About the Communications Plan Tool

Purpose

Create a communications plan to identify, organize and prepare messages about a new service introduction, a change in service, the ending of a service, or any other service (or support resource) related activity that impacts clients. A communications plan is also helpful for planning internal communications, as well as external promotional campaigns.

You can use this tool on your own or in preparation for a discussion with the Communications team.

A Plan helps you:

* consider the needed communications at various stages of an activity,
* identify the messages you need to deliver, and to whom and when,
* identify preferred channels for delivering a message to a particular audience,
* stay organized and focused with your communications.

Communications plans are living documents that evolve over time, and should be revisited and updated regularly.

Get Help

Get help completing the communications plan in one of three ways:

* Hover your cursor over the **explain** links to get basic instructions for completing sections of the plan.
* Click **explain** (or scroll down) to get more detailed instructions, including examples, in *Your Guide to Completing a Communications Plan*, included at the end of this file.
* Contact the University IT Communications team by going to [uitcomm.stanford.edu](http://uitcomm.stanford.edu) and submitting a HelpSU request for additional assistance.

COMMUNICATIONS PLAN

Name of related service or project

**purpose** ([explain](#purpose))

*Replace this text with your content.*

**background/overview** ([explain](#background))

*Replace this text with your content.*

**communications objective** ([explain](#objective))

*Replace this text with your content.*

**communications plan** ([explain](#plan))

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| --- | --- | --- | --- | --- |
| [**audience**](#audience) | [**objective(s) & key message(s)**](#key) | [**comm channel(s)**](#channels) | [**delivery timing**](#delivery) | [**roles & responsibilities**](#roles) |
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**contact**

For more information about this Communications Plan, contact *<name>, <title>, <email>*

Your Guide to

Completing a Communications Plan

Following are basic instructions, considerations, and examples you may find helpful when completing a Communications Plan.

**title:** Select “Name of related service or project” and change it to the name associated with your event or activity.

*example:* Transitioning Stanford IM to Cisco Jabber

**footer:** Change the footer. Open the footer and change it to reflect the current revision date and the plan title.

*example:* April 2, 2016 Transition Stanford IM to Cisco Jabber <auto page number>

**purpose:** Describe why a communication plan is needed. What’s the catalyst for the communications? What has or will be changing? What’s different? What’s coming up ahead?

*example:* University IT is transitioning the current Stanford IM services from its current OpenFire technology to the Cisco Jabber technology. Current users will experience some minor changes to the way they authenticate when using supported applications such as Adium and Pidgin. Those users will have the choice to continue to use those applications or transition to the Cisco Jabber application.

Additionally, the Jabber platform provides a number of new integrations with telephony that offers a existing and new users other features.

We need to make existing Stanford IM clients aware of the change and its impact on their current Stanford IM experience, and their options for using the more complete Cisco Jabber service. We need to make others aware that the new Jabber service is available to them and how they can start using it.

**background:** Provide additional context and background information to further the understanding of the communication need.

*example:* For several years, University IT has provided an IM service using local credentials (SUNet ID and Kerberos). The service was built on an OpenFire platform and allowed users to use an application (Pidgin for PCs and Adium for Macs) to exchange messages with other Stanford users. Using these applications, users could additionally tie in other instant messaging services such as Yahoo and Google. Because the features of this service have not kept pace with IM services commonly available, many members of the Stanford community have started using other options, such as SLACK, which are not fully integrated with Stanford’s IT infrastructure.

University IT is supporting a Jabber infrastructure for the Stanford Hospital that ties IM features with other telephony features. This effort will expand that infrastructure to the campus and create a single IM infrastructure for University IT to support.

**communications** Define the overall communication objective, including the goals and

**objective:** desired outcomes of the planned communications.

*example:* The overall communications objective is to provide the information and resources — through many communication channels — that the campus community needs to seamlessly transition from the current Stanford IM service to the Cisco Jabber service and to encourage those currently using the existing service to fully transition to the new service. An additional communications objective is to do preliminary promotion of the service to everyone eligible to use it, regardless of whether they are using the current service.

**communications** This table is the heart of the Communications Plan. Below are

**plan:** considerations and examples for each column of the table.

**audience:** It’s typically best to identify the different audiences or stakeholder groups first. Consider all the audiences that you want to reach regardless of the reason. Depending on the communications, you may want to be very specific or general.

*examples:* All UIT staff, UIT Support staff (e.g., Service Desk, CRC), existing users, potential users, external IT support staff, external IT leaders, key stakeholders, etc.

note: It may help to further specify audience types if that may impact the communications that is created. For example, “existing users” might be divided by faculty, staff, and students when the message to each group may be different; staff might be further divided if the impact varies depending on where the staff is located such as GSB vs. Law School vs. R&DE; IT support staff might be further divided depending on expertise such as LNAs vs. Expert Partners vs. desktop support staff.

