

**DRAFT
V 6.0**

Enterprise Resource Planning (ERP)

**Internal Communication Team
ERP Tactical “Plug & Play” Communication Plan**

Tactical Communication Plan: Communication Activities by Phase

Prerequisites for Using This Tactical Plan

Change and Learning team members and SBE/site Internal Communications representatives should complete the following:

- Review all supporting documentation contained in Division ERP Communication Overview Presentation
- Participate in a C&L ERP on-boarding session

For each deployment, the ERP system implementation will be broken into the following seven phases: Project Initiation, Site Preparation, Local Blueprint, Realization, Value Chain Confidence Testing (VCCT), Final Preparation, and Lessons Learned & Benefits Realization. This tactical plan provides information about each implementation phase, including information about tentative timing and relevant communications topics. It also maps out the major communications activities recommended for each phase.

NOTE: Because each business/site’s deployment(s) will be managed separately, the timing of and activities in each phase will differ across deployments. For this reason, SBE Internal Communications (I.C.) resources and C&L Leads are asked to meet at the start of their deployment efforts to better understand the planned implementation. After these meetings, SBE I.C. resources, together with the C&L lead(s), will need to customize the following tactical plan for the deployment. **A Microsoft Excel version of this tactical plan is included in the “plug & play” communications toolkit for customization purposes.**

Separate communications plans will be developed and managed for external stakeholders in close coordination with the internal communication effort. In certain instance, C&L and I.C. staff may choose to create a localized communication plan that includes tactics for both internal and external audiences. In addition, except in initial and critical instances, communications to the site team, power users and end users are not incorporated into this tactical plan.

Hot Links to Sections in Plan

[Project Initiation Phase](#)
[Site Preparation Phase](#)
[Local Blueprint Phase](#)
[Realization Phase](#)

[Value Confidence Testing \(VCCT\) Phase](#)
[Final Preparation Phase \(Including Go-Live & Support\)](#)

[Lessons Learned/Benefit Realization Phase](#)

Linkages to ERP Change & Learning Three “Pillars”

This communication plan and its associated tactics provide foundation support for the three “pillars” of the ERP Change & Learning effort. To illustrate the linkages between communications the broader ERP Change & Learning effort, the plan uses the following color-coded stars:

Ownership/
Engagement



User
Readiness

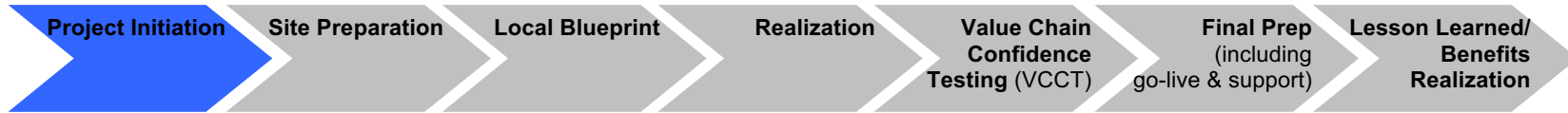


Organizational
Alignment



ERP Tactical “Plug & Play” Communication Plan

Project Initiation Phase



At the Division level, this phase took place in XXXX, approximately one year before the first SBE deployment kickoffs. The global blueprinting and design phase, the key output of this phase was the Global Design Model (GDM). During this phase, Company Division provided information about the following topics to employees and project participants:

- Initiative announcement
- Business case for change
- Division and SBU blueprinting effort

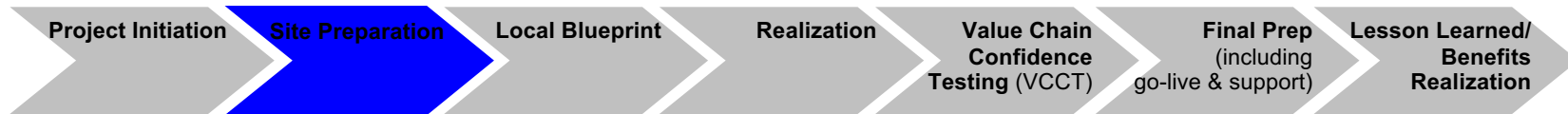
At the SBE-level, this phase is completed before each specific project is launched. During this phase, leadership teams validate project initiation factors.

Communication During Phase

No communications need to be deployed at the site deployment level associated with this phase, though work on localizing the business/site-specific communication plan may begin during this phase as project team members and other resources (including Internal Communications staff and C&L team leaders) are identified.

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Site Preparation Phase



At the business/site deployment level, this will be the first phase that employees really “experience.” During this phase, the project is announced and deployment project teams are launched. It is in this phase that deployment scoping begins. Also in this phase, the business begins to engage in the ERP effort. For instance, in terms of Change & Learning Activities, C&L facilitates a process of business leader “onboarding.” Also, the business and the deployment project team begin to discuss and work out requirements for Sarbanes-Oxley compliance related to the move to SAP, including the tollgate criteria and detailed requirements for documenting and testing business controls. Finally, lessons learned from previous go-lives are reviewed and incorporated in the project plan.

Activities in Phase (from Tollgate Worksheet)

- Team rooms allotted and equipped
- Project plan completed and commitment secured
- Potential systems to be decommissioned identified
- Company and external resources identified
- Project team kick-off and steering committee meeting held
- Business leader on-boarding event completed
- Master data source systems identified
- Transactional data source systems identified
- Lessons learned from previous go-lives reviewed and incorporated in project plan

Timing of Phase

- Varies in length by deployment
- Takes place approximately 9 months to 1 year before scheduled “Go-Live” date

Communication During This Phase

This is the phase in which the ERP initiative is introduced and positioned with most internal stakeholder groups at the site level. As such, a great deal of communication will be required. In terms of volume of communication activities necessary, this phase will be fairly intense. Only the Final Preparation phase (which includes cutover, go-live and post-go-live support) will see more communication activity. **Note: For the project to pass Tollgate 1 at the end of this phase, teams need to complete a localized communication plan for the deployment.**



Communication Theme for Phase

What are the Division Backbone Program, ERP, and SAP? Why are we doing this?



