Communications Plan

Designing an Electronic Performance Support System (EPSS)

for

WidgetMart

2345 London Avenue

London, NJ 00001

April 20, 2013

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**Introduction**

This Communications Plan sets the communications framework for WidgetMart’s Electronic Performance Support System (EPSS) project. This plan will serve as a guide throughout the project life cycle and will be updated as needed. The Communication Matrix in this document defines the communication requirements and approach for the project; i.e., what information will be distributed, how, when, by whom, and to whom. Additionally, this plan provides definition of project roles, communications standards and meeting guidelines, and issues escalation process. The project manager will be responsible for updating this plan as the project progresses, and for distributing the information in a timely manner.

**Stakeholder Communication Requirements**

The project manager will contact each stakeholder to determine his/her preferred frequency and method of communication. The project manager will document the feedback and make updates as needed.

**Roles**

**Project Sponsor** – The project sponsor is the individual who champions the project and gives authorization to proceed with the project.

**Key Stakeholders** – Although the WidetMart EPSS project has various stakeholders, such as the users of the EPSS, it is deemed necessary to identify the key stakeholders – those with the authority and power to make decisions and provide resources. The key stakeholders of WidgetMart EPSS project are also the clients.

**Client** – The CEO of WidgetMart is the primary client for the EPSS project and will be accepting the final deliverable of this project upon consultation and agreement with the Directors of BuyMore and Universal Widget.

**Project Manager** – Theproject manager has the responsibility to oversee the implementation of the EPSS project. The project manager manages the day to day processes of the project, provides guidance to team members and stakeholders, monitors progress and reports any deviations, escalates issues and obtain resolution as required, and generally ensures the project is moving according to the plan. The project manager has the primary responsibility for communicating and distributing information about the project according to this Communications Plan.

**Project Team** – Theproject team comprises of all individuals that will be performing the work on the EPSS project.

**Communication Methods and Technologies**

The methods and technologies of communication will be determined based on stakeholders’ preference and access and availability of communication technologies, as well as the type and frequency of the information being communicated.

**Meetings Guidelines**

**Meeting Agenda** – will be distributed 5 business days prior to the meeting. The Agenda should identify the presenter for each topic and a time limit for the topic. The first item on the agenda should be a review of action items from the previous meeting.

**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.

**Action Items** – will be recorded during the meetings and will include the action item, the owner of the action item, assigned date as well as due date.

**Meeting Chair Person** – theChair Person is responsible for facilitating the meeting and distributing the meeting minutes. The Chair Person will ensure the meeting start and end times are adhered to. The topic of the meeting will determine who will be the Chair Person. The Chair Person will also distribute the finalized meeting minutes.

**Note Taker** – theChair Person will assign the Note Taker for each meeting. The Note Taker will document the meeting minutes and provide a copy to the Chari Person for review prior to distribution to the team.

**Time Keeper** – willensure the meeting participants adhere to the allotted time for the topic/agenda. The Time Keeper will provide a signal to the presenter to indicate how much time is left on the clock.

**Parking Lot Items** – ParkingLot refers to items that need to be discussed at future meetings or at a different forum. The note taker will include parking lot items in the meeting minutes.

**Communications Standards**

To ensure consistency and minimize confusion in communication methods, the project manager will provide standard templates for each type of communication items noted in the matrix.

**Communication Escalation Process**

Timely response and resolution of issues is critical for a project’s success. Team members will communicate issues that require escalation to the project manager. The project manager will follow the process noted in the table below, and ensure resolution of the issues.

|  |  |  |  |
| --- | --- | --- | --- |
| **Priority** | **Definition** | **Decision Authority** | **Timeframe for Resolution** |
| Priority 1 – High | Critical impact to project or to business operations of one or all three WidgetMart stores. If not resolved promptly there will be a significant adverse impact to revenue and/or schedule. | Director or higher | Within 5 hours |
| Priority 2 – Medium | Moderate impact to project or to business operations of one or all three WidgetMart stores. There may be some adverse impact to revenue and/or schedule. | Project Sponsor | Within one business days |
| Priority 3 – Low | Slight impact to project. There may be some minor scheduling issues. No impact on business operations or revenue. | Project Manager | Within two business days |

**WidgetMart EPSS Project Team Directory**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Role** | **Name** | **Title** | **Department** | **Email** | **Phone** |
| Project Sponsor/Client | Jon Luc Picard | WidgetMart CEO | WidgetMart | [JP@widgetmart.com](mailto:JP@widgetmart.com) | 999-999-9999 |
| Project Manager | Davey Jones | Project Manager | WidgetMart | [DJ@widgetmart.com](mailto:DJ@widgetmart.com) | 888-888-8888 |
| Key Stakeholders/Clients | Kira Nerys  Jadzia Dax | Director  Director | Universal Widget  BuyMore Widget | [KN@universal.com](mailto:KN@universal.com)  [JD@buymore.com](mailto:JD@buymore.com) | 777-777-7777 |
| Project Team 1 | Ellen Lockhart | Merchandising Consultant | Merchandising | EL@widgetmart.com | 666-666-6666 |
| Project Team 2 | Josie Roberts | System Consultant | Training | JR@widgetmart.com | 555-555-5555 |
| Project Team 3 | Tim Sisko | Translation Expert | Human Resources | TS@widgetmart.com | 444-444-4444 |
| Project Team 4 | Barry White | Change Management Consultant | Marketing | BW@widgetmart.com | 333-333-3333 |
| Project Team 5 | Elim Garak | Developer | External vendor | EG@external.com | 222-222-2222 |
| Project Team 6 | Geordie LaForge | Developer | External vendor | JL@external.com | 111-111-1111 |
| Project Team 7 | Deanna Troi | Instructional Design Consultant | External vendor | DT@external.com | 000-000-0000 |