**objective(s) & key message(s):** Identify specific communication objectives for each message based on the audience. What are you expecting the recipient to learn or do? What do you need them to know? It sometimes helps to think of these in regard to timing, such as before, during, and after.

*examples:*

* General Awareness — the message does not require the recipients to take any action. It may describe something new that is available or a change that won’t impact them until a later time.
* General Awareness Reminders — the message reminds the recipients of something they may already know, or something they missed or forgot.
* Call to Action — the message tells the recipients about something they can or must do, either to take advantage of something new or to minimize the impact of a change.
* Call to Action Reminders — the message reminds the recipients of something they must do to minimize the impact of a change.

Additionally, you should note what the key message is in that objective, the “what” of the message. Of what specifically are you making the recipient aware? What specific action will this ask the recipient to take?

note: Although you do not need to include this information in your plan, consider that later, as you prepare these messages, you will need to tell the recipients why the key message matters to them, what impact is has on them, and why they should care. Thinking about that now may help you refine the key message.

**comm channels:** Brainstorm all possible communication channels to reach target audiences, and then identify the most effective ones to reach each audience group. What are the regular or preferred channels for each audience group? What’s worked best in the past? A single communication can use multiple distribution channels.

*examples:* A comprehensive list of communication channels is available at <coming soon>.

**delivery timing:** Specify desired timing for each communication to each audience group. Several communications in a given period may be required to meet your objectives with each audience group and ensure the messages resonate. That said, be cautious not to inundate or oversaturate your audiences.

**roles & responsibilities:** Identify by name the roles and responsibilities for each planned communication. Common roles include author/creator, reviewer/editor, approver, etc.

*examples:* author/creator, reviewer/editor, approver, subject matter expert, etc.

EXAMPLE ON NEXT PAGE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| audience | objective(s) & key message(s) | comm channel(s) | delivery timing | roles & responsibilities |
| UIT Stakeholders | General Awareness: what’s coming and its impact, why we’re making the change, who we’ll be telling and when, what’s expected of UIT staff, where to direct questions/concerns | • email to Service Desk director and manager, CRC director | • 2/1/16 | • draft coordination–Jo-Ann; approver–Jesse; email send–Jesse |
| UIT IT Support Staff | General Awareness: what’s coming and its impact, why we’re making the change, who we’ll be telling and when, what support you may be expected to provide, resources available, where to direct questions | • email to Service Desk staff and CRC staff  • staff meeting presentations | • 2/4/16  • TBD | • draft coordination–Jo-Ann; approver–Jesse; email send–Jesse  • presentation coordination–Jo-Ann; approver –Jesse; delivery–Jo-Ann |
| External IT Leaders | General Awareness: what’s coming and its impact, why we’re making the change, who we’ll be telling and when, what’s expected of their staff, what UIT resources will be available. | • email to campusITleaders | • 2/8/16 | • draft coordination–Jo-Ann; approver–Jesse; email send–Jo-Ann (under UIT banner) |
| External IT Support Staff | General Awareness: what’s coming and its impact, why we’re making the change, who we’ll be telling and when, what support you may be expected to provide, resources available. | • email to Expert Partners  • TechBriefing presentation  • Campus IT Partners presentation | • 2/10/16  • 2/19/16  • 2/18/16 | • draft coordination–Jo-Ann; approver–Jesse; email send–Jo-Ann (under UIT banner)  • presentations coordination–Jo-Ann; approver–Jesse; delivery–Jo-Ann |
| Existing Users | General Awareness and Call to Action: what’s coming and its impact, what they need to do to prepare, what they need to do after, where they can find additional resources or support. | • email to existing users  • TechBriefing presentation  • announcement on UIT website | • 2/15/16  • 2/19/16  • 2/15/16 | • draft coordination–Jo-Ann; approver–Jesse; email send–Jo-Ann (under UIT banner)  • presentations coordination–Jo-Ann; approver –Jesse; delivery–Jo-Ann |
| Existing Users | General Awareness and Call to Action Reminder (final): what’s coming and its impact, what they need to do to prepare, what they need to do after, where they can find additional resources or support. | • email to existing users | • 2/25/16 | • draft coordination–Jo-Ann; approver–Jesse; email send–Jo-Ann (under UIT banner) |
| Existing Users | Call to Action (post change): Transition completed, what they need to do now, where they can find additional resource or support. | • email to existing users | • 3/1/16 | • draft coordination–Jo-Ann; approver–Jesse; email send–Jo-Ann (under UIT banner) |
| Potential Users | General Awareness: service is available, primary benefits and features, how can it be useful to them, where to go for more information. | • web page updates  • article in UIT newsletter  • ad in SR; social media postings  • announcement on UIT website | • 3/1/16  • 4/1/16  • 3/15/16  • 3/15/16 | • draft coordination–Jo-Ann (with Kendall and Rachel); approver–Jesse; email send–Jo-Ann (under UIT banner) |