



ERP Deliverables Series

by
Edward G. Bottrell, FCMC
www.bottrell.ca

Project Implementation

Communications Plan

June 4, 2008

TABLE OF CONTENTS

1. Executive Summary	1
1.1 Outstanding Issues or Questions	1
2. Background.....	2
2.1 What is the ERP Implementation Project and Enterprise ERP?	2
2.2 The ERP Implementation Project Vision	3
2.2.1 'One Face to the Customer'	3
2.2.2 'One Face to the Business'	4
3. Objectives	5
3.1 Key Objectives.....	5
3.2 Factors Supporting Communications Objectives	5
3.3 Key Communications Elements	5
4. General Communications Activities	6
4.1 Communications Repository	7
4.2 Key Messages and Frequently Asked Questions (FAQs)	7
5. Details (Spreadsheet) of Communications Plan	8
5.1 Internal and External Stakeholders Tables.....	9
5.2 Topic-Author-Status Table.....	11
5.3 Communications-Topic-Audience Table	14

Version	Date	Description
V2	June 4, 2008	Prepared for generic use



1. Executive Summary

Communications for the ERP Implementation Project have been active since the beginning of the Project; however, the purpose of this document is to plan the specific internal/external communications needed during the final stages of implementation. Specifically, the plan starts with the 'Go' decision, which is about 8-weeks prior to Go Live and will continue for some time after Go Live. The focus is on formal communications, with the recognition that many types and instances of informal communications will continue.

1.1 *Outstanding Issues or Questions*

As of the date of this draft, the following issues or questions are outstanding:

- Inadequate skilled resources to develop, update and (sometimes) deliver communications content, and manage-coordinate overall process
- How avoid duplication of effort, mixed-messages, miscommunications
- How will we know, communicate when the Project is successful?
- How do we deal with apathy? Passive resistance?
- How do we deal with unintended or unplanned communications?
- How do we contain and deal with major setbacks? Crises? Failure?



2. Background

With the addition of the ABC plant in 1998, the DEF plant in 2002 and more recently the GHI plant in 2005, the business model has been shifting from an independent regional and product based model to a new North American model covering multiple product lines, without regard to geography.

During this growth period, the business team and the IT Department team have been focused mainly on the efforts required to support the expansion efforts. The resulting system complexities and varying business processes will continue to pose significant challenges to the business units as they grow the volumes of current product lines and as future products are added.

The ERP Implementation Project was initiated in early 2006 to resolve many of these challenges by consolidating and upgrading the systems, to adopt common best practices across the organization, and to establish a foundation for future growth.

2.1 What is the ERP Implementation Project and Enterprise ERP?

The ERP Implementation Project is the name of the XYZ organization project that is implementing a suite of enterprise resource planning (ERP) IT systems for all business units. Specifically, the following functions (ERP modules or applications) are being changed across all business units:

Accounts Payable	Inventory Control
Accounts Receivable	Job Cost Accounting
Advanced Pricing	Manufacturing Accounting
Advanced Warehousing	Manufacturing Planning
Asset Life (Maintenance)	Payroll
Credit and Collections	Procurement
Distribution Planning	Product Data Management
EDI	Sales Order Processing
Fixed Asset Accounting	Shop Floor
Forecasting	Transportation Planning
Freight Processing	Master Data
General Ledger	Reporting

Collectively, these systems are known as Enterprise ERP. Concurrent with these changes in systems, the ERP Implementation Project is working with management to also implement changes to individual roles and responsibilities, and improved business processes in all business units that use or depend upon the systems.

Enterprise ERP has some natural groupings, shown in the table below, to handle the major



business processes of the enterprise.

Accounts Payable
Accounts Receivable
Advanced Cost Accounting
Asset Reliability
Data Warehouse
Demand to Manufacture (D2M)
EDI
Fixed Assets
General Ledger
Job Cost
Master Data
Order to Cash (O2C)
Payroll
Procure to Pay (P2P)
Warehouse Management

Three of these groupings, Order to Cash (O2C), Demand to Manufacture (D2M), and Procure to Pay (P2P), involve the vast majority of the transactions and knowledge workers in the enterprise. For example, O2C, the largest and most complex, is utilized for the vast majority of transactions with our customers from the initial sales order through manufacturing, shipping, invoicing and applying the customer's payment.

