

Document Purpose

This Practices Guide is provides an overview describing the best practices, activities, attributes, and related templates, tools, information, and key terminology of industry-leading project management practices and their accompanying project management templates. The purpose of this document is to provide guidance on the practice of Communications Management and to describe the practice overview, requirements, best practices, activities, and key terms related to these requirements.

Background

The Department of Health and Human Services (HHS) Enterprise Performance Life Cycle (EPLC) is a framework to enhance Information Technology (IT) governance through rigorous application of sound investment and project management principles and industry's best practices. The EPLC provides the context for the governance process and describes interdependencies between its project management, investment management, and capital planning components. The EPLC framework establishes an environment in which HHS IT investments and projects consistently achieve successful outcomes that align with Department and Operating Division goals and objectives.

The Enterprise Performance Life Cycle (EPLC) has certain project management activities that are inherently required in every life cycle phase. One of those activities is ongoing communications to ensure all stakeholders are apprised appropriately.

The Communications Management Plan (CMP) is part of the Project Management Plan (PMP), which includes methods of communication between all of the concerned parties. Activities during the Concept and Planning Phases includes project management planning, the PMP and component plans such as the CMP. During the remaining phases of the EPLC the Communications elements of the PMP are reviewed and appropriately updated.

Practice Overview

Effective communications is a key component of successful project management and delivery. It is often estimated that eighty percent of a Project Manager's job revolves around communications with the project team, client, and executive management. Without effective communications, vital information may not be exchanged effectively. A lack of communications may even delay or prohibit the execution or completion of scheduled tasks. Project success increases exponentially by avoiding communication issues.

The goal of communications management planning is to define the project's structure and methods of information collection, screening, formatting, and distribution. It also outlines an understanding among project teams regarding the actions and processes necessary to facilitate the critical links among people, ideas, and information that are necessary for project success. Effective communications planning and management helps ensure:

- Information needs of project stakeholders are met
- Project performance is tracked and reported
- Project results are formally documented
- Enthusiasm and support for the project

Most projects will require some form of internal and external communications regularly to sustain momentum on the project and to fulfill organizational reporting requirements. To effectively accomplish and manage this, a CMP should be developed.

A CMP is a platform for understanding between project participants; it documents the methods and activities needed to ensure timely and appropriate collection, generation, dissemination, storage, and ultimate disposition of project information among the project team and stakeholders. The CMP also

defines which groups do not have access to certain information and what type of information will not be widely distributed.

The Project Management Institute's (PMI) A Guide to the Project Management Body of Knowledge (PMBOK Guide) defines a CMP as a document that describes: the communication needs and expectations for the project; how and in what format information will be communicated; when and where each communication will be made; and who is responsible for providing each type of communication. Key elements of a CMP include answers to the following types of questions:

- WHO do you need to talk to?
- WHY are you talking to them?
- WHAT do they need to know?
- WHEN do they need to know it?
- HOW do you communicate it to them?
- WHERE do you store it (communications medium)?

The CMP documents a consistent method for communications and the management of that communication throughout the project's life and should be developed in coordination with, and be accessible to, all project team members and stakeholders.

Developing the Communications Management Plan

The process of developing a CMP is primarily concerned with the actions necessary to define, integrate, and coordinate all project communications and communication methods into a single management planning document. The CMP is usually drafted by the project manager, reviewed by the project team, and approved by the project sponsor.

A good CMP is not necessarily lengthy. A CMP can be very short and still have great value. The content of the CMP will vary depending upon the complexity of the project. The size of and time invested to develop a CMP should be balanced with the size and complexity of the project. Large, more complex projects justify a significant effort in developing a comprehensive CMP and may even justify the creation of separate subsidiary communications plans for some sections of the CMP. If this were the case, the subsidiary plan would be referenced in the appropriate section of the CMP.

