

DG [Name]

Unit [Name]

Communications Management Plan

**<Project Name>**

Date: <Date>

Doc. Version: <Version>

Template Version: 3.1



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|  |  |
| --- | --- |
| **Settings** | **Value** |
| **Document Title:** | Communications Management Plan |
| **Project Title:** | <Project Name> |
| **Document Author:** | <Document Author> |
| **Project Owner (PO):** | <Project Owner (PO)> |
| **Project Manager (PM):** | <Project Manager (PM)> |
| **Doc. Version:** | <Version> |
| **Sensitivity:** | <Public, Limited, High> |
| **Date:** | <Date> |

**Document Approver(s) and Reviewer(s):**

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| **Revision** | **Date** | **Created by** | **Short Description of Changes** |
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| *<These notes should be deleted in the final version :>*  **Notes for Templates:**   * Text in <orange>:has to be defined. * *Text in <blue>:* guidelines and how to use the Template. Should be deleted in the final version. * Text in green: can be customised. Should be recolored to black in the final version. |

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# Introduction

The Communications Management Plan helps to ensure that all project stakeholders have the information they need to perform their roles throughout the project. Planning and executing project communication activities is essential for project success.

The Communications Management Plan determines how to communicate most efficiently and effectively to the various stakeholders. It defines and documents the communication items content, format, frequency, the audience and expected results. It also defines how to communicate project status and the assignment of activities to the various stakeholders, and the communication strategy for each stakeholder, based on their interests, expectations and influence in the project.

# Communications Objectives

Proactive communication is important on all projects. Communication needs to be:

* **Adequate**: in the right format and right content;
* **Specific**: for the targeted audience;
* **Sufficient**: providing all the necessary information;
* **Concise**: brief, avoiding repetition and non-important information;
* **Timely**: addressing points at the right time.

Communication is also a vital way to manage project stakeholders' expectations such as:

* Following project progress and execution;
* Reporting on project quality;
* Assigning activities.

## Inputs

When planning communication, one of the major inputs is the *Stakeholder Matrix*, in order to identify project stakeholders' groups. To determine what information needs to be communicated to each target group the following inputs should be used:

* *Project Charter*;
* *Project Handbook* and possible related management plans.
* *Project Work Plan*.

## Media

The communication media that will be used for the project are:

* Email(s);
* Document(s) (Word, Powerpoint…);
* Phone call(s);
* Meeting(s);
* …

*<Please customize the above list as per your project's or/and organization's needs.>*

The communication media above contain, or are supported by:

* Minutes of Meeting (MoM);
* The Project Status Report;
* The Project Progress Report;
* The Quality Review Report;
* Contractor Status Report;
* Custom or Ad-Hoc Reports;
* Project Work Plan (updated estimates of effort and schedule);
* Project Logs;
* Project repository;
* …

*<Please customize the above list as per your project's or/and organization's needs.>*

# Project Meetings

*<Please customize the information for the Kick-off Meeting as per your project's or/and organization's needs.>*

|  |  |
| --- | --- |
| MEETING | **Planning Kick-off Meeting** |
| Purpose | Official kick-off of the planning phase of the project. Through this meeting, the scope of the project as well as the project governance structure must be clear, the expectations of all the key project stakeholders and their roles & responsibilities must be set and all the relevant risks at the time must be identified. |
| Location | Defined by the Project Manager (PM) in time. |
| Frequency | Done once at project level. Date of the meeting to be defined. |
| Chairperson | Project Manager (PM) |
| Minutes by | To be defined by the Project Manager (PM). |
| Attendees | Project Owner (PO)  Solution Provider (SP)  Business Manager (BM)(s)  Project Manager (PM)  Project Manager Assistant (PMA)(s) (if applicable)  Project Support Officer (if applicable)  Project Quality Assurance (if applicable - optional)  (Functional) Team Leader (optional)  Local Information Security Officer (optional)  Data Protection Coordinator (optional) |
| Agenda Items | * Introduce the agenda; * Introduce participants; * Outline the goals, expectations and activities of the Planning Phase, and discuss the planning timeline; * Introduce the project scope statement; * Invite the Project Owner (PO) to explain the importance of the project for the organisation and other beneficiaries; * Discuss the main elements of the Project Charter; * Discuss the governance structure, roles & responsibilities of the Project Core Team (PCT) and the Business Implementation Group (BIG);Discuss the overall project timeline; * Discuss the overall approach of the project; * Discuss the project plans needed for the project; * Discuss risks, constraints and assumptions; * Discuss or present any project supporting tools; * Allow time for any other business (questions & answers); * Summarise the discussion (decisions, actions, risk); * Communicate next steps. |
| Distribution list | All participants involved |
| Media | Meeting minutes written in MS- Word or by email. |