Communication Topics

- Business case/vision for change
- Benefits of change
- Vision for SBU/SBE and organization
- Project team kick-off
- Project participants
- Project overview
 - Including information about planned project timeline and high-level description of activities in the remaining phases



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Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
Business/Site Employees	Case/vision for change, benefits of change, project team, process changes, updates, training, tollgate news, cutover plans, FAQs, etc.	SBU ERP Intranet site, linked from Division-wide ERP site NOTE: ALL important information for end-users/power users should be placed here; Intent is to have a place where employees with access to the Intranet can go for up-to-date information	No template, though website redesign planned (both SBU/SBE and Division-level sites)	Ongoing communication	Ongoing through life of deployment*	Launch as soon as possible following start of this phase	Creation: I.C. and C&L Lead	Monitor site traffic and downloads over life of deployment
Business/Site Top Tier Leaders Ownership/Engagement 	Case/vision for change, benefits of change, and project overview to ensure that the business leadership team has a common understanding about the project and its impacts, including program “non-negotiables.” Also, include information about the role of leaders in change.	Business Leader On-Boarding Workshop (NOTE: C&L Team Event, not primarily viewed as an I.C. activity)	Yes	Introduce effort and case/vision for change to leaders; Level-set regarding program decisions to date; Set expectations of leadership involvement	1x	Must be completed by the end of phase to pass tollgate	Creation: C&L, with input from I.C. on messaging	Feedback = questions asked during session and subsequent participation in leadership action planning Metric = C&L team must complete workshop with key business leaders to pass tollgate
Business/Site Top Tier Leaders Ownership/Engagement  LAP	Project status/updates, including process changes, information about key decisions, tollgate news, testing/training status, cutover plans, etc.	In-person presentation/briefing Include ERP as a rolling agenda item on the leadership team’s regularly scheduled staff meeting	Yes, for initial presentation No, for ongoing briefings	Ongoing communication about project status and decisions	Ongoing throughout life of deployment as agreed upon by the leadership team and ERP deployment leadership	Begin updates after Business Leader On-Boarding Workshop has been completed	Creation: ERP leaders/ C&L Leads Delivery: VP GM and Deployment Manager, or other leader as appropriate	Anecdotal

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Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metric
Business/Site Second Tier Leadership Ownership/ Engagement  LAP	Case/vision for change, benefits of change, vision for SBU/SBE, project team formation, commitment to provide timely and relevant information, leaders role in managing change	In-Person Meeting or Net Meeting	Yes	Introduce and position project	1x	After Business Leader On-Boarding Workshop (Approx. 9 months to 1 year before go-live)	Creation: C&L, with input on messaging by I.C. Delivery: Top-tier business functional leader and member of deployment team	Anecdotal
Business/Site Front Line Managers Ownership/ Engagement  LAP	What are the Division Backbone Program, ERP, and SAP? Why are we doing this? Case/vision, benefits, vision for SBE/SBE, project team formation, commitment to provide timely and relevant information, supervisor/ manager role in successful change; announce coming manager cascade material	Manager SAP Briefing 1 [Mandatory meeting for all front line managers and supervisors] (NOTE: C&L Team Event, not primarily viewed as an I.C. activity)	Yes	<ul style="list-style-type: none"> ▪ Introduce and position project ▪ Set expectations for manager role in ERP effort 	Ongoing (6 in total spread throughout deployment/ 1 per phase)	Schedule first session early in phase (before tollgate 1)	Creation: C&L, with input on messaging from I.C. Delivery: Business/site leader and Deployment Manager or other appropriate member of deployment team	Feedback = questions asked during session Metric = Managers participation in SAP Briefing is a tollgate metric for each phase
Business/Site Front Line Managers	Supervisor/ manager role in successful change and communication process, request them to present information to their staff Also distribute presentation to cascade messages from Manager SAP Briefing 1.	Manager Cascade Materials Packet (in form of 3-5 PPT slides with talking points) and E-mail to Managers	Yes	<ul style="list-style-type: none"> ▪ Request managers & supervisors to present news of initiative to their staffs ▪ Distribute “manager cascade” materials 	1x	Send late in the day on which the Manager SAP Briefing takes place	Creation: I.C. and C&L Lead Delivery: I.C.	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
Business/Site Employees	<p>What are the Division Backbone Program, ERP, and SAP? Why are we doing this?</p> <p>Case/vision for change, benefits of change, project team formation, anticipated timeline; commitment to providing more info over time</p>	Manager Cascade	No, managers will use manager cascade packet distributed to brief employees	Introduce and position project	1x	Provide info to staff within one week of receiving it	Delivery: Front Line Managers	Anecdotal
Business/Site Employees Ownership/Engagement  LAP	Case/vision for change, benefits of change, project team formation, commitment to provide timely and relevant information	E-Mail/Memo from VP GM	Yes	Introduce and position project	1x	Distribute at start of phase; Time for one week after manager cascade materials sent to managers	Creation: I.C. and C&L Lead Delivery: VP GM	Anecdotal
Deployment/Site Team	Case/vision for change, benefits of change, vision for SBU/SBE & organization, project overview/ timeline, roles & responsibilities, governance, participants, etc.	Deployment/Site Team Kick-off Meeting (NOTE: Deployment Team Event, not primarily viewed as an I.C. activity)	Yes	<ul style="list-style-type: none"> ▪ Introduce and position project ▪ Provide timeline information ▪ Gain understanding & buy-in on roles/ responsibilities 	1x	Conduct at start of phase after intro announcement	Creation: Deployment Team, with input from C&L and I.C. on messaging Delivery: C&L and Site Team Leaders	Questions asked
Business/Site Employees Ownership/Engagement  LAP	<p>Case/vision for change, benefits of change, overview of project</p> <p>Later in life of deployment provide progress updates and CRITICAL cutover information</p>	Electronic Town Hall Meetings / All Hands Meetings (Content offered in existing, regularly scheduled quarterly meeting)	Yes	<ul style="list-style-type: none"> ▪ Introduce and position project ▪ Introduce website 	Ongoing Begin practice of providing ERP content at each quarterly town hall/ all hands meeting or other regularly scheduled meeting	As scheduled during this phase	Creation: I.C. and C&L Lead Delivery: Business leader or deployment manager	Questions asked

