

## Change Communications Planning Worksheet

**NOTE:** Use this template in the early stages of change planning to develop and deliver a clear and compelling vision.

### Background:

**Title:** 2-4 words for ease of reference and consistency; Will resonate with multiple audiences

**Date Created:** XX/XX/XX (**Revisions:** XX/XX/XX)

**Elevator Pitch / Vision Statement:** 1-2 succinct sentences that describe the concept, change, or event that the communication is about.

**Purpose of Communication:** Examples: inform, inspire, persuade, reassure

### Key Messages

**What is happening?**

**Why is it happening?**

**What do we know today?**

**What details will be communicated later?**

**Elevator Pitch / Vision Statement:** (1-2 succinct sentences that describe the concept, change, or event that the communication is about. Avoid formal, conceptual words, aim to use a conversational tone with 9<sup>th</sup>-grade-level comprehension).

*\*NOTE: For high-profile or highly sensitive messages, obtain sign-off and buy-in of key messages and elevator pitch from sponsors, Champions, and project/core team resources*

## Audience Analysis

**Audience:** Individuals or groups. May reference specific names, teams, email distribution lists, etc.

Consider the following:

- **Champion Tier** – those who will need to help communicate the message; demonstrate buy-in
- **Engagement Tier** – those who are directly involved or impacted (including the core/project team)
- **Awareness Tier** – those who are not directly impacted but can benefit from basic awareness, or need to know they are not impacted
- **Consumer Tier** – those who may be recipients of the change, or for whom the change is aimed

**Objectives:** State the primary purpose or intended outcome of the communication, including any action required

**Sensitivities/Risks:** Define any known or potential areas of confusion, resistance, special circumstances or relationships to be considered, etc.

AUDIENCE	OBJECTIVES	SENSITIVITIES	RISKS OF POOR COMMUNICATION
<i>Team ABC</i>	<i>Need to have awareness of Key Messages and need to understand short-term and long-term impacts; need to complete exercise/activity</i>	<i>Several recent changes to team structure; multiple new team members who are less familiar with historical context</i>	<i>If the team does not receive the information, they may not complete the exercise, or may complete the exercise incorrectly</i>
<i>Add</i>			

## Cascading Plan

Date	Tactic	Target Audience	Responsibility for Development / Delivery	Objectives / Notes	Measure / Monitor / Maintain
<i>XX/XX/XX</i>	<i>Email from CIO</i>	<i>Team ABC</i>	<i>Joe to develop; Susan to deliver</i>	<i>Introduce the key messages/concepts and notify of detailed communication in next staff meeting</i>	<i>Manager to follow-up 1:1 after email to verify understanding &amp; gather questions for FAQ document</i>
<i>XX/XX/XX</i>	<i>FAQ Document emailed to teams and posted to SharePoint</i>	<i>All</i>	<i>Joe to develop, send &amp; publish</i>	<i>Reiterate key messages</i>	
	<i>Add more rows</i>				