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Communication Planning Guide

Edition 1

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1.

The importance of a communications plan

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The importance of communications plan

Before we jump into creating a communications plan, it is important to understand why a communications plan is important when it comes to launching anything new into your organisation. Most of us know why a comms plan is a great tool to have but it's always good to reminder ourselves.

- Software is only successful if people use it, and use it well. And put simply, your organisation will feel no benefit if no one is using it or not using it properly.

- The way to get people using new software is by telling them about it. If we don't tell people about it, no one knows it's there or the benefits from it.
  - We love a good analogy here at Allocate. A good one for this situation is think about Ferrari in a desert that is being given away for free to the first person who gets there. You think it wouldn't take that long to get snapped up. But if no one has been told about it, then it will sit there. And It's not likely to be stumbled upon by people. So a great benefit goes to waste.

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The importance of a communications plan

- So how do I tell people about the something new? We understand health and care organisations are unique and face so many different challenges. From size of workforce, to its spread and everyone working different shifts and days, internal comms can be challenging. It's not as simple as hitting 'Send All' on one email and sticking a poster on the fridge in the break room.

- This is where a communications plan, using various comms channels and tactics that are aligned together, will help you to effectively and efficiently spready your message. A good comms plan will help you:
  - To plan out the 5 W's
    - **What** you're telling your workforce
    - **Who** needs telling about it
    - **Why** they should use it (How it will benefit them/remove any objections they have/answer any questions they have)
    - **When** they can get it
    - **Where** people can it
  - Plan out your timeline for your communications
  - Understand and plan the different phases you'll go through in your comms plan
  - Turn your plan into tangible actions

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Going from good to great.

But what turns a good comms plan into a great one?

A great one goes beyond just telling people this it is and get it here. It's ensuring that people really understand why it benefits them, why they should use and remove any objections they may have about using it. In essence, a great comms plan gets your workforce excited about what's new.

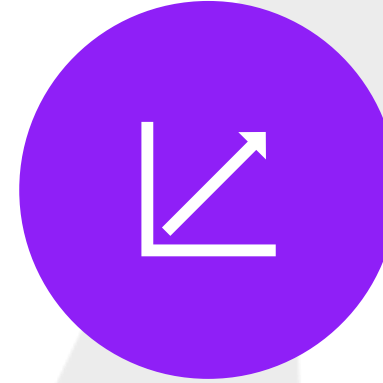A great comms plan goes beyond just launching. It then also helps to drive adoption and usage beyond day one.

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Recap

- To recap, a great communications plan will ensure you:

Effectively communicate the right message to the right audience
(The What, Who and Why)

Get people ready for what is coming.

(The Where and When)

Drive adoption and usage beyond launching the product

- This guide will help you create a communications plan that helps to deliver on these key points.

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2.

Understanding your objectives

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Setting your objectives.

- So you're launching a new product or solution, which is amazing! Before we get into planning how you're going to communicate it to everyone, it's important that you know as a whole organisation, what are your objectives for it.

- Your organisation will have a key reason or two as to why they want to introduce new software. It may be that you want to introduce a piece software for all its features or you want it for one feature in particular.

- Depending on what your objectives are, will therefore effect the what, the who and the why of your communications plans.

- Before we get into what you are going to communicate, it's useful to then gather your internal team who are launching the software and get down on a single page the **project's purpose**. On the next page you'll see a sample of the project one-pager we created to show you. A blank template is also provided with this workbook.

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Project Purpose | Example

What is the project called?	*Loop launch*	**When is it live?** *Include here is it is phased by departments or groups of staff*	*End of November 2021* *(Full launch to Organisation)*
What is the project?	*To launch Loop as a new communication and engagement tool within the organisation.*	Clinical Sponsor	*Nick Wilson*
		Business Sponsor	*Liz Jones*
Organisations	*Allocate Hospital*	Communications Lead	*Chris Hammersley*

Goals		Why are you doing it?	
Goal 1	*Staff find it easier to communicate with their teammates that they are rota'd with*	Staff Benefit	• *Staff receive our communications faster and more easy to digest, rather than getting lost in emails or on noticeboards* • *Staff are able to communicate with other members of the team pre and post shifts, should information need to be shared*
Goal 2	*Staff feel communication between them and the organisation has improved.*	Care Benefit	• *Staff able to digest communications on the go* • *Staff have the right information at the right time to do their job*
Goal 3	*Allocate Hospital are able to send out emergency communications quickly and easily, that have maximum reach.*	Organisation Benefit	• *Prepared to send emergency comms out should we need to. IE: COVID-19 situation,* • *Able to more easily engage with*
Goal 4		Other	

Which software products are you launching, and with which feature configurations?

