The purpose of the Communications Management Plan is to define the communication requirements for the project and how information will be distributed. The Communications Management Plan defines the following:

* What information will be communicated
* How the information will be communicated
* When information will be distributed
* Who is responsible for communicating project information
* Communication requirements for all project stakeholders
* What resources the project allocates for communication
* How any sensitive or confidential information is communicated and who must authorize this
* How changes in communication or the communication process are managed
* Any standard templates, formats, or documents the project must use for communicating
* An escalation process for resolving any communication-based conflicts or issues

Note: Instructions for what to include in each section appear in gold italics. Samples appear in regular black text.

Communication management plan:

Project Name

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# **Introduction**

This section provides an overview of the plan’s purpose and contents.

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings. A project team directory is included to provide contact information for all stakeholders directly involved in the project.

## Communications Management Approach

By having a solid communications management approach you’ll find that many project management problems can be avoided. In this section give an overview of your communications management approach.

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

As with most project plans, updates or changes may be required as the project progresses or changes are approved. Changes or updates may be required due to changes in personnel, scope, budget, or other reasons. Additionally, updates may be required as the project matures and additional requirements are needed. The project manager is responsible for managing all proposed and approved changes to the communications management plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with the project’s Change Management Plan and ensures that all project stakeholders remain aware and informed of any changes to communications management.

## Communications Management Constraints

Project communications are subject to limitations and constraints like the rest of the project’s variables; they must be within scope and adhere to budget, scheduling, and resource requirements. There may also be legislative, regulatory, technology, or organizational policy requirements which must be followed as part of communications management. Summarize key constraints in this section.

All project communication activities will occur within the project’s approved budget, schedule, and resource allocations. The project manager is responsible for ensuring that communication activities are performed by the project team and without external resources which will result in exceeding the authorized budget. Communication activities will occur in accordance with the frequencies detailed in the Communication Matrix in order to ensure the project adheres to schedule constraints. Any deviation of these timelines may result in excessive costs or schedule delays and must be approved by the project sponsor.

VUMC organizational policy states that where applicable, standardized formats and templates must be used for all formal project communications. The details of these policy requirements are provided in the section titled “Standardization of Communication” in this document.

VUMC organizational policy also states that only a Vice President or higher level employee may authorize the distribution of confidential information. The project manager is responsible for ensuring that approval is requested and obtained prior to the distribution of any confidential information regarding this project.

# **Stakeholder Communication Requirements**

Most projects consist of a broad range of stakeholders all of whom may have differing interests and influence on the project. This section should summarize these needs in order to effectively manage their interest, expectations, and influence and ensure a successful project.

As part of identifying all project stakeholders, the project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the project manager in the project’s Stakeholder Register. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the project’s communication channels and ensure that stakeholders have access to these channels. If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.

Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project’s Stakeholder Register and use this, along with the project communication matrix as the basis for all communications.

## Role Descriptions

In this section, outline all the key roles of your project’s stakeholders. (Not all examples below will be relevant for every project.) Summarize the role each stakeholder plays in the project.

**Project Sponsor**

The project sponsor is the champion of the project and has authorized the project by signing the project charter. This person is responsible for the funding of the project and is ultimately responsible for its success. Since the Project Sponsor is at the executive level communications should be presented in summary format unless the Project Sponsor requests more detailed communications.

**Program Manager**

The Program Manager oversees the project at the portfolio level and owns most of the resources assigned to the project. The Program Manager is responsible for overall program costs and profitability as such they require more detailed communications than the Project Sponsor.

**Key Stakeholders**

Normally Stakeholders includes all individuals and organizations who are impacted by the project. For this project we are defining a subset of the stakeholders as Key Stakeholders. These are the stakeholders with whom we need to communicate with and are not included in the other roles defined in this section. The Key Stakeholders includes executive management with an interest in the project and key users identified for participation in the project.

**Change Control Board**

The Change Control Board is a designated group which is reviews technical specifications and authorizes changes within the organizations infrastructure. Technical design documents, user impact analysis and implementation strategies are typical of the types of communication this group requires.

**Customer**

The customer for this project is <Customer Name>. As the customer who will be accepting the final deliverable of this project they will be informed of the project status including potential impacts to the schedule for the final deliverable or the product itself.

**Project Manager**

The Project Manager has overall responsibility for the execution of the project. The Project Manager manages day to day resources, provides project guidance and monitors and reports on the projects metrics as defined in the Project Management Plan. As the person responsible for the execution of the project, the Project Manager is the primary communicator for the project distributing information according to this Communications Management Plan.

