Regardless of which template you use, the plan should provide the following information:

- The key audiences that need to receive project communications
- A description of the segments of the campus community that will be impacted by the project
- An outline of the communication and preparation that the campus community will need to receive for the implementation of the new services to be successful
- How project team members will communicate with one another
- A description of the project information that the project team, sponsor and key stakeholder need to receive
- The communication tools that the project team will use to reach each stakeholder audience
- The people who will be responsible for developing and delivering each project message
- Where project documents are stored and maintained online
- The timing and/or frequency of messages, reports, and meeting

### PROJECT NAME

The first step in developing a communication and change management plan is to determine the official name of your project. The name of the project is extremely important as it:

- Conveys what the project is about
- Appears on numerous dashboards and reports
- Must be understood by subject matter experts (SMEs), and non-SMEs

Use these tips for developing a project name that reflects the project outcome:

- Include a verb along with the problem you are trying to solve
- Keep it short-- Try for 35 to 45 characters for reporting and dashboards
- If there is enough space, spell out acronyms

Examples:

- Security Trng for fac/staff/stds
- Automate & Centralize Prospect Data
- Move FTP Svr to Linux

## Project Impact

A stakeholder is defined as anyone or group who has interest in a project. The interest may stem from the project's outcome causing substantial changes to a person's job, or because the project may be tangentially related to a stakeholder's interest. For example, a stakeholder could be a frontline worker, or an executive who will never be impacted by the outcome but has influence over how the project is perceived by the organization. A stakeholder can also be an external organization interested in a project for its social justice or environmental implications.

It is important, especially for large projects, to consider who those stakeholders are and communicate in a way that satisfies their interest. Use the stakeholder checklist to identify potential stakeholders. You may also use this form to identify your stakeholders and their interest in the project.

| KEY STAKEHOLDERS<br>(List the key stakeholders who will be using the product and services created by the project, or stakeholders with high influence who may have an interest the project) | CURRENT STATE<br>(Describe the stakeholders current understanding of the project, experience with similar existing products and services, and needs and concerns about transitioning to the new services created by the project.) | FUTURE STATE<br>(Describe the understanding that key stakeholders will need to prepare for the successful adoption of the services created by the project.) | ACTIONS TO MOVE CURRENT TO FUTURE STATE<br>(Describe the actions that will be taken to transition the key stakeholders from the current state to the future state.) | CRITERIA FOR SUCCESS<br>(Describe how the project team, sponsor(s) and governance committee will know that the key stakeholders have successfully transitioned from the current state to the future state.) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
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## Developing a message for your project

Project communications are more effective if they use a consistent "project voice" that is **personal**, **authentic**, **strategic**, and **confident**. It is not necessary or appropriate for all messages to include all four of these attributes, but they serve as a guide for developing an overall voice for your project.

### PERSONAL

Although your project will bring about changes in tangible factors (process, systems, software, hardware, training, and techniques), ultimately, your project is about making people more productive and successful. Your project communications will be more accessible if they explain how the project will impact and help the members of the campus community.

## **AUTHENTIC**

Your project should neither ignore the difficult challenges ahead nor oversell the benefits of the proposed changes. Your project will gain credibility by giving a fair assessment of the challenges and expected outcome of each underlying change project.

## **STRATEGIC**

Proactively designing change allows UC Berkeley to strategically prepare for its financial and operational future, rather than let declining financial circumstances limit future options. Your communications should reiterate how your project supports the goals of the campus.

## **CONFIDENT**

In order to overcome the inertia of the status quo, your project communications needs to convey confidence that it is bringing necessary and positive changes to the campus. Your project needs to convey optimism that it will succeed in helping Berkeley position itself for the future.

## Putting it all together

Your project communications will be successful if your messages convey the enthusiasm of faculty, students, and staff for the positive changes that your project will bring to their personal and professional endeavors at UC Berkeley.

## ARCHIVING YOUR MESSAGES

Project teams will find it useful to keep a log of all messages that can be used in the future. Whenever you use a message that resonates with the intended audience, be sure to add it to the log so you can draw upon it in the future instead of continually drafting new content for each new communication project.

