

# **HOW TO CREATE A HIGH-PERFORMANCE INTERNAL COMMUNICATIONS PLANS**

**CHASE**  
MARKETING

# Is This eBook for You?



This eBook is designed for anyone in charge of telling employees about an upcoming change in their company. In this case it is the a name change and rebranding of a product line.

You may be in HR, Communications, Marketing, or another communications-related department. You may be in a small company, singly responsible for informing everyone of new initiatives. Or you may be part of a larger team tasked with managing a company-wide communications strategy.

The Internal Communications Plan described here is a tried-and-true approach to helping you keep the right people in your company informed about the right things, at just the right time as your company undergoes change.

*"The art of communication is the language of leadership."*

— James Humes

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*Gather all findings into one file for approval and implementation*

# THE WHY AND THE WHAT



*Why is an internal communications plan important,  
and what is it, anyway?*

# Why an Internal Communications Plan?



Because change happens, and your people need to know what to expect and how to deal with it.

Every time your company plans a new initiative, product, marketing campaign, merger, management change, culture shift, restructuring, global expansion, or some other potentially work-disrupting event, it's your job to keep the right people informed about the right things, at just the right time.

Enter the **High-Performance Internal Communications Plan**. This cohesive document captures—all in one place—the communications purpose, messages, channels, and process you will follow to help your fellow employees enact change, retain their morale, and move in the same direction during the transition.

# What Makes a Good Communications Plan?



The best internal communications plan ensures that your messages and content are well planned, well written, appropriately targeted, and optimally delivered to address each level of readership in your business.

It ensures that everyone fully understands what's happening and why, what's expected of them and how to do it, and what's coming next and how to prepare for it.



*A well-oiled internal communications system is fast, reliable, and efficient. It contributes substantially to workplace productivity. Achieving it takes discipline and time.*

# How Do You Create One?



The next two sections, “Doing the Foot Work” and “Digging for Details,” walk you through developing an internal communications plan.

The final section, “Pulling It All Together,” provides an outline for documenting your plan for approval and implementation.

In general, you are working toward the following plan content:

- Overview of the change, stakeholders, and communications goals
- Communications messages and objectives by audience
- Matrix of deliverables, with budget
- A plan for creating and managing the messaging content
- An overall communications flow
- Master timeline
- Feedback and metrics plan
- Plan for keeping execs informed

# DOING THE FOOT WORK



*Identify communications stakeholders, goals,  
audiences, key messages, and channels*



# 1 PURPOSE, STAKEHOLDERS, AND GOALS



*Communications objectives and participants*

# 1a Identify Communications Purpose



Name the big change you need to communicate to employees.

Is it a merger, a new initiative, product, marketing campaign, CEO, culture shift, restructuring, global expansion, etc.?

Describe your strategic objectives in communicating about it.

Are you trying to inform, educate, persuade, raise awareness, alleviate concerns, smooth the way, or some combination? For instance:

- A group talking to a worldwide employee base might seek to deliver consistent communications to execs, leaders, and staff, in the right order, and guide each audience in how to handle the change
- Another company may want a more tactical communications plan specifically for leaders, giving an overall roadmap for organizational changes in the next year
- A company gaining new leadership may want communications that, in addition to helping employees deal with the change, renews employee awareness of their value to the company's mission and success

# 1b Identify Communications Stakeholders



Every internal communications project has people who “own” the message being sent.

These people can greatly influence the content and effectiveness of your internal communications plan. Identifying and involving all stakeholders early creates deeper buy-in and greater project success. Stakeholders can be individuals or groups; each group will have a primary “point” person with whom you can work.

- **Who is the initiative’s sponsor**—which executive is on point for the major elements of the change?
- **Who is the communication plan’s sponsor**—the one in charge of the communications rollout strategy and overall messaging about the initiative?
- **Who are the other audiences**—the content owners, employees, partners or other departments that are involved?
- **Are there people beyond your immediate department** who are valuable resources for feedback and communications support?