ERP Tactical “Plug & Play” Communication Plan

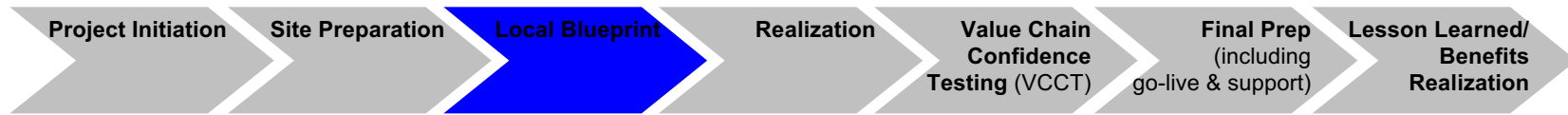
Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metric
Business/Site Employees	Announcement of SBU ERP Intranet site	E-mail or existing SBU publication	Yes	Introduce Intranet site	1x	Anytime during phase after introductory e-mail from VP GM	Creation: I.C. and C&L Lead Delivery: I.C.	Track web hits before and after e-mail

* Text in red indicates tasks that continue into subsequent phases.

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Local Blueprint Phase



During this phase, the site blueprint is created. The site blueprint maps site-specific requirements to the Global Design Model (GDM) developed in the Division and SBU Blueprint phase. During this phase, the deployment scope is finalized and legacy systems are evaluated for decommissioning. This also is the phase during which system development begins for each site and power users join the implementation effort. Power users will play a large role in training, testing, and go-live support.

Activities in Phase (From Tollgate Worksheet)

- Deployment scope finalized
- Power users identified
- Confirm requirements to template
- Redesign business processes
- Design organizational hierarchy
- Legacy systems evaluated for decommissioning
- Prototype complex processes in SAP
- Identify development requirements
- Define end user roles & security

Timing of Phase

- Varies in length by deployment
- Takes place 6 to 9 months before scheduled “go live”

Communication During Phase



Communication during this phase can be thought of as an extension of the project positioning that occurs in Site Preparation. In this phase, communication activities will add additional layers to the information presented previously – “What will this mean for my department and for me?” and “How are we really going to accomplish this change?”

Communication Theme for Phase




How will individual departments/functional areas be affected by the move to SAP?

Communication Topics

- Business case/vision for change
- Benefits of change
 - Include benefits to Company Division, as well as benefits for departments, individual employees, customers and other external stakeholders
- Departmental impacts
 - Answer these questions: What is involved with the change? What will it mean for my department and me? What will it mean for external stakeholders
- How will we achieve lasting change?
 - Include first overview of testing process, training, and communications
- Identification & on boarding of power users
- Power users join team
- Progress updates

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism /Metric
Business/Site Employees	<p>Project updates, tollgate news, "success stories" from other deployments, training information, transaction cutoff information, cutover plans, etc...</p> <p>Note: "Template" available that maps out by phase topics for each newsletter issue (Sample editorial calendar in LB_1_eUpdate Editorial Guidance).</p>	<p>E-Update/ E-newsletter (also made available on SBE ERP intranet site)</p> <p>(Ask managers and supervisors to post editions for employees w/o intranet and e-mail access.)</p> <p>Suggestion: Publish one version per SBE, not individual versions for each site/deployment wave</p>	<p>Yes</p> <p>Graphic design template = TBD</p> <p>Editorial guidance and sample editorial calendar = LB_1_eUpdate Editorial Guidance</p>	ERP Updates	<p>Ongoing</p> <p>(Tip: Sit down with C&L Lead to establish editorial calendar. See sample in plug & play tool kit.)</p>	<p>Launch at start of phase;</p> <p>Monthly during this phase and integration testing;</p> <p>Twice monthly during last month of Final Prep or what works best per SBE needs</p>	<p>Creation: I.C. and C&L Lead</p> <p>Delivery: I.C.</p>	Questions submitted to e-mail box
<p>Business/Site Top Tier Leaders</p> <p>(May consider extending to Second Tier Leaders)</p> <p>Ownership/ Engagement</p> 	<p>Project updates, timeline, major decisions, progress reports, leadership roles and responsibilities for making ERP successful</p>	<p>"Very Important Topic (VIT):" ERP Leadership Update</p> <ul style="list-style-type: none"> ▪ Leadership Update ▪ Hardcopy collateral material (One-page, double-sided and laminated) ▪ Soft copy provided in addition upon request 	<p>Yes</p> <p>Graphic design template = TBD</p> <p>Editorial guidance and sample editorial calendar = LB_2_VIT Editorial Guidance</p>	Project updates	<p>Ongoing</p> <p>2x a phase</p> <p>Frequency of distribution during Final Prep to be determined by I.C. and C&L Leads; May be more frequent</p> <p>(Tip: Sit down with C&L Lead to establish editorial calendar. See sample in plug & play tool kit.)</p>	<p>Launch "VIT" at the start of this phase</p>	<p>Creation: I.C. and C&L Lead</p> <p>Delivery: C&L</p>	Anecdotal
<p>Random Sampling of SBE Employees</p> <p>Ownership/ Engagement</p> 	<p>Organizational and Leadership Survey</p> <ul style="list-style-type: none"> ▪ Coming Zoomerang survey, why important, timely responses appreciated/ valued, thanks, etc. 	E-mail	Yes	Notify employees of upcoming survey and the need for feedback	<p>Periodically throughout deployment as determined by C&L plan</p>	Send 2 weeks before each planned survey; First one this phase	<p>Creation: I.C. and C&L Lead</p> <p>Delivery: C&L</p>	<ul style="list-style-type: none"> ▪ Survey response rate