Part of the Communications Plan objectives is intended to help the people in the organization and different business units understand more about the Enterprise ERP functional modules and how they work together to support the major activities (i.e. business processes) of the organization.

Other ERP Implementation Project objectives and plans, such as the Training Plan, will help specific people and groups learn how to use the new systems and processes in detail and how to use them to do their work.

2.2 The ERP Implementation Project Vision

The Enterprise ERP will provide a foundation to support future growth of the enterprise including volume growth of current product lines, new products, new plants, distribution centers and businesses, and to enable continuous improvements in our operations.

2.2.1 'One Face to the Customer'

Our customers will be able to place one purchase order for XYZ products instead of separate orders to each business unit. Among other things, it means consolidating our business transactions with our customers by providing one contact point, shipping



combined products in one load, issuing one invoice and receiving one payment. That sounds simple enough but there are many complexities and too many limitations in our current systems to try and fix what we have now.

2.2.2 'One Face to the Business'

We will have one set of business processes and practices for all operations in all business units, and we will have one consolidated view of our business information across the enterprise. Further, we expect significant improvements in the quality and timeliness of business information that will help our people effectively and efficiently run our business.



3. Objectives

3.1 Key Objectives

- Communicate and reinforce Key Messages about the Project and Enterprise ERP to internal and external stakeholders
- Utilize *Push* and *Pull* means of communications.
 - Examples of *Push* communications are meetings, newsletters, emails, etc.
 - Examples of *Pull* communications are web site, hot-line, walk-in centre, etc.
- Build awareness and understanding of the changes in systems, master data, processes, best practices, etc. required to successfully implement and utilize Enterprise ERP
- Build support and commitment for P1, and the implementation activities before and after Go Live
- Build awareness and understanding of the operational benefits of Enterprise ERP going forward

3.2 Factors Supporting Communications Objectives

- Top-down, bottom-up and cross-organizational communications
- Provide concise, clear, consistent & positive messages
- Build awareness through repetition, continuous ongoing messages
- Help manage expectations of key stakeholders including end users
- Ensure all information available is updated regularly and accurate
- Inform individuals and groups what they need to do and what is expected for Project implementation
- Distribute Project Implementation information and progress details to appropriate stakeholders in a timely manner
- Encourage feedback from all business units and provide for appropriate responses

3.3 Key Communications Elements

The following are the key elements of the Communications Plan and are discussed further in subsequent sections of this document and in a spreadsheet:

- Communication – What Information, Key Messages
- Audience – Stakeholders
- Sender – Who Delivers the Communication
- Timing – When or How Often
- Where – Geographical Location of Delivery
- How – Channel, Method or Media of Delivery (push or pull)
- Author – Who Prepares the Content of the Communication



4. General Communications Activities

The following general communications activities are summarized here and detailed in a spreadsheet table discussed later in this document.

- Face-to-Face Meetings, Workshops and Special Events
 - Organizational
 - Departmental
 - Group or Committee
 - One-on-One
- Calls
 - Teleconference
 - Video Conference
 - Webex
 - MS Communicator (informal)
- Presentations & Briefings
 - Road shows
 - Downloadable from website
 - Specific issue and/or stakeholders (e.g. customer briefing)
- E-mails
 - Periodic update
 - Special Purpose and coordination with other Project communications (e.g. training logistics)
 - High importance
 - Informal
- The Enterprise ERP Websites
- Newsletters and Printed Materials
 - Periodic – key messages
 - Overview Schedule
 - Event Posters – “Go-Live” Date, Training, etc.
 - Brochures
- TV Monitors
 - Key messages
 - Events
- Special & Other
 - Hot-line telephone, email address for handling Implementation Project & Enterprise ERP questions from the organization
 - Questionnaire(s) and Feedback Form
 - Mass mailing(s) to internal and/or external key stakeholders (informational & marketing purposes)
 - Bulletin Boards
 - Project Promotional items: pens, pads, cups



4.1 Communications Repository

Although the author of specific communications may have originals/copies, it is intended that The ERP Implementation Project maintain a repository of all formal communications including a log of communications events.