*Large communications projects with a wide impact are well served by a core team or steering committee that meets every month during planning.*

# 1c Identify Overall Communications Goals



Each stakeholder has a unique communications agenda and need.

Your task is to identify and crystallize these agendas and needs into one sentence for each type of stakeholder. To do so, talk to the stakeholders directly, preferably as a group. Specifically, ask:

- What are your group's key strategic issues around internal communications?
- What are your current specific communications challenges?

☒ Remember that this is an internal-only communications plan. Your initiative may also require communicating with external audiences, such as customers, shareholders, visitors, vendors, partners, the media, etc. You can follow roughly the same process here to create an external communications plan.

# 1 **SAMPLE** Purpose, Stakeholders, and Goals



**Our big change:** Rebranding of major product line

**Our communications purpose:** To keep people informed on the change; how it will affect worldwide organization, department, and projects; what support is available through the transition

**Our stakeholders' top-level internal communication goals:**

Stakeholders	Their key communication goals
Project sponsor	Launch name change and create awareness through all levels and roles
Communications sponsor	Convey change as forward and favorable, mitigate the noise of dissenting employees
Reviewers, approvers	Educate and build awareness and how it fits into the future of the organization.

## 2 AUDIENCES AND CHANNELS



*Audiences, their concerns, and how to reach them*

## 2a Prioritize Your Audiences



An audience is anyone (and everyone) you want to communicate with about the change.

Each internal audience faces specific problems you must seek to address. Grouping audiences into general categories makes it easier to compare, understand, and prioritize them. For example, you can start with all major departments in your company, then drill down to specific roles or positions in each department. Your message may need to vary for each region or country in which you do business.

Most companies have multiple layers to reach. You may have to pass your messages through departmental or regional leadership to get them to a certain audience.

There are as many ways to segment and view audiences as there are types of companies. Internal communications plans often have to address cross-sections of these categories.



*Various ways to view and prioritize audiences:*

- *By department*
- *By role or job level*
- *By geography*
- *Others that may be unique to your enterprise*

## 2b Identify Their Concerns



Each audience has its own hot-button issues and approaches to dealing with the upcoming change.

Understanding these concerns will help you determine the content of your communications—what you'll tell each audience type.

For example, executives typically want to meet a broader business goal. Finance wants to control dollars spent. Implementation teams and groups want to know how to carry out the change. And everyone wants to know how their jobs or responsibilities will ultimately be affected.

While you can make some educated guesses about each audience's concerns, take time to interview one or more representatives from each group. Even a few ten-minute chats can reveal valuable patterns to guide the content and messaging of your communications.



*Although email, surveys, and social media are useful polling tools, gathering information one-on-one (by phone or in person) can encourage employees to engage with the change and show that your company values their opinions and feelings about it. This can help sustain morale as the change progresses.*



## 2c Pinpoint Likely Communications Challenges



In addition to unique concerns about a change, certain audiences may present challenges in how to communicate with them about it.

Questions to ask at this time include:

- Are any groups broadly dispersed, requiring messaging that is tailored to their situation or region?
- Does a particular group have a “gatekeeper” through whom all communications must be distributed?
- Are there language barriers to consider, calling for multilingual materials or the need to omit jargon, idioms, etc.?
- Have any audiences just been through other big disruptions, creating an atmosphere of “change fatigue” that you must push through?
- Has part of your readership been jaded by previously poor internal communications, requiring a better job this time?

Asking these and similar questions will help you unearth key issues that will shape your communications to each audience.

## 2d Use Their Preferred Channels



Each person has preferred ways to receive and respond to communication.

While you can't accommodate individual communication styles, using multiple channels across broader audience types ensures you'll reach each recipient through at least one path. For fresh attention, explore distribution options beyond those your company already uses.

Typical vehicles are internal web portals, newsletters, department meetings, one-on-ones, FAQs, emails, Q&A sessions, posters, placards, webinars, YouTube videos, and online forums. Setting up specific email aliases or phone numbers can also support employees through change.