## Worksheets

### About your project

**NAME OF PROJECT:** \_\_\_\_\_

### PROJECT DESCRIPTION

Most project team members are so close to a project that they have difficulty describing their project in simple terms. It is important to be able to describe your project in three-to-four sentences that will convey the opportunity and the benefit. Your project description should include the:

- Name of your project.
- The problem it is trying to solve.
- The benefit of solving the problem (save money, save time, more effective, etc.).
- The specific audience whose lives will improve because of it
- How the audience(s) endeavors will improve.

- The hoped-for benefit to UC Berkeley if the project is successful.

The description should have the following structure.

**(Name of Project)** will enable UC Berkeley to **(benefit)** by **(problem it will solve)**. When successfully completed, **(audience)** will become more effective by **(anticipated improvement)**.

## YOUR PROJECT DESCRIPTION:

## Audiences & Stakeholders

Below is a list of campus groups that you will want to consider when developing your communication plan. Check all audiences that you will want to communicate with and consider whether they will need a general message or a specific message targeted for their group.

### YOUR PROJECT TEAM

- ☐ Project Manager
- ☐ Project Sponsor(s)
- ☐ Project Team
- ☐ Project Steering Committee
- ☐ Technology Program Office
- ☐ Other \_\_\_\_\_

### Berkeley IT (bIT)

- ☐ Executive Leadership Team
- ☐ bIT Directors
- ☐ Berkeley IT Action Team
- ☐ Campus Applications & Data
- ☐ Campus IT Experience
- ☐ Information Security Office

- ☐ People, Performance & Culture
- ☐ Strategy & Partnerships

### CAMPUS LEADERSHIP

- ☐ Vice Chancellors
- ☐ Chancellor's Cabinet
- ☐ Council of Deans

### Other Internal Stakeholders

- ☐ University Health Services (UHS)
- ☐ Athletics IT
- ☐ Research Teaching and Learning
- ☐ Student Affairs IT
- ☐ University Development & Alumni Relations (UDAR)
- ☐ Admissions
- ☐ Academic Advising

- ☐ Environment Health and Safety (EHS)
- ☐ Financial Aid and Scholarship Office (FASO)
- ☐ General Accounting
- ☐ Office of the Registrar
- ☐ Payroll
- ☐ Vice Chancellor of Administration & Finance (VCAF)
- ☐ Vice Chancellor of Equity & Inclusion (VCEI)
- ☐ Vice Chancellor of Research (VCR)
- ☐ Vice Chancellor of Student Affairs (VCSA)
- ☐ Vice Chancellor of Undergraduate Education (VCUE)
- ☐ Vice Chancellor of University Development & Alumni Relations (UDAR)

## FACULTY

- ☐ Council of Deans
- ☐ Academic Senate
- ☐ The Berkeley Division Council (DIVCO)
- ☐ Department Chairs

## STUDENTS

- ☐ Associated Students of UC (ASUC Leadership)
- ☐ Graduate Assembly Leadership
- ☐ Undergraduates
- ☐ Graduate – Professional
- ☐ Graduate – Academic

## STAFF ORGANIZATIONS

- ☐ Review website (linked above) to determine potential audiences. Below are listed audiences you may want to pay particular attention to.
- ☐ IT Leadership Group (ITLG)
- ☐ IT Community Council (ITC)
- ☐ Administrative Business Officer Group
- ☐ Chancellor's Staff Advisory Committee (CSAC)
- ☐ [Identity-Based Staff Organizations](#)
- ☐ [COMMUNITIES OF PRACTICE](#)
- ☐ [IT GOVERNANCE](#)
- ☐ [COMMUNITIES OF PRACTICE](#)

## OFF CAMPUS- STAKEHOLDERS

- ☐ UCOP
- ☐ UC Regents
- ☐ Donors
- ☐ UCB Foundation
- ☐ State Legislators
- ☐ Vendors
- ☐ Other UC Campuses
- ☐ Local City Councils
- ☐ Local Chambers of Commerce
- ☐ Parents
- ☐ Cal neighbors
- ☐ UC Berkeley Alumni

## Communications Media

Below is a list of the communication tools most frequently and effectively used at UC Berkeley. Some audiences may require multiple communication channels to be reached effectively. Check all tools that you are interested in using for your project communications.