**Project Team**

The Project Team is comprised of all persons who have a role performing work on the project. The project team needs to have a clear understanding of the work to be completed and the framework in which the project is to be executed. Since the Project Team is responsible for completing the work for the project they played a key role in creating the Project Plan including defining its schedule and work packages. The Project Team requires a detailed level of communications which is achieved through day to day interactions with the Project Manager and other team members along with weekly team meetings.

**Steering Committee**

The Steering Committee includes management representing the departments which make up the organization. The Steering Committee provides strategic oversight for changes which impact the overall organization. The purpose of the Steering Committee is to ensure that changes within the organization are effected in such a way that it benefits the organization as a whole. The Steering Committee requires communication on matters which will change the scope of the project and its deliverables.

**Technical Lead**

The Technical Lead is a person on the Project Team who is designated to be responsible for ensuring that all technical aspects of the project are addressed and that the project is implemented in a technically sound manner. The Technical Lead is responsible for all technical designs, overseeing the implementation of the designs and developing as-build documentation. The Technical Lead requires close communications with the Project Manager and the Project Team.

## Project Team Directory

The following table presents contact information for all persons identified in this communications management plan. The email addresses and phone numbers in this table will be used to communicate with these people.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Role** | **Name** | **Title** | **Organization/ Department** | **Email** | **Phone** |
| **Project Sponsor** | 1. White
 | CIO | IT | a.white@abc.com | (555) 555-1212 |
| **Program Manager** |  |  |  |  |  |
| **Project Manager** |  |  |  |  |  |
| **Project Stakeholders** |  |  |  |  |  |
| **Customer** |  |  |  |  |  |
| **Project Team** |  |  |  |  |  |
| **Technical Lead** |  |  |  |  |  |

# **Communication Methods and Technologies**

This section should outline the communication methods and available technologies for communicating project information to stakeholders.

The project team will determine, in accordance with VUMC organizational policy, the communication methods and technologies based on several factors to include: stakeholder communication requirements, available technologies (internal and external), and organizational policies and standards.

VUMC maintains a Planview platform within the PMO which all projects use to provide updates, archive various reports, and conduct project communications. This platform enables senior management, as well as stakeholders with compatible technology, to access project data and communications at any point in time. Planview also provides the ability for stakeholders and project team members to collaborate on project work and communication.

For stakeholders who do not have the ability to access Planview, a web site will also be established for the project. Access to the website will be controlled with a username and password. Any stakeholders identified who are not able to access Planview will be issued a unique username and password in order to access the web site. The project manager is responsible for ensuring all project communications and documentation are copied to the web site and that the content mirrors what is contained on the Planview platform.

VUMC maintains software licenses for Planview software. All project teams are responsible for developing, maintaining, and communicating schedules using this software. Gantt Charts are the preferred format for communicating schedules to stakeholders. The project schedule will be maintained in Planview and the project website.

All project communication and documentation, in addition to being maintained on the Planview platform and project website, will be archived on the internal VUMC shared drive which resides in the PMO program directory. Organizational naming conventions for files and folder will be applied to all archived work.

## Communications Matrix

The following table identifies the communications requirements for this project.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Type** | **Objective** | **Medium** | **Frequency** | **Audience** | **Owner** | **Deliverable** | **Format** |
| Kickoff Meeting | Introduce the project team and the project. Review project objectives and management approach. | * Face to Face
 | Once | * Project Sponsor
* Project Team
* Stakeholders
 | Project Manager | * Agenda
* Meeting Minutes
 | * Soft copy archived on project Planview site and project web site
 |
| Project Team Meetings | Review status of the project with the team. | * Face to Face
* Conference Call
 | Weekly | * Project Team
 | Project Manager | * Agenda
* Meeting Minutes
* Project schedule
 | * Soft copy archived on project Planview site and project web site
 |
| Technical Design Meetings | Discuss and develop technical design solutions for the project. | * Face to Face
 | As Needed | * Project Technical Staff
 | Technical Lead | * Agenda
* Meeting Minutes
 | * Soft copy archived on project Planview site and project web site
 |
| Monthly Project Status Meetings | Report on the status of the project to management. | * Face to Face
* Conference Call
 | Monthly | * PMO
 | Project Manager | * Slide updates
* Project schedule
 | * Soft copy archived on project Planview site and project web site
 |
| Project Status Reports | Report the status of the project including activities, progress, costs and issues. | * Email
 | Monthly | * Project Sponsor
* Project Team
* Stakeholders
* PMO
 | Project Manager | * Project Status Report
* Project schedule
 | * Soft copy archived on project Planview site and project web site
 |

## Communication Process

Project communications may be extremely complex depending on the size and scope of the project and the number of stakeholders. A flowchart may provide stakeholders with a better understanding of the steps involved with the distribution of all project communications. If a flowchart is not needed, consider putting the process in numerical steps.