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Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism /Metric
Random Sampling of Business/ Site Employees Ownership/ Engagement 	Survey reminder messages	E-mail	Yes	Reminder about survey	Periodically throughout deployment as determined by C&L plan	2 days before survey is due	Creation: I.C. and C&L Lead Delivery: C&L	Survey response rate
Business/Site Employees Ownership/ Engagement 	Share survey results	SBE ERP intranet site	Yes	Publish results of Org. Readiness Survey for employee viewing	Periodically throughout deployment as driven by C&L plan	Post approx. 2 weeks after survey close	Creation: I.C. and C&L Delivery: I.C.	Track website hits
Business/Site Front Line Managers Ownership/ Engagement  LAP	How will individual departments/functional areas be affected by the move to SAP? Business case/vision for change, departmental changes (“From/ To” process changes), how to achieve lasting change Stop, Start, Continue activity will help provide content for this	Manager SAP Briefing 2 [Mandatory meeting for all front line managers and supervisors; Breakout sessions conducted sequentially will cover content about individual affected departments/functional groups] (NOTE: C&L Team Event, not primarily viewed as an I.C. activity)	Yes	<ul style="list-style-type: none"> ▪ Reinforce business case/vision for change ▪ Begin to introduce news of how changes will impact departments and individuals 	Ongoing (6 in total spread throughout deployment/ 1 per phase)	Schedule session early in phase (before tollgate 2)	Creation: C&L, with input on messaging from I.C. Delivery: Business/site leader and Deployment Manager or other appropriate member of deployment team	Feedback = questions asked during session Metric = Managers participation in SAP Briefing is a tollgate metric for each phase
Business/Site Front Line Managers	Supervisor/ manager role in successful change and communication process, request them to present information to their staff Also distribute presentation to cascade messages from Manager SAP Briefing 2.	Manager Cascade Materials Packet (in form of 3-5 PPT slides with talking points) and E-mail to Managers	Yes	<ul style="list-style-type: none"> ▪ Distribute “manager cascade” materials ▪ Request managers & supervisors to present news of initiative to their staffs 	1x	Send late in the day on which the Manager SAP Briefing takes place	Creation: I.C. and C&L Delivery: C&L	Anecdotal

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Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism /Metric
Business/Site Employees	<p>How will individual departments/functional areas be affected by the move to SAP?</p> <p>Business case/vision for change, departmental changes (“From/ To” process changes)</p>	Manager Cascade	<p>No</p> <p>Managers will use manager cascade packet distributed to brief employees</p>	Provide information and build understanding of department/functional changes	1x	Provide info to staff within one week of receiving it	Delivery: Front Line Managers	Anecdotal
Business/Site Front Line Managers	<p>ERP updates and information about key operational tasks required as part of ERP effort</p> <p>(Example: common transaction cutoff deadlines)</p>	<p>Bi-Weekly Meeting Planner</p> <p>An existing bi-weekly (or in some cases weekly) publication</p>	No, but editorial guidance provided	<ul style="list-style-type: none"> ▪ ERP updates ▪ Provide information about tasks that must be completed by many people throughout the SBE 	<p>Ongoing</p> <p>ERP content would appear periodically as needed throughout the life of the deployment</p>	Driven by project need and existing publication schedules	<p>Creation: I.C. and C&L</p> <p>Delivery: I.C.</p>	Anecdotal and Questions Received

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Realization Phase



During this phase, the system is tested to ensure proper functionality. Also, legacy systems are mapped to SAP. Though it begins in earnest in the next phase, this is the phase where VCCT activities begin, starting with the power user’s train-the-trainer experience. VCCT is an iterative process used by the project team to test and make further refinements to the system. SAP users of all usage levels participate in VCCT. Through VCCT participation, those same users are trained in how to operate the new system.

Activities in Phase (From Tollgate Worksheet)

- Configure SAP to support processes
- Develop RICE objects
- Perform unit & string testing
- Identify end users
- Power users identified, SAP basic navigation trained and ready to begin VCCT
- Develop detailed cutover plans (25% completion expected by end of phase)
- Prepare QA / Test & production environments
- Develop end user roles and security

Timing

- Varies in length by deployment
- Takes place approximately 3 to 6 months prior to the “go live” date
- Exit from this phase occurs approximately 17 weeks before go-live

Communication During Phase

Communication activity will shift focus slightly from broad messaging intended to position the effort to more targeted tactical/operational messaging intended to facilitate the change. Of all the phases, this phase will seem the quietest in terms of the volume of message delivery.

However, this does not mean that communications activity will be slow during this phase. Rather, because the next two phases – VCCT and Final Preparation – will be very busy, it is recommended that whenever possible I.C. and C&L leads work ahead to plan and prepare cutover messaging. It will be very important at this stage for C&L and I.C. staff to learn what will be involved in their deployment’s cutover process. Because cutover activities (for example, transaction cutoff details) will likely vary from deployment to deployment, communications in the Final Preparation phase will require the most customization. **To facilitate this learning and advance work, I.C. staff and C&L leads should hold a cutover communications working session at the end of this phase to revise and refresh the VCCT and Final Preparation portions of the tactical plan and top create a sub-plan for managing cutover communications. (Note: This working session should be built into the overall ERP deployment Microsoft Project Plan.) During this session, begin planning for cutover communication needs. Also, it is important to note here that a separate sub-plan for cutover communications will need to be completed for the ERP effort to pass through tollgate 5.**





ERP Tactical “Plug & Play” Communication Plan

Communication Theme for Phase




What does SAP look like from end to end? What are the cross-functional implications of SAP?

