AITS
Administrative Information
Technology Services

Communication Plan

Administrative Information Technology Services

University of Illinois

December, 2015

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Executive Summary

Developing a clear and consistent message is essential for effective communication to take place in any organization. The AITS Communication Plan outlines the plan for managing and coordinating communication at AITS. Successful communication results from a committed effort by each AITS unit in using the channels and guidelines presented in this plan. Such a commitment ensures that AITS provides relevant, accurate, customer-centric, and consistent information to its service community, while incorporating the guiding principles of the Office of University Relations in University Administration. This plan is a living document and will be modified when necessary.

Primary areas addressed in this plan include:

- Audiences to be addressed
- Delegation of responsibility
- Message standards
- Channels to be used
- Frequency of communication
- Communication matrix
- Communication standards and guidelines

Quick Reference Guide

- AITS General Guidelines
- Identity Standards
- Style Guide
- Web Guidelines
- Branding
- Templates – PowerPoint, meeting minutes and agenda

Purpose

This Communication Plan was developed for AITS by the CRM team in 2015 and will be updated to reflect changes within the organization. Its purpose is to provide an overall framework for managing and coordinating communication within AITS.

This plan identifies audiences, communication channels, frequency, messages, feedback and standards. The framework ensures that AITS provides relevant, accurate and consistent information while increasing awareness of information technology at the University of Illinois.

Communication is a shared responsibility in AITS, and it is imperative that AITS leadership and the CRM team collaborate on communication within the organization. The CRM team will measure the effectiveness of this plan and make appropriate adjustments when necessary.

Goals and Objectives

The AITS Communication Plan outlines the plan for managing and coordinating communication at AITS. Successful communication results from a committed effort by each AITS unit in using the channels and guidelines presented in this plan. Such a commitment ensures that AITS provides relevant, accurate, customer-centric, and consistent information to its service community, while incorporating the guiding principles of the Office of University Relations in University Administration. This plan is a living document and will be modified when necessary.

The following objectives support this goal:

- Ensuring understanding and use of communication plan
- Ensuring clear and consistent communication to recipients
- Educating constituents on information technology
- Soliciting feedback

These goals and objectives are accomplished by:

- Designing, writing and distributing up-to-date information in support of AITS
- Continuing to move IT messages toward a more customer-centric language
- Showing value and a quick introduction of AITS services is communicated through Infographics
- Social Media will provide quick updates and provide visibility
- Maintaining a standard AITS identity for all written materials
- Creating announcements of new services
- Collaborating with our peer CRM staff to provide relevant information that impacts the University of Illinois
- Participating in special events to promote AITS
- Maintaining relevant information in all communication channels
- Maintaining procedures for executing short-term, mid-term and ad hoc project tactical communication plan

Assumptions

The success of this plan is based on the following assumptions:

- The CRM team is defined as the Customer Relationship Management Team, a unit within the Project and Portfolio Management Office (PPMO) division of AITS. Currently, there are 2 FTE (Susan Flanagin and Mark Pollard).
- AITS leadership and staff members participate in the communication process using the channels and guidelines presented in this plan
- AITS is committed to open and honest communication
- AITS communication balances the needs of the campus community with the goals of the organization

Audiences

AITS communicates with two primary audiences: the first is internal to the organization and the second includes clients, stakeholders and other external constituencies. Detailed information about the audiences and communications to each audience is included in this document in the Communication Matrix by Audience.

These audiences include, but are not limited to:

- Campus community (faculty, staff and students)
- Senior leadership (faculty and staff)
- AITS staff
- External constituents (affiliates, peers in higher education, service organizations, vendors) and the general public

Communication Responsibility

The CRM team writes, reviews and edits AITS campus messages to ensure that the messages are professional, informative and user-friendly. AITS messages may be forwarded to other campus groups as needed. AITS maintains communication and editorial standards that exemplify these traits.

The Customer Relationship Management (CRM) team is a unit within the Project and Portfolio Management Office (PPMO) division at AITS. Currently, the CRM team is a 2 person unit staffed by Susan Flanagin and Mark Pollard.

The CRM team owns the following AITS communication mediums:
- Maintenance of the Website
- Maintenance of the Social Media accounts
- Writing, reviewing and implementation of Mass Email messages
- Creation and use of AITS Branding
- Creation and dissemination of the AITS Monthly Report
- Evaluation of future Social Media accounts

All AITS Staff own the following responsibilities in AITS communication mediums:

- Utilizing AITS communication standards and templates
- Engaging CRM team in message creation
- Providing Subject Matter content to messages
- Reviewing messages to be sent to customers

Communication Analysis

The effectiveness of the AITS Communication plan should be analyzed regularly. This analysis includes:

- Updating AITS customer identification
- Determining measures of success of the communication plan
- Determining mechanisms for customer feedback and a plan to act upon that feedback
- Performing gap analysis on the communication plan, communication distribution and effectiveness of communication

Measures of success are being determined and will be added to this Communication Plan document when they are identified.