4.2 Key Messages and Frequently Asked Questions (FAQs)

Common to most communications are the key messages to be conveyed and the answers to frequently asked questions (FAQs). FAQs are typically maintained on a website so that people can 'pull' the specific information and answers they wish. The following is a starting list of topics for key messages and FAQs:

- What is The ERP Implementation Project?
- What is Enterprise ERP (New, Changed, Eliminated)?
- Who is affected?
- Who are the Key Stakeholders?
- Why is it being implemented? What are the driving needs, benefits?
- How and when is it being implemented?
- Who is implementing? What can I or do I need to do?
- What are the risk/challenges?



5. Details (Spreadsheet) of Communications Plan

As mentioned earlier, there will be many types of formal and informal communications throughout the remainder of the ERP Implementation. The focus of the Communications Plan is on the basic, required communications that need to be planned and delivered in a coordinated fashion. As such, they will be discussed as formal communications whereas informal communications are outside the scope of this Plan.

Communications are detailed and maintained in four tables in the spreadsheets that follow:



Project Implementation
Communications Plan

5.1 Internal and External Stakeholders Tables

The **Internal and External Stakeholders Tables** in the spreadsheet summarize the key stakeholders with sample names, primary physical location, general information needs including timing or frequency of update.

Internal Stakeholders					
ID	Stakeholder Group	Members	Primary Location(s)	Key Information Needs	Frequency
1	Owner	President	HQ	Project Overview, Overview Progress & Status Reports, Specific Issues	Monthly, As Required
2	Project Sponsor	CEO and General Manager	HQ	Summary Progress & Status Reports, Specific Issues, Plans	Weekly, As Required
3	Exec. Team	Corporate Executive Team & General Managers.	HQ & Plants	Project Overview, Overview Progress & Status Reports	As Required
4	Executive Steering Committee	CEO, CFO, COO, CIO, VP Sales & Marketing, VP HR, VP Manufacturing, VP Engineering, Dir Logistics, ABC Plant Manager, DEF Plant Manager, Dir IT, Dir Internal Audit, IT Program Director, Project Manager	HQ & Plants	Summary Progress & Status Reports, Specific Issues, Plans, Changes	Weekly, As Required
5	Project Team Leaders & Functional Leaders	Project Manager, IT Program Director, Functional Team Leaders (14), Master Data Manager, Implementation Manager, Training Manager, Data Conversion Manager, Communications Specialist, PMO Administration,	HQ & Plants	Detailed Progress & Status Reports, Specific Issues, Plans	Weekly, As Required
6	Project Core Members	Full and part-time business, ITD and consultant resources working on the Project Team	HQ & Plants	Summary Progress & Status Reports, Specific Issues, Plans	Monthly, As Required
7	Project Power Users	Full and part-time business Power Users and Super Users working on the Project Team	HQ & Plants	Summary Progress & Status Reports, Specific Issues, Plans, Changes	Monthly, As Required
8	Managers	Managers in plants, warehouses, HQ and other locations	HQ & Plants	Summary Progress & Status Reports, Specific Issues, Plans, Changes	Monthly, As Required
9	End Users	Approximately x00-people: Planning, Receiving, Shipping, Accounting, Purchasing, Stores, Maintenance, Manufacturing, Warehouses, Transportation, Quality, Customer Service	HQ & Plants	Project Overview, Overview Progress & Status Reports, Specific Issues, Plans,	Bi-Weekly Monthly



Project Implementation
Communications Plan

External Stakeholders					
ID	Stakeholder Group	Example Members	Primary Location(s)	Key Information Needs	Frequency
1	Customers	Tier 1, 2, 3, 4 & 5 Customers	NA	Project Overview, Specific Issues, Changes	Monthly starting 8-12 weeks before Go Live
2	Vendors <i>(Related Companies)</i>	Raw Materials	NA	Project Overview, Specific Issues, Changes	Monthly starting 8 weeks before Go Live
3	Vendors <i>(Un-related Companies)</i>	Raw Materials, Packaging, Non-production & Production Supplies	NA	Project Overview, Specific Issues, Changes	Monthly starting 8 weeks before Go Live
4	Transportation	Rail, Trucking	NA	Project Overview, Specific Issues, Changes	Monthly starting 8 weeks before Go Live
5	Warehouses	Warehouses, Distribution Centers	NA	Project Overview, Specific Issues, Changes	Monthly starting 8 weeks before Go Live



Project Implementation
Communications Plan

5.2 Topic-Author-Status Table

The **Topic-Author-Status Table** in the spreadsheet summarizes the topics, level of detail needed (i.e. detailed, summary and/or overview), author and comments including the current state of readiness.