Communication Topics


- Business case/vision for change
- Benefits of change
- VCCT **(should be covered in tactics and eUpdate)**
 - Integration testing and training information
- High-level overview of cutover plans developed to date and their implications for stakeholder groups **(not included in tactics below, but should also be covered in eUpdate publication)**

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metrics
Power Users User Readiness  Ownership/ Engagement  LAP	Power User Kick-off <ul style="list-style-type: none"> ▪ Role and responsibilities of power users, What is VCCT? – Its purpose, impact, scope/timeline, train-the-trainer May actually be a session in the train-the-trainer event itself	Net Meeting or In-Person (NOTE: Deployment team event, not primarily viewed as an I.C. activity)	No template available	Introduction to Value Chain Confidence Testing (VCCT)	1x	Scheduled before VCCT for Power Users begins (Approx. 6 months prior to go-live)	Creation: Deployment Team with input from C&L and I.C. on messaging Delivery: Deployment Team (and appropriate business leader if included on LAP)	Questions Asked
Power Users User Readiness  Ownership/ Engagement  LAP	Welcome to ERP Effort; Your role is important to project success	E-mail/memo VP GM or Site Lead	Yes	Welcome	1x	Day after Power User Kick-off	Creation: I.C. and C&L Delivery: I.C.	Anecdotal

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Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metrics
End Users User Readiness 	SAP Basic Navigation Course Now Available; Please Take It	E-mail from deployment manager	Yes	To encourage participation by end users in critical task	1x	When course available	Creation: I.C. and C&L Delivery: I.C.	Anecdotal
Business/Site Front Line Managers Ownership/ Engagement  LAP	Overview of VCCT: Reminder of VCCT process, news that it will be starting soon, participation encouraged	E-mail/memo VP GM or Site Lead	Yes	Introduction to VCCT	1x	Schedule before VCCT begins (Approx. 6 months prior to go-live)	Creation: I.C. and C&L Leads Delivery: I.C.	Questions submitted to e-mail box
Business/Site Front Line Managers Ownership/ Engagement  LAP	What does SAP look like from end to end? What are the cross-functional implications of SAP?	Manager SAP Briefing 3 [Mandatory meeting for all front line managers and supervisors] (NOTE: C&L Team Event, not primarily viewed as an I.C. activity)	Yes	Provide information about the end-to-end nature of SAP and what that means to departments/functions and individuals	Ongoing (6 in total spread throughout deployment/ 1 per phase)	Schedule session early in phase (before tollgate 3)	Creation: C&L, with input on messaging from I.C. Delivery: Business/site leader and Deployment Manager or other appropriate member of deployment team	Feedback = questions asked during session Metric = Managers participation in SAP Briefing is a tollgate metric for each phase
Business/Site Front Line Managers	Supervisor/ manager role in successful change and communication process, request them to present information to their staff Also distribute presentation to cascade messages from Manager SAP Briefing 3.	Manager Cascade Materials Packet (in form of 3-5 PPT slides with talking points) and E-mail to Managers	Yes	<ul style="list-style-type: none"> ▪ Distribute “manager cascade” materials ▪ Request managers & supervisors to present news of initiative to their 	1x	Send late in the day on which the Manager SAP Briefing takes place	Creation: I.C. and C&L Delivery: C&L	Anecdotal

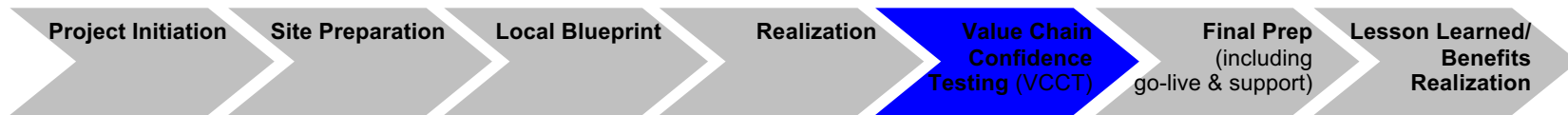
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Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metrics
				staffs				
Business/Site Employees	What does SAP look like from end to end? What are the cross-functional implications of SAP?	Manager Cascade	No Managers will use manager cascade packet distributed to brief employees	Provide information about the end-to-end nature of SAP and what that means to departments/functions and individuals	1x	Provide info to staff within one week of receiving it	Delivery: Front Line Managers	Anecdotal
Power Users User Readiness 	ERP progress and VCCT logistical information: <ul style="list-style-type: none"> ▪ Pre-training information topics ▪ VCCT dates ▪ Scope ▪ Expectations for Power Users 	E-mail/memo	Yes	<ul style="list-style-type: none"> ▪ Provide brief project update ▪ Distribute training logistical information 	1x	Schedule after power user kick-off and e-mail to managers (Approximately 5 - 6 months prior to go-live)	Creation: C&L Leads, Training Leads, and I.C. (for review and input) Delivery: I.C. or C&L	Anecdotal
I.C. and C&L	Cutover Communication Planning Working Session	Presentation form (reviewed in sit-down meeting attended by I.C. and C&L)	No, but guidance provided	<ul style="list-style-type: none"> ▪ Assist with cutover communication planning ▪ Raise awareness of cutover communication intricacies 	At least 1x, more as needed	As soon as cutover plan is available, typically end of Realization phase	I.C. and C&L	NA

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Value Chain Confidence Testing (VCCT) Phase



During this phase, integration testing occurs. Also VCCT preparation and system preparation continues to take place prior to “Go-Live.” This is when the project team, working together with the business, finalizes its cutover conversion plan (80% complete). Also, during this phase, the project team conducts cutover rehearsals.

Activities by Phase (from Tollgate Worksheet)

- Complete integration tests
- Rehearse data conversion loads
- Conduct stress / volume testing
- Conduct security authorization testing
- Develop training materials & schedule
- Implement organizational changes

Timing

- Approximately 7-8 weeks in duration
- Takes place 2 to 3 months prior to Go-Live
- Exit from phase expected approximately 10 weeks before Go-Live

Communications During Phase

Typically, during this phase, the frequency of communications begins ramping up, as businesses/sites get ready for end user training (VCCT and non-VCCT). However, again, it is recommended that whenever possible I.C. and C&L leads work ahead to plan and prepare cutover messaging because Final Preparation will be very busy.