When developing the CMP it is important to consider all obvious and not so obvious audiences to ensure quick and effective communications with internal and external stakeholders. The CMP should address the following:

- **Stakeholder Identification and Analysis** – Summarizing both the project's internal and external stakeholders, their relationship to the project, and their required information needs is one of the most important steps in effective communications planning. Communications planning begins with an understanding of who the project stakeholders are, what their relationship to the project is, and their information needs.
- **Communications Matrix** – Describe the communications approach for each communication vehicle and include information on target audience, distribution/purpose, and frequency, owner, and distribution vehicle, whether the communications should remain internal or is allowed externally, and any additional comments. Include items such as project meetings, project reporting, product documentation, test results, metrics, etc.
 - **Project Meetings** – Describe the project's internal and external meetings, meeting schedule, and informational requirements for each meeting. Meetings should never substitute for ongoing communications between the project manager, project team, client, senior management, and/or any other project stakeholder needing information. Meetings are simply formal time set aside from the rest of the week to concentrate solely on the project. Include descriptions and distribution policies for items such as:
 - *Project kick-off meeting* – The project kick-off meeting is the most important project meeting to be held. It is the first time the whole project team is assembled and an opportunity for the project manager to meet his team and gain their commitment to the project. The kick-off meeting is a team building exercise for the project team and used to clarify project goals and objectives, individual roles and responsibilities, interdependencies with other projects, contact point within the project team, and to commit to project success.

- *Team meetings* – It is best practice for project team meetings to be held at least weekly by the project manager for the project team and bi-weekly for senior management. The meeting's purpose is to communicate risk, issues, resource concerns, schedule, deliverables, milestones, interdepartmental dependencies, etc.
 - *Client/Sponsor meetings* – Client/Sponsor meetings should be held at an interval that satisfies the client's need for information. The purpose is for the project manager to communicate with the client about risk, issues, schedule, deliverables, milestones, etc. and for the client to do the same in return.
 - *Stage Gate Review meetings* – These meetings are held at the end of each stage to obtain approval from IT Governance to continue with the project. The Project Manager coordinates with the Stage Gate Review Team Lead and Critical Partners to ensure that all project deliverables are reviewed and recommendations are provided to the IT Governance board for final determination. Stage Gate Review activities are included in the Project Schedule and the Stage Gate Review are identified as a project milestones. This also applies to meetings with IT Governance.
- **Project Reporting** – Describe the project's internal and external reporting, reporting schedule, and informational requirements for each report. Reports should never substitute for ongoing communications between the project manager, project team, client, senior management, and/or any other project stakeholder needing information. Include descriptions and distribution policies for items such as:
 - *Status reporting* – It is best practice for the project manager to distribute formal project status reports at least weekly. The purpose of status reporting is to communicate project progress, risk, issues, etc.
 - *Project schedule* – The project schedule documents key goals of the project and tasks to be accomplished and controls the progress of the project.
 - **Other Communication Vehicles** – Describe any other internal and/or external communications vehicles that the project may utilize, their distribution schedule, and information requirements.

Best Practices

The following best practices are recommended for Communications Management Plan development:

- **Collaborate** – The CMP should be developed in collaboration with all project team members and stakeholders
- **Accessible** – The CMP should be accessible to all project team members and stakeholders
- **Include** – All work required for execution of the CMP should be included in the Project Plan
- **Work** – All information in the CMP should be consistent with the Project Plan and any other related planning documents
- **Update** – Update the CMP when significant changes occur. A determination should be made from the core project team in the CMP to define 'significant'
- **Survey** – Survey stakeholders to determine if they are getting appropriate information when it's expected
- **Approve** – Obtain proper approval before disseminating project information

Practice Activities

For Information Technology projects the following practice activities are appropriate:

- **Audiences** – Identify both internal and external communication audiences
- **Needs** – Determine who needs what information, when, and in what format
- **Sources** – Identify sources of information for developing project communications
- **Responsibility** – Assign responsibility for collection, presentation, and dissemination of information
- **Distribution** – Identify the best methods of distribution for each type of project communications
- **When** – Define when communications will be distributed and by whom
- **Approval** – Document and define the approval process within the CMP, if needed, for any types of communications
- **Process** – Develop a process for handling ad hoc request for project information
- **Library** – Identify a location for a library of project information