Communications Plan

# Executive Summary

contributed by Emily Iem

The communication plan begins with a thorough summary (less than a page).

## Purpose

This is a guide for creating a Communication Plan. Template language is in italics and grey font, some sample text is in normal font. See the Appendix for just the structure – you can delete instructional text as you use this template.

The Business Analysis (BA) Communication Plan includes:

* What (type of communication),
* How (method of communications),
* To whom (recipients), and
* How often (timeframes) to communicate with the initiative stakeholders.

The Communication Plan considers the needs of:

* Initiative Sponsors,
* System Users,
* External Stakeholders,
* Initiative Managers,
* Quality Assurance, and
* Team Leads.

## Communication Plan

To promote the success of the initiative by meeting the informational needs of initiative stakeholders.

### Acronyms and Terms

Define acronyms and terms used in the initiative.

|  |  |
| --- | --- |
| **Acronym or Term** | **Description or Definition** |
| BA | Business Analysis |
|  |  |

# Initiative Stakeholders

Conducting a stakeholder analysis provides your team with a detailed list and a matrix to understand the stakeholders’ impact and influence on the initiative, allowing you to provide effective communications.

## Stakeholder Analysis

Stakeholder analysis is conducted throughout the initiative to ensure the correct people are included and communicated to Stakeholders:

* Identifies the stakeholders (who will be directly or indirectly impacted by the change),
* Identifies their characteristics, and
* Analyzes the information.

### Define Groups and Identify Stakeholders

Identify stakeholder groups, and then the individuals within those groups, that should be included in the planning, communication, and initiative activities.

#### Stakeholder List

Creating a detailed stakeholder list ensures that all relevant stakeholders are included. Understanding who the stakeholders are, the impact of proposed changes, and the influence they may have on the change, is vital to understanding what needs, wants, and expectations must be satisfied by the solution.

|  |  |
| --- | --- |
| **Stakeholder Group** | **Stakeholder Name** |
| Initiative Team | Sally Analyst |

#### Stakeholder Matrix

Positioning stakeholders within this matrix will help you complete the Communication Matrix in the next section. Update the Matrix as stakeholders’ positioning and/or needs change during the initiative.

Stakeholders are positioned within the matrix to identify the level of communication and engagement they require.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| High              Influence | **High Influence/Low Impact:**  Have needs that should be met. Engage and consult with them, and if possible, increase their level of interest with the change activity. | | **High Influence/High Impact:**  Key players in the change effort and should be engaged regularly. | |
| Low | **Low Influence/Low Impact:**  Should be kept informed using general communications. Additional engagement can help gain support. | | **Low Influence/High Impact:** Supporters of, and potential goodwill ambassadors for, the change effort. Engage this group for their input and show interest in their needs. | |
|  | Low | Impact | | High |

# Communication Matrix

Identify the different communication methods that will be used, including:

* workshops,
* interviews,
* meetings,
* reports, and
* newsletters, etc.

Communication planning may be shared with the Project Manager. There may be separate communication plans for the overall initiative, as well as business analysis communications, or they may be developed concurrently.

The Communication Matrix identifies initiative communication details including:

* **Frequency:** How often information is distributed, or a meeting occurs (e.g., weekly, monthly).
* **Title:** The name of information being communicated.
* **Purpose:** The reason communication is needed.
* **Method of Communication:** The way information is shared.
* **Recipient/Participant:** The individual who will receive the report or participate in the meeting.
* **Responsible:** The person responsible for the communication.

Sample Communication Matrix

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Frequency** | **Title** | **Purpose** | **Method of Communication** | **Recipient/ Participant** | **Responsible** |
| *As Needed* | *Requirements Workshops* | *Elicit requirements from stakeholders* | *In-person or via teleconference* | *Business Unit 1*  *Business Unit 2* | *Business Analyst* |
| *Within Two Days after the Workshop* | *Requirements Workshop Minutes* | *Document requirements elicited during Workshops* | *Email distribution and SharePoint site* | *Workshop invitees* | *Technical Writer* |
| *Weekly* | *Status Meeting* | *Communicate initiative status*   * *Risk Review* * *Issue Review* * *Schedule Review/Update* | *In-person or via teleconference* | *Core initiative team* | *Project Manager* |
| *Monthly* | *Risk Identification* | *Identify new risks and opportunities for improvement opportunities* | *In-person or via teleconference* | *Core initiative team* | *Project Manager* |
| *Monthly* | *User Workgroup Meeting* | * *Communicate updates* * *Elicit business process requirements to incorporate* | *In-person or via teleconference* | *Core initiative team*  *Business representatives* | *Project Manager*  *Business Analyst* |
| *Six Months before Implementation* | *Get Ready for the New Product* | *Communicate the timeline for the new initiative and high-level expectations* | *Email or text (based on user preference)*  *Printed brochure* | *End users* | *Implementation Team* |
| *Three Months before Implementation* | *Here is the New Product* | *Communicated expectations for the next service receipt* | *Email or text (based on user preference)*  *Printed brochure* | *End users* | *Implementation Team* |

## Communication Effectiveness

Throughout any initiative, revisit plans and review activities to determine:

* If the planned activities are being executed,
* How effective they are, and
* What actions can be taken to address any gaps or issues.

*Update the frequency of any of the activities being used to measure effectiveness.  Add any other activities within your organization (e.g., customer feedback surveys, employee engagement feedback) that may contribute to measuring communication effectiveness.*

### <Insert frequency here> Status Meetings

Status meetings are used to:

* report progress on schedule,
* share recent accomplishments,
* identify upcoming activities,
* highlight issues or risks that affected accomplishments or will affect activities, and
* Conduct a risk and issue review.

*Update communication needs based on activities and as new stakeholders join the initiative.*

### <Insert frequency here>Risk Identification

Risk identification meetings are held to identify new risks that may impact the initiative. Based on new risks, you may need to review and update:

* Stakeholder analysis,
* Communication frequency,
* Communication methods, and
* Participants.

### Lessons Learned

*Conduct a “Lessons Learned” at the end of every phase (or at milestones) to elicit feedback on communications.*

##### Appendix - Template

Communication Plan Template

# Executive Summary

## Purpose

## Communication Plan Goal

### Acronyms and Terms

|  |  |
| --- | --- |
| **Acronym or Term** | **Description or Definition** |
|  |  |
|  |  |

# Initiative Stakeholders

## Stakeholder Analysis

### Define Groups and Identify Stakeholders

#### Stakeholder List

|  |  |
| --- | --- |
| **Stakeholder Group** | **Stakeholder Name** |
|  |  |
|  |  |

#### Stakeholder Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| High              Influence |  | |  | |
| Low |  | |  | |
|  | Low | Impact | | High |

# Communication Matrix

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Frequency** | **Title** | **Purpose** | **Method of Communication** | **Recipient/ Participant** | **Responsible** |
|  |  |  |  |  |  |

## Communication Effectiveness

### Status Meetings

### Risk Identification

### Lessons Learned