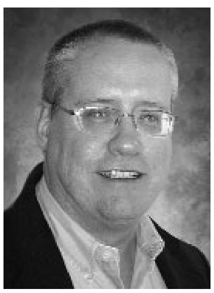
Ensure the success of your SAP implementation projects through meaningful communication — a guide to creating a communications plan

by Evan J. Albright



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Every organization has its own project methodology, and within it there are certain communications that are required — perhaps a weekly report to the project team and consultants, or quarterly presentations to the executive team. Some projects are managed by exceptions, so there are communications that occur whenever a task or milestone is at risk. To ensure that consistent and meaningful communication does take place in a project, I recommend developing a communications plan.

I've found very few organizations that go to the trouble to create a separate communications plan for their projects. Some include it in their change management or training plans. Some incorporate the communication-based tasks into the overall project plan. Most, at least in my experience, don't do it at all. Failing to properly plan communications during a project can result in increased calls to the help desk or support center, lower user acceptance, or in some cases, outright resistance to new technologies.

For six years I supervised IT communications at Reed Business Information, a billion-dollar-a-year B2B publisher. I've never met anyone else in the profession who held a similar position. The CIO at the time placed a high value on communicating effectively, and he was willing to expend budget just for that purpose.

My most important responsibility was teaching others in IT how to communicate. Over the years I developed a methodology so that any project manager could create their own communications plan or evaluate how effective their communications were for any given project. This article presents the results of that effort.

What follows are tips and tricks for improving communication during an SAP implementation. There is a methodology for creating a communications plan, and we will walk through an example communications plan scenario to illustrate the concepts that are introduced. At the end of the article is a sample communications plan, based on the scenario that runs through the article.

This article is for project managers — or for anyone who considers good communication critical to the success of a project. And although reference is made to SAP implementations, the information is applicable to communication in any project. There is nothing in this article that is revolutionary. In fact, much of it is simply common sense. But while much of the information contained within may seem obvious, you would be surprised at how often it is completely overlooked in the rush to start and finish a project.

What do we mean by "communication"?

Communication, at least within the context of this article, applies to the dissemination or exchange of information that needs to take place within a project, and it is defined more broadly than reports or email exception alerts. Communications for any given project can be summed up in one, simple sentence:

Who needs to know what when.

It is important to remember that communication is *not telling*. It is *not reporting*. Communication is a two-way street, and each individual communication is not linear, but circular. In all communication there are encoders and decoders. The encoder sends the message and the decoder receives it, interprets it, and then sends acknowledgement that the message has been received and understood. The encoder is usually the project manager and the decoders are those identified as the "who needs to know," or in other words, the audience.

Projects by their very nature require communication. A project's very purpose — be it to increase revenue, reduce costs, improve productivity or avoid risk — creates change within an organization. This change affects individuals, groups, or the organization as a whole, and how well this change is communicated directly affects the success and effectiveness of the project.

Communication in projects is the process of conveying that information in ways that enable the best possible outcome for the project.

For the purposes of this article, we will create a communications plan for the go-live of an SAP Learning Portal, an online training system, for a fictitious company.

The example — the go-live of an SAP Learning Portal

We are at the last stage of an SAP Learning Portal project: go-live. As project manager, we need to create a communications plan for the go-live of the Learning Portal — the new online training system. This system will provide online technical training on Microsoft Office applications used by all employees.

Communication has been ongoing since the beginning of the project. The system has been designed, tested (including user acceptance testing), and determined ready for production. Servers have been installed and connected to the network. Training materials have been created and tested with users. But now a new communications plan for the final phase of the project needs to be created in order to ensure the successful implementation of this new training system.

For the go-live, there are some conditions and constraints that must be taken into consideration as we develop our communications plan:

- Demand for this online training system is unknown, and it can only support a finite number of users without severe degradation of performance. Therefore, access to the Learning Portal must be carefully managed.
- Access to the Learning Portal requires a fast network connection. Therefore, employees who have a slow network connection will not be able to access the system.
- One of the corporate locations, Atlanta, is a recent acquisition. It has a separate network, and the employees at that location will not have access to the Learning Portal.

- Technical training on Microsoft Office applications is currently managed by the IT Technical Training team, which has no connection to the SAP teams, other than that all teams report eventually to the company CIO.

Who needs to know — identifying your audiences

The best project managers are the ones who know exactly who their stakeholders are for any given project. Stakeholders are anyone who is affected by your project or, sometimes more importantly, anyone who can affect your project. The former group includes end users, training and support groups, and the help desk or call center, which is often called upon to provide first-level support. The latter group might include your executive sponsor or the head of finance, or even that angry vice president on the third floor who five years ago resented the migration of his legacy system to SAP. Whoever is a stakeholder in your project will translate into an audience for your communications.

> ***Tip!***
>
> Integrators (or SAP consultants) are excellent resources to tap to identify stakeholders. If these individuals are experienced, there probably isn't a stakeholder group they haven't encountered at one time or another, regardless of the culture that exists at your particular organization.

Here's a little known secret about stakeholders: Some of them don't like you very much. But we all have to get along. To execute a successful communications plan (and therefore a successful project), you're going to need the help of experts.

Always cultivate those who can help you. My specific recommendation is that you should get on the good side of your organization's communications or public relations department. You may be resistant to this idea because of conflicts in the past, but there really is no way around it. Bypass them at your own risk, but at some point it will catch up to you.