*<Please customize the information for the Kick-off Meeting as per your project's or/and organization's needs.>*

|  |  |
| --- | --- |
| MEETING | **Executing Kick-off Meeting** |
| Purpose | Official kick-off of the executing phase of the project. After this meeting, the Project Core Team (PCT) is aware of the scope of the project, the project governance structure, the roles & responsibilities of the team members as well as the project rules. |
| Location | Defined by the Project Manager (PM) in time. |
| Frequency | Done once at project level or for each major project phase. Date of the meeting to be defined. |
| Chairperson | Project Manager (PM) |
| Minutes by | To be defined by the Project Manager (PM). |
| Attendees | Project Owner (PO) (may be represented by the Business Manager)  Business Manager (BM)  Project Manager (PM)  Project Core Team (PCT)  Project Manager Assistant (PMA) (if applicable)  Project Support Office (PSO) (if applicable)  Other project roles or stakeholders (optional). |
| Agenda Items | * Introduce the agenda; * Introduce participants; * Present the Project Handbook and the Project Work Plan; * Present the Communications Management Plan; * Agree on the conflict resolution process and present the escalation procedure; * Present the Project Stakeholder Matrix; * Present the Risk Management, Issue Management and Project Change Management processes, and the Quality Assurance & Control activities; * Clarify the expectations for the Project Core Team (PCT); * Agree on the team’s ground rules (communication via email, meetings, phone, meeting minutes to be produced, availability, etc.); * Allow time for any other business (questions & answers); * Summarise the discussion (decisions, actions, and risk). |
| Distribution list | All participants invited. |
| Media | Meeting minutes written in MS-Word or by email. |

*<Please customize the information for the Project Status Meeting as per your project's or/and organization's needs.>*

|  |  |
| --- | --- |
| MEETING | **Project Status Meeting** |
| Purpose | * Discuss Project status; * Discuss open actions and check progress; * Discuss new risks or/and issues and define action points * Discuss and resolve conflicts; * Discuss and review change requests and possibly approve/reject. |
| Location | Office of Project Manager (PM) (or meeting room to be defined in time). |
| Frequency | <Frequency of the meeting (+ day of the week) to be defined herein> |
| Chairperson | Project Manager (PM) (or delegated person if Project Manager (PM) cannot attend) or Project Manager Assistant (PMA)(s). |
| Minutes by | <Note that sometimes minutes are not needed in case there is a document supporting the meeting. For instance, no need for meeting minutes if there is a Project Status Report and decisions are documented in the Decision Log.> |
| Attendees | Project Owner (PO)  Business Manager (BM)  Project Manager (PM)  (Functional) Team Leader (optional)  Project Manager Assistant (PMA)(s) (If applicable - optional)  Project Support Officer (optional)  Project Quality Assurance (optional)  Business Implementation Group (BIG) (If applicable - optional) |
| Agenda Items | Progress status review (presentation of periodic Project Status report);   * Accomplishments (Current and Planned actions); * Actual work (m.d.) vs Planned (m.d.); * Milestones status; * Current deliverables status:   + Indicators;   + Existing change requests (current progress);   + New change requests (input from Project Steering Committee). * Next deliverables status:   + Existing change requests (Current progress);   + New change requests (input from Project Steering Committee). * Risks & Issues:   + Major risks, issues & actions monitoring. |
| Distribution list | All participants invited. |
| Media | * Project Status Report will be written in MS-Word document, and sent by e-mail; and/or * Meeting minutes written in e-mail. |