For launching just Loop, this will just be Allocate Loop. For other projects, this might sound 'techie' but often launch products together that would change the messages. Certain products have additional kits to help you.

Product/s	Features/uses
• *Allocate Loop*	• *121 Messaging between teammates, pre-created groups from rosters,* • *Newsfeed and Allocate Hospital page, able to post content from organisation* • *Additional Engagement Module: Send out surveys and polls, send out targeted communications from Organisation.*

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Setting your communication objectives

- So, the project team and you are all on the same page. That's a great start.
- It's time to think about the specific communications objectives/goals that come from the project purpose.
- What to think about:
    - Think about what your 5 W's are for the project.
        - The **What**: What are you communicating about it? What specific features do staff need to know about
        - The **Who**: Who exactly are you communicating to? Does 'the what' change depending on 'the Who'?
        - The **Why**: What benefits will this deliver to the staff group (or groups)? Why should they be excited by it coming? And how do you remove any objection people may have?
        - The **When and Where**: What date can users get their hands on it? Is there going to be training sessions? Is it a big bang launch or phased roll out.
    - By doing the 5 W's, it also allows you to think about what tactics work best for each staff group for when you come to creating your communications plan
    - Plus, it will help you focus on what possible concerns you need to overcome and any possible influencers with staff groups that can help with your communications.

- On the following page, we have a template to help you establish your communication gaols.

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Communication objectives | Example

Staff Group (The Who)	e.g. All Rostered Nurse Workforce			
Staff Group Objective	**Benefits**	**Concerns**	**Influencers**	**Locations**
Download Loop Communicate with each other via Loop Build stronger staff relationships	Always get the latest news directly	Can't I just use WhatApps? Is it going to be hard to connect to	Ward Managers Junior Doctors	Allocate Hospital

Key Dates (The When)	Organisational Launch – 01st November 2021		Goals	Get 25% of organisation onto Loop on launch day
Key Messages (The What)	Stay in the Loop with news from Allocate Hospital Connect and communicate with teammates		Best tactics for reaching staff group	Newsletter Articles Drop-in sessions/demo's Incentives Video Ambassadors Morning briefings Launch event
What do they need to know? (The Why	• How to download Loop • How they can communicate with teammates • How the get messages from Allocate Hospital	*What do you need them to do?*	• Download the app • Chat with teammates • Read Allocate Hospitals updates • Comment/like/engage with content	*How do you want them to feel?* • Excited • Empowered • Engaged with • Part of the Allocate Hospital community

A blank version of the Communications Objectives for you to use can be found in the Communications Vault.

Top Tip #1: You may need to consider different staff groups here if you have an objective that is specific to a certain group of staff.

Top Tip #2: Run focus groups with the groups you are trying to reach if you are not sure of all the answers.

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To recap

- Recapping understanding both the project's purpose and also, your communication objectives/goals.

Have an understanding of why your organisation is introducing new software

Understand the 5 W's of what you need to do with your communication plans

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3.

Creating your communications plan

Creating your communications plan

- Next steps is to create your communication plan, now you know your comms objectives.

- To start, its important to split down what the 3 key phases are.

- By splitting the launch into phases, you can clearly define when you want your end users to do at each stage and it will help define what messages you should be using.

- The 3 key phases are:

Awareness & Knowledge

Action

Participate & Reinforce

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Understanding the phases of your Communications Plan

- Below is a quick breakdown of the different phases and what it means

Awareness & Knowledge	Action	Participate & Reinforce
Before you let people get hold of new software within your organisation, it's important to educate end users on what it is. First and foremost you need to create an **awareness**, focusing on what it is and what it means to the end users. It is this part on what it means to them that will get them invested. Going beyond just being aware of it, it's making end users **knowledgeable** about what it will do for them and an opportunity to handle any concerns and remove objections.	Action means it time for the audience that you have made aware and knowledgeable about your product, to do something. Whether that's an action to 'download the app' or 'download an update' or 'use the new feature', Action is often seen a anchor point for communications plans that the awareness and knowledge phase builds up to.	Just because you've got your end users to take action it, doesn't mean your done. Analogy time! You can take a horse to water but you can't make it drink. You have to show it how its done. Participate and Reinforce is about getting users to use the software organically and using it well. Your plan for this period should focus on how you can encourage these and embed good actions.

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Our comms phases is based upon the ADKAR model for organisational change.

Understanding the phases of your Communications Plan

Here's an example of what these means for example if you were to launching a brand new app across your organisation.