Communication Standards and Processes

Effective messages are short, clearly written and presented in a consistent manner regardless of the media used. Guidelines for messages are included in this document. Templates are still being developed. Detailed information about AITS messages are in this document in the Communication Matrix by

Communication Method.

The following items help determine what to include in a message and processes to follow:

- What is the purpose?
- Who is the audience?
- When does it need to go out?
- What is the most direct way to say it?
- What action is required on the part of the reader?

General Guidelines

Communication focuses on conveying a positive message and identifying a knowledgeable resource for questions.

The following are examples of AITS messages:

- Accomplishments and project updates
- Service announcements
- Emergency service notices
- System outage notices
- System upgrade messages

General guidelines for communicating with the groups identified in this plan are as follows:

- Establish a clear, consistent and easily recognizable message
- Each communication should fit the technical level of the intended audience
- Provide definitions of topics to the audience
- State any necessary action at the beginning of each message
- Provide a direct message to the audience
- Avoid acronyms and technical jargon for messages outside AITS
- Educate about AITS services when appropriate
- Use all appropriate and available communication channels
- Ensure timely and meaningful communication
- Listen and act on feedback

AITS communication requirements

- Include your unit name, contact information, closing statement and provide a link to the AITS website
- CRM team will develop or approve all large scale messages to the University community (Examples: all of UA, All Banner users, All View Direct users)
- In the event of an unplanned incident, CRM staff should create the message. In the event that a member of the CRM team is not available to be the primary writer of the message, the message creator will have the message approved by AITS Leadership Team members and primary staff for the event to review and approve the message before it is sent.
- All mass communications about planned upgrades, outages and other topics will be created by the CRM team and then reviewed by the Project team. Once the message is ready to be sent, it will be reviewed and approved by the AITS Leadership Team
- Copy the AITS Service Desk on drafts of emails so that they are prepared to answer questions
- Copy the AITS Leadership Team, AITS Service Desk, and Project managers or affected AITS staff when

messages are mailed to the University community
- CCSP, REACH, AITS COE Client Services Support, the UIS Help Desk and UIS Management Team are distribution lists for communication to IT Pros

Guidelines for communication or information storage is as follows:

- Team communications: teams can use Fileshares, SharePoint, or any other communication vehicle that works for the team
- AITS communications: AITS SharePoint site
- Project communications: use Project section of the AITS SharePoint site
- External audience communications: Box is the appropriate mechanism for sharing documents outside of AITS. The exception is when external customers are part of a Project team and then those documents are part of the Project SharePoint site and might be posted on the appropriate Project website.
- Support documents for the AITS Service Desk: KnowledgeBase is the appropriate mechanism for all Support documentation. Any application that is supported at a first or second tier by the AITS Service Desk should have documentation in the KnowledgeBase.

If AITS staff have social media accounts on Facebook or Twitter, they should follow the AITS accounts. In the event of a catastrophic event at the AITS Data Center in Chicago, social media is the only mechanism to receive information until the infrastructure is restored or certain services (email and web services) are moved to redundancy locations.

Graphic Identity

Graphic identity involves the use of logos, typefaces and colors to create a clearly recognizable image. A successful graphic identity helps AITS develop a strong name recognition by defining a "look" for all AITS materials that audiences instantly identify.

This plan supports and recommends using the UA [Identity Guidelines](). With a consistent graphic identity, AITS projects a strong, unified and professional image to all audiences.

AITS templates must conform to UA standards and guidelines. This plan recommends using templates (e.g. PowerPoint, meeting minutes, agenda) provided by UA, in addition to those already approved and in place at AITS.

Style

Style is the approach an organization uses to present its image through the written word. It is a set of guidelines that standardize the use of terminology and grammar to make messages and materials the most applicable to all audiences.

This plan supports and recommends using the communication standards outlined in the UA [Style Guide](). This guide answers common questions about grammar, spelling, capitalization and punctuation. Through the use of a common style, AITS projects a cohesive and coordinated professional image to the campus and public.

Templates

Templates for AITS documents

Templates for AITS documents in Microsoft Word (Meeting Minutes, Agendas and Word documents) and

PowerPoint are being developed. Once developed, they will be added to this document and stored on the AITS SharePoint site.

