Sample Communication Plan and Checklist

Communication Element	Key Message	Recommend Communication Channel	Author/Sender	Date Sent
Pre-Launch Information for Stakeholders	Outline a timeline of the project for practice heads, office partners, and managers. Set expectations for their involvement and express the importance of their engagement to the project's success.	Meeting/ conference call	Executive Sponsor or Project Sponsor	
Project Launch	Announce the firm's technology launch plan. Communicate the Project Vision tied to business drivers. Brand the communication with the project theme. Communicate enthusiasm and convey why this is a positive change for the firm, and the users. Set expectations with regard to the role of the project team, managers, and frontline employees.	Email	Executive Sponsor	
Manager Communication to teams	Follow-up on the launch announcement and provide any insight into timeline for team members, direct impact the upgrade might have on team members, any team-specific software or functionality that will be impacted.	Small group meeting	Direct Supervisor or Office Sponsor	
Announcement of Project Briefings	Encourage attendance and explain the importance behind attending the sessions to understand the project plan and benefits, learning opportunities, and expectations.	Email	Executive Sponsor	
Project Briefings	Deliver project briefings in each office to build awareness of the coming changes and to build enthusiasm. Reiterate the business reasons behind the change. Kick these session off with an introduction from the Executive Sponsor.	Info Meetings	Project Sponsor and Project Team	

Communication Element	Key Message	Recommend Communication Channel	Author/Sender	Date Sent
What to Expect and What You Need to Do	As migration approaches for each office, it is critical to communicate the "must know" or "gotcha" information that will help smooth the way for a successful migration for the user.	Email	Project Team/ Communication Lead	
Technology Commercials	Get people excited about what's to come with the technology commercials. Post them on a walk-up kiosk set-up in a central location.	Kiosk, flat-screen or portal	Project Team	
Learning Plans and Pre-Learning Opportunities	Promote learning plans that include eLearning links, classroom learning schedule, and one-on-one coaching appointments. These will be personalized communications depending on the recipient. Promote the idea of a personal learning plan, tailored to address individual needs. Reiterate expectations around the importance of users being proactive and committing to learning firm best practices and gaining an awareness of key functionality that will improve client service and self-sufficiency. **Note:** Time of this communication is four to six weeks prior to migration.	Email	Project Communication Lead or Direct Supervisors	

Communication Element	Key Message	Recommend Communication Channel	Author/Sender	Date Sent
Learning and Deployment Reminders	Reminder around scheduled attendance of instructor-led training, including the details of when and where. Include a quick "What to Expect" note reinforcing that the course will be succinct, targeted, and efficiently run. Time is valued and learning is respected. Set expectations again about when users will receive the new software and about the floor support that will be available. Also include reminders around any "must do" tasks, including surrendering laptop computers. Keep this email short and to the point. **Note:** Timing of this communication is one to two days prior to individual migration.	Email	Project Team/ Communication Lead	
Welcome Kit	Deliver a Welcome Kit to each user's workstation in an obviously visible place. Best practices around this include a "Must Know" one-page resource that is colorful and branded to help with visibility.	Email and hard copy	Project Team/ Communication Lead	
Follow up and check in	One to two days after migration, managers should reach out to employees to reinforce messages about on-going learning, floor support, and solicit feedback especially as it relates to issues with team workflows. Encourage them to ask questions or express concerns. Communication should express that this is a long-term partnership and commitment and include a reminder for how and where to get immediate support or personal coaching on a specific topic.	Email	Direct Supervisor or Office Sponsor	

Communication Element	Key Message	Recommend Communication Channel	Author/Sender	Date Sent
Celebration Messages	Celebrate the successful completion of each office's migration as a milestone for the project. As appropriate, include quotes and testimonials (with permission) that help reinforce that this was a success. If culturally appropriate, include in-person celebrations that include refreshments.	Email/Town Hall Meetings	Project or Office Sponsor	
Project Completion Celebration Message	Communicate the success story of the project, and share the vision of the impact the change will have on the firm. Thank users for their cooperation and their patience, and acknowledge the contributions of those involved.	Email	Executive Sponsor	
Executive Presentation	Tell the success story of the project to Executive Management, including testimonials, but also budget and financial information. The story should map back to the project business drivers and illustrate how the project supported each of those.	Meeting/ Presentation	Project Sponsor	