Communication Theme for Phase

How will SAP end users be trained, assessed and supported?




Communication Topics

- Business case/vision for change
- Benefits of change
- VCCT (Testing and training information)
- Cutover plans and implications
 - Schedule of system shutoffs (and if possible decommissionings) and transaction cutoff deadlines
- Support plan overview
- Directions for accessing new system
- Early Go-Live prep activities


ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metrics
End Users Ownership/ Engagement  LAP	Project Milestone Completion: End of system design and start of integration testing	E-Mail from Deployment Sponsor	Yes	<ul style="list-style-type: none"> Help build awareness of and excitement for SAP deployment Celebrate progress made Provide information about system integration and other next steps (Power User refresh training and End User training) 	1x	After system design is completed, but before system integration test	Creation: C&L and I.C. Delivery: I.C.	Anecdotal
Business/Site Front Line Managers Ownership/ Engagement  LAP	How will SAP End Users be trained, assessed and supported?	Manager SAP Briefing 4 [Mandatory meeting for all front line managers and supervisors] (NOTE: C&L Team Event, not primarily viewed as an I.C. activity)	Yes	Provide information about VCCT process and its importance	Ongoing (6 in total spread throughout deployment/ 1 per phase)	Schedule session early in phase (before tollgate 4) (Approx. 3 months prior to go-live)	Creation: C&L, with input on messaging from I.C. Delivery: Business/site leader and Deployment Manager or other appropriate member of deployment team	Feedback = questions asked during session Metric = Managers participation in SAP Briefing is a tollgate metric for each phase
Business/Site Front Line Managers	Supervisor/ manager role in successful change and communication process, request them to present information to their staff Also distribute presentation to cascade messages from	Manager Cascade Materials Packet (in form of 3-5 PPT slides with talking points) and E-mail to Managers	Yes	<ul style="list-style-type: none"> Distribute “manager cascade” materials Request managers & supervisors to 	1x	Send late in the day on which the Manager SAP Briefing takes place	Creation: I.C. and C&L Delivery: C&L	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metrics
	Manager SAP Briefing 4.			present news of initiative to their staffs				
Business/Site Employees	How will SAP End Users be trained, assessed and supported?	Manager Cascade	No Managers will use manager cascade packet distributed to brief employees	Provide information about VCCT process and its importance	1x	Provide info to staff within one week of receiving it	Delivery: Front Line Managers	Anecdotal
End Users Ownership/ Engagement  LAP	Welcome to ERP Effort; Your role is important to project success, particularly in VCCT	E-mail/memo VP GM or Deployment Sponsor	Yes	Welcome	1x	Send out after the VCCT logistical information is sent to Power Users and after the Manager SAP Briefing has taken place (Approx. 3 months prior to go-live)	Creation: I.C. and C&L Delivery: I.C.	Anecdotal
End Users User Readiness 	Intro to VCCT, details on training times, place, topics, registration information, expectations	E-mail/memo	No, as method of managing VCCT and distributing VCCT logistical information TBD by deployment	<ul style="list-style-type: none"> ▪ Introduction to Value Chain Confidence Testing (VCCT) ▪ Distribute training logistical information 	1x	Schedule after Power User net meeting and e-mail to managers/ supervisors (Approx. 3 months prior to go-live)	Creation: C&L Leads and Training Leads, and I.C. (for review and input) Delivery: C&L Leads and Training Leads	Anecdotal
Power Users/ End Users User Readiness 	Strategic importance of project, Importance and overall support of training/testing, please attend	E-mail: Training reminders from deployment manager	Yes	Training reminders	1x for each VCCT session	One week before sessions May need to send out in batches each week	Creation: I.C. and C&L Delivery: I.C. or C&L	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metrics
						depending upon how VCCT will be managed		
Business/Site Employees Ownership/ Engagement  LAP	Leadership message about project importance, highlight VCCT as a key step, provide early high-level information about cutover and support plans	E-mail/memo from VP GM	Yes	ERP Program Status and VCCT Update	1x	About 2.5 months prior to go-live	Creation: C&L Leads, I.C., and Training Leads Delivery: from VP GM or other leader	Anecdotal
Business/Site Employees	Go-live countdown reminders	E-mails/memos (Depending upon each site's capabilities, these updates could be accomplished with other vehicles, particularly those that take place 1 day and 1 hour before go-live. Optional vehicles may include broadcast voicemail, TV monitors, and intercom announcements.)	Yes	Reminders	5x before go-live (60-day version happens in VCCT phase, rest in Final Preparation)	At 60-days before go-live	Creation: I.C. and C&L Leads Delivery: I.C.	Questions sent to mailbox
Unions (leaders, supervisors, general employees)	Cutover messages tailored for unique audience	Leader cascade materials or e-mails	No, but provide tips about union communications	Cutover/Go-Live prep	1x	About 2-3 months prior to go live	Creation: I.C. and C&L Leads Delivery: I.C.	Anecdotal
Business/Site Employees	Countdown to go-live at site	Posters	Yes	<ul style="list-style-type: none"> ▪ Go-Live prep ▪ Raise awareness 	Daily	About 2 months prior to go-live	Creation: C&L Lead (input from I.C. to ensure posters follow site guidelines about signage, if needed)	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metrics
							Delivery: C&L	
Business/Site Employees	SAP cutover and Go-Live information, support information	Flyers 1) SAP Overview Flyer 2) SAP HelpDesk 3) “How You Can Help?”	Yes	<ul style="list-style-type: none"> ▪ Go-Live prep ▪ Raise awareness of SAP Go-Live 	3x before Go-Live	First flyer approx. 2 months before Go-Live	Creation: I.C. and C&L Leads Delivery: I.C.	Anecdotal and questions received Or Monitor website traffic in the days immediate following distribution (if capability is available)

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ERP Tactical “Plug & Play” Communication Plan

Final Prep Phase (Including Go-Live & Support)



This phase is the final push toward Go-Live and Go-Live readiness. During this phase, the detailed cutover plan is finalized and approved. To prepare for cutover, End Users and other stakeholders (customers and suppliers) may be asked to meet special transaction cutoff dates planned to facilitate conversion to the new system. Also, during this phase, the project team prepares legacy systems for the cutover to SAP and loads data into SAP. Also, during this phase, End-User training finally occurs. This phase also encompasses the system “Go-Live” and the technical support that accompanies it after Go-Live.