**WidgetMart EPSS Communications Matrix**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Communication Type | Objective of Communication | Medium | Frequency | Audience | Owner | Deliverable | Format of Deliverable |
| Kickoff Meeting | Introduction of team members and overview of the project. | Face to Face | Once at the beginning of the project | Project sponsor  Project Team  Stakeholders | Davey Jones | Agenda  Meeting minutes | Email  Copy archived on project website or wiki |
| Project Team Meeting | Project status review with the project team | Face to Face  Conference Call | Weekly | Project team | Davey Jones | Agenda  Meeting minutes  Project schedule  Action items | Email  Copy archived on project website or wiki |
| Requirements Meetings | Discuss, plan, and finalize requirements gathering and documenting | Face to Face  Conference Call | As needed | EPSS system users  Business Analysts  Systems Analysts  Trainers  Davey Jones (for review and approval) | Ellen Lockhart | Requirements Document | Uploaded to the project’s website or wiki with access only to developers, analysts, and Project Manager. Email notification of the upload to the audience. |
| System Development & Designers Team Meeting | Discuss, plan, and finalize system development & design | Face to Face  Conference Call | As needed | Developers (project team #8 and 9)  Ellen Lockhart | Elim Garak | Finalized Systems development specification | Uploaded to the project’s website or wiki with access only to developers, analysts, and project manager. Email notification of the upload to the audience. |

**WidgetMart EPSS Communications Matrix**

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Communication Type | Objective of Communication | Medium | Frequency | Audience | Owner | Deliverable | Format of Deliverable |
| Training Development & Designers Team Meeting | Discuss and plan training development, design, and delivery. | Face to Face  Conference Call | As needed | Trainers, designers, system developers | Deanna Troi | Finalized training development document | Uploaded to the project’s website or wiki. Access limited to the audience noted.  Email notification of the upload to the audience. |
| Project Status Reports | Update team members and stakeholders on the project’s progress. | Face to Face  Conference call | Weekly | All team members  Clients | Davey Jones | Status report | Email, uploaded to the project’s website or wiki. Access enabled to all team members and stakeholders. |

**Sponsor/Client Acceptance**

Approved by the Project Sponsor/Client:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Jon Luc Picard

WidgetMart CEO

Rationale Statement

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**Case # 25 – Designing an Electronic Performance Support System for WidgetMart**

**(Ertmer & Quinn, 2007)**

Communication is at the heart of project management. (Portny, Mantel, Meredith, Shafer, Sutton, & Kramer, 2008) note “the key to successful project management is effective **communication**—sharing the right messages with the right people in a timely manner.” (p.357). The technology and the method used to communicate project information also need to be defined in the communications plan.

The project communications management process, as defined in (PMBOK Guide, 2008, p. 243) includes:

* Identifying stakeholders—their interests, involvement, and impact on project success.
* Planning communications—determining the stakeholders’ information needs and defining the communication approach.
* Distributing information—providing relevant information in a timely manner.
* Managing stakeholder expectations—communicating and working with stakeholders to meet/address their needs.
* Reporting performance—collecting and distributing project performance information.

The WidgetMart EPSS project Communications Plan is a detailed document that incorporates the above noted components by defining what information is communicated when, why, how, by whom, and to whom. The plan details meeting guidelines as well as how the results of the meetings are to be communicated. Communications issues escalation process has also been defined. The project manager has taken into consideration the stakeholders’ preferences and access to technology in determining the communication medium. The plan lists all project team members and stakeholders, as well as, identify the audiences and owners for each type of communication.

**References**

Ertmer, P. A. & Quinn, J. (2007). *The ID CaseBook. Case Studies in Instructional Design.*

Upper Saddle River, NJ: Pearson Education, Inc.

PMBOK Guide (2008). A Guide to the Project Management Body of

Knowledge (PMBOK® Guide). (p. 243). 4th ed. Newton Square, PA: Project Management Institute, Inc.

Portny, S. E., Mantel, S. J., Meredith, J. R., Shafer, S. M., Sutton, M. M., & Kramer, B.

E. (2008). (p. 357). *Project Management: Planning, scheduling, and controlling projects*. Hoboken, NJ: John Wiley & Sons, Inc.

**Note:**

Communications Plan template is courtesy of [www.ProjectManagementDocs.com](http://www.ProjectManagementDocs.com), free project management templates, and has been modified to fit the WidgetMart EPSS project.