This opens up a broader topic that can only be touched upon in this article: SAP is not just for SAP anymore. With the advent of SAP NetWeaver, with analytics being pushed out to general users, with more and more people within an organization dependent upon SAP for business information, SAP is no longer the domain of the SAP team. SAP is being woven into the fabric of every business process, and therefore it becomes imperative that anyone who implements an SAP tool, system, or infrastructure work closely with a broad cross section of teams within an organization. To avoid costly political battles, you should cooperate with everyone and neglect no one.

In my experience, there are two stakeholder groups that are routinely overlooked when planning a project: IT teams and external stakeholders.

- **IT teams:** Although this may be heresy, I consider IT and SAP teams as one and the same in this article. And as SAP continues to break down the boundaries between enterprise applications and infrastructure, this will only become more so in the future. Usually, IT and SAP teams report, eventually, to a CIO. Therefore, overlooking individuals and departments in IT, who are theoretically on the same team, can cause innumerable headaches. Many times this is the result of not thinking a project through. For example, there was one project I was involved in where the manager of the data center asked, during a conference call just before go-live, "Who's going to do the backups?" In this organization, backing up servers was the responsibility of the IT team, which knew nothing about the project. Although this is not a communications problem, per se, had there been more effective communications within IT much earlier (i.e., before go-live), this oversight might have been detected earlier.
- **External stakeholders:** As more and more technologies break out beyond the boundaries of the corporate firewall, projects that were once

self-contained now affect external audiences such as vendors and customers. Communicating effectively with these audiences is especially challenging and warrants an article of its own.

> ***Tip!***
>
> Stakeholders, and therefore audiences, change with each phase of a project. If you use email to distribute reports and general information about your project, be sure to update your distribution lists regularly.

So who should you consider as stakeholders when planning a project? **Figure 1** provides a sampling of commonly identified project stakeholders.

> ***Tip!***
>
> Make sure the boss knows. After identifying your audiences, always ask yourself, "Is it important I tell their boss first?" Avoid the political blunder of making an important announcement to an audience before discussing the situation with the boss.

Other audience considerations

Projects can be singular in nature or multifaceted. Depending on the scope of a project, some audiences might be included in the first phase, while others are included in the final phase; still others in every phase of a project. As you develop your communications plans for a project, consider the scope and phases of the project, and then consider its stakeholders in terms of the scope and phases. For example, for a company-wide migration to a new platform, the audience for the planning stage of such a massive, far-reaching project might include only the most senior members of the

Internal stakeholders

IT teams
- CIO
- Data center
- Enterprise architecture
- Help desk
- IT executive management team
- Network engineering
- PMO manager
- Project manager
- Project team (including integrators or other consultants)
- Support staff (first through third level support)

SAP teams
- BI
- CRM
- FI/CO
- HR

Executive
- Board of directors
- CEO
- CFO
- CIO
- Corporate communications
- Corporate executive team
- Executive sponsor

Back office
- Finance
- Human Resources
- Legal
- Real Estate

Business
- Manufacturing
- Marketing/sales
- Supply chain

External stakeholders
- Consultants
- Customers
- Partners
- Vendors

Figure 1 Stakeholder checklist

company (e.g., the CEO, the board of directors, etc.) and not the end user. Once the actual migration begins, neither the CEO nor the board of directors needs to know the details of this stage, yet the end users are an essential audience; therefore, your communications plan for the go-live migration will not include the CEO, the board of directors, etc., but will include others who are involved and directly affected by this stage of the project.

Individuals or groups that work for or report to those who have been identified as audiences should not be included in the communications plan, unless they too have been explicitly identified as an audience. Make sure that before you send any communication you carefully select those who need to know, and as you will learn in an upcoming section, make sure you are sending the correct communications message to the identified audience(s). In other words, don't copy everyone in your department or related departments on every piece of correspondence.

The example — identifying audiences for the go-live of the SAP Learning Portal

For our Learning Portal go-live example, the most obvious audience is the employees (the end users). Less obvious are several IT departments, namely, the IT Technical Training team (which currently handles the distribution of training CD-ROMs) and the Help Desk, where most employees currently call seeking training.

> ***Note!***
>
> For this project, the SAP teams will report to the CIO, as do the IT teams. We have decided that once the Learning Portal is activated, the IT Technical Training team will remain responsible overall for technical training and the Help Desk will still be the place employees call with questions about training.

Finally, there is one audience we almost always include if we plan to communicate with the user population at large. Our Corporate Communications department oversees all mass communication with employees.

The following stakeholders have been identified as the audiences for our communications plan:

- CIO — The executive sponsor of the Learning Portal go-live.
- IT Executive Management — As this project has, at one time or another, touched every facet of IT, it is important to keep IT Executive Management up-to-date as we near the go-live date. Also, this rollout will require the assistance of various IT departments (especially the IT Technical Training team and the Help Desk), which report to IT Executive Management.
- IT Director of Training and the IT Technical Training team — The IT Technical Training team, headed by the IT Director of Training, currently handles all technical training in the company. Currently, the IT Technical Training team oversees the distribution of CD-ROM courses that are being transferred online to the Learning Portal. The staff will now direct employees to the Learning Portal.
- Help Desk managers and Help Desk staff — Currently most requests by employees for technical training come through the Help Desk. Once the Learning Portal goes live, the Help Desk will support employees with a fast network connection to the Learning Portal, and employees with a slow network connection will be directed to the IT Technical Training team.
- Corporate Communications — Corporate Communications is in charge of content on the Corporate Intranet, which we intend to use as one of the main access points for employees to navigate to the Learning Portal. We will also be sending out bulk emails to employees, and we do not want to compete with any other communications in the company. Corporate Communications will verify this.
- Employees — The end users of the Learning Portal, who are located in Boston, New York, Chicago, Philadelphia, Denver, and Los Angeles.