ID		Communication		Level of Detail Needed			Author	Comments-Status
		Topic	Description	Detailed	Summary	Overview		
1	T001	Detail of Business Readiness Assessment Plan	Plan of activities in advance of Go/No Go decision	Y			PM, Team & Functional Leaders	Checklist started. Will contain an executive summary.
2	T002	Detail of BI Reporting	BI Reporting and Data Warehousing	Y			BI Reporting Team Lead	Overview presentation completed.
3	T003	Summary of BI Reporting	BI Reporting and Data Warehousing		Y		BI Reporting Team Lead	Overview presentation completed.
4	T004	Overview of BI Reporting	BI Reporting and Data Warehousing			Y	BI Reporting Team Lead	Overview presentation completed.
5	T005	Communications Plan	Formal communications & PR for Project	Y			PM	Draft completed. Executive Summary included
6	T006	Detail of Customer Changes	Customer Changes Required	Y			Team & Functional Leaders	Used for letters, emails, meetings et al.
7	T007	Summary of Customer Changes	Customer Changes Required		Y		Team & Functional Leaders	Used for letters, emails, meetings et al.
8	T008	Overview of Cutover Business Continuity Plans	Plan to continue business operations during planned outage with and Go Live			Y	Cutover Team Lead, Manager IA and ESC	Existing and new BC plans need updating for Go Live
9	T009	Summary of Cutover Business Continuity Plans	Plan to continue business operations during planned outage with and Go Live		Y		Cutover Team Lead, Manager IA and ESC	Existing and new BC plans need updating for Go Live
10	T010	Detail of Cutover Business Continuity Plans	Plan to continue business operations during planned outage with and Go Live	Y			Cutover Team Lead, Manager IA and ESC	Existing and new BC plans need updating for Go Live
11	T011	Dashboard	Dashboard Status on all WBS	Y			PM, Team & Functional Leaders	Updated in Weekly ESC and Team/Functional Leaders Meetings. Collapsible XLS.
12	T012	Detail of Master Data Conversion & Validation Plan	Plan for MD Tables conversion, validation & clean-up.	Y			Data Conversion Team Lead & Functional Leaders	Draft Started. Executive Summary included.



Project Implementation
Communications Plan

ID		Communication		Level of Detail Needed			Author	Comments-Status
13	T013	Detail of Master Data Loads & Cleanup Plan	Data Loads, Clean-up & Dual Maintenance Plan	Y			Data Conversion Team Lead & Functional Leaders	Draft Started
14	T014	Summary of Data Loads & Cleanup Plan	Data Loads, Clean-up & Dual Maintenance Plan		Y		Data Conversion Team Lead & Functional Leaders	Draft Started
15	T015	Overview of Benefits	Qualitative and Quantitative benefits of implementation			Y	Communications Lead, Team & Functional Leaders	Used by many other communications including website, TV monitors, newsletters
16	T016	Detail of Changes	Changes in Functional, Business Process, Organizational, Roles & Responsibilities.	Y			Team & Functional Leaders	Many details completed but need updating, review & refinement. Non-standard practices documented
17	T017	Summary of Changes	Changes in Functional, Business Process, Organizational, Roles & Responsibilities.		Y		Team & Functional Leaders	Many details completed but need updating, review & refinement. Non-standard practices documented
18	T018	Overview of Changes	Changes in Functional, Business Process, Organizational, Roles & Responsibilities.			Y	Team & Functional Leaders	Many details completed but need updating, review & refinement. Non-standard practices documented
19	T019	PMO Plan	On-going Program Management - Systems & Processes	Y			PM	Draft Started. Executive Summary included.
20	T020	Detail of Functions & Processes	Business Models, Functional Modules	Y			Functional Leaders	Needed for multiple communications. Overview esp. for Newsletters, TV, etc.
21	T021	Summary of Functions & Processes	Business Models, Functional Modules		TBD		Functional Leaders	Needed for multiple communications. Overview esp. for Newsletters, TV, etc.
22	T022	Overview of Functions & Processes	Business Models, Functional Modules			Y	Functional Leaders	Needed for multiple communications. Overview esp. for Newsletters, TV, etc.
23	T023	Implementation Plan	Implementation Plan for Project including post Go-Live Support	Y			Implementation Lead, Team & Functional Leaders, IT	In progress. Overview completed. Executive Summary included