Channels can be “push” or “pull”: audiences passively receive (via your push) or actively obtain (via their pull) the information they need. The presentation of the content—such as quick-to-skim vs. in-depth explanation—also comes into play.

Using a mix of channels encourages your audiences to:

- Engage with your initiative
- Obtain training if necessary
- Stay current about its progress
- Get support when they have a question



*When adding new distribution channels to support your initiative, such as a web portal or YouTube videos, be sure to account for the additional time and budget needed to set them up.*

## 2 SAMPLE Our Communications Channels



Our common internal communications channels and when we'd use them:

Channel type	Push or pull?	Most used by which audience(s)	Frequency	Visibility
Onsite posters	Push	Staff	Every 3 months	High
One-on-one-meetings	Push	Leaders to team	Varies	High
Dept newsletter	Pull and push	Staff, leaders	Weekly	High to medium
Staff meetings	Push	Staff, leaders	Monthly	High
Exec emails	Push	Execs	2x a week	High
Intranet	Pull and push	All	Daily	High
Company social forums	Pull and push	Staff, leaders	Daily	Medium
Webinars	Push	Leaders	As needed	Medium
Internal blog	Pull and push	Staff, leaders	Weekly	High
YouTube videos	Pull and push	All	As needed	Medium
Email blasts to alias	Push	All, especially employees	At launch and monthly at a minimum	Medium

## 2 SAMPLE Audience Matrix



Our key audiences, what they think about, our biggest communications challenges concerning them, and the best ways to reach them:

Audiences	Their key concerns	Biggest challenges	Best channels
Execs	<ul style="list-style-type: none"><li>• Corporate financial stability</li><li>• Hitting KPIs</li></ul>	<ul style="list-style-type: none"><li>• Busy, want strategic content only</li><li>• Often have gatekeepers</li></ul>	Monthly online calls with leadership
Regional Managers (Asia, Europe, etc.)	<ul style="list-style-type: none"><li>• Department success</li><li>• Hitting KPIs</li><li>• Staff productivity and satisfaction</li></ul>	<ul style="list-style-type: none"><li>• Mitigate confusion relating to name change, maintain productivity amidst changes in all marketing channels.</li></ul>	<ul style="list-style-type: none"><li>• FAQ and fact sheet</li></ul>
Account managers	<ul style="list-style-type: none"><li>• Hitting sales quotas</li></ul>	<ul style="list-style-type: none"><li>• Broadly dispersed</li></ul>	<ul style="list-style-type: none"><li>• All-hands meetings</li><li>• Email newsletters, internal portal</li><li>• Quarterly webinars</li></ul>
Local marketing staff	<ul style="list-style-type: none"><li>• Understanding strategic changes and how it will impact partners</li></ul>	<ul style="list-style-type: none"><li>• Short timeframe for implementing change in all media and communications channels.</li></ul>	<ul style="list-style-type: none"><li>• Online meeting with project leaders</li><li>• Complete support materials, including artwork, template, etc.</li></ul>

# DIGGING FOR DETAILS



*Develop key messages, communications strategies,  
matrix, metrics, timelines, and follow-up*

# 3 WHAT DO YOU WANT TO SAY?



*Key messages, by audience*

## 3a Develop Your Key Messages



To maximize buy-in and reduce angst about the change or initiative, make all key messages consistent.

“Telling the same story” to everyone gets people moving in the same direction. Most important is to convey the background, expected outcomes, and risks of the change. Be ready to provide content such as the following:

- What led to the need for introducing this change? How will the “post-change world” be different from the “pre-change world”?
- What strengths/weaknesses about the change or initiative will you need to highlight or, conversely, to manage?
- What is unique about the change or initiative that will support your company? What are the biggest risks to your business if it the rebranding is not accepted?
- Do you have proof points to substantiate the change, such as statistics, historical examples, testimonials, etc.?
- Is there a high-level “takeaway” or benefit that applies to all? Consider making this an elevator pitch around which all other messages cascade.

