**Communications Plan Template**

**Objective(s):**

* This can be tweaked to fit whatever project you’re communicating. It should be high level and a simple statement of what you’ve been asked to do.
* Example: To effectively communicate to [identified stakeholders or audience] the [policy/procedure/project/process], which outlines the requirements/steps necessary to [state action].

**S.M.A.R.T. Goal:**

* Smart stands for Specific, Measurable, Actionable, Relevant and Time-Based and is different than an objective in that the statement will be much more specific. The S.M.A.R.T. will indicate how you will measure success.
* Example: To effectively communicate [new or revised policy, procedure/project/process] to [state your audience (be specific)] through channels including [list channels such as email from leadership, verbal updates in meetings, printed memos, posters or employee advocacy] by [include a target date for communications to be implemented], with follow-up communications planned through [add another date or time period].

**List of Stakeholders:**

* This is the initial list of people who are affected in some way by, or who need to be informed of, the policy/procedure/project/process that you’re helping to communicate.
* I like to err on the side of caution and include everyone I can think of in this list, no matter how small their interest in the effort.
* Like the other sections of this plan, the list may become longer or shorter, but it can serve as a means of discussion with the project leadership and ensure that everybody is included in your communications effort and that no one is left out.

**Stakeholder Analysis:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Potential Influence** |  |  |  |  |
| **High** | **Involve/Engage**  Decision-makers in the organization oftentimes responsible for the company culture and can greatly influence change through words and actions, but who may not be concerned about the specific project | **Involve/Engage**  Decision-makers and influencers in the organization, but this group has a more vested interest in the outcome of the effort and may want to be more involved in the roll-out. High-level leaders of people would fall into this category. | **Partner**  Decision-makers and key leaders who have a vested interest in the success of this project/ process/ procedure. As the responsible communicator, these people will be your partners in the comms effort. |  |
| **Medium** | **Inform**  People who need to know about the process or change, but aren’t as vested in the outcome. May be leaders in another part of the organization, for example. | **Consult**  Interested in the roll-out and may have helpful suggestions, but don’t have as much influence over the success of the process/project/procedure. | **Consult**  This group may be directly affected by the project/process/procedure or its change, but have not been involved in the decision-making. |  |
| **Low** | **Inform**  This group is unaffected by the change or the rollout and doesn’t have a vested interest. | **Inform**  This group isn’t highly influential, but may be able to help you in your efforts and would appreciate a heads-up before roll-out. | **Consult**  These people can’t influence the process, but have a vested interest in the outcome. This is oftentimes your primary audience for the communications effort. |  |
|  | **Low** | **Medium** | **High** | **Potential Interest** |
|  |  |  |  |  |

**Key Messages**

These are the messages that you will create in conjunction with your project leadership.

These messages can be sent to and used by anyone in the organization to help communicate your messaging.

Helpful channels may include:

* Talking points for leadership to be used in meetings, conversations, etc.
* As a basis for follow-up emails
* In the creation of media statements, social media posts or any other public-facing medium, if necessary

Higher level talking points may also be the basis for a frequently asked questions (FAQ) document, if the subject matter will invite queries from affected parties or audiences.

Key messages should start with the change being presented and also include the “why” for the change.

These messages should be positive and optimistic, even they have been created to address a recent challenge.

Messages should also address any action(s) that the intended audience must take.

A timeline for the change or rollout should be included.

Make sure you include contact information for someone in a position of authority over the project if someone has a specific question that has not been addressed in high-level messaging.

If multiple questions are received or if the process/policy/procedure/project is complex, consider creating a separate FAQ document and including in your channels.

Be cognizant of changing messaging and ensure that this document is being used as your master messaging document.

**Tactics and Channels:**

Use this section to document the high-level actions you will take along with the associated channels that you will used to communicate.

