**Communication plans are key to project success**

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By Rick Freedman

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Consulting engagements carry with them the element of risk. Enterprises typically engage a consultant because a project is beyond their capabilities due to technical issues, scarcity of bandwidth, or skill sets within the organization, or because of organizational or political risk factors that convince the organization to engage an outsider. All of these risk elements make formal communication more critical, both as a facilitator of success and as a “cover your rear” discipline.  
  
In this column, I’ll discuss the impact good communication has on an engagement, and I’ll talk about the elements that make up a communications plan.  
In a related column, [“Keep clients in the loop with a good communication plan,”](http://www.techrepublic.com/article.jhtml?id=r00720000828fre01.htm) Freedman discussed the importance of setting expectations, building in assurance factors like status reports and issues reviews, and the marketing and consensus-building benefits of a robust communications program.  
Communication skills: A perennial favorite  
Back in January 1964, the *Harvard Business Review* published an article titled “What Helps or Harms Productivity.” The top U.S. corporations of the day participated in this survey, in which they were asked to rank the attributes that contribute to an employee’s productivity. Among the attributes included were traits like maturity, decision making, ambition, capacity for hard work, flexibility, and confidence. All of these characteristics were deemed important and remain so today. In the context of this discussion, however, the important point is that the number one attribute was the ability to communicate.  
  
Although this study was focused on employees, it seems obvious to me that the results are even more appropriate for consultants. Consultants, by nature, are outsiders, without the history and the relationship capital that coworkers build up over years of working together. Employees who’ve worked together for years are like old friends in the sense that they have developed a shorthand of communications, so they often understand each other without a lot of formal communications. They can read one another’s moods and reactions the way an outsider never could. Consultants usually come into engagements without that depth of shared experience, so all communications must be explicit.  
  
Communication plans should be divided into two categories: project communications and constituent communications. Project communications include the interaction that is required in order to deliver the engagement with quality. Included in this category are the project plan itself, the memos and status reports that the team distributes to one another, the team meetings, and the minutes that are issued from them. In the realm of constituent communications are the executive briefings, auditorium presentations, newsletters, “lunch and learn” sessions, posters, brochures, focus groups, and feedback mechanisms like e-mail and voicemail suggestion boxes. Let’s explore all these elements in a bit more detail.  
  
Project communications  
In terms of project communications, the project plan itself is probably the most meaningful communication vehicle in the entire arsenal. By committing to paper the deliverables, the responsible parties, the scheduled delivery dates, and the dependencies, we take the overall engagement—which may be large and difficult to visualize—and break it down into its component parts, thus making it much easier to comprehend and discuss at the level of detail necessary.  
  
A mistake I see many consultants make is creating the project plan at the start of the engagement and then posting it on the wall or, worse, sticking it in a drawer and never referring to it or updating it again. To be a meaningful part of the communication program, the project plan must be revised, reviewed, and revisited throughout the project and used as the axis around which all subsequent communications revolve.  
  
Memos and status reports are the next most important project communications channel, as they give team members the chance to raise issues, “red flags,” unexpected results, and impacts on the project that were not foreseeable before they occurred. The most important advice I can give about internal memos and status reports is that they need to be true and tough. The inclination to sugarcoat, pussyfoot, or otherwise shirk the responsibility for facing the unpleasant truth is one of the key points of engagement failure I’ve experienced in my career. This is not to say that status reports are a place for blame or emotion. In fact, it’s critical that these communications be focused on the facts and the problems, not the personalities or the team dynamics. That being said, however, the ability to take the emotion out of communication, while still imparting the unpleasant facts and their implications, is one of the central traits of a mature and effective consultant or team member.  
  
Project meetings are also an important focus point for communications. Meetings that are well run, with agendas, time contracts, full team participation, and an opportunity for honest and open exchange, can impart the overall vision to the team, build commitment, and ensure success. It’s very easy—in the crush of individual deliverables—for team members to lose sight of the holistic goal, and team gatherings are a great opportunity to remember collectively what we’re all working toward. Meeting leaders should use the agenda to facilitate the discussion, to encourage everyone to participate, to get status reports from all so that everyone builds an overall vision of the project, and to expose and resolve open issues. Formal meetings should be captured in minutes, especially action items and deliverables. The meeting is the cornerstone for project team building and for issue resolution as a team.  
  
While I referred to these as project communications, it’s clear that the client or his representatives will participate in some or all of these activities. It’s critical to ensure that you’re projecting an image of professionalism—that even though these communications are not specifically addressed to the client community, they nonetheless are of the quality and content that will add, not detract, from your relationship and the project’s chance of success. It’s a fine art to balance the requirement for candor and realism with the need to control the message so that rumor and concern don’t cascade through the organization, but it is a skill that the competent consultant must master.  
  
Constituent communications  
Constituent communications are specifically designed to inform the client and all the engagement stakeholders. Some of the elements that a constituent communication program should contain are:

* **Executive briefings.** The executive sponsors of the project should be briefed periodically on the status of the project. This communication should be kept at a high level, typically in the form of a short presentation that focuses on the strategic, not the tactical, issues.
* **Assembly presentations.** Some projects, such as large relocation projects or company-wide IT initiatives, should be presented to the rank-and-file employees, typically in the form of an auditorium presentation. This type of communication is typically focused on two aspects: features and benefits, otherwise known as “what’s in it for me?” and any disruption or dislocation that the project will cause.
* **Newsletters.** Newsletter formats allow for periodic, informal communications that can keep the organization in the loop on the status and schedule of the project. This is also a good forum for executives of the company to sell the project through things like open memos or “From the President’s Desk” inserts.
* **Lunch and learn sessions.** In some organizations, like those that have their own cafeteria, it’s useful to set up a mini trade show environment, where representatives from the project team can meet with the employees and answer questions, address concerns, and sell the project in an informal, unscripted environment.
* **Focus groups.** Like the executive presentation, it sometimes makes sense to deliver focused presentations to specific groups or teams within the organization to address their specific concerns and questions. For instance, the human resources group might be interested in the impact a new system will have on their processes and activities, while the shipping and logistics team might have their own concerns.
* **Project marketing.** As we’ve discussed, projects need to be marketed. I’ve worked on projects that actually went so far as to design logos, project “brand names,” and posters and brochures to advertise the features and benefits of the project.

Other communication conduits include customer surveys, electronic suggestion boxes, and intranets. The key point about all this is that consulting, although obviously a technical discipline, is a communications discipline as well, and the projects and engagements that succeed are the ones in which we bring not only our technical expertise but also our ability to share knowledge, to converse, to create a shared vision, to build team spirit and consensus—in short, to communicate.

Rick Freedman is the author of [*The IT Consultant: A Commonsense Framework for Managing the Client Relationship*](http://www1.fatbrain.com/asp/bookinfo/bookinfo.asp?theisbn=0787951730&from=techrep) and the upcoming *The Internet Consultant*, both by Jossey Bass. He is the founder of [Consulting Strategies, Inc.,](http://www.consulting-strategies.com/) a training firm that advises and mentors IT professional services firms in fundamental IT project management and consulting skills.