Other audience considerations for the go-live of the SAP Learning Portal

There are several stakeholders considered, but found to be not relevant for this communications plan. Below are a couple of examples that may have been considered for our Learning Portal go-live:

- CEO and Corporate Executive team — The CIO has taken responsibility for communicating with this group; therefore, no separate communications are necessary.
- Atlanta employees — The Atlanta WAN has not been brought into the WAN of our company; therefore, employees at that division will not have access to this system. This will be noted in the communications plan.
- Vendor supplying online courses — The vendor has already been informed of the go-live date as part of the contract for services.

Who needs to know what — determining the messages needed

After who needs to know (i.e., your audiences), you need to determine exactly what you intend to tell them. This is probably the most difficult part of the exercise. Begin by examining each audience and then determine exactly what information this audience needs to know, what action this audience needs to take, or what outcome from this audience you expect in order to make this project successful. Knowing what information, what action, and what outcome you expect from an audience will help you determine the messages needed.

I recently participated in an interview with an IT executive who said, "You can't communicate too much." I would amend his statement to say, "Most of the time we don't communicate enough, but occasionally we are guilty of over-communicating."

There is a fine line, for example, between what is communication and what is just noise. Here are some common abuses:

- **The email deluge:** Some project managers copy everyone on everything. Ninety percent of their correspondence is irrelevant to the recipient, and after a while, their emails are DWO (deleted without opening). They become a modern day Chicken Little, discovering that, when they have something important to communicate, nobody is listening. If you have identified your audiences correctly, you should be communicating with just those individuals, groups, or teams.
- **The meeting minutes minutiae:** There are other project managers who are religiously devoted to their bureaucracy. They distribute the minutes to important meetings, which provide a laundry list of all discussion and actions, but without priority or importance. If action items from a meeting are not transferred to a master list, exception list, or similar tool, they are useless.
- **The rambling repository:** There are project managers who frequently send links to content management repositories. Once there, newcomers find all the information they want on the project, but without context or explanation.

The example — determining the messages needed for the go-live of the SAP Learning Portal

Going through our list of audiences, we determine that we need to communicate the following:

- CIO (executive sponsor) — We need to present the communications plan to him and seek his approval of it.
- IT Executive Management — We need to brief them on the progress of the project, what they can expect with the go-live, and how it will affect their respective staffs.
- IT Director of Training — We need to inform this individual on the progress of the project, what to expect with the go-live, and how it will affect training needs.

- IT Technical Training team — We need to inform this group on how to use the Learning Portal training system. We also need them to change their procedures so that they direct employees who have a fast network connection to the Learning Portal instead of distributing CD-ROM training courses. We also need to inform them on how to treat employees who have a slow network connection.
- Help Desk managers — We need them to know how the Learning Portal works, when it will be implemented, and how it affects the information the Help Desk staff will give employees calling to request training — i.e., employees with a fast network connection should be directed to the Learning Portal; employees with a slow network connection should be directed to the IT Technical Training team, which will distribute training-related CD-ROMs.
- Help Desk staff — We need the Help Desk staff to direct employees requesting training to the Learning Portal. We also need the staff to be aware that employees with a slow network connection will need to get CD-ROMs from the IT Technical Training team.
- Corporate Communications — We need their signoff on the communications plan.
- Employees — We need to make them aware of the Learning Portal and tell them when they can access the training materials (so as not to negatively impact the performance of the system by allowing everyone access at the same time).

Once we have determined the outcomes we expect from our communications, we craft the messages outlined in **Figure 2**.

CIO (executive sponsor)
• Inform him of and get approval for the Learning Portal go-live communications plan.
IT Executive Management (includes CIO)
• Inform them when the Learning Portal will go online. • Inform them of deployment timing. • Inform them of the Learning Portal go-live communications plan. • Inform them that the Learning Portal will only be available to employees with a fast network connection. • Inform them how employees who do not have a fast network connection will be supported. • Inform them of the process for accessing the Learning Portal. • Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.
IT Director of Training
• Inform her when the Learning Portal will go online. • Inform her of deployment timing. • Inform her of the Learning Portal go-live communications plan (making sure she understands when her staff will be communicated with). • Request that her department add the Learning Portal to the IT Technical Training suite of options. • Reinforce that distribution of CD-ROMs by the IT Technical Training team will continue. • Inform her that only employees with a fast network connection will have access to the Learning Portal.

Figure 2 Messages needed for the go-live of the example SAP Learning Portal

Continues on next page

***Figure 2** continued*

- Inform her that employees who do not have a fast network connection will continue to need training via CD-ROM.
- Inform her of the process for accessing the Learning Portal and possible troubleshooting options.
- Inform her of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.

IT Technical Training team

- Inform them when the Learning Portal will go online.
- Inform them of deployment timing.
- Request that they add the Learning Portal to the IT Technical Training suite of options.
- Reinforce that distribution of CD-ROMs will continue for employees with a slow network connection.
- Inform them that the Learning Portal will only be available to employees with a fast network connection.
- Inform them that employees with a slow network connection will need CD-ROM training.
- Inform them of the process for accessing the Learning Portal and possible troubleshooting options.
- Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.

Help Desk managers

- Inform them when the Learning Portal will go online.
- Inform them of deployment timing.
- Inform them of the Learning Portal go-live communications plan.
- Inform them of the process for accessing the Learning Portal and possible troubleshooting options.
- Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.