## 3b Tailor by Audience



Various audiences need varying kinds of content, and your messaging must resonate with each group.

Thinking through the differences helps you create highly relevant messages. From the audience concerns you discovered earlier, clarify:

- The one thing each audience cares about most
- Your own communication goals for each audience—what do you want to accomplish with them?
- The top three benefits of the change for each target audience



*Remember, too, that each channel has its own best use for communicating key messages. Posters and website banners demand crisp copy that focuses on the benefit of the change or initiative. Social media feeds are good for ongoing but quick progress updates. FAQs can be as long as necessary to provide details about the topic and its impact.*



## 3 **SAMPLE** Key Messages by Audience



Our key messages for communicating about the product line name change.

Audience	Their #1 concern	Communications goals	Key messages
Execs	Financial impact	<ul style="list-style-type: none"><li>• Educate about product name change</li><li>• Ease concerns</li><li>• Inform of expectations</li></ul>	<ul style="list-style-type: none"><li>• Case for change, benefits to them and company</li><li>• Detailed understanding of full impact to product launch</li><li>• How their bottom line is affected</li><li>• Available support for their local staff</li></ul>
Regional Managers	Effect on their department, teams, and workload	<ul style="list-style-type: none"><li>• Ease concerns</li><li>• Inform about next steps</li><li>• Manage expectations</li></ul>	<ul style="list-style-type: none"><li>• Case for change, benefits to them</li><li>• How they and their staff will be affected</li><li>• Timeline</li></ul>
Regional marketing staff	Time for materials development including translations	<ul style="list-style-type: none"><li>• Ease concerns</li><li>• Educate</li><li>• Inform about next steps</li><li>• Offer support/feedback channel</li></ul>	<ul style="list-style-type: none"><li>• Case for change, benefits to company</li><li>• How they will be affected</li><li>• What stays the same and what will be different</li><li>• Where to go for more information</li><li>• Frequently asked questions</li></ul>



# Communications Checkpoint



Have you covered all the bases? Verify the following before moving on:

- Are we addressing the right audiences with the right channels?
- Do we know how audiences are to engage with, and get training about, this initiative?
- Do we need to research particular audiences in more detail? (e.g., to understand their current attitude toward the change, and what they stand to gain or lose once initiative is rolled out)
- Will this communication plan require iterative updates?
- Are we clear on how audiences get support when they have a question? Do we have email aliases and phone numbers in place?
- In what ways are we continuing to build relationships with these audiences for future communications?

## 4 HOW WILL YOU CREATE IT?



*Content creation and management process,  
deliverables list, and development plan*

## 4a Content Creation and Management Process



Creating content requires writing, design, layout, and review, while managing it means dealing with distribution and feedback.

As with all phases of your plan, following a process ensures your communications serve your primary purpose and help meet organizational goals. Questions you and your communications team could consider include:

- What new content is necessary vs. what content is already available?
- What mechanisms already exist to help us create, approve, and distribute content?
- Is our review process adequate for the importance of the communications?
- Who is responsible for writing and producing new content? Do we have the right resources and are they delivering concise, targeted communications?
- How much will writing, design, and production support cost, and is budget available?
- What is our current process for distributing information, and does it work?
- Are there new channels we need to budget for and create (such as a new web portal) in order to carry out the plan?
- Do new processes need to be put in place to adapt to the change?

## 4b List Your Deliverables



Every communications plan comprises a list of deliverables, each with its own focus and audience.

One way to organize them is to create a matrix with the name of the deliverable, its audience, frequency, key messages, and calls to action. The exact matrix you use depends on the complexity of the project.

Your list of deliverables and content may also need to be coordinated with those of other departments that are creating their own materials for dealing with the change.

With a rebranding, for example, headquarters marketing is likely to develop materials for FAQs, PowerPoints, intranet sites that regional leaders will want to leverage.

Similarly, external communications groups, such as PR, may need to be supported by FAQs, fact sheets and other materials your team creates.