Planned Outage/Upgrade Messages

Planned Outage/Upgrade messages follow this format:
- Simple Subject
- One sentence telling what's happening
- Impact to Users
- What is Application X?
- How do I get help or start using Application X?
- Incident/Emergency Messages
-

Planned Outage/Upgrade messages follow this process:
- CRM crafts the message
- Project team reviews the message
- AITS Leadership Team and AITS Service Desk review the final draft
- Final message is sent to Users who have access to the application
- Final message is copied to the AITS Leadership Team, AITS Service Desk and Project management
- Evaluation should be done to evaluate if IT Pros need a copy of the message as well

Incident/Emergency Messages

Before the message is crafted, determine the audience who needs to be informed. Everyone affected by the "issue" gets the message. The message needs to be clear and relevant; timely and frequently monitored.

Incident/Emergency messages follow this format and answer the following questions:

- What happened?
- What do we know about the cause of the incident? If known
- What are we doing about the incident?
- When will be back in service?

Incident/Emergency messages follow this process:
- Post the incident/emergency to the Status page (status.uillinois.edu)
- Determine and send the message to affected users
- Draft of message should be reviewed by the Incident team, AITS Leadership and AITS Service Desk
- User message should be copied to AITS Leadership, AITS Service Desk and other AITS management team
- Determine if IT Pros should be copied/informed about the incident
- If the outage is lengthy (more than 90 minutes) the System Status page should be updated. It should continue to be updated regularly. Determine if an interim message should be sent to the audience at the 90 minute mark. Regular updates are necessary.
- A follow up message to the user community is required when service is restored.

Web Guidelines

UA web policies, site standards and web templates are available online at *http://www.uillinois.edu.*

The AITS website is owned by the CRM team. For assistance creating AITS webpages, contact Susan Flanagin at *sflanagi@uillinois.edu.*

Communication Matrix by Audience

The Communication Matrix by Audience is a summary of audiences that AITS communicates with on a regular basis. This matrix displays a specific audience, channels and delivery timetable. See Appendix A

Communication Matrix by Communication Method

The Communication Matrix by Communication Medium serves as a guide to the "why," "what," "who," and "when" of communication messages. See Appendix B

Conclusion

The AITS Communication Plan ensures that AITS provides relevant, accurate and consistent information to its service community.

The CRM team assists in developing specific tactical communication plans for each AITS unit and project as needed in this plan. Contact Susan Flanagin at *sflanagi@uillinois.edu* or Mark Pollard at *mpollard@uillinois.edu* for assistance.

Appendix

Appendix A—Communication by Audience

Communication Matrix—By Audience			
Audience	**Communication Channel**	**Frequency**	**Communication Purpose**
All AITS employees	Meetings	Weekly, biweekly, monthly, quarterly	Consistent and timely messages help all AITS employees to answer the same questions with the same message. Communication about internal and external opportunities are also provided to staff.
	Email	As needed	
	AITS website	Monthly or as needed	
	CIO website	Monthly or as needed	
	Training	Biweekly, monthly, quarterly	
	Social media (e.g. Facebook, Twitter, YouTube)	Daily	
	AITS Intranet (SharePoint)	As needed	
	Events (e.g. University of Illinois Web Conference, New Faculty Orientation, Faculty Technology Open House, IT Pro Forum)	As needed	
	Upgrade messages	As needed	
	Emergency Service Notices	As needed	
	KnowledgeBase	As needed	
	System Status Web Page	As needed	
Faculty and staff	AITS website	Monthly or as needed	Faculty communication goal is to show value, verify performance, solicit feedback, and engagement of activities. Staff communications include procedural and operational messages.
	CIO website	Monthly or as needed	
	Email	As needed	
	Meetings	As needed	
	Training	Biweekly, monthly, quarterly	
	Social media (e.g. Facebook, Twitter, YouTube)	Daily	
	Eweek (Urbana campus)	As needed	
	UIC News (Chicago)	As needed	