Activities in Phase (from Tollgate Worksheet)

- Conduct End-User training
- Conduct user acceptance tests
- Execute data conversion loads (Master and Transactional Data)
- Prepare & train help desk
- Go Live
- SAP support through Power Users and through CoE

Timing

- Approximately 4 to 5 weeks in duration

Communications During Phase

This phase is likely to be the busiest of the phases in terms of communication dissemination. In the run up to Go-Live, communication may need to occur on a weekly or even daily basis. This phase primarily will involve communications aimed at facilitating the tactical/operational components of the ERP initiative, such as transaction cut-offs planned to help the cutover process and the schedule of system shutdowns. Communication frequency tapers off after Go-Live.



Communication Theme for Phase

We are going live very soon. What do I need to know to help make our Go-Live a success?



Communication Topics

- Business case/vision for change
- Benefits of change
- Cutover status updates
- Support plan details and contact information
- Role of Power Users
- Application outage notices (internally and externally facing systems affected by cutover)
- Job impact information



ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
Business/Site Employees	Go-Live prep content	TV Monitors	No, but content suggestions	<ul style="list-style-type: none"> Go-Live Prep Raise Awareness 	As needed	Throughout phase	Creation: C&L and I.C. Delivery: I.C.	Anecdotal
Business/Site Employees Ownership/Engagement  LAP	Go-Live countdown reminders	E-mails/memos (Depending upon each site’s capabilities, these updates could be accomplished with other vehicles, particularly those that take place 1 day and 1 hour before Go-Live. Optional vehicles may include broadcast voicemail, TV monitors, and intercom announcements.)	Yes	Reminders	5x before Go-Live (60-day version happens in VCCT phase, rest in Final Preparation)	30 days, 10 days, 1 day out, and 1 hour before Go-Live starts	Creation: I.C. and C&L Leads Delivery: VP GM (at 30 days); I.C. all others	Questions sent to mailbox
Business/Site Employees in Affected Departments and Functional Groups Ownership/Engagement  LAP	Cut-off dates, master data loading, points of contacts/support	E-mail(s)	Yes	Go-Live Prep	Series of e-mails, as needed per cutover plan	About 1 month prior to Go-Live	Creation: I.C. and C&L Leads Delivery: Business Leaders or Deployment Functional Leads	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
Business/Site Employees Ownership/Engagement  LAP	Go-Live Update: Go/No-Go Decisions	E-mail/memo from VP GM and Deployment Manager	Yes	<ul style="list-style-type: none"> ▪ Tollgate update - provide status update ▪ Establish expectations for timing of cutover 	1x	When decision is made	Creation: I.C. and C&L Leads Delivery: Business Leader an Deployment Manager	Anecdotal
Business/Site Employees	Cutover Status: Starting Master Data Cutover from Legacy to SAP system	E-mail/Memo	Yes	SBU / SBE / Site Go-Live Update	1x	Per cutover plan (Typically about 1 month prior to Go-Live)	Creation: I.C. and C&L Leads Delivery: I.C.	Anecdotal
Power Users	Cutover Overview: <ul style="list-style-type: none"> ▪ Cutover information ▪ Transaction cutoff information ▪ Legacy system decommissioning ▪ Post-Go-Live SAP support 	E-mail with FAQ materials	Yes	Go-Live Prep	1x	About 1 month prior to go-live	Creation: I.C. and C&L Leads Delivery: I.C. or C&L	Anecdotal
Business/Site Employees	Support information	Support quick reference magnet	Yes	Cutover/Go-Live Prep	1x	About 1 month prior to Go-Live	C&L	Anecdotal
Business/Site Front Line Managers	Cutover Overview: <ul style="list-style-type: none"> ▪ Cutover information ▪ Transaction cutoff information ▪ Legacy system decommissioning ▪ Post-Go-Live SAP support 	E-mail with FAQ materials	Yes	Go-Live Overview	1x	About 1 month prior to Go-Live; distribute after cutover overview e-mail to Super Users	Creation: I.C. and C&L Leads Delivery: I.C.	Anecdotal
Business/Site Employees Ownership/Engagement  LAP	Importance of execution and trouble-shooting	Live Town Hall	Yes	Checklist for Final Preparation	1x	About 1 month prior to Go-Live	Creation: I.C. and C&L Leads Delivery: VP GM or Deployment Manager	Questions Asked