Help Desk staff

- Inform them when the Learning Portal will go online.
- Inform them of deployment timing.
- Inform them of the Learning Portal go-live promotional campaign.
- Inform them of the process for accessing the Learning Portal and possible troubleshooting options.
- Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.

Corporate Communications

- Inform them of the Learning Portal go-live promotional campaign to make sure there is no conflict with other company communications.

Employees (all except the Atlanta division)

- Inform them when the Learning Portal will be available.
- Inform them that to access the Learning Portal they need a fast network connection, and if they have a slow network connection, instruct them to contact the Help Desk for information on training-related CD-ROM distribution.

Identifying the communication tools

The best way to convey information is with one-on-one, face-to-face contact. This is not practical, obviously, if you want to communicate with your entire organization. Equally, sending a broadcast email for an important message may not have the impact you are seeking. Therefore it is important to prioritize your audiences, and match them with the best communication tool available. **Figure 3** lists some commonly used communication tools in order of effectiveness.

Each tool has its pluses and minuses that are affected by how large your audience is, how critical the timing of your messages needs to be, and how much budget you have for communication.

My usual practice is to select the communication tools after having identified the audiences and messages. If I see an overlap between several audiences, then I consider more of a broadcasting tool, such as email instead of face-to-face contact, for example (see the sidebar below for some tips on sending email). There are circumstances where you should eschew using a less effective method of communication, even though

1.	Face-to-face contact
2.	Direct telephone calls
3.	Meetings
4.	Teleconferences and videoconferences
5.	Instant messaging (note that most instant messages are not recorded or archived and therefore require follow-up with email or a telephone call)
6.	Person-to-person email
7.	Online forums, chat rooms
8.	Bulk telephone broadcasts
9.	Bulk email (i.e., distribution lists)
10.	Collateral (letters, chair drops, postcards, flyers)
11.	Posters
12.	Web sites (e.g., Corporate Intranet with static information pages)
13.	Organization or third-party news sources: • Corporate Intranet with news pages or feeds • Company newsletter • Press releases

Figure 3 Sample communication tools

Tips for sending email

Because so much communication is done by email, many of us take for granted how hard it can be to use the medium to communicate effectively. Here are some things to remember before you hit the "send" button:

- Find a good editor and give them the copy before you send it. Typos and other errors can make you look foolish and hurt the credibility of your project.
- Test email communications before sending them. I've known many project managers who would never put any untested software before users but would send messages or publish other communications having never done it before. Always start by sending a copy of the email to yourself and a few others to make sure links are not broken or graphics show up.
- Check to make sure the distribution list you need actually exists. For example, you might want to send an email message to "All Finance." Don't wait until the day you plan to send your email to find out no one has created such a list.
- Make certain you have all the necessary permissions before you send mass emails. Most email systems, particularly in this age of computer viruses, block attempts by employees to send to large distribution lists. Check with your email administrator to see if you have the proper authorizations.

it may mean extra cost or time. In those cases, factors to consider include:

- The higher up the audience is in the organization food chain the more direct the communication should be.
- The greater the impact the stakeholder has on your project the more direct the communication should be. You want regular face-to-face time with your executive sponsor, for example. Just dropping him an email or copying him on reports isn't going to cut it.
- Resources responsible for tasks on the critical path need consistent and direct communication.

The example — identifying communication tools for the go-live of the SAP Learning Portal

For this go-live, we are in a unique position. We want employees to be aware the system exists, but we don't want them to use it — at least not right away. Therefore, we want to broadly inform them that the Learning Portal is available; however, they should not expect to use it the second they learn about it. They will have to wait for notification of its availability to them via email.

The more critical communications need to occur within IT. The IT Director of Training and the Help Desk managers need to prepare their respective staffs for the changes that will occur when the training system goes live. The IT Technical Training team and the Help Desk staff will be responsible for directing users seeking training to the Learning Portal, so it is important they understand what their roles are.

Figure 4 summarizes the tools we will use for the example.

We have decided to use email to announce the Learning Portal to employees and to use the Corporate Intranet to provide information about the Learning Portal for those seeking information on technical training. To communicate with the IT Technical Training team and Help Desk managers and staff, we will distribute information using email and then follow it up with a teleconference to explain the project and to hear any concerns or other feedback.

Of course, at the top of the audience list are the CIO, IT Director of Training, and Corporate Communications. Direct contact with these individuals and the contact person(s) in the Communications Department will take place on a one-to-one basis for the most part.

Who needs to know what when — scheduling the communications timeline

Timing in communications, as in comedy, is everything, and next to figuring out what to tell your audiences, when you're going to tell them is hardest to determine. As communications rarely influence the milestones of your project, the easiest approach is to work backward from the project milestones to create a communications plan.

Here are some tips to remember when planning your timing:

- If timing is important, don't depend upon communications tools over which you have no control. I once worked on a project that, at the time, was considered the company's most important initiative for that year. We were planning to begin our rollout and thought it would be appropriate to announce that in the company newsletter. A writer from Corporate Communications conducted the interviews, the story was written, but at the last minute the story was pulled. Fortunately our communications plan was not dependent on the story.
- Start at the top and work down. Don't undermine your project by telling a group of employees without first communicating with their supervisor.
- Be mindful of vacations, holidays, and other time off. Announce changes well in advance. Don't wait

Corporate Intranet
For this project, to communicate with all employees we will post a Web site on the Corporate Intranet that contains the following: • Overview of the Learning Portal • Sample list of available courses • Links to the Learning Portal Links to this Web site will be found under “Employee Training” (in the HR menu on the Corporate Intranet home page toolbar) and on the main IT page (under “Business Units” on the Corporate Intranet home page toolbar). (Remember that Corporate Communications is responsible for the Corporate Intranet.)
Email
• To communicate with IT Executive Management, the IT Technical Training team, Help Desk managers, and Help Desk staff • To communicate with employees
Teleconference
• To communicate with IT Executive Management and Help Desk managers first, and then with the IT Technical Training team and Help Desk staff
Face-to-face meetings, direct telephone calls
• To communicate with the CIO, the IT Director of Training, and Corporate Communications

Figure 4 Communication tools selected for the example SAP Learning Portal go-live

until the day before, or you may miss important audiences who are taking vacation or personal days. Make it a practice to announce any significant change several weeks in advance, then publish another announcement a week or so before, and then the day before the change.

