



Communication Plans

Communication plays an integral role in keeping a project on track together with the engagement of those ultimately affected by the project. The project manager is charged with guiding all aspects of the project communication with the project team, although the size and scope of a project may dictate the need for a dedicated Communication Specialist to manage communication to the broader community. The specifics of communication, including the method and frequency, vary based on each individual project, however the methodology to developing a communication plan is the same.

1. **Clarify the Project objectives:** Think of your plan as your roadmap; you know where you want to go, but you need a route to get there. The plan is your route.
2. **Define the audiences:** Going through the communications planning process will help you identify who you need to reach, tell them what you want them to know, and how you will reach them. You will find that each of your audiences has unique characteristics, needs, and motivations. Through planning, you will discover the most effective ways to communicate with them.
3. **Communication Methods:** There are many ways to spread your message. This will help you to settle on which activities you will engage in so that you are not continuously pulled in different directions.
4. **Identify Stakeholders:** People need to know what they will be contributing to the organisation and what they are responsible for. A plan will help manage people and their responsibilities.
5. **Engage the Team:** Involving many people in the planning process will bring in different perspectives and diversity of thought.
6. **Clarity of Message:** A well-articulated plan will help people get on the same page and articulate a consistent message. Everyone pulling in the same direction.
7. **Ask for and Include stakeholder input:** These people are important to your organisation, and this will show them how much you do value their input.
8. **Giving stakeholders what they want:** This is an extension of the previous point: when you go through the process and identify strategies to reach stakeholders from the start, you will communicate with them more effectively.



Beakon Communication Plans

They are important

9. **Empowerment through Ownership:** Getting involved in the process and integrating participants' opinions brings a sense of ownership.
10. **Assess Success:** Organisations will often do a review to determine strengths, weaknesses, and obstacles and then create and implement new approaches based on that feedback. You can develop a unique, tailored evaluation strategy that will gather the information you need to improve your plan.

Do not over complicate your plan, 'keep it simple' using the following format.

Audience	Message	Communicator	Frequency	Method	Feedback
Who is this communication aimed at?	What are the key messages	Who will be responsible for this communication	How often will this be communicated	How will it be communicated (classroom, postcard, email, SharePoint, SMS, Posters, gimmick)	Did it work? Do not forget to ask the question.



Phase 1

Define and Prioritise your Goals

Customers typically take the approach of walking before they run. They focus first on a subset of the functionality available in Beakon rather than allowing users to get comfortable with the application and adopt the most critical features, and then add more functionality during later phases.

When defining your process, it helps to follow these steps:

- Identify key characteristics of your business processes
- Define and develop an overview of your own process
- Clarify what happens at each step, what inputs are needed, who does what, and how to measure the results

Define concrete goals. Keep in mind that different groups within your organisation are likely to have different goals. For example:

- Executives want to improve work health and safety and track top performers or customer issues.
- Work health and safety managers want better visibility into their pipelines and reports that summarize key information.
- Work health and safety reps want to easily access the work health and safety materials they need and cut down on administrative work.

Beakon provides various reports to help measure whether you have reached your goals. Most people, and most organisations, want to take on more than they can handle at any one time. Clearly defining your goals and then prioritising them will make it easier to decide what to put off, and/or what should be brought forward. Having some early "wins" is essential. When people experience the value of Beakon firsthand, they are more likely to support adding additional features.

Prepare

Careful preparation and planning will help make the remaining steps in implementing Beakon go smoothly.

Task
Define your business goals and objectives
Identify key characteristics of your business processes
Define and develop an overview of your own process
Clarify what happens at each step what inputs are needed, who does what, and how to measure the results



Phase 1

Map your Business Processes to Beakon

The most important step when setting up Beakon is filling in the **Beakon Getting Started** Excel Document. This contains vital settings for master data including, user profiles, skills, and other information needed to set up Beakon. We recommend clients send Beakon all the current information on hand to review and assess before any work commences on the Excel Document.

Task
Complete the 'Beakon Getting Started' Excel Document

Set Up Beakon

Company profile – These settings use your local time for setting the time zone, default language, and the default currency.

Establish User Access and Permissions - There are some key components that determine users' access to data as well as what they can do with the data, they have access to.

Data Access - When setting up Beakon for the first time, you need to make some decisions about who will have access to what data.

Role Hierarchy - The person in the top role has full access (view and edit) to his or her data as well as the data of anyone lower in the hierarchy. Two common ways to set up role hierarchy are by region or by product.

- System Administrator – Can configure and customize the application
- Standard User – Can run reports and create and edit records, access certain modules and functionality

Define the basic roles, such as work health and safety representative, director of work health and safety, and CEO. It is not necessary to create individual roles for each title; the idea is to simply define a hierarchy that gives users in higher-level roles access to the information entered by users in the lower-level roles.