## 4 SAMPLE Matrix of Deliverables



Our deliverables for telling employees about the rebranding of product line.

Deliverable	Audience	Frequency	Key messages	Call to action
All company meeting	All	Once	<ul style="list-style-type: none"><li>• Elevator pitch on rebranding</li><li>• How branding will help the company</li></ul>	<ul style="list-style-type: none"><li>• Watch email, SMS</li><li>• Visit intranet site</li></ul>
Exec FAQ	Execs and leaders	Once	<ul style="list-style-type: none"><li>• Case for change, benefits to company</li><li>• How their organization and budget will be impacted</li></ul>	<ul style="list-style-type: none"><li>• Budget guidance</li></ul>
Marketing staff FAQ	All	Once	<ul style="list-style-type: none"><li>• Case for change, benefits to company</li><li>• How they will be affected</li><li>• What stays the same and what will be different</li></ul>	<ul style="list-style-type: none"><li>• Provide input on toolkit and assets enabling change</li></ul>

List above can be expanded to include social media, digital sites, online meetings, etc.

## 4b Organize How They Will Be Created



Deliverables have yet to create themselves, so you must identify who will oversee them, when they will be created, and how much they will cost.

One way to capture this information is to create a table with each deliverable's name, departmental or geographical scope, delivery date, responsible team members, dependencies, budget, and status. (The status column makes the final plan a living document with which you can track your program's progress.) The exact matrix you use depends on your project's scope and complexity.

For smoother communications, be sure to get input from the designated team members to gain buy-in and make sure the schedule works with their other responsibilities.

## 4 **SAMPLE** Deliverables Creation Matrix



Who does what, and when, for creating our deliverables

Deliverable	Owner	Dept/ Geography	Due date	Budget	Status
All company meeting	Mary	Worldwide	June 1	N/A	On track
Exec FAQ	Bruce	Eastern region	May 1	\$2500	Done
Employee FAQ	Mary	NW region	May 15	\$2500	In final review



## 5 HOW WILL YOU SCHEDULE AND MEASURE IT?



*Communications flow, metrics, follow-up, master timeline*

## 5a Variables To Consider



Timing is everything when distributing communications.

Your goal is to increase the likelihood that each communication will reach its audience at just the right time for them to be able to absorb and respond to it. Several variables may affect this timing:

- **Some initiatives will require a communications phase-in, prioritized by audience or department.** For instance, leadership will need to know details about a merger sooner than the rest of the company.
- **External or company events may influence the receipt of your message.** For example, informational emails and training opportunities might go unnoticed amid holiday schedules or a trade show in which a primary audience will be absent. Conversely, an upcoming event or regularly scheduled meetings might provide an ideal platform for sharing your message.
- **You may need to work toward a “drop dead” date.** In some cases, your communications deadlines and process will be driven by an immutable date, such as a merger closure target or a must-hit tradeshow for a product launch.

## 5b Summarize the Communications Flow



Summarize your communications distribution flow in a table that includes:

- Your general communications objectives
- Target audiences
- Gatekeepers (if any), plus notes about their availability
- The primary distribution channels you will use
- Any variables that might affect the communications timing, such as
  - External or internal events or deadlines you need to work around
  - Key, not to be missed, communication opportunities that may help disseminate your information

## 5 **SAMPLE** Communications Flow Summary



Flow for talking about product rebranding for ABC Co.

General communication objective	Audience	Gatekeepers (if any)	Primary distribution channels	Upcoming events we need to work around	Upcoming events we can tag onto
Inform about product name change	Regional Management	Work through Chief of Staff	Online calls	<ul style="list-style-type: none"><li>• Must go to execs at least a month before rest of company</li><li>• Week-long international trade show</li></ul>	text
Launch all communications	Employees	Work through Marketing Steering Committee	Email, intranet site	<ul style="list-style-type: none"><li>• Annual kick-off</li></ul>	Semi-annual management offsite

## 5c Establish Your Metrics



Equally important to implementing a communications strategy is measuring its effectiveness during and after implementation.