Awareness & Knowledge	Action	Participate & Reinforce
Learn what it is?	Download it	Use it

| Awareness:
Create Interest and Desire
Educate what the benefits of using it are.
When is it coming? | Knowledge:
Answering concerns and remove objections | Action
Download the app
Set up an account. | Use the app, based on what your objectives are for it
Grow participation
Consistent Action |

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What could I do in each phase?

- Here are some key principles when thinking about the different activity you can undertaken in each phase.

Awareness & Knowledge	Action	Participate & Reinforce
Learn what it is	Download it	Use it

Awareness & Knowledge — Learn what it is

Promotional materials
- Not every way of communicating will hit or be digested by everyone. So its key to have a good mixture of different tactics for your end users. This can include a wide range of things from traditional posters on staff notice boards and leaflets in common rooms to updates in team briefings and email comms and articles in newsletters.

A resource centre
- The majority of organisations have an internal intranet or SharePoint site. Setting up a dedicated area where you an put all information and resources about the software means you have one version of everything for anyone to access. It's ideal for putting videos, resources for managers to download and FAQ's.
- Plus, in your awareness comms, having a resource area is perfect for your 'call to action' to find out more information.

Ambassadors
- It's important to have ambassadors that can act help spread the message and help remove any objections may have. Across large organisation, having a group of people that are a mixture of roles and levels covering different departments. You could give your ambassadors dedicated 'Ask me about XX' badges or email signatures.

Managers Packs
- People naturally turn to their line managers for more information on work related stuff. So giving your line managers a pack of information to help share the awareness and the knowledge is great. Things can include briefings documents, detailing what it is and answers to FAQ's, posters they can add to their team's notice boards and quick reference guides.

Action — Download it

Clear Call to Action
Here is where you have a clear call-to-action statement in your comms, to get people to do something. Strong call to actions include 'download now' if you were launching a new app or 'log in at XXX' if need to log into a new piece of software.

Make your launch an event
To help create the excitement, think about holding a launch event as well where you can people to come along and learn more and answer any questions they have.

Top tip: We all love a freebie. From handing out free pens to a free cupcake or drinks voucher can help attract your audience.

Participate & Reinforce — Use it

Give users an incentive
To help encourage participation, why not run a competition or incentives that encourage use. Such as, most booked bank shifts by a department win a prize

Use the data to reinforce
This phase allows you to be a bit more reactive to situations as well. Using the data the software can provide, you can see areas where users may not be using the features of the software you want them to do. So you can then adjust your comms to reinforce the actions you are looking for.

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Creating your communications plan

- So we've provided plenty to think about and hopefully, got your creative ideas following for you. Then let's put these ideas down on paper.

- Think about the different activity you can do and write down what you would do for each phase. We've given an example below of some of the things you could do in each section in our 'Activity Breakdown'.

Awareness & Knowledge		Action	Participate & Reinforce
Learn about App		Download App	Use App
• Weekly News Articles • Posters • Leaflets • Weekly Countdown Emails • Roller Banners, outside break areas • Internal Social Media Images • Countdown Screens (10 days to go)	• Central Digital Resource • FAQ's • User Guides • Ambassadors • Given early demo of app • Provide with 'Ask me about XX' badges, Internal FAQ's, early access to app to demo'	• Posters (Download Now) • Leaflets (Download Now) • Launch day event • Offer free cupcake to everyone that downloads the app.	• Content on the app • Message that links back to your objectives • Reports of usage

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A blank version of the above Activity Breakdown template for you to use can be found in the Communications Vault.

Creating your communications plan | Timelines

- For each of these phases, it's important you plan a timeline around it to fit with your go live date for end users. Below is our recommendations on these timelines. Overall, we like to think of it as an exciting new movie coming out. It just doesn't appear overnight. You get to take the time to get people excited for it and the day its coming.

Awareness & Knowledge	Action	Participate & Reinforce
Have a constant heartbeat of news	**Make your 'Action' an event**	This phase never really ends either and is about having plans of action in place should things not go the way you hoped. Use the data to provide insights of whether you are hitting your objectives and then take action to achieve that. IE: everyone is on your new app but not enough people are not using it, so run an incentive to encourage people to get posting.
How long you have to promote awareness and knowledge depends on how big your organisation is, how many people you are launching it too and which product. It's a balancing act.	Launching something new? Then have a launch day. A day that you can focus your awareness and knowledge comms to and then swapping it on that date to take action. And you can focus all your activity on the one day, including hosting a launch event, such as a booth.	
Too short, people maybe aware of a new product but do haven't time to build up knowledge before needing to do your desired Action. Too long, people will forget about what you have saying.	But it doesn't just have to be the one day, you could extend this over a week with your comms, to make sure you capture everyone that may not be working on your launch day.	
So think about what messages and knowledge you need to share and give yourself enough time to promote and digest the news. Think about it as a 'heartbeat of news'. You want enough time to promote messages often and regularly. We've given an example below:		

