

# Communications Plan Worksheet

**Directions:** Use this worksheet to plan communications for your organization on quality improvement (QI) projects. A communications plan should be revisited every six to 12 months to ensure it is still applicable to the latest QI objectives and project activities. Your QI lead or coordinator may find it helpful to plan communications using this worksheet.

**Date of Current Review:** \_\_\_\_\_ **Next Review Scheduled for:** \_\_\_\_\_

## Step 1: State the content of the communication

**Step 2: Define Audiences.** An effective communications plan targets messages and customizes tactics to specific audiences. To direct resources appropriately, you may choose to rank audiences as primary or secondary. Internal audiences for a communications plan will likely include the board of directors/trustees, staff, patients and their families. You may also choose to communicate about QI activities to external audiences, such as community partners, the media or others. List your target audiences below.

**Primary Audience(s):** \_\_\_\_\_

**Secondary Audience(s):** \_\_\_\_\_

**Step 3: Identify Communications Channels.** Consider the different communications channels available for use. Mark any potential channels you may want to use based on whether **(a)** your organization has had previous success with it or has the resources available to try it for the first time; **(b)** your staff has the adequate skills and time to appropriately execute it; and **(c)** funds and other resources are available to support its use.

In- Person Channels:	Print Channels:
<input type="checkbox"/> Face-to-face small meetings	<input type="checkbox"/> Annual report
<input type="checkbox"/> Health fairs or trade association events	<input type="checkbox"/> Banners
<input type="checkbox"/> Lunch-and-learn events	<input type="checkbox"/> Direct mailings
<input type="checkbox"/> Off-site meetings, retreats or seminars	<input type="checkbox"/> Employees pay stub enclosures
<input type="checkbox"/> On-site meetings, retreats or seminars	<input type="checkbox"/> Fact sheets
<input type="checkbox"/> Presentations or speeches	<input type="checkbox"/> Flyers
<input type="checkbox"/> Special events	<input type="checkbox"/> Newsletters
<input type="checkbox"/> Town meetings	<input type="checkbox"/> Posters
<input type="checkbox"/> Other:	<input type="checkbox"/> Other:

Media Channels:	Electronics Channels:
<input type="checkbox"/> Letters to the editor	<input type="checkbox"/> Blog
<input type="checkbox"/> Paid advertising	<input type="checkbox"/> Computer/video kiosk
<input type="checkbox"/> Press releases	<input type="checkbox"/> Email
<input type="checkbox"/> Other:	<input type="checkbox"/> Electronic newsletters
	<input type="checkbox"/> Intranet
	<input type="checkbox"/> Organizational website
	<input type="checkbox"/> Social media (e.g., Facebook, LinkedIn)
	<input type="checkbox"/> Video
	<input type="checkbox"/> Other:

**Step 4: Define Approach.** Using following table to define key aspects of the communications plan based on audience and timeframe. The table has room to define a plan for two audiences.

	[Insert Name of Audience]	[Insert Name of Audience]
<b>Purpose:</b> Why is it important to communicate to this audience? What is the goal of your communications? Do you have a specific need or request (i.e., do you need approval, buy-in, involvement, support)?		
<b>Values:</b> What does this audience most value when it comes to this topic? How will the content support these values? How will you express this in your messaging?		
<b>Concerns:</b> What is this audience's greatest concern when it comes to this topic? How can the content alleviate these concerns or overcome them as barriers? How will you express this in your messaging?		
<b>Message:</b> What is the key message you want to deliver to this audience? Remember to tie in the audience's values and concerns. Also address the following: what successes are there at this point? What challenges need to be overcome? What is happening next?		
<b>Channels:</b> Which communication channels will you use for this audience (Step 4)? How frequently will they be used?		

	[Insert Name of Audience]	[Insert Name of Audience]
<p><b>Messenger:</b> Who will deliver the message to this audience? You may assign the responsibility for delivering the message through each channel to different individuals.</p>		
<p><b>Evaluation:</b> How will you know you were successful? What output will you track (e.g., number of electronic newsletters delivered and opened)? How will you monitor the effectiveness of the messages and channels used (e.g., surveys, key informant interviews, observations of changed behavior)?</p>		

This material was prepared by Health Quality Innovators, a Hospital Quality Improvement Contractor (HQIC) under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services (HHS). Views expressed in this material do not necessarily reflect the official views or policy of CMS or HHS, and any reference to a specific product or entity herein does not constitute endorsement of that product or entity by CMS or HHS. 12SOW/HQI/HQIC-94-10/05/21