*<Please customize the information for the Project Core Team (PCT) Meeting as per your project's or/and organization's needs.>*

|  |  |
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| MEETING | **Project Core Team (PCT) Meeting** |
| Purpose | * Obtain commitment on the execution tasks; * Review the accomplished work and estimate time to complete + schedule; * Review risk & issues; * Assess new change requests. |
| Location | Office of the (Functional) Team Leader (or meeting room to be defined in time). |
| Frequency | <Frequency of the meeting (+ day of the week) to be defined herein> |
| Chairperson | (Functional) Team Leader |
| Minutes by | Minutes will be made by the (Functional) Team Leader (or delegated person).  <Estimated Time to Completion / Schedule updated in Project Work Plan.  Other plans / outputs will be updated when needed> |
| Attendees | All Project Core Team (PCT) members working on the project under concern. |
| Agenda Items | Project status:   * Current and next milestones; * Done; * To do; * Estimate Time to Completion review; * Plan reviews; * Indicators review.   Process status:   * Debriefing on quality assurance aspects.   Risk & Issues:   * Risks, issues & actions monitoring.   Change management:   * Assess new change requests. |
| Distribution list | (Functional) Team Leader  Project Manager (PM) <if it concerns a project with sub-projects, S/he will receive a set of meeting minutes coming from all the subsequent projects linked to the project.>  Project Core Team (PCT) members working on the project under concern |
| Media | * Updated project plans; * Estimate Time to Complete updated for every task in Project Work Plan; * Updated Change Log with assessment results; * Meeting minutes (if used): written in an email or MS-Word document. |

*<Please customize the information for the Project Review Meeting as per your project's or/and organization's needs.>*

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| MEETING | **Project Review Meeting** |
| Purpose | * Management Review meeting; * Meeting discussing about project progress. * Topics to be discussed: major scope changes, next year’s budget, major re-baselining of the Project Work Plan (PWP), confirming alignment to portfolio goals and objectives, and business strategies. |
| Location | No specific location. Defined by the (Functional) Team Leader in time. |
| Frequency | Quarterly (or more frequently, depending on project duration) |
| Chairperson | Project Manager (PM) |
| Minutes by | Project Support Officer (or delegated person) |
| Attendees | Project Manager (PM)  Solution Provider (SP) (optional)  (Functional) Team Leader  Project Support Officer  Project Manager Assistant (PMA)(s) (if applicable)  Project Quality Assurance (optional) |
| Agenda Items | * Follow-up of mandatory documents; * Major milestones review; * Testing progress; * Risks (budget, resources, others), issues & actions monitoring; * Project Manager (PM) feedback; * Others: people / resources / contracts. |
| Distribution list | All participants invited |
| Media | * Project Progress Report * Meeting minutes in MS-Word, and sent by e-mail. |

*<Please customize the information for the Project Steering Committee Meeting as per your project's or/and organization's needs.>*

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| MEETING | **Project Steering Committee Meetings** |
| Purpose | * Meeting with the sponsor(s) about the follow-up of the project; * This meeting has also to be held at the moment there are:   + Contractual aspects to be discussed;   + Formal project approvals requested   + Commitments made. |
| Location | No specific location. Defined by Project Owner (PO) in time. |
| Frequency | Monthly or at the moment there is an important project milestone reached, that needs approval(s) from Sponsor(s). |
| Chairperson | Project Owner (PO)  Project Owner (PO) may delegate his responsibility to <To be specified in this case.> |
| Minutes by | Business Manager (BM) or to delegated person.  <To be specified in this case.> |
| Attendees | Project Steering Committee (PSC):   * Solution Provider (SP) * Project Owner (PO) * Business Manager (BM)(s) * Project Manager (PM)   Project Support Officer (PSO) (optional)  Project Quality Assurance (PQA) (optional)  Contractor’s Project Manager (CPM) (optional)  Local Information Security Officer (LISO) (optional)  Data Protection Coordinator (DPC) (optional) |
| Agenda Items | Project debriefing:   * Accomplishments for this period; * Problems encountered and actions taken; * Major points meriting management attention; * Subjects to be realised until next milestone/meeting; * Evaluation of current status with respect to project scope, project budget, project finish date; * Formal approvals / Commitments / Contractual aspects. |
| Distribution list | All participants invited |
| Media | * Meeting minutes written in MS-Word, and sent by e-mail; * Decision log updated; * <If other support used, they have to be specified here.> |