The communication flowchart below was created to aid in project communication. This flowchart provides a framework for the project team to follow for this project. However, there may be occasions or situations which fall outside of the communication flowchart where additional clarification is necessary. In these situations the Project Manager is responsible for discussing the communication with the Project Sponsor and making a determination on how to proceed.



# **Communication Standards**

Standard templates and formats may be applied to certain types of project meetings or specific types of communication (i.e. emails, status reports, etc.). By using standardization, organizations can help ensure that its project teams and stakeholders have a thorough understanding of what is expected and achieve consistent and effective communications. This section should summarize any standards, including templates, formats, graphic standards, and naming conventions.

For this project, VUMC will utilize standard organizational formats and templates for all formal project communications. Formal project communications are detailed in the project’s communication matrix and include:

Kickoff Meeting – project team will utilize VUMC standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the VUMC standard slideshow template.

Project Team Meetings – project team will utilize VUMC standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the VUMC standard slideshow template.

Technical Design Meetings - project team will utilize VUMC standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the VUMC standard slideshow template.

Monthly Project Status Meetings - project team will utilize VUMC standard templates for meeting agenda and meeting minutes. Additionally, any slides presented will use the VUMC standard slideshow template.

Project Status Reports – project team will utilize VUMC standard templates for meeting agenda and meeting minutes. Additionally the standard project status report document, available on the share drive, will be used to provide project status.

Informal project communications should be professional and effective but there is no standard template or format that must be used.

## Guidelines for Meetings

If you have a set of expectations or guidelines for running face-to-face meetings, consider outlining them in advance in this planning document. It is a good reference tool for conducting meetings throughout the project lifecycle.

**Meeting Agenda**

Meeting Agenda will be distributed 5 business days in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

**Meeting Minutes**

Meeting minutes will be distributed within 2 business days following the meeting. Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.

**Action Items**

Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting. The review of the new action items will include identifying the owner for each action item.

**Meeting Chair Person**

The Chair Person is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chair Person will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

**Note Taker**

The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will give a copy of their notes to the Chair Person at the end of the meeting as the Chair Person will use the notes to create the Meeting Minutes.

**Time Keeper**

The Time Keeper is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Time Keeper will let the presenter know when they are approaching the end of their allocated time. Typically a quick hand signal to the presenter indicating how many minutes remain for the topic is sufficient.

**Parking Lot**

The Parking Lot is a tool used by the facilitator to record and defer items which aren’t on the meeting agenda; however, merit further discussion at a later time or through another forum. A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. The Parking Lot list is to be included in the meeting minutes.

# **Communication Escalation Process**

As issues or complications arise with regards to project communications it may become necessary to escalate the issue if a resolution cannot be achieved within the project team. Project stakeholders may have many different conflicting interests in a given project. While escalations are a normal part of project management, there must be a documented process that defines how those escalations will take place.

Efficient and timely communication is the key to successful project completion. As such, it is imperative that any disputes, conflicts, or discrepancies regarding project communications are resolved in a way that is conducive to maintaining the project schedule, ensuring the correct communications are distributed, and preventing any ongoing difficulties. In order to ensure projects stay on schedule and issues are resolved, VUMC will use its standard escalation model to provide a framework for escalating communication issues. The table below defines the priority levels, decision authorities, and timeframes for resolution.

|  |  |  |  |
| --- | --- | --- | --- |
| **Priority** | **Definition** | **Decision Authority** | **Timeframe for Resolution** |
| Priority 1 | Major impact to project or business operations. If not resolved quickly there will be a significant adverse impact to revenue and/or schedule. | Vice President or higher | Within 4 hours |
| Priority 2 | Medium impact to project or business operations which may result in some adverse impact to revenue and/or schedule. | Project Sponsor | Within one business day |
| Priority 3 | Slight impact which may cause some minor scheduling difficulties with the project but no impact to business operations or revenue. | Project Manager | Within two business days |
| Priority 4 | Insignificant impact to project but there may be a better solution. | Project Manager | Work continues and any recommendations are submitted via the project change control process |

\*\* NOTE: Any communication including sensitive and/or confidential information will require escalation to VP level or higher for approval prior to external distribution.

# **Approvals**

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Signature** | **Date** |
| Executive Sponsor |  |  |  |
| Project Sponsor |  |  |  |
| Project Manager |  |  |  |
| Operational Leader |  |  |  |