- 4 weeks to launch, announce the product is coming
- 3 weeks to launch, share a promotional video to answer questions
- 2 weeks to launch, hold a demo sessions to build knowledge
- 1 week to launch, announce live date and start a countdown

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Creating your communications plan | Timelines

- To help then flesh out your communications plan further, we recommend dropping your ideas for activity into a top level calendar format. We've provided an example of this on the next page.
  - Having a calendar of events will help you visualise your 'heartbeat of communications' so that you don't end up dropping all information on day 1 and then nothing until launch.
  - It also a useful tool to show to your project team on what the communications plan.
  - You don't have to use our calendar as well; tools such as Asana or Trello are great ways of visualising your plans as well these as well.

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Communications Timeline | Example Calendar

Week 0: the week you go live

Example shown for launching a new app

Phases	Activity	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7
Knowledge	Online Resource page live (linked in intranets)	■	■	■	■	■	■	■	■	■	■	■	■
Awareness	Digital Banner on staff portal	■	■	■	■								
Awareness	Newsletter Article: XX is coming	■											
Awareness	Newsletter Article/Email: Check out XX Video, join us for a demo session		■										
Awareness	Newsletter Article: XX Launch date announced			■									
Awareness	Newsletter Article: How will I get onto XX				■								
Awareness	Posters/Roller Banners in key staff areas	■	■	■	■								
Awareness	Newsletter Article/Email: Call for Ambassadors		■										
Awareness	Countdown to launch day screens			■	■								
Knowledge	Demo session for Ambassadors			■									
Knowledge					■								
Knowledge	Briefing documents and FAQ's given to line managers		■	■									
Knowledge	Newsletter article: How to connect info				■								
Action	Roller Banner/Leaflets (updated with Download Today CTA)					■	■	■	■	■	■	■	■
Action	Email auto Notifications (including EoL details)					■							
Action	Launch event/booth set up					■							
Action	Launch Competition (download it and get entered into a prize draw)					■							
Participate & Reinforce	First day/s reaction video					■							
Participate & Reinforce	XX Content Plan					■	■	■	■	■	■	■	■
Participate & Reinforce	Incentives for using app (if needed, check in weekly against objectives)					■	■	■	■	■	■	■	■

A blank version of the calendar for you to use can be found in the Communications Vault.

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Recap

- Hopefully following this section you'll be able to:

Create a strong communications plan that is aligned to your objectives

Have a timelines in place for each of the phases

Have understand of the activity you are going to undertaken

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4.

Introducing the Communications Kits

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Introducing the Communication Kit

- You have planned out your communications plan. ✔

- You have your plan linked to your communications objectives. ✔

- And you know what activity/tactics you want to do in order to execute it. ✔

- Now you just need to create all the content for these. A daunting task maybe?

- **Well there is good news!** For our various products, we are have a wide range of **Communications Kits.** in. From posters and email signatures, to leaflets and video content, our Communications Kits contain various pre-created assets that you can use to help you execute your communications plan.

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Introducing the Communication Kit

- Here is just a sample of the different content you can find under each products Communication Kit.

Introducing the Communication Kit

- Here is just a sample of the different content you can find under each products Communication Kit.

Accessing Communications Kits

All items in the Communications Kit can be found in the Communications Vault.

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Additional Top Tips

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Additional Top Tips

- Make sure you give yourselves time to do your communications planning properly. Depending on the size and complexity, it could take from a half-a-day workshop to a couple of weeks work. Also, make sure you have the whole project team on board to help make it even easier when completing the project purpose and communication objectives.

- Are you doing a phased roll out to different departments rather than one big launch?
    - Use the launch plan and phases but rather than just having one big launch plan for everyone, split each audience into heir own launch plan, and therefore each phases. It will really help you to focus the right message to the right people at the right time.
    - Consider having one big Phase 1 awareness Activity but highlight to difference audiences when it is coming to then. IE: Use social and intranets to spread your key message to everyone, but when it is time for certain teams or departments to get it, use the posters and ambassadors to make just those specific areas aware.

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Any questions or feedback about using this workbook.
Email: comms-vault@allocatesoftware.com

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