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| MEETING | **Change Control Meeting** |
| Purpose | * Discuss and prioritise change requests or client's inquiries * Discuss and prioritise maintenance requests * Prepare for decisions to be made by the Project Steering Committee (PSC) or the Change Control Board (CCB) or Change Advisory Board (CAB). |
| Location | Office of Project Manager (PM) (or meeting room to be defined in time) |
| Frequency | <Frequency of the meeting (+ day of the week) to be defined herein> |
| Chairperson | Project Manager (PM) (or delegated person if Project Manager (PM) cannot attend) or Assistant Project Manager (APM)(s) that are part of the Project. |
| Minutes by | <Note that sometimes minutes are not needed in case there is a document (such as Change Log) that is supporting the meeting. For instance, no need for meeting minutes if there is a progress report.> |
| Attendees | Business Manager (BM)(s)  Project Manager (PM)(s)  Project Manager Assistant (PMA)(s) (If applicable - optional)  Project Support Officer (PSO) (optional)  Project Quality Manager (PQA) (optional)  Business Implementation Group (BIG) (optional) |
| Agenda | Change request status:  **1- Progress update on open changes**  Current deliverables status:  **2- Existing change requests** (current progress)  **3- New change requests** (commitment on prioritization, on budget, on milestones, …)  Next deliverables status:  **4- Existing change requests** (current progress)  **5- New change requests** (commitment on prioritization, on budget, on milestones, …) |
| Distribution list | All participants invited |
| Media | * Meeting minutes written in MS-Word and sent by e-mail(s); * Change log to be updated. |

*<Please customize the information for the Project-End Review Meeting as per your project's or/and organization's needs.>*

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| --- | --- |
| MEETING | **Project-End Review Meeting** |
| Purpose | The objectives for the Project-End Review meeting are:   * Review the main project performance and achievements; * Discuss the overall project experience; * Discuss if the objectives have been reached and if not, why; * Discuss problems and challenges faced during project and the way they were addressed; * Discuss Lessons Learned and Best Practices that might be useful for future project. |
| Location | No specific location. Defined by the Project Manager (PM) in time. |
| Frequency | No frequency. The meeting is realized once. |
| Chairperson | Project Manager (PM) |
| Minutes by | To be defined by Project Manager (PM) in time. |
| Attendees | Solution Provider (SP)  Project Owner (PO)  Business Manager (BM)(s)  Project Manager (PM)  User Representatives  (Functional) Team Leader  Project Core Team (PCT)  Project Support Officer (PSO) (if applicable)  Project Quality Assurance (PQA) (if applicable)  Project Manager Assistant (PMA)(s) |
| Agenda Items | * Remind the project performance and achievements; * Enumerate project relevant facts (budget & work history, milestones & timing history, technical & methodological approaches used); * Indicate the Lessons learned; * Business continuity plan (operational organisation, budgets & procedures) |
| Distribution list | All participants invited |
| Media | Project-End Review MoM, Project-End Report Word Document ; sent by e-mail. |

*<Please insert the information for any other meetings as per your project's or/and organization's needs.>*

|  |  |
| --- | --- |
| MEETING |  |
| Purpose |  |
| Location |  |
| Frequency |  |
| Chairperson |  |
| Minutes by |  |
| Attendees |  |
| Agenda Items |  |
| Distribution list |  |
| Media |  |

# Project Reports

Reports may be produced to show the status of the project or a particular work package or the collected required measures etc. This section should document how the reports will be distributed and the standard format for the project reports.

