

Series on Effective Stakeholder Engagement¹

Communication Planning

By Dr. Lynda Bourne

To plan without acting is futile. To act without planning is fatal!

Communication planning is an essential element in crafting a communication strategy that will work to support the success of the project or other activity being managed. Inadequate planning may lead to problems such as delays in message delivery, the communication of information to the wrong audience, insufficient communications activities, and misunderstanding or misinterpretation of the messages communicated.

To avoid these problems and facilitate the development (and then implementation) of an effective communications plan people with the following knowledge and skills are needed:

- Understanding the politics and power structures in the organization and the wider stakeholder community, including customers and sponsors;
- Knowledge of the environment and culture of the organization and the key stakeholders;
- Knowledge of the industry and type of project deliverable;
- Knowledge of communications technologies;
- Knowledge of corporate policies and procedures regarding security, legal and other requirements affecting communications.

Communication Requirements

Before developing the communications plan, it is important to analyse the information needs of the project and its stakeholders. Sources of information used to develop the project communication requirements include:

- Stakeholder information and communication requirements derived from the analysis of the stakeholder community and documented in the stakeholder register and stakeholder engagement plan;
- Organizational charts (for the customer, the performing organisation and the project) and stakeholder responsibilities, relationships and interdependencies;
- The range of technical disciplines, departments, and other specialties involved in the project;
- Logistics of how many persons will be involved with the project and at which locations;

¹ This series of articles on effective stakeholder engagement is by Lynda Bourne, PhD, Managing Director of Stakeholder Pty Ltd (Australia) and author of the books *Stakeholder Relationship Management* and *Advising Upwards*, both published by Gower (UK). Dr. Bourne is one of the world's leading authorities on program/project stakeholder relations. Her author profile can be found at the end of this article.

- Internal information needs (e.g., when communicating within organizations);
- External information needs (e.g., when communicating with the media, public, or contractors);
- Legal and regulatory requirements (eg, mandated stakeholder consultations).

Based in this information, the project's communication requirements are developed by combining the type and format of information needed with an analysis of the value of that information, and how the communication supports the project's objectives. Project resources should be focused on communicating information that contributes to the success of the project or where a lack of communication can lead to project failure. Factors to consider during the planning process include, but are not limited to:

- The number of potential communication channels and the complexity of stakeholder relationships as an indicator of the complexity of a project's communications (and therefore the complexity of the plan);
- Who needs what kind of information and who is authorised to access that information;
- How best to use the '*three types*²' of project communication;
- For PR (project relations) type communication:
 - What schedule is appropriate?
 - What messages should be sent in what order?
 - How will the 'news' be broadcast?
 - What feedback and community discussion forums are appropriate?
- For Project Reporting:
 - Who gets what type of report;
 - When the information is needed;
 - Where the information should be stored;
 - What format should the information be stored in;
 - What format should the information be transmitted in;
 - How can the information be retrieved;
 - How often does it need to be updated;
 - Should time zone, language barriers, and cross-cultural considerations need to be taken into account;
 - How does the information benefit the project and the stakeholder(s) and help the project achieve its objectives?
- For Directed Communication:
 - What information is needed by the stakeholder and why;
 - When the information is needed;
 - Where and in what format should the information be stored;
 - How should the information be communicated for maximum effect;

² For more on the ***three types of project communication*** see:
http://www.mosaicprojects.com.au/Mag_Articles/ESEI-08-three-types-of-communication.pdf

- What effect do we expect from the communication?
- The optimum communication methods to use (see below).
- The types of communication technology available and to be used (see below).
- The communication tools available and to be used (see below).
- The needs of individual stakeholders or stakeholder groups (see below).
- Determining an appropriate review cycle for the communication plan. As a minimum, the communications plan and the effectiveness of the communication activities need to be reviewed on every occasion that the stakeholder community is reviewed and updated.

Communication Methods

Once the communication requirements are understood, the optimum communication methods to share information among project stakeholders can be decided. These are broadly classified as follows:

- **Interactive communication.** An interactive discussion between two or more people exchanging information in real time. This is the most efficient way to ensure a common understanding of the subject matter by all of the participants, and to create new knowledge, insights or understanding. The communication can be face-to-face or use remote conferencing facilities such as Skype.
- **Push communication.** A message is sent directly to specific recipients who need to receive the information. This process ensures that the information is distributed but does not guarantee that the information actually reached, or was understood by, the intended recipients.
- **Pull communication.** Requires the recipients (or information users) to access content at their own discretion, when needed, and subject to security procedures. The information is usually held in a web portal or secure information repository. This option is typically used for:
 - Large, or complex, information sets;
 - Where large audiences are involved;
 - Where access to the latest version of the information is vital (typically the controlled version of the data is held on the information server, downloaded or printed copies are ‘uncontrolled’);
 - Where different stakeholders need access to specific elements of an overall data set (eg, BIM³ data).

