## **Purpose**

Use this tool to plan communications for your change.  Creating AWARENESS is critical for individuals to understand what is happening and why.

## **Document Overview**

|  |
| --- |
| Communication Plan Document Information |
| Project Name |  |
| Document creation date |  |
| Version number |  |
| Project launch date |  |
| Project completion date |  |
| Document owner |  |

This tool includes three sections. Use the links below to jump to another section:

* Communication Best Practices
* Plan Framework
* Communication Plan Templates
	+ Phase 1: Early Communications
	+ Phase 2: Roll Out & Implementation
	+ [Phase 3: Reinforce & Follow Up](#_PHASE_3:_REINFORCE)

## **Communication Best Practices**

Remember, Organizational Change Management requires individuals to adapt to a new normal. You need to make sure your audience understands the change and their role.

Put yourself in your audience’s shoes and focus directly on what they need to know. You can use the SBAR model to help you craft your change messaging.

People going through a change will want to know:

|  |  |  |
| --- | --- | --- |
| S | SituationWhat is changing? | * Give a clear and concise description of the change
 |
| B | BackgroundWhy is it changing? | * Provide rationale for the change.

Explain how they are directly or indirectly connected to the change and how it will benefit the people we serve in the long run.Focus on benefits. * Refer to your change vision statement: **Why + Future State + Inspiration**
 |
| A | AssessmentHow does this affect me? | * Describe how the audience will be impacted by the change
* This could include:
	+ Changes in roles or responsibilities
	+ Policy changes
	+ New required job tools (software, equipment, etc.)
 |
| R | RecommendationWhat do I need to do next and when?What resources are available for support? | * Do they need to:
	+ Cascade information down to their teams
	+ Change a procedure
	+ Attend training
* Direct the audience to necessary resources
* Leave contact information for feedback and questions
 |

## **Plan Framework**

Before you work on planning change communication tactics, complete this table to think through the big picture. Use SBAR model (Situation, Background, Assessment and Recommendation) to guide you through the change communication plan overview.

|  |
| --- |
| **Situation** |
| **Situation**What is the change? \*Use Change Vision Statement from [OCM Workbook](https://odandl.org/resources/change-support-resources/) |  |
| **Background** |
| **Communication Goals**What are the expected outcomes of the change? What are the key messages? |  |
| **Key Audiences**Who needs to be informed? \*Designate priority using the Stakeholder Tools in the [OCM Workbook](https://odandl.org/resources/change-support-resources/) |  |

|  |
| --- |
| **Assessment** |
| **Anticipated Reactions**What is known about how the change will be received? |  |
| **Dependencies**What is the schedule or timeline of the communication vehicles you plan to use?  |  |
| **Recommendation** |
| **Tactics**What are some key communication vehicles to use? \*Look for ideas in the Initial Actions section of the [OCM Workbook](https://odandl.org/resources/change-support-resources/) |  |
| **Measurements**How will you track success?  |  |

## **Communication Plan Templates**

You’ll notice this document includes three separate templates. As you build your communication plan, consider how your tactics and messaging differ as you move through each phase of the project.

**Rollout & Implementation**

**For everyone affected by the change.**

This will be the bulk of your change communication work. Ensure the people impacted by change stay informed. Refer to your Stakeholder Analysis for help.

**Use the best practices:**

* What is changing?
* How does this affect me?
* What do I need to do next and when?
* What resources can I go to for support?

**Reinforce & Follow Up**

**Closing the loop.**

Ensure your audience is supported in the early stages of the future state.

**You may need to communicate:**

* Gaps or problems
* Feedback and coaching for sustainability if roles have changed
* Compliance reporting
* Measurements
* Follow up
* Successes

**[Early Communications](#PhaseONe)**

**[For those who need to be in the know.](#PhaseONe)**

You will need to engage with sponsors, critical project team members, key stakeholders, and champions as early as possible.

**Share:**

* Roles and expectations to make the change successful
* Project and change plans
* Cadence for communications
* Opportunities for them to share gaps, opportunities, and feedback

## **Phase 1: Early Communications**

For those who need to be in the know.

You will need to engage with sponsors, critical project team members, key stakeholders, and champions as early as possible. Refer to your Stakeholder Analysis for help and add rows to the table as needed.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Audience**Use Stakeholder Analysis | **Key Messages/ Changes**Key talking points should be created for each conversation, as needed | **Who will deliver the message?**Messages have greater impact when they come from one’s direct leader  | **Communication Method** (email, newsletter, meetings, teams, huddles) | **Anticipated Reaction**+/-  | **Timing** (date)  | **Dependencies** | **Feedback loop**For questions, clarifications, or problems | **Done?**Y/NDate |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

## **Phase 2: Rollout & Implementation**

For everyone affected by the change.

Ensuring the people impacted by change stay informed is the bulk of your change communication work. This will be an ongoing process of communication to provide updates, mend gaps, ask and deliver feedback and reinforce the change. Refer to your Stakeholder Analysis for help and add rows to the table as needed.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Audience**Use Stakeholder Analysis | **Key Messages/ Changes**Key talking points should be created for each conversation, as needed | **Who will deliver the message?**Messages have greater impact when they come from one’s direct leader  | **Communication Method** (email, newsletter, meetings, teams, huddles) | **Anticipated Reaction**+/-  | **Timing** (date)  | **Dependencies** | **Feedback loop**For questions, clarifications, or problems | **Done?**Y/NDate |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

## **Phase 3: Reinforce & Follow Up**

Closing the loop.

Support your audience and/or steer them toward corrective action and positive reinforcement as they adopt the change. Add rows as needed.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Audience**Use Stakeholder Analysis | **Key Messages/ Changes**Key talking points should be created for each conversation, as needed | **Who will deliver** **the message?**Messages have greater impact when they come from one’s direct leader  | **Communication Method** (email, newsletter, meetings, teams, huddles) | **Anticipated Reaction**+/-  | **Timing** (date)  | **Dependencies** | **Feedback loop**For questions, clarifications, or problems | **Done?**Y/NDate |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**\*Sustainment plan:** What methods need to be put in place to ensure this stakeholder stays on target with the change? Coaching? Practice? Corrective Action?