

Effective Communications: How to Develop a Communications Plan

FOUNDATIONAL Refreshed: 21 January 2016 | Published: 19 August 2009

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The communications core consists of a communications strategy, delivery skills and a comprehensive communications plan. The first publication in this series about effective executive communications presented a strategy for effective communications and discussed how effective CIOs build their communication skills. This publication, the second in the series, discusses how to develop a communications plan. Upcoming research will address how to develop messages for communications stakeholders, and then a series of publications will address how to conduct specific communications, such as IT updates and communicating IT performance.

Gartner foundational research is reviewed periodically for accuracy. This document was last reviewed on 21 January 2016.

Key Findings

- To deliver great IT communication, CIOs and other IT executives must build an effective communications core, which consists of a communications strategy, a communications plan and delivery skills.
- Organizations that communicate effectively are 4.5 times more likely to report high levels of employee engagement.
- As with any IT initiative, effective planning increases the likelihood of success. By formalizing a communications plan — and adopting a disciplined approach to using it — the quality of communications can improve over time.

Recommendations

- Round out your communications core by developing a communications plan for your organization.

- Effective communications is a core leadership competency. Engage your organization in developing a communications plan to begin building this competency in your leadership team.

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Analysis

Communication: To communicate is to express oneself in such a way that the message is readily and clearly understood.

While this formal definition of communication captures the mechanical act of imparting information, it neglects to consider the human elements of inspiring, exciting or calming. Effective communications is a core skill of all good business leaders and a well-honed skill for great ones. CIOs can build their leadership abilities by focusing on delivering great communications.

Whereas a communications strategy provides the overall framework for communication (see "Effective Communications: A Strategy"), a communications plan brings the strategy to life by addressing the specifics for each communication.

1.0 Components of an Effective Communications Plan

A communications plan contains the essential components of purpose, communicator, stakeholders, messages, delivery method, delivery frequency, feedback and measures of success.

1.1 Purpose

Each communication must have a clear purpose. Identify what you want to achieve through the communication. Common purposes fall into five basic categories: inform, request, position, consult and champion (see Figure 1).

Figure 1. Understand the Desired Outcome of the Message

Communication Purpose	Description	Role of CIO
Inform	Create awareness.	Steward
Request	Encourage action.	Motivator
Position	Create a placeholder for future action. Put it in the context of a larger vision.	Change agent
Consult	Refine ideas.	Consultant
Champion	Create an extension of the CIO communications process — one who can act as a surrogate and becomes part of the communications team.	Inspirer

Source: Gartner (August 2009)

The roles of the CIO and the executive team will change, depending on the purpose of the communication, and the roles may include that of a steward (of information), a motivator, change agent, consultant or inspirer. A good communications plan specifically documents the purpose of a communication. It is continually revisited and refined after every communication as more becomes known about stakeholders and their current stance on the topic. (A specific publication about stakeholder management will be the next in this series on effective communications.)

When the purpose of a communication is to inform stakeholders, the expectation is that the message recipient is not expected to do anything, except to be aware. The CIO and executive team are acting as stewards for the organization — imparting necessary information as needed across the organization or to a particular person. For example, as a new executive joins the organization, it is wise for the CIO to meet with the person and give the person a background or history of how IT has benefited his or her area in the past.

When requesting something from somebody, the CIO is motivating that person to do something. An example might be to have the difficult conversation with an executive about becoming a more visible project sponsor.

As a change agent, the CIO is trying to position an effort within the organization that will require much change. For example, changes to the supply chain tend to have a significant impact on the organization. Carefully engaging the impacted organizations to appreciate the reasons for the change, the benefits of the new operating model, and their roles and responsibilities in the effort will significantly increase the likelihood of success.

And, finally, inspiration is often required to help an organization engage in significant change or to overcome difficult times, such as when leadership changes or layoffs occur. The purpose of this role is not only to inspire people to stay engaged with the organization, but also to understand the change well enough to become champions of the effort as well.

1.2 Communicator

Communication is a two-way street, so the first question to answer is, "Who should deliver the message?" A message is typically delivered by peers across the organization, from executive to executive or manager to manager. The advantages of this approach are twofold: Relationships are built at all levels across the organization, and IT employees are given the opportunity to build a critical leadership skill.