- Consider using different tools to communicate with your audiences. Mixing up media helps reinforce the message. Publish important messages on posters, on chair drops, and in email.

The example — scheduling the communications timeline for the go-live of the SAP Learning Portal

Our Learning Portal is set to go-live on March 2. Communication with the employees is particularly critical because demand for this system is unknown and there is a concern that too many simultaneous users will negatively affect the overall performance of the system.

The project team decides to forego a company-wide announcement for a slow, rolling announcement. To reduce the possibility of too many employees using the system at once, we have decided to issue an email announcement of the Learning Portal after normal business hours to employees in different locations on a rolling schedule.

Prior to the go-live date, the emphasis of the communications timeline centers around informing various IT audiences of the launch and of the roles they will play in it. After the go-live date, the emphasis of the communications timeline switches to the end users (i.e., employees by location) informing each corporate location of the availability of the training site.

Date	Task
Friday, Feb. 2	• Complete a draft of the Learning Portal go-live communications plan with examples of the following deliverables: - A copy of the Learning Portal Web page (included in the appendix to this article), including an explanation of the Learning Portal, a list of courses, information on hardware, software, CD-ROM distribution, and reporting resources, and contact information for questions or problems - A draft of the email to employees (included in the appendix to this article) announcing Learning Portal training
Wednesday, Feb. 7	• Hold a facilitated review of the communications plan (see the section "Assembling the communications plan" in the article text) • Review the communications plan with Corporate Communications. Get permission to put the plan on the Corporate Intranet.
Friday, Feb. 16	• Distribute via email the Learning Portal project profile (which provides an overview of the project), the Learning Portal support and maintenance plan, and the communications timeline and deliverables to IT Executive Management.
Monday, Feb. 19	• Attend IT Executive Management weekly teleconference and present the Learning Portal go-live communications plan.
Wednesday, Feb. 21	• Meet with IT Director of Training and review the Learning Portal go-live, including the communications plan, the project profile, the support and maintenance plan, etc.
Monday, Feb. 26	• Distribute via email the Learning Portal project profile, the support and maintenance plan, and the communications timeline and deliverables to the IT Director of Training, the IT Technical Training team, and Help Desk managers.
Tuesday, Feb. 27	• Hold a teleconference with Help Desk managers to respond to issues, questions, and concerns. • Hold a teleconference with the IT Technical Training team to respond to issues, questions, and concerns.
Tuesday, Feb. 27 – Friday, March 2	• Help Desk managers distribute the Learning Portal project profile, the support and maintenance plan, and the communications timeline and deliverables to respective staffs, with special emphasis on communicating with the IT Technical Training team.
Friday, March 2	• Transfer of the Learning Portal to the production server. • Add links to the "Employee Training" and "IT" pages on the Corporate Intranet. • Send email to the IT Director of Training and the IT Technical Training team announcing the Learning Portal is now live.
Friday, March 2, 6 pm EST	• Send an email to all employees in Boston announcing the availability of Learning Portal. Boston is first because it will put the least strain on the WAN and the Learning Portal servers. Also, most of the project team is located there.
Monday, March 5	• Monitor the performance of Learning Portal servers.
Monday, March 5 – Wednesday, March 7	• Hold a teleconference with key stakeholders to evaluate communications tactics and tools.

Figure 5 The schedule for the example SAP Learning Portal go-live

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Figure 5 *continued*

Date	Task
Friday, March 9, 6 pm EST	• Send an email to all employees in New York announcing the availability of the Learning Portal.
Friday, March 16, 6 pm EST	• Send an email to all employees in Chicago announcing the availability of the Learning Portal.
Friday, March 23, 7 pm EST	• Send an email to all employees in Philadelphia announcing the availability of the Learning Portal.
Friday March 30, 6 pm EST	• Send an email to all employees in Denver announcing the availability of the Learning Portal.
Friday, April 13, 9 pm EST	• Send an email to all employees in Los Angeles announcing the availability of the Learning Portal.
Friday, April 20, 6 pm EST	• Send an email to remaining company employees announcing the availability of the Learning Portal.

Figure 5 shows the communications timeline determined by the project team.

Assembling the communications plan

Having worked out who needs to know what when, the next step is to assemble the communications plan.[1]

As we have discussed, the plan should include:

- Audiences
- Messages
- Timeline

There is something else that you should include in your communications plan: drafts of the important communications. Having taken the time to determine the messages that need to be communicated, you should take the time to draft them. As suggested in the sidebar on page 61, you should work with an editor or someone in the Corporate Communications department to ensure that the intended meanings of all your communications, be it email or Web page, are clear and concise.

Early in my career I resisted drafting the communications so far in advance. Fortunately I had a boss who insisted, and on more than one occasion, having the communications ready early averted a potential disaster. The one downside is that changes to the project between the time the communications plan is completed and executed can mean significant rework of the communications.