Within the above general classifications, different approaches should be selected to best meet the needs of the stakeholders and the project team. Some of the communication options that may be chosen include:

- **Intrapersonal communication.** Your internal preparations for a discussion or meeting, including analysing the ‘problem’ and planning the actual exchange.

³ **BIM** = Building Information Model, a multi-dimensional database of information used to construct and maintain a building.

See: http://www.mosaicprojects.com.au/WhitePapers/WP1082_BIM_Levels.pdf

- **Dyadic, or interpersonal, communication.** Information exchange between two individuals, typically face-to-face or via a real-time communication tool.
- **Small group communication.** Occurs when groups of around 3-6 people communicate. Communication becomes more complex because of the increase in links between the individuals, and roles become more formalized.
- **Public communication.** A single speaker addressing a group of people. Examples are presentations for information exchange or decision-making, to foster better understanding of a topic, to gain acceptance of change.
- **Mass communication.** There is minimal connection between the person or group sending the message and the large, sometimes anonymous groups for whom the information is intended.
- **Networks and social computing communication.** Supports emerging communication trends of many-to-many supported by social computing technology and media.

Planning to use more than one method of delivery will increase the probability that the message is received without distortion.

Communication Technology

Based on the requirements and methods, the ‘best’ choice of communication technologies to use can then be determined. Factors affecting the choice of technology include the:

- **Urgency of the need for information.** What is the urgency, frequency, and format of the information to be communicated? This is likely to vary over the life of the project.
- **Availability of technology.** Ensure that the technology that is required for distribution of project communications will be available and accessible to the relevant stakeholders throughout the life of the project, or their involvement in the work.
- **Ease of use.** Ensure that the choice of communication technologies is suitable for project participants and that proper training is planned where appropriate.
- **Project environment.** Factors in the project environment that affect communication technology decisions include:
 - Will the team be co-located and meet and operate on a face-to-face basis or in a virtual environment;
 - Are they located in one or multiple time zones;
 - Will they will use multiple languages for communication; and,
 - Are there are any other project environmental factors, such as various aspects of culture, which may affect the choice of technology?
- **Sensitivity and confidentiality of the information.** If the information to be communicated is sensitive, confidential or classified; additional security measures may be required and the methods of communication restricted.

The range of ‘technologies’ used to communicate information are very wide and can range from simple written documents (physical paper or electronic formats such as PDF) to

extensive integrated documentation which can be only accessed via specialised software. Online technologies include interactive databases, and websites; social media technologies integrated with various computer platforms and mobile devices to enable various forms of collaboration and information exchange. Factors that affect the choice of communication technology may include:

- **Availability of technology.** Ensure that the technology that is required for distribution of project communications artefacts is compatible, available, and accessible for all stakeholders throughout the life of the project.
- **Ease of use.** Ensure that the choice of communication technologies is suitable for project participants and that proper training events are planned, where appropriate.
- **Project environment.** Determine if the team will meet and operate on a face-to-face basis or in a virtual environment; whether they will be located in one or multiple time zones; whether they will use multiple languages for communication; and finally, whether there are any other project environmental factors, such as various aspects of culture, which may constrain the efficiency of the communication.
- **Sensitivity and confidentiality of the information.** Some aspects to consider are:
 - Whether the information to be communicated sensitive or confidential. If so, additional security measures may be required. The most appropriate way to communicate this information should be clarified.
 - With the advent of social media and its proliferation into the business world, corporations are designing social media policies for employees to ensure appropriate behaviour, security and the protection of proprietary information. These policies are crafted to ensure they are complied with, while at the same time providing opportunities for enhanced communication and collaboration.
 - Corporate social media policies for employees that require appropriate behaviour, security and the protection of proprietary information. The plan needs to ensure these policies are complied with, while at the same time providing opportunities for enhanced communication and collaboration.