*<Please customize the information for the following reports as per your project's or/and organization's needs.>*

|  |  |
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| REPORT | **Project Status Report** |
| Purpose | The Project Status Report provides summary information regarding the overall project performance (rather than detailed task-level information). The report includes tracking information for the cost, schedule, scope/changes, risks, issues, and reports on the status of important milestones for the current reporting period and provides forecasts for future performing periods. |
| Frequency | The elaboration of this report will follow the frequency defined for the Project Follow-up Meeting. |
| Author | Project Manager (PM) |
| Distributed to | Refer to Distribution List specified in the Project Follow-up Meeting. |
| Media | Word Document |
| Reference to | <Please reference to the document.> |

|  |  |
| --- | --- |
| REPORT | **Project Progress Report** |
| Purpose | The Project Progress Report provides a high-level overview of the entire project and its actual status. The report includes a Project Overview (Project Stakeholders, Milestones and Deliverables, Project Plan, Budget and Costs) and further Project Details (Scope Changes, Major Risks/Issues and Actions Taken, Achievements). This report provides more detail than the Project Status Report. |
| Frequency | The elaboration of this report will follow the frequency defined for the Project Review Meeting. |
| Author | Project Manager (PM) |
| Distributed to | Refer to Distribution List specified in the Project Progress Review Meeting. |
| Media | Word Document |
| Reference to | <Please reference to the document.> |

|  |  |
| --- | --- |
| REPORT | Quality Review Report |
| Purpose | This report provides an overview of the status of all project quality management activities and presents the major quality assurance and control results, non-conformities, opportunities for improvement, recommendations and remediation/improvement actions and their impact and status. |
| Frequency | <please define the frequency as per your project's or/and organization's needs.> |
| Author | Project Manager (PM) |
| Distributed to | <please define the distribution list as per your project's or/and organization's needs.> |
| Media | Word Document |
| Reference to | *<Please reference to the document.>* |

|  |  |
| --- | --- |
| REPORT | Outsourcing (Contractor) Status Report |
| Purpose | The report presents the status for the current reporting period and provides forecasts for future performing periods, along with information on new risks, disputes, and issues. Project Manager (PM) (PM) should include summary/highlights of these reports in the Project Status Report. |
| Frequency | <please define the frequency as per your project's or/and organization's needs.> |
| Author | Contractor, represented by the Contractor’s Project Manager (CPM) |
| Distributed to | <please define the distribution list as per your project's or/and organization's needs.> |
| Media | Word Document |
| Reference to | *<Please reference to the document.>* |

|  |  |
| --- | --- |
| REPORT | **Project-End Report** |
| Purpose | The Project-End Report summarises project experience. The evaluation of the major project parameters, best practices, lessons learned, pitfalls and solutions to problems are documented in this report. |
| Frequency | This report is realised once, during the Closing Phase. |
| Author | Project Manager (PM) |
| Distributed to | Refer to Distribution List specified in the definition of Project-End Review Meeting. |
| Media | Word Document |
| Reference to | <Please reference to the document.> |

*<Please insert the information for other reports as per your project's or/and organization's needs.>*

|  |  |
| --- | --- |
| REPORT |  |
| Purpose |  |
| Frequency |  |
| Author |  |
| Distributed to |  |
| Media |  |
| Reference to |  |

# Other Communications

<Complete one block of the following table for each type of other regular communication items>

|  |  |
| --- | --- |
| Name of the communication |  |
| Description |  |
| Audience |  |
| Frequency |  |
| Media |  |