Project Implementation
Communications Plan

ID		Communication		Level of Detail Needed			Author	Comments-Status
24	T024	Key Messages	Key Messages for use with other Communications, FAQs	Y			Communications Lead, Team & Functional Leaders	Used by many other communications including website, TV monitors, newsletters



Project Implementation
Communications Plan

5.3 Communications-Topic-Audience Table

The **Communications-Topic-Audience Table** in the spreadsheet that follows summarizes the formal communications including the topics covered and intended audience. Where appropriate, it also suggests the sender or presenter, media and timing of the communication.

Communications Activities								
ID	Communication	T#	Topic	Sender	Audience	Timing	How	Comments
1	Newsletters	T024	Key Messages	Communications Person Project Team	All Internal Stakeholders	Biweekly, Weekly after Go decision	Printed and displayed on bulletin boards	Can be included with other newsletters (e.g. Plants). Consider version for some external stakeholders
2	Business Readiness Plan Presentation	T001	Detail of Business Readiness Assessment Plan	PM or Implementation Manager	ESC	June	Special Meeting	For review and approval
3	BI Reporting Presentation	T002	Detail of BI Reporting	BI Team Leader or Member	BI Reporting Developers	TBD	Special Meeting	Information
4	BI Reporting Presentation	T003	Summary of BI Reporting	BI Team Leader or Member	BI Reporting Users	TBD	Special Meeting	Information
5	FAQs	T048	Key Messages	Project Communications	All Internal Stakeholders	June	Website	Pull information
6	Project Key Messages, Announcements, Events via TV Monitors	T024	Key Messages	Project Communications	All Internal Stakeholders	Weekly starting in late-June, Urgent updates as required	TV Monitors	TV Monitors can be used for Project announcements, upcoming events, and overall exposure/awareness
7	BI Reporting Presentation	T004	Overview of BI Reporting	BI Team Leader or Member	Managers of BI Reporting Developers & Users	TBD	Special Meeting	
8	Communications Plan Presentation	T005	Communications Plan	PM or Implementation Manager	ESC	June	ESC Meeting	Review and approval
9	Communications Plan Presentation	T049	Key Messages	PM or Implementation Manager	Managers	June	Special Meeting	
10	Customer Changes	T006	Detail of Customer	Sales	Customers	6-8 weeks	Letter	May need to follow up with



Project Implementation
Communications Plan

Communications Activities								
	Letter		Changes		(individualized?)	before Go Live		telephone calls, meetings
11	Customer Changes Letter	T007	Summary of Customer Changes	Sales	Customers (individualized?)	8-12 weeks before Go Live	Letter	May need to follow up with telephone calls, meetings
12	Cutover Business Continuity Plans Presentation	T008	Overview of Cutover Business Continuity Plans	PM or Implementation Manager	Business Executive and Managers	TBD	Special Meeting	Current status, requirements & expectations needed. Who does the work TBD.
13	Cutover Business Continuity Plans Presentation	T009	Summary of Cutover Business Continuity Plans	PM or Implementation Manager	Business Executive and Managers	TBD	Special Meeting	Current status, requirements & expectations needed. Who does the work TBD.
14	Cutover Business Continuity Plans Presentation	T010	Detail of Cutover Business Continuity Plans	PM or Implementation Manager	Business Executive and Managers	TBD	Special Meeting	Current status, requirements & expectations needed. Who does the work TBD.
15	Project Dashboard	T011	Dashboard	PM	ESC	Weekly	ESC Meeting	Reduced after Go Decision