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
HR Organizational Alignment 	Job Foundation Redesign	Packet of Materials	No	Redesign of jobs/roles	1x	About 1 month prior to go-live	HR/ Change Team/Site Lead	
Business/Site Front Line Managers Ownership/ Engagement  LAP	We are going live very soon. What do I need to know to help make our Go-Live a success?	Manager SAP Briefing 5 [Mandatory meeting for all front line managers and supervisors] (NOTE: C&L Team Event, not primarily viewed as an I.C. activity)	Yes	Provide information about VCCT process and its importance	Ongoing (6 in total spread throughout deployment/ 1 per phase)	Schedule session early in phase (before tollgate 5) (Approx. 3 weeks prior to Go-Live)	Creation: C&L, with input on messaging from I.C. Delivery: Business/site leader and Deployment Manager or other appropriate member of deployment team	Feedback = questions asked during session Metric = Managers participation in SAP Briefing is a tollgate metric for each phase
Business/Site Front Line Managers	Supervisor/ manager role in successful change and communication process, request them to present information to their staff Also distribute presentation to cascade messages from Manager SAP Briefing 5.	Manager Cascade Materials Packet (in form of 3-5 PPT slides with talking points) and E-mail to Managers	Yes	Go-Live Prep	1x	Send late in the day on which the Manager SAP Briefing takes place	Creation: I.C. and C&L Delivery: C&L	Anecdotal
Business/Site Employees	We are going live very soon. What do I need to know to help make our Go-Live a success?	Manager Cascade	No Managers will use manager cascade packet distributed to brief employees	Go-Live Prep	1x	Deliver within 1 week of materials distribution	Delivery: Front Line Managers	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
End Users	Cutover Overview: <ul style="list-style-type: none"> ▪ Cutover information ▪ Transaction cutoff information ▪ Legacy system decommissioning ▪ Post-Go-Live SAP support 	E-mail with FAQ materials	Yes	Go-Live Prep	1x	About 2 weeks before Go-Live	Creation: I.C. and C&L Leads Delivery: I.C.	Questions sent to mailbox
Business/Site Employees	Cutover status	E-mail (Depending upon each site’s capabilities, these updates could be accomplished with other vehicles. Optional vehicles may include broadcast voicemail and TV monitors.)	Yes	Updates	2x	1/3 and 2/3 through Go-Live (over cutover weekend)	Creation: I.C. and C&L Leads Delivery: I.C.	Questions in E-mail box
Business/Site Employees	We are Live! 1) What now – soft start 2) Full production	E-mail (Depending upon each site’s capabilities, these updates could be accomplished with other vehicles. Optional vehicles may include broadcast voicemail, banners, intercom announcements, and TV monitors. Might also consider day of or day after celebration ideas like balloons, ice cream, team photos, etc.)	Yes	Update and provide information about transaction processing in the days immediately following Go-Live	1x	1) At Go-Live soft start 2) At Go-Live full production	Creation: I.C. and C&L Leads Delivery: I.C.	Anecdotal
End Users	Support Information Reminder	E-mail	Yes	Reminder	2x	1 day post Go-Live, 7 days post Go-Live	Creation: I.C. and C&L Leads Delivery: I.C.	Anecdotal

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ERP Tactical “Plug & Play” Communication Plan

Lessons Learned/Benefits Realization Phase



This final phase is important. It is during this time that the business must take up SAP and run with it. Typically, 30 days after Go-Live ongoing support for SAP will transition from the ERP core team to the SAP Helpdesk. Also during this phase, businesses will typically make any organizational changes needed to best realize the benefits of SAP.

This phase also is important from the standpoint of ongoing ERP positioning and continuous improvement. During this phase, the I.C. team and C&L leads will communicate success stories and lessons learned (as captured by the project team) in an effort to reinforce awareness and understanding of the benefits brought by ERP. Also, by passing the stories and lessons on, I.C. staff and C&L leads will help improve the way subsequent deployments are positioned and managed. Finally, in this step, participants in the ERP deployment will be acknowledged and their efforts celebrated.

Timing

- Takes place over 6 months following Go-Live

Communication During Phase

Communications during this phase will be focused on publicizing real-life examples of how the ERP deployment has improved the customer experience and/or how changes have improved the way that Company Division employees perform important tasks. It also will include discussion of key lessons learned in the deployment. In addition, communications also supports the effort to recognize and celebrate the successful completion of the ERP deployment.




Communication Theme for Phase

We are live. What have we learned? What are we working on to fully realize the benefits of SAP?

Communication Topics

- Success stories
- Lessons learned
- Any organizational changes made to best realize SAP benefits

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle(s)	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/Metric
Business/Site Employees Ownership/ Engagement  LAP	Congratulations, thanks, success stories	Electronic Town Hall (Regularly Scheduled) In addition, may choose to publish content in existing SBE newsletters and other publications, including ERP newsletters	No	Celebrate success and project completion	As needed, at least 1x	Next major meeting after Go-Live	Creation: I.C. and C&L Delivery: I.C.	Anecdotal
Project Team and Power Users/End Users	Congratulations, thanks, success stories	Thank you letter(s)	Yes	<ul style="list-style-type: none"> ▪ Celebrate success and project completion ▪ Share lessons learned 	1x	Within 3 weeks after Go-Live	Creation: I.C. and C&L Delivery: VP GM	Anecdotal
Business/Site First Tier Leaders Ownership/ Engagement 	Congratulations, thanks, success stories, ways you can thank your team	Follow-up VIT	Yes	<ul style="list-style-type: none"> ▪ Celebrate success and project completion ▪ Share lessons learned 	1x	Within 3 weeks after Go-Live	Creation: I.C. and C&L Delivery: VP GM	Anecdotal
Business/Site Front Line Managers	Thank you and ways to thank your team	Bi-Weekly Meeting Planner	Yes	<ul style="list-style-type: none"> ▪ Celebrate success and project completion 	1x	Within 3 weeks after Go-Live	Creation: I.C. and C&L Delivery: I.C.	Anecdotal
Business/Site Employees Ownership/ Engagement  LAP	Congratulations, thanks, success stories	E-mail from VP GM	Yes	<ul style="list-style-type: none"> ▪ Celebrate success and project completion ▪ Share lessons learned 	1x	Within 3 weeks of Go-Live	Creation: I.C. and C&L Delivery: VP GM	Anecdotal
Business/Site Employees and Project Team	User and Customer Success Stories	Video interviews (Interviews would be	No	<ul style="list-style-type: none"> ▪ Celebrate success and project 	1x	Within 3 months of Go-Live	Creation: I.C. and C&L	Anecdotal

ERP Tactical “Plug & Play” Communication Plan

Stakeholders	Key Messages	Vehicle(s)	Template	Purpose	Frequency	Timing	Resp.	Feedback Mechanism/ Metric
		used in town hall meetings and other presentation, particularly in subsequent deployments.)		completion <ul style="list-style-type: none"> ▪ Share lessons learned 				

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