Communications plans should contain finished drafts of the most important communications. I usually make certain there is a message from the executive sponsor or some other key executive announcing the project to employees or to a specific end-user audience that directs them to give their complete cooperation. At times I have taken these messages to the executive for their signoff. If they balk or suggest that the responsibility for such a message belongs to someone else, you now have an indication you may be in trouble.

After the communications plan is assembled, it must be reviewed and approved. If, for example, your plan includes an announcement from the CEO to all employees, you need the approval of the CEO. Keep

[1] The appendix to this article contains a sample communications plan based on our Learning Portal go-live example scenario.

in mind that executives and other senior management are sometimes skittish about putting their name to something over which they perceive they have little control. You don't want your go-live date to slip because an executive has not signed off. Therefore it's important to assemble the communications plan as far in advance as possible to avoid the bottleneck of getting approval.

> ***Tip!***
>
> Project managers frequently cite lack of executive support as the number one risk of failure in any project. Without buy-in from the top, it is nearly impossible to get buy-in from the bottom. In my experience, a fully formed communications plan serves as an excellent indicator of how far the executive management team is willing to go to support the project, much like a parakeet in a coal mine.

In addition to the regular approvals, I recommend putting the plan through a facilitated review. This is a simple process that puts the communications plan in front of a handful of key stakeholders to make sure you have covered your bases. I've used this process with great success, but only when participants are committed to it.

Facilitated reviews

A facilitated review is a rapid and objective process for key stakeholders to evaluate a communications plan with its key deliverables. The process is designed to improve the quality of a project and increase the level of success with a project by getting feedback from the key stakeholders.

It is the responsibility of the project manager to put together a facilitated review. First, the project manager must select a *facilitator*, who will lead the discussion, and a *scribe*, who will take minutes. The project team should be encouraged to attend, although the project manager will be the lead individual to act as a representative of the plan. All stakeholders should also be encouraged to attend, even if it is only to observe the process.

Then the project manager must also select a panel of no more than five *reviewers* of the project documents. The project manager can select more individuals, but no more than five should participate in the actual review.

There are a few ground rules to consider when selecting this panel:

- Reviewers should include a cross-section of subject matter experts and stakeholders — especially customers.
- Reviewers must have the communications plan well in advance so they can spend quality time reading and digesting it.
- Although anyone can attend a facilitated review, only the reviewers and the project manager (or his or her designee) can comment on the plan. Observers will not be permitted to ask questions or participate in any manner.

At the appointed time set by the project manager, the facilitator, scribe, reviewers, project team, and other interested stakeholders convene. The facilitator chairs the meeting. The meeting cannot take place unless a quorum (three or more) of reviewers is present.

The facilitated review then uses the following format:

1. The facilitator opens by explaining the ground rules and procedures for a facilitated review.
2. The facilitator asks each reviewer how much time he or she spent reviewing the project documents, and the response is recorded in the minutes. The facilitator must determine if the reviewers have spent enough time to reasonably be able to review the documents thoroughly. If the facilitator believes that a quorum of reviewers have spent enough time reviewing the documents, then the

facilitator will proceed with the next phase of facilitated review; if not, then the review must be rescheduled.

3. Next the facilitator asks the authors of the documents (the project manager or the designee) to take up to five minutes to introduce the communications plan.

4. Going around the room, the facilitator asks each reviewer to state one positive aspect of the documents.

5. The facilitator then asks each reviewer one at a time to raise an issue or question he or she may have about the documents. The project manager (or the designee) may present a limited response to the issue or question raised. The goal of the response is to reach a resolution, not to engage in a debate. The project manager should limit his or her response to a clarification (to correct a misunderstanding), an affirmation (which will result in a change of the documents to address the issue raised), or a dissent (meaning the project manager does not agree with the issue). The facilitator continues to go to each reviewer until all issues or questions have been raised.

6. After the reviewers have exhausted their lists of questions and issues, the facilitator will ask each reviewer to cast one of three votes on the documents:

   - **Accept the documents as is:** The documents are satisfactory without any revisions.
   - **Passed with revisions:** The documents need to be updated based on the feedback received from the reviewers, and then sent out for their approval.
   - **Not passed:** The documents require substantial revision and another facilitated review must be conducted.

> ***Note!***
>
> If the facilitated review runs more than one hour before the reviewers exhaust their lists of issues and questions, it is recommended that the facilitator announce that the meeting be adjourned and another review scheduled after the documents have been redrafted.

Facilitated review is a consensus-building process. Therefore, if only one of the reviewers votes “not passed,” then the documents still must be redrafted and another review held. If one dissenting reviewer raises issues that result in an impasse (e.g., the issues raised by the dissenting reviewer contradict the wishes of another reviewer), the project manager must then take the issue or issues to the executive sponsor for direction.

After the facilitated review, the scribe publishes the minutes and sends them to each reviewer for approval. If the documents “passed with revisions,” then the project team makes the agreed upon changes and distributes the updated documents to the reviewers for their approval. The reviewers must review the documents in a timely fashion and notify the project manager whether they approve the documents.

Executing the communications plan

You’ve drafted your communications plan and received approval to proceed. Now all you have to do is execute. Pulling the trigger on any plan always sounds simpler than it is. Here are a few words of advice that can help make your execution as uneventful as possible.

- **Leave communicating to the experts.** Your Corporate Communications department is your organization’s communications experts. They don’t tell you how to configure your servers; therefore, you shouldn’t tell them how to communicate. When it comes to collateral (flyers, brochures, posters, etc.) or creating a promotional campaign, leave it in their capable hands. Just don't expect them to turn around the deliverables overnight.