## EXECUTIVE MESSAGING

- ☐ Campus leadership
- ☐ Executive Leadership (ExLT)
- ☐ Senior Directors & Managers

- ☐ Project leadership

## EMAIL

- ☐ CalMessages broadcast email
- ☐ Cal Message subscription lists

- ☐ Berkeley IT Mailing Lists
- ☐ Other campus email lists

## ELECTRONIC

- ☐ Regular Status Reports
- ☐ Project web site
- ☐ Project dashboards
- ☐ Project blog
- ☐ Presentation Slide Deck (repeatable, consistent messaging)
- ☐ Departmental Website
- ☐ Project WIKI
- ☐ Sponsor/Partner Website
- ☐ System Notifications (Smartsheet notifications)
- ☐ Videos
- ☐ PowerPoint
- ☐ Virtual Chat Rooms
- ☐ Newsletter
- ☐ YouTube
- ☐ Facebook
- ☐ Instagram
- ☐ LinkedIn
- ☐ Slack
- ☐ Youtube
- ☐ Twitter
- ☐ Wisdom Cafe

## EDUCATIONAL TOOLS

- ☐ Training workshops
- ☐ Training manuals
- ☐ Infographics
- ☐ FAQs
- ☐ Job Aids
- ☐ Information kits
- ☐ Videos

## Meetings

- ☐ 1:1

- ☐ Department Staff or Team Meetings
- ☐ Unit Staff Meetings
- ☐ bIT Staff Meeting

## PUBLICATIONS- EDITORIAL AND/ OR ADVERTISING

- ☐ The Berkeleyan
- ☐ The Graduate
- ☐ California magazine (alumni)
- ☐ Daily Californian

## ENGAGEMENT AND DATA GATHERING

- ☐ Surveys
- ☐ [OpinionSpace](#)
- ☐ User polls
- ☐ Customer satisfaction surveys
- ☐ Anonymous email inbox

## PRINT

- ☐ Newsletter
- ☐ Fact sheets
- ☐ Postcards
- ☐ Campus posters
- ☐ Banners
- ☐ Brochures / Tent Cards

## EVENTS

- ☐ Project launch event
- ☐ Town hall meetings
- ☐ Project road show
- ☐ Open House

## OBTAIN PRE/POST IMPLEMENTATION FEEDBACK

- ☐ Surveys/User Polls
- ☐ Open Comment Box
- ☐ Incentivized Feedback
- ☐ Focus Groups

## Project Documents and Reports

Use this worksheet to determine what project documents will be distributed, and the frequency of the distribution.

| REPORT TYPE     | PURPOSE | Responsible | Consulted | Audience | How often | Distribution Method | Where Stored (Document Links) |
|-----------------|---------|-------------|-----------|----------|-----------|---------------------|-------------------------------|
| PROJECT CHARTER |         |             |           |          |           |                     |                               |
| SCHEDULE        |         |             |           |          |           |                     |                               |
| RISK PLAN       |         |             |           |          |           |                     |                               |
| STATUS REPORTS  |         |             |           |          |           |                     |                               |
| ISSUE LOG       |         |             |           |          |           |                     |                               |
| CHANGE REQUESTS |         |             |           |          |           |                     |                               |

## PROJECT Meetings

Use this worksheet to determine and list the types and cadence of project meetings.

| MEETING TITLE                                                                     | PURPOSE | Facilitators | PARTICIPANTS | MEETING SCHEDULE |
|-----------------------------------------------------------------------------------|---------|--------------|--------------|------------------|
| <b>PROJECT KICK OFF MEETING</b><br>(recommended for large projects)               |         |              |              |                  |
| <b>PROJECT TEAM MEETINGS</b><br>(recommended for all projects)                    |         |              |              |                  |
| <b>PROJECT STEERING COMMITTEE MEETINGS</b><br>(May apply only to larger projects) |         |              |              |                  |

|                                                              |  |  |  |  |
|--------------------------------------------------------------|--|--|--|--|
| <b>SPONSOR MEETINGS</b><br>(large projects)                  |  |  |  |  |
| <b>CHANGE CONTROL MEETING</b><br>(as needed; large projects) |  |  |  |  |
| <b>Senior Leaders Meeting</b>                                |  |  |  |  |
| <b>All Staff bIT</b>                                         |  |  |  |  |
| <b>LESSONS LEARNED MEETING</b><br>(all projects)             |  |  |  |  |
| <b>PROJECT CLOSING MEETING</b><br>(large projects)           |  |  |  |  |