Communication Tools and Artefacts

Supported by the chosen technologies, the methods used to transfer information among project stakeholders will vary significantly. Possible communication tools and artefacts include:

- Noticeboards (physical or virtual);
- Does the organization have an effective knowledge management system that can be used?
- Letters to team members;
- Press releases;
- Various forms of reports;
- Emails and intranets;
- Web portals and other information repositories (for 'pull' communication);
- Does the organization have an effective knowledge management system that can be used?
- Phone conversations;

- Presentations;
- Team briefings and various types of meetings;
- Focus groups and facilitated workshops;
- Face-to-face formal or informal meetings between various stakeholders;
- Consultation groups or staff forums (face-to-face or virtual);
- Social computing technology and media.

The choices of communications tools and artefacts that are used for the project should be discussed and agreed with the project stakeholders based on:

- Their communication requirements;
- The cost and time constraints; and
- Their familiarity and the availability of the required tools and resources that may be applicable to the communication process.

Individual Communication Requirements

The final stage in planning your communication is to determine the specific communication activities needed to meet the information needs and requirements of each key stakeholder, or stakeholder group. Some of the factors to consider during this planning process include:

- Is the stakeholder internal to the organization or external? Confidentiality, proprietary and commercial considerations may affect external communications to a greater extent than internal communication.
- Is the team co-located or distributed across multiple time zones? If they are distributed across multiple time zones or geographical areas it is essential to take into account the cultural differences and communication styles. Ensuring that team members who are located remotely are included in all team activities is an important element in communication planning.
- What technologies are most appropriate for communicating with the stakeholder, what do they have access to and what are they comfortable using?
- How much of the communication within this stakeholder community needs to be retained and for how long (including security and legal requirements)?

Conclusion

From the data gathered through the consideration, and answering, of the questions and options outlined above, the final draft of the Communication Plan can be developed and circulated for agreement. Some aspects of the plan will be general and focused on 'mass communication' using various 'PR' strategies and routine report distribution. Other elements will be specific and focused on key individuals and groups (directed communication). However, particularly in the near term each communication activity should be precisely defined with the reason for the communication (including any expected outcome or change), the scheduling of the activity, the information to be communicated and the person responsible for the activity defined; along with any feedback and assessment processes. In larger projects, a 'rolling wave' approach to planning is desirable, allowing future actions to be adapted based on feedback from the current communication activity.

A key part of the planning activity is determining the resource requirements needed to implement the plan. In addition, it is necessary to ensure there is adequate additional capacity to deal with then inevitable ‘ad hoc’ requests for information that will arise from within the wider stakeholder community. These requirements and the key actions should be incorporated into the project schedule and resource plans.

The communication planning process and the resulting communication plan need to be appropriate to the scale and complexity of the work and stakeholder community. However, particularly in the early stages of a project, it is prudent to ‘over communicate’ and prevent stakeholder issues arising. Once the work of the project is underway and the actual relationships with key stakeholders know, an opportunity to scale back the communication effort may become apparent. This approach has a far lower risk profile (and lower costs) than under communicating and then having to ‘fire fight’ emergencies and stakeholder issues that could have otherwise been avoided.



About the Author

Dr. Lynda Bourne

Melbourne, Australia



Dr. Lynda Bourne is Managing Director of Stakeholder Management Pty Ltd – an Australian based company with partners in South America and Europe. Through this global network she works with organisations to manage change through managing the relationships essential for successful delivery of organisational outcomes. Lynda was the first graduate of the RMIT University, Doctor of Project Management course, where her research was focused on tools and techniques for more effective stakeholder engagement. She has been recognised in the field of project management through her work on development of project and program management standards. She was also included in PMI's list of 50 most influential women in PM.

She is a Fellow of the Australian Institute of Management (AIM) and a Fellow of the Australian Computer Society (ACS). She is a recognized international speaker and seminar leader on the topic of stakeholder management, the Stakeholder Circle® visualization tool, and building credibility and reputation for more effective communication. She has extensive experience as a Senior Project Manager and Project Director specializing in delivery of information technology and other business-related projects within the telecommunications sector, working as a Senior IT Project Management Consultant with various telecommunications companies in Australia and South East Asia (primarily in Malaysia) including senior roles with Optus and Telstra.

Dr Bourne's publications include: [Stakeholder Relationship Management](#), now in 2nd edition, published in 2009, [Advising Upwards](#) published in 2011, and [Making Projects Work](#), published in 2015. She has also contributed to books on stakeholder engagement, and has published papers in many academic and professional journals and is blogger for PMI's *Voices on Project Management*.

Dr. Bourne can be contacted at lyndab@stakeholder-management.com.

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