"If you are clear in communicating your vision and direction, then you are leading and not just managing people. People will want to be part of your vision and help you move it forward. Sharing different perspectives requires transparent communications up, down and across the organization. Everybody needs to understand what you're doing and why. The result: It leaves fewer questions than they had when the conversation started." — Adam Frumkin, CIO, School Employees Retirement System of Ohio

1.3 Stakeholders

The second question to ask is, "Who needs to receive the message?" Typical stakeholder segments include the board of directors, executive team, midlevel management, user community, IT leadership and IT staff. Less familiar segments, but ones that CIOs should increasingly consider, are customers and the media. A great communication accounts for the attributes of stakeholders. Understanding both the common and unique attributes of stakeholders will help effectively shape the messages to be delivered. (A specific publication about stakeholder management will be the next in this series on effective communications.)

1.4 Messages

Given the goal for a particular stakeholder group, what kind of message needs to be communicated to achieve the goal? Consider the needs of the stakeholders by answering the following questions: "Why do these stakeholders need to hear the message?" "What does it mean to them on a personal or organizational level?" "What will they get out the communication?" "Why should they care?" Craft

a message that helps achieve the purpose of the communication, while meeting the needs of the stakeholder.

"Be open and honest. If you are caught in a falsehood, you have shot all your credibility. Honesty is always the best place to start." — Ronald Bonig, Vice President and CIO, The George Washington University

1.5 Delivery Method

Consider what the best method or channel is to deliver the communication. What must be taken into account when determining the most effective method of communication for the situation? A good communication considers all the avenues available — from face to face to phone to e-mail. A great communication considers the corporate culture and characteristics when the communicator selects how a message will be delivered. For example, in an environment where there are warehouse employees who do not have access to e-mail, then posters or other hard-copy methods should be used. And, finally, deliver the message in the recipient's language. For example, the context and tone of a message targeted at the CFO will be more financially oriented than one for the head of sales, who cares more about business growth, or one for the CEO, who is focused on achieving competitive advantage. Selecting the right delivery method is key to demonstrating consideration for the role of the stakeholders, successfully drawing their attention and engaging them to act on the message (see Figure 2).

Figure 2. Select Communication Channels Based on Desired Outcomes

Communication Channel	Desired Outcome
In person (face to face or over the phone)	<ul style="list-style-type: none"> • Feedback about a significant strategic message and organizational readiness to change • Refined vision and strategy
E-mail	<ul style="list-style-type: none"> • Consistent delivery of a nonurgent message to a large group of people — e.g., policy changes
Intranet or other websites	<ul style="list-style-type: none"> • Historical context or reference tool — e.g., IT policies or IT update meeting summaries
Posters and other printed media	<ul style="list-style-type: none"> • Reaching people who may not have access to online resources — e.g., factory workers • Reminders to build interest — e.g., local classes or "save the date"

Source: Gartner (August 2009)

1.6 Delivery Frequency

How often and at what times do you need to communicate? Frequency should vary based on the purpose of the communication, the specific needs of the stakeholders and the type of message content. Some guidelines:

- Communicate on a regular basis about core IT activities via governance meetings and IT or project updates. Consistent delivery of these communications will create a predictable rhythm within the organization about operational performance and contribute to a steady level of IT credibility.
- In emergency situations, engage quickly and communicate frequently throughout the crisis period. After each communication, announce when people can expect to hear the next update.
- If the goal is to achieve a high degree of internalization among stakeholders, engage in more frequent communication, using a "build" approach. Each communication should delve deeper into the topic than the previous communication.
- Understanding how particular stakeholders internalize information will help determine how often and when to communicate. The more important it is for a stakeholder to internalize the information and take action on the communication, the more frequently these communications should be delivered.

1.7 Feedback

Communication involves soliciting the ideas and opinions of others and then using that feedback to refine your message, identify additional stakeholders, improve your timing and measure your success.

1.8 Measures of Success

Consider the results of the communication. Are they what you expected? If the goal of communicating an IT strategy was for a business executive to understand how their organization is impacted by the strategy, can this executive effectively articulate the business change? If not, then take the opportunity to refine your plan using the feedback received to move closer toward achieving the desired results. Consider applying formal and informal measures of success for more common, regular communications, and informal measures for special, out-of-the-ordinary communications.

2.0 How to Develop a Communications Plan

"Plan your work, and work your plan." — Vince Lombardi, former American football coach

Figure 3 shows a sample communications plan. It is intended to provide an "at a glance" view of all of the communications within an IT department. While a recommended set of communications will be provided for you to consider, when creating a communications plan for your organization, think carefully about creating the minimum number of communications you will use. With information increasing at an alarming rate, many are feeling overwhelmed by the amount of information they receive — your goal is to not contribute to this feeling. Less is more.