This section can be broken into two separate sections. For example, I may decide to list out the channels that I’m going to use:

* Email from leader
* Article on internal company portal
* Posters printed for each location
* Talking points distributed to managers of people
* Mention in Monday Morning Leadership meeting
* Media statement or press release
* Social media content
* Website content

I may include my tactics in a tactical communications plan and timeline (see below).

If I’m going to combine these two sections, I may include an example such as:

* Send talking points to senior leadership with a copy of the communications plan on January 18.
* Draft an email from company leadership to be sent the morning of January 20.
* Draft and issue an internal article to the company intranet site to run the afternoon of January 20.
* Update company website the afternoon of January 20.
* Draft and issue a press release on January 21 to local media outlets.
* Ensure that communications teams are equipped with talking points, FAQs and approved media statement to be used if queried.

**Tactical Communications Plan and Timeline**

This section will include details on the roll-out of each communications activity and outline specific elements in support of your S.M.A.R.T. objective. This is my favorite section of the communications plan because it is how you’re going to measure the success of your communications effort.

| Tactical Communications Plan | | | | | |
| --- | --- | --- | --- | --- | --- |
| Activity/Material/Channel | Goal | Stakeholder/Audience | Responsible Party | Due Date/Timeframe | Notes |
| In this box, list each activity that you will perform in support of the identified communications objective that we’ve discussed above. I’ve listed some examples below. | In this box, state how this specific activity supports the overall goal of the communications effort. (This does not have to be a S.M.A.R.T. goal.) | This is the person, group or organization to whom this activity is targeted. Breaking each activity down by stakeholder or audience group will also help you to identify where you may have gaps. | While you may be the one putting the plan together, chances are, the specific activities will be spread across multiple parties. For example, a senior leader (or his or her assistant) may be responsible for the sending of an email. | This can be a specific date or a general idea of when the activity will take place. When you first draft your plan, many of these boxes may be completed as TBD until you have a better idea of the timeline. | This section allows for any documentation of unusual circumstances or challenges that you might face during the execution of the communications plan. |
| Talking Points | Intended to be used as a resource for all company leadership and state leadership with their employees through a variety of channels (e.g., staff meetings, weekly communications channels, etc.). | Senior leadership and managers of people | Sarah Barczyk to draft and send to identified distribution list. | Morning of January 18, 2021. | Sarah will also draft the email to accompany the talking points and copy all assistants on the message. |
| Email to identified employees | Will introduce the project/campaign and inform these teams of the resources that can be used through state and department-level stakeholders. | All company employees | Sarah Barczyk to draft from existing materials, Senior Leadership (or assistants) to distribute to organizational partners. | Morning of January 20, 2021. | Sarah Barczyk will reach out to each administrative assistant to ensure that he/she is prepared to send from the senior leader’s mailbox. |
| Company Intranet Article | High-level article reinforcing the email from senior leadership. | All company employees. | Sarah Barczyk to draft from approved talking points. Corporate Communications to post. | Afternoon of January 20, 2021. | Sarah to ensure that Corporate Communications is aware of this project and the need for the article to post on this date and time. |
| Update Company Website | External messaging related to the project. May include a banner on the homepage with a link to a subpage with additional information. (Note that your communications plan may only be internal or external and that you should use the elements that make sense for your project.) | External customers and stakeholders who may be visiting the company website. | Sarah Barczyk to draft content from approved talking points. Corporate Communications to post. | Morning of January 21, 2021. | Corporate Communications will need to know of this need ahead of time. Sarah to schedule a meeting with the team to discuss content and timeline and answer any questions or obtain any information they may need to meet project deadlines. |
| Draft and Issue Press Release | External messaging to ensure that a wider audience receives the appropriate information. | Local media outlets and targeted public contacts. | Sarah Barczyk to draft. Local Communications teams to send to identified outlets. | Morning of January 21, 2021. | Sarah Barczyk to ensure that internal stakeholders who may deal with public officials are also aware that this information will be distributed. |