- **Be prepared for feedback.** Whenever I sent an email to all employees, I made certain I kept my schedule open for two or three hours afterward to allow time to respond to the multitude of questions and comments (and sometimes FLAMES) from email recipients.

- **Always have a contingency plan.** Sometimes things go wrong. For example, if you are replacing your email system and crash it in the process, you won't be able to send an email to users announcing what happened. Use common sense and always have a back door just in case things go awry.

Conclusion

You may encounter reluctance by your boss, peers, or project team to spend time on a "communications plan." There may be a belief that it is overkill. The important thing is to go through the exercise, which for small projects can be done in a few hours. Much of the work has to be done anyway. You need to identify your audiences. You also need to explain what you are doing and when. All a communications plan does is handle it in a much more orderly way to ensure your project goes off without a hitch.

You don't have to create a separate communications plan; you can add communication tasks to your training plan or change management plan, or even just add the tasks to your overall project plan. The important thing is to remember that good communication can make a good plan better.

Appendix — a communications plan for the go-live of the example SAP Learning Portal

For the past two years, the Company has made available to its employees computer-based training. The method for delivery has been CD-ROMs, which have been distributed through the IT Technical Training team and Help Desk staff at all major facilities.

By March 2, the SAP Learning Portal computer-based training system will be placed on the Corporate Intranet. Employees with high-speed connections will be able to take courses in real time.

The online training system is not engineered to handle a large number of clients at one time. Normal capacity is estimated to be no more than three users per hour. Since usage will spike significantly if all employees are simultaneously notified of the system's availability, a rolling communications plan is recommended. Once a week over a period of several weeks, an email message will go out to employees in one or more locations regarding the availability of the Learning Portal until all employees are notified.

Audience and messages

CIO (executive sponsor)
• Inform him of and get approval for the Learning Portal go-live communications plan.
IT Executive Management (includes CIO)
• Inform them when the Learning Portal will go online. • Inform them of deployment timing. • Inform them of the Learning Portal go-live communications plan. • Inform them that the Learning Portal will only be available to those with a fast corporate network connection. • Inform them how employees who do not have a fast corporate network connection will be supported. • Inform them of the process for accessing the Learning Portal. • Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.
IT Director of Training
• Inform her when the Learning Portal will go online. • Inform her of deployment timing. • Inform her of the Learning Portal go-live communications plan (making sure she understands when her staff will be communicated with). • Request that her department add the Learning Portal to the IT Technical Training suite of options. • Reinforce that distribution of CD-ROMs by the IT Technical Training team will continue. • Inform her that only employees with a fast corporate network connection will have access to the Learning Portal. • Inform her that employees who do not have a fast corporate network connection will continue to need training via CD-ROM.

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• Inform her of the process for accessing the Learning Portal and possible troubleshooting options. • Inform her of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.
IT Technical Training team
• Inform them when the Learning Portal will go online. • Inform them of deployment timing. • Request that they add the Learning Portal to the IT Technical Training suite of options. • Reinforce that distribution of CD-ROMs will continue for employees with a slow network connection. • Inform them that the Learning Portal will only be available to employees with a fast network connection. • Inform them that employees with a slow network connection will need CD-ROM training. • Inform them of the process for accessing the Learning Portal and possible troubleshooting options. • Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.
Help Desk managers
• Inform them when the Learning Portal will go online. • Inform them of deployment timing. • Inform them of the Learning Portal go-live communications plan. • Inform them of the process for accessing the Learning Portal and possible troubleshooting options. • Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.
Help Desk staff
• Inform them when the Learning Portal will go online. • Inform them of deployment timing. • Inform them of the Learning Portal go-live promotional campaign. • Inform them of the process for accessing the Learning Portal and possible troubleshooting options. • Inform them of the available support resources for hardware, software, CD-ROM distribution, and reporting as they relate to the Learning Portal.
Corporate Communications
• Inform them of the Learning Portal go-live promotional campaign to make sure there is no conflict with other company communications.
Employees (all except the Atlanta division)
• Inform them when the Learning Portal will be available. • Inform them that to access the Learning Portal they need a fast network connection, and if they have a slow network connection, instruct them to contact the Help Desk for information on training-related CD-ROM distribution.

Special consideration — Atlanta division employees

Because this location does not have access to the corporate Internet at this time, this group of employees is not included in the communications plan. Before any communication can take place with this group, the current access to CD-ROMs needs to be investigated.

Communication tools

Corporate Intranet
For this project, to communicate with all employees we will post a Web site on the Corporate Intranet that contains the following: • Overview of the Learning Portal • Sample list of available courses • Links to the Learning Portal Links to this Web site will be found under “Employee Training” (in the HR menu on the Corporate Intranet home page toolbar) and on the main IT page (under “Business Units” on the Corporate Intranet home page toolbar). (Remember that Corporate Communications is responsible for the Corporate Intranet.)
Email
• To communicate with IT Executive Management, the IT Technical Training team, Help Desk managers, and Help Desk staff • To communicate with employees
Teleconference
• To communicate with IT Executive Management and Help Desk managers first, and then with the IT Technical Training team and Help Desk staff
Face-to-face meetings, direct telephone calls
• To communicate with the CIO, the IT Director of Training, and Corporate Communications

Timeline

Date	Task
Friday, Feb. 2	• Complete a draft of the Learning Portal go-live communications plan with examples of the following deliverables: - A copy of the Learning Portal Web page (also included in this appendix), including an explanation of the Learning Portal, a list of courses, information on hardware, software, CD-ROM distribution, and reporting resources, and contact information for questions or problems - A draft of the email to employees (also included in this appendix) announcing Learning Portal training
Wednesday, Feb. 7	• Hold a facilitated review of the communications plan. • Review the communications plan with Corporate Communications. Get permission to put the plan on the Corporate Intranet.
Friday, Feb. 16	• Distribute via email the Learning Portal project profile (which provides an overview of the project), the Learning Portal support and maintenance plan, and the communications timeline and deliverables to IT Executive Management.
Monday, Feb. 19	• Attend IT Executive Management weekly teleconference and present the Learning Portal go-live communications plan.