This typically involves gathering and assessing feedback from your various audiences.

To do this, you must first identify what you want to know—what measures of success and key performance indicators are you looking for? For example:

- Survey for local marketing teams on value of toolkit
- Employee survey about their comfort with the change, knowledge about it.
- Spot interviews to obtain qualitative input

## 5d Build Channels for Audience Feedback



Once you know what you want to measure, create a plan to gather feedback at least half-way through rollout, as well as after.

A brief, intermediate audience survey can quickly identify areas that need improvement or additional communications in time to do something about them. A more involved post-rollout survey can capture measurements to compare against your target metrics and KPIs, as well as improvements to apply to your next internal communications project. Typical survey questions include:

- How do you rate the communications deliverables you receive? Which ones have you used the most?
- How easy has it been to consume and share the information provided?

Assessing recipients' pain points and whether they are getting the information they need can expose changes that your communications strategy may require.



*For more timely and frequent feedback, set up a Q&A or feedback forum via social media, email, etc.*

## 5e Set Up Executive Status Meetings



Leadership will often want a monthly or quarterly “executive summary” of how communications are progressing.

Schedule regular status meetings with executives to quickly summarize whether projects are on track or at risk, and whether they require executive involvement to get through road blocks. (A simple status chart is useful here.)

This meeting is also a good time to address current constraints, accomplishments, and communications plans for the upcoming month, as well as any intermediate feedback you have gathered from your audiences.

## 5f Create a Master Timeline



A master timeline is a snapshot of what will be completed first and how the communications project will progress.

A project-scheduling program can be useful for creating a timeline in which everything can be captured at a glance.

A typical timeline includes:

- Communications milestones organized by audience then deliverables, indicating the chunks of time needed for planning, creation, etc.
- Major distribution milestones
- Any interruptive, synchronizing, or “must meet” dates, such as holidays, a special event, or a shareholders meeting
- Regularly scheduled status meetings with executives
- Target dates for gathering feedback and following up on metrics



# 5 SAMPLE Master Timeline



Our rollout timeline for the product rebranding:

Audience & Deliverables	December				January				February				March		
	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3
<b>Executives</b>															
Sneak preview announcement															
<b>Regional Management</b>															
Announcements: Yammer, Email, newsletter															
<b>Local Marketing Staff</b>															
Develop Bill of Materials															
Intranet															
Corporate Newsletter															
Yammer															
Video															

# PULLING IT ALL TOGETHER



*Gather findings, strategies, and rollout plans  
into one working file*

## 6 READY FOR APPROVAL AND LAUNCH



*Plan consolidation and sample outline*

## 6a Everything in One Place



Consolidate all your findings into single Internal Communications Plan file, such as a Word document.

This file becomes the go-to document for executive approvals of the plan, as well as the playbook for those responsible for carrying it out.

The next page provides a working outline, based roughly on the order in which you have gathered your information. The more concise you make each section, the better.

The complexity and length of your own final plan document will reflect the complexity of your company's change and the extent to which it affects your employees.

## 6b A Sample Outline



Internal Communications Plan section	To create the content
1. Brief overview of the change, stakeholders, and communications goals	See <a href="#">pages 9-13</a>
2. Communications messages and objectives by audience, the best channels to use for each	See <a href="#">pages 15-20, 23-26</a>
3. Matrix of deliverables, including budget	See <a href="#">pages 28-30</a>
4. How the communications content will be created and managed	See <a href="#">pages 31-32</a>
5. General communications flow matrix	See <a href="#">pages 34-36</a>
6. Master timeline	See <a href="#">pages 40-41</a>
7. Plan for metrics, feedback, and follow-up	See <a href="#">pages 37-38</a>
8. Plan for keeping execs informed	See <a href="#">page 39</a>

*The internal communications plan described here is a tried-and-true approach to keeping the right people in your company informed about the right things, at just the right time.*

*We'd be happy to assist you with this important ongoing task, project by project, initiative by initiative.*



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