Figure 3. Sample Communications Plan

Communications Plan							
Communication Type	Purpose	Communicator	Stakeholders	Messages	Delivery Method	Feedback	Measures of Success

Source: Gartner (August 2009)

Engage your leadership team, and ask the following questions when developing your communications plan:

- What do we need to communicate about? Why? How do we know? As Owen McCall, CIO of The Warehouse Group in New Zealand, advises, "If you have nothing to say, then don't say anything."
- What does the enterprise need to hear? Why? How do we know?
- What are common questions we receive within the organization? Can a regular communication be developed to answer these questions?
- What are the problems we are experiencing? Would a regular communication help fix the problem?
- Where can we help the enterprise improve its maturity as it relates to technology? Where is the enterprise today in its understanding, and what can we give it that would help?

Figure 4 shows an example of a partially completed communications plan.

Figure 4. A Partially Completed Sample Communications Plan

Communications Plan							
Communication Type	Purpose	Communicator	Stakeholders	Messages	Delivery Method	Feedback	Measures of Success
IT strategy	<ul style="list-style-type: none"> The purpose of the IT strategy is to communicate the value of IT in business terms and to discuss the actions and plans of IT over the next XX months 	CIO	<ul style="list-style-type: none"> Board of directors Business executives IT organization 	<ul style="list-style-type: none"> The IT strategy reflects the business direction The IT strategy enables the enterprise to accomplish its vision in a unique way Etc. 	<ul style="list-style-type: none"> In person: board of directors and business executives Supported by a PowerPoint presentation: IT organization 	<ul style="list-style-type: none"> Qualitative feedback from board of directors and business executives Online survey for IT organization 	<ul style="list-style-type: none"> Extent to which people can articulate what they will be doing for the company Etc.

Source: Gartner (August 2009)

Identify each type of communication you need to deliver in order to be effective within the enterprise. Examples include the IT strategy or performance success of the IT organization. Other common examples include project updates or results of employee opinion surveys.

Once the list is completed, look at it with a critical eye: How many items are on the list? Are there more than 15 or 20? Remember, if you are communicating too much, you may be teaching people to ignore you. For each of the items you identified, spend time documenting its true purpose. What will you achieve by delivering this type of communication that you won't using any of the others on the list? It is far better to have fewer types of communications, and repurpose or reuse them for a particular audience or in a different venue, than it is to have many communications with a single purpose or use.

Again, be critical about who should communicate this message. While this topic will be explored more in our next publication, remember that one purpose of this process is to develop a critical leadership competency. The phrase "spread the wealth" applies here. Consider creating liaisons between the IT team and the rest of the enterprise at all levels not only to build this competency, but also to create a true relationship organization.

Consider every person in the organization who needs to hear and internalize the message type you are considering. Answer the following questions to determine people's communications needs:

- Why do they need to hear this message?
- What do we expect them to do with this information?
- How will the information benefit them?
- If they have the information, how will that benefit us?

People are far busier than they used to be and have far less tolerance for being included in things that do not matter to them. Make sure that what you are talking to them about, matters to them.

Select a venue that is appropriate for the person or group to whom you are delivering the message, as well as for the type of communication you are delivering. For example, to e-mail an IT strategy with no explanation would most likely defeat the purpose of the IT strategy, which is to create a shared vision of the future through the use of technology.

While larger IT organizations have teams dedicated to developing a communications plan for the organization, most organizations do not. Whether you have a dedicated communications department or not, after completing your plan for the organization, develop a timeline to achieve what you set out to do (see Figure 5). Assuming you plan on building this skill within your organization, assign ownership for each type of communication to your teams, and establish a date when all tools will be developed for the communication. Come together again to review each of the tools, and assign one individual to ensure consistency across all of the tools. The communications tools you choose and use reflect the "IT brand." By creating the same look and feel across all tools, you are subtly reinforcing that this is a communication from IT and that it is important to pay attention.

Figure 5. Develop a Communications Plan Timeline

Communications Plan Timeline		
Communication Type	Owner	Date to Build Out Communications Plan
IT strategy	IT communications	November 2009
IT updates (department meetings)	IT managers	October 2009
Etc.		