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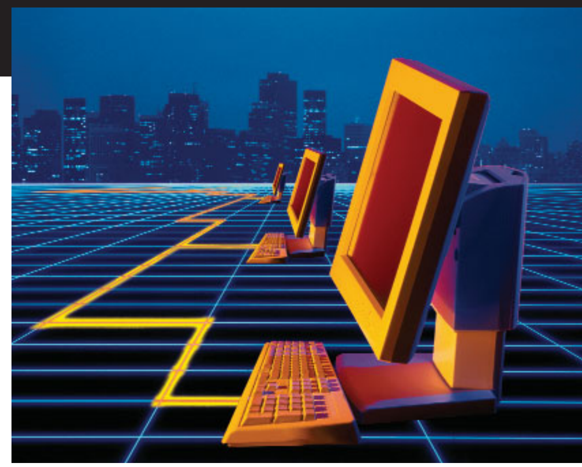
Wednesday, Feb. 21	• Meet with IT Director of Training and review the Learning Portal go-live, including the communications plan, the project profile, the support and maintenance plan, etc.
Monday, Feb. 26	• Distribute via email the Learning Portal project profile, the support and maintenance plan, and the communications timeline and deliverables to the IT Director of Training, the IT Technical Training team, and Help Desk managers.
Tuesday, Feb. 27	• Hold a teleconference with Help Desk managers to respond to issues, questions, and concerns. • Hold a teleconference with the IT Technical Training team to respond to issues, questions, and concerns.
Tuesday, Feb. 27 – Friday, March 2	• Help Desk managers distribute the Learning Portal project profile, the support and maintenance plan, and the communications timeline and deliverables to respective staffs, with special emphasis on communicating with the IT Technical Training team.
Friday, March 2	• Transfer of the Learning Portal to the production server. • Add links to “Employee Training” and “IT” pages on the Corporate Intranet. • Send an email to the IT Director of Training and the IT Technical Training staff announcing that the Learning Portal is now live.
Friday, March 2, 6 pm EST	• Send an email to all employees in Boston announcing the availability of the Learning Portal. Boston is first because it will put the least strain on the WAN and the Learning Portal servers. Also, most of the project team is located there.
Monday, March 5	• Monitor the performance of the Learning Portal servers.
Monday, March 5 – Wednesday, March 7	• Hold a teleconference with key stakeholders to evaluate communications tactics and tools.
Friday, March 9, 6 pm EST	• Send an email to all employees in New York announcing the availability of the Learning Portal.
Friday, March 16, 6 pm EST	• Send an email to all employees in Chicago announcing the availability of the Learning Portal.
Friday, March 23, 7 pm EST	• Send an email to all employees in Philadelphia announcing the availability of the Learning Portal.
Friday March 30, 6 pm EST	• Send an email to all employees in Denver announcing the availability of the Learning Portal.
Friday, April 13, 9 pm EST	• Send an email to all employees in Los Angeles announcing the availability of the Learning Portal.
Friday, April 20, 6 pm EST	• Send an email to remaining company employees announcing the availability of the Learning Portal.

Copy of the Learning Portal Web page

The Learning Portal



- Need a refresher on how to use Microsoft Excel?
- Looking for a tutorial on how to build and maintain a Web site?
- Want to know the best way to manage a project?

The Learning Portal has courses for all things technical.

About this site

This page is your link to the Learning Portal, the company's new online learning tool. The Learning Portal offers online courses for the most frequently used software products and tools.

In addition to courses on the Microsoft Office suite (Word, Excel, Access, etc.), there are tutorials on software such as Microsoft Project, operating systems such as Windows NT, and courses on best practices such as project management and Web site development and maintenance.

Below you will find a link to the Learning Portal, and directions for how to log on and register for courses. It is recommended that you print this page before proceeding.

The Learning Portal online training system is not recommended for employees who are using a 56K connection or less. Our IT Technical Training team does offer all the courses on CD-ROM. Contact your local Help Desk at [URL] for more information.

[INSERT LINK AND INSTRUCTIONS FOR FIRST TIME VISITORS HERE]

Draft of email to employees

FROM:	IT Technical Training
TO:	[all employees at specific site]
DATE:	[Friday after work hours]
SUBJECT:	Company Launches New Online Training System

The Company has placed its computer-based training system online.

The Learning Portal offers courses on the most-used Microsoft applications, such as Word, Excel, PowerPoint, Access, Internet Explorer, and Outlook, as well as seminars on project management, Web page construction, and other business-related topics.

You can find the Learning Portal on the Company Intranet at [URL]. You can also find links to the Learning Portal on the Company Intranet home page (point to "Business Units" on the Intranet menu bar, click on IT, and follow the links).

Please note that the Learning Portal is not recommended for remote users with a 56K connection or less. Employees who connect to the network over a normal telephone line should contact the Help Desk at [URL] to find out about taking the Learning Portal courses using CD-ROMs.