Task
Define your roles
Define your user access

Phase 2

Develop Your Rollout Plan

It does not have to be elaborate, nor does it have to be a step by step task list. What it needs to be are clear milestones with deliverable dates, including our already established WHO, WHAT, WHEN, WHERE model (see our Implementation 101 resource paper)

Train Your Administrator

Investing in your administrator is the best way to ensure success. Beakon offers both virtual and in person training to support this important step. We also offer a popular basic course called 'Getting Started: Administering Beakon' together with comprehensive instructor led training courses regionally and virtually.

Communicate with Your End Users

You have done your due diligence to follow a clear plan, set up and customise Beakon to fit your needs, and scrubbed and imported your data. Now it is time to focus on training your users and driving adoption. With clear goals set, you can now engage your users. User adoption is critical for Beakon success.

- **Keep users informed** - Keep your users updated as the handover date approaches. For the highest impact, these communications should come from the executive sponsor.
- **Develop a training strategy** - The training strategy summarises the plan and provides users with clear direction on what is expected and how they'll use the application.

Understand Your Audience

- Knowing your audience is critical to the success of training. Different kinds of users will have distinct goals and perform different tasks in Beakon, so it is important to focus your training based on their roles.
- Train your management team separately from your end users since they will interact with the application in different ways. This also applies to different areas of the business. If you are deploying to multiple departments, you want to train your marketing users separately from work health and safety or support.
- Also, if you are deploying Beakon globally, certain factors might affect your training strategy.
- Be sure to consider language, cultural differences, and time zones so that your training is appropriate for an international audience.

Provide Relevant Content

- Your users will be more engaged with the training if it's relevant to them. Be sure to incorporate scenario-based training using real data so that users walk through examples they confront in their daily lives.
- Interactive, hands-on exercises are a great way to provide realistic training.
- Quick reference cards give users something to use when they are on the job. Use the cards during training for reference and consider publishing them online later.
- Slide shows give your users the big picture and can be launched from Beakon. Remember: Keep it simple!

Phase 2

Deliver Effective Training

- When planning how you will deliver the content, think about the pace of the training. We recommend creating multiple training sessions. Cramming all the content into one long session can overwhelm users and prevent them from retaining the information. This is especially important if your deployment of Beakon is very complex or if you are introducing new processes.
- We always recommend live, face-to-face training where possible to ensure your audience. However, this may not work if your team is spread across different geographies, so you might provide users with web training or pre-recorded training.

Q&A - Lastly, when you deliver training, be sure you leave time for feedback and questions.

Handover

Now that you've trained your users, you are ready to flip the switch and start using Beakon.

User Adoption - The key to increasing user adoption is supporting users and being responsive to their needs, tracking usage trends over time, and actively encouraging adoption. Understanding what works and what does not is critical, both immediately after hand over and over the long term.

Supporting users is an ongoing process. It involves getting user feedback, providing ongoing training, and identifying user champions who will help their co-workers day to day. Here are some ideas for providing user support:

- **Encourage user champions** - Identify users who are enthusiastic about Beakon and encourage them to help others. Leverage their success to help inspire others.
- **Address problems quickly and publicly** - Consider any problems an early warning.
- Fix problems and modify the application based on feedback immediately. Communicate to users how the problems were solved and how their feedback directly impacted the application.
- **Offer refresher training** - Additional or "refresher" training does not have to be formal; just make sure it's appropriate for each user group. For example, work health and safety managers and work health and safety reps will have different issues and will need different refresher sessions.

Measure Adoption - Before you can improve adoption, you must measure it. Then you can use incentives to actively encourage adoption.

The most common measurement of adoption is the login rate, but it cannot be the only measure. For a more detailed analysis of usage and adoption, consider taking a phased approach to track progress.

- Are users logging in?
- Who is logging in most frequently?

As your usage evolves, so will your adoption metrics.

Phase 2

During phase 2, you may want to get more insight into how users are interacting with Beakon by tracking information like:

- The number of incidents or hazards being created
- Volume of tasks associated with key records.
- Tracking improvement with these metrics are clear indicators that users are becoming more comfortable with Beakon and adoption is growing.

Encourage Adoption - Here are a few suggestions for encouraging user adoption:

- **Incentives** – Making your deployment of Beakon fun by offering prizes and incentives has proven a very effective way to engage users.
- **Super users** – Identify and reward the strongest adopters. For example, this measurement can be based on the highest number of reports or activities created or the highest number of new contacts added.
- **Floor walking** – After you are live on Beakon, have the administrator or super users walk the floors and sit with users at their workstations. By giving users one-to-one attention, you can understand their challenges and address them quickly.
- **Communication** – Create a communication plan to establish an ongoing dialogue with your users. You may need to keep them informed about future training sessions. (See our Comms Plans Count resource material)

Don't forget to celebrate the wins!!!!