# Summary Table

*<Please customize the information for the following communication items as per your project's or/and organization's needs.>*

| **Item Name** | **Audience (summary)** | **Responsible person** | **Frequency** | **Media of Communication** |
| --- | --- | --- | --- | --- |
| **Planning Kick-off Meeting** | Project Owner (PO)  Business Manager (BM)  Solution Provider (SP)  Project Manager (PM)  Project Core Team (PCT)  Business Implementation Group (BIG)  User Representatives (URs)  Other project roles or stakeholders (optional) | Project Manager (PM) | Once at Project Level. | Meeting and  Meeting minutes |
| **Executing Kick-off Meeting** | Project Owner (PO)  Business Manager (BM)  Project Manager (PM)  Project Core Team (PCT)  Other project roles or stakeholders (optional). | Project Manager (PM) | Once at Project Level or for each major project phase. | Meeting and  Meeting minutes |
| **Project Status Meeting** | Project Owner (PO)  Business Manager (BM)  Project Manager (PM)  (Functional) Team Leader (optional)  Other project roles or stakeholders (optional). | Project Manager (PM) or Project Manager (PMA)(s) | <Frequency of the meeting (+ day of the week) to be defined herein> | Meeting minutes and  Project Status Report. |
| **Project Core Team (PCT) Meeting** | All Project Core Team (PCT) members working on the project. | (Functional) Team Leader | <Frequency of the meeting (+ day of the week) to be defined herein> | Meeting minutes  Updated Change log  Updated project plans with actuals  Estimate Time to Complete updated. |
| **Project Review Meeting** | Project Manager (PM)  Solution Provider (SP) (optional)  (Functional) Team Leader  Project Support Officer  Project Manager Assistant (PMA) (if applicable)  Project Quality Assurance (optional) | Project Manager (PM) | Quarterly (or more frequently, depending on project duration). | Meeting minutes  Project Progress Report |
| **Project Steering Committee (PSC) Meeting** | Solution Provider (SP)  Project Steering Committee (PSC) members | Project Owner (PO)  Project Owner (PO) | Monthly or at the moment there is an important project milestone reached, that needs approval(s) from Sponsor(s). | Meeting minutes  Decision log updated |
| **Change Control Meeting** | Business Manager (BM)  Project Manager (PM)  Other project roles or stakeholders (optional). | Project Manager (PM) | <Frequency of the meeting (+ day of the week) to be defined herein> | Meeting  Meeting minutes Change log (updated) |
| **Project-End Review Meeting** | Project Owner (PO)  Business Manager (BM)  Solution Provider (SP)  Project Manager (PM)  User Representatives (URs)  (Functional) Team Leader  Project Core Team (PCT) Other project roles or stakeholders (optional). | Project Manager (PM) | Once per project or major project phase. | Meeting minutes Project-End Report |
| **Project Status Report** | Refer to Audience specified in the Project Status Meeting. | Project Manager (PM) | Will follow the frequency defined for the Project Status Meeting. | Word document |
| **Project Progress Report** | Refer to Audience specified for the Project Review Meeting. | Project Manager (PM) | will follow the frequency defined for the Project Review Meeting. | Word document |
| **Quality Review Report** | <please define the distribution list as per your project's or/and organization's needs.> | Project Manager (PM) | <please define the frequency as per your project's or/and organization's needs.> | Word Document |
| **Outsourcing (Contractor) Status Report** | <please define the distribution list as per your project's or/and organization's needs.> | Contractor | <please define the frequency as per your project's or/and organization's needs.> | Word Document |
| **Project-End Report** | Refer to Audience specified in the Project-End Review Meeting. | Project Manager (PM) | Once, during the Project Closing Phase. | Word Document |

Appendix 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g. the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>*  *<04.Project\_Handbook.XYZ.11-11-2013.V.1.0.docx>* | *<Example of a location>*  *< U:\METHODS\PM²@EC\Documents\>* |
| 2 | Project folder | *<Insert project folder location.>* |
| 3 | *<Example of a reference>*  *<"The Communication on Risk Management, SEC(2005)1327">* | *<Example of a source>*  *<20/10/2005, European Commission>* |