Source: Gartner (August 2009)

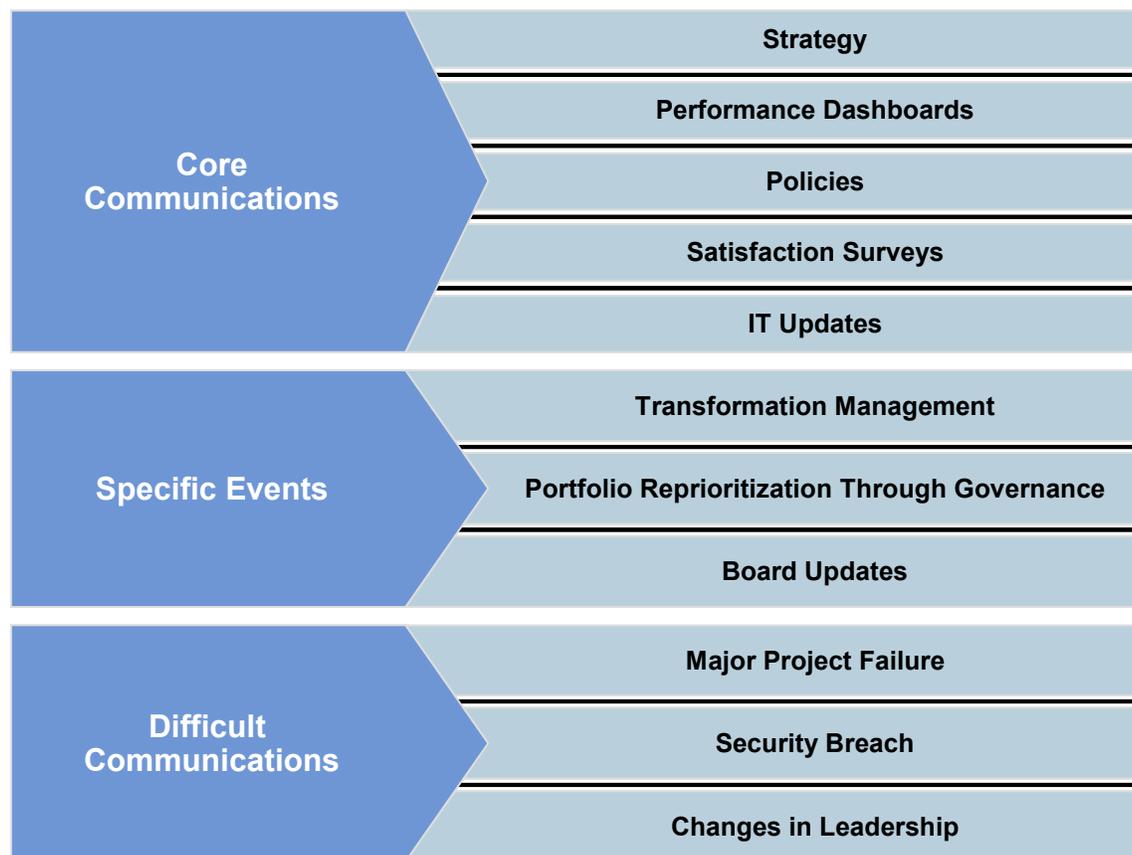
Examples of the tools that make up each communications plan item include:

- Refinement of what the communication type will be called.
- Identification of all communications plan items — from who will be responsible for communicating, to what the key messages should be and how success will be measured.
- A draft of the communication format. If it is an e-mail, develop a standard e-mail; if it is a Microsoft PowerPoint presentation, create a consistent template that will be used each and every time and can be modified as improvements are made to the communication.
- If success will be measured via a survey, develop the key questions for the survey, and identify when it will be administered, who will assess the results and how the results will be communicated back to the organization.
- If success will be measured in face-to-face meetings, develop a list of questions that the interviewer would likely ask.
- Create a method for collecting and analyzing the information. Remember, *less is more*.

3.0 Crafting the IT Communications Portfolio

CIOs must develop plans for building an effective communications portfolio around stakeholder management and messaging that considers the context of each type of IT communications. While the portfolio of items you develop for your organization may differ, Figure 6 presents common examples of IT communications that Gartner's Office of the CIO has found across the membership community.

Figure 6. Develop a Communications Portfolio



Source: Gartner (August 2009)

Our next publication will delve deeper into understanding your communications stakeholders, and subsequent publications will discuss each of the items in the communications portfolio.

Using the guidelines described in this research, you should now develop a communications plan for your organization.

Recommended Reading

"Toolkit: How to Create a One-Page IT Strategy"

"Effective Communications: A Strategy"

"Effective Communications: Stakeholder Analysis"

"A Practical Guide to Stakeholder Management"

"Effective Communications: IT Strategy"

"Effective Communications: Lead Through Storytelling"

"Effective Communications: Performance Dashboards"

"Effective Communications: Policies"

"Effective Communications: IT Satisfaction Surveys"

"Effective Communications: IT Updates"

"Effective Communications: Difficult Communications"

"Creating the Communications Core: The CIO's Guide to Effective Communications"

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