Communication Matrix—By Audience

Audience	Communication Channel	Frequency	Communication Purpose
	Events (e.g. University of Illinois Web Conference, New Faculty Orientation, Faculty Technology Open House, IT Pro Forum)	As needed	
	Upgrade messages	As needed	
	Emergency Service Notices	As needed	
	System Status Web Page	As needed	
	KnowledgeBase	As needed	
General public	AITS website	Monthly or as needed	University of Illinois is a public university so communications to the general public are designed to provide transparency in our activities and encourage people to subscribe to our communication mediums (social media, system status page).
	CIO website	Monthly or as needed	
	Social media (e.g. Facebook, Twitter, YouTube)	Daily	
	KnowledgeBase	As needed	
	System Status Web Page	As needed	
Students	AITS website	Monthly or as needed	Communications are designed for students to: get help with enterprise applications, general knowledge of AITS services, following AITS on social media to get information on services, activities, outages and upgrades.
	CIO website	Monthly or as needed	
	Social media (e.g. Facebook, Twitter, YouTube)	Daily	
	Email	As needed	
	KnowledgeBase	As needed	
	System Status Web Page	As needed	
University Administration	General Email messages	As needed	Communication to the University Administration population is the same as other faculty and staff but also include communications about services that AITS provides services: desktop support, teleconferencing, IT security and web content management.
	Targeted Email messages (desktop, security)	Weekly, biweekly, monthly, quarterly	
	Meetings	As needed	
	Events	Weekly	
	Eweek	Daily	
	Social media (e.g. Facebook, Twitter, YouTube)	Daily	
	ITPC reports	Quarterly	
	System Status Web Page	As needed	

Communication Matrix—By Audience			
Audience	**Communication Channel**	**Frequency**	**Communication Purpose**
University Governance Groups	AITS Monthly Report	Monthly	Governance group communications are to provide information so that groups can be informed, engaged, and invested in the IT Governance process. IT Governance representatives have information so that they can actively participate, improve IT services on their campus by reducing redundancy of IT systems.
	ITPC Quarterly Report	Quarterly	
	AITS Annual Progress Report	Yearly	
	ITPC Annual Report	Yearly	
	BPI Annual Report	Yearly	
Project Stakeholders	Project Agendas	Daily/Monthly/Quarterly/Yearly/As needed and identified in the Project Communication Plan which is part of the Project Charter.	Project Communications: accountability, engagement, consultation on the project and help keep the Project on track.
	Project Minutes		
	Project Meetings		
	Project Deliverables		
	Project Weekly/Monthly Reports (as applicable)		
	Project Website (as applicable)		
	Project Newsletters (as applicable)		
	System Status Web Page		
Executive Leadership	One Page Summary Reports (Infographics)	As needed	Communication targeted to Executive Leadership is to show value, educate executives on what AITS does regularly, build credibility, provide information for participation in the annual budget process, and gather support or push for an IT decision.
	Welcome Deans Meetings		
	Annual reports	Each semester	
	Reports	Monthly	
	Large/Mega project updates—high dollar/profile projects	Yearly	

Appendix B—Communication by Communication Method

	Communication Matrix—By Communication Method					
Category	**Communication Method**	**Purpose**	**AITS Owner**	**Access/Update**	**Frequency**	**Distribution**
Email	Incident/Emergency Messages	Used to disseminate information about unplanned and unexpected outages	CRM Team	Incident Team	As needed	Email sent, post to Facebook and Twitter; Post to the System Status page
Email	List Serves (CCSP, REACH, CCC, Webmasters)	Used to disseminate information to IT Pros about issues affecting their processes or items related to their customers	CRM Team	CRM Team and others as needed	As Needed	IT Pros
Email	Outage calendar	Used to plan the AITS maintenance, upgrade and other work affecting customers throughout the year	CRM Team	Susan Flanagin	Yearly	Email to Cross Functional distribution list before the meeting and have a meeting to discuss each summer
Email	Project Communications	Used to disseminate Project information to the University Community and Project Stakeholders	CRM Team	Project Team	As identified in the Project Communication Plan which will be completed as part of the Project Charter	Customers affected by the upgrade
Email	Upgrade Messages	Used to disseminate information about an upgrade to the affected customers	CRM Team	Project Team	As identified in the Project Charter	Customers affected by the upgrade
Help	AITS Intranet (SharePoint)	Used to disseminate information to AITS staff about AITS processes, access to forms and to communicate consistent messages	CRM Team	All AITS	As needed	All AITS
Help	KnowledgeBase Articles	Used to disseminate information for customers to get self-service help	All AITS	All AITS	As needed	UI Population and outside populations as needed
Help	System status page	System status page is to announce planned and unexpected outages to all AITS systems	CRM	Deployment Team, CRM Team	As events occur	Status.uillinois.edu

Communication Matrix—By Communication Method						
Category	**Communication Method**	**Purpose**	**AITS Owner**	**Access/Update**	**Frequency**	**Distribution**
Help	Training	Used to train University customers on AITS services or processes.	All AITS	All AITS; regular trainers are BPI staff and Decision Support staff	As needed	Decision Support conducts regular training sessions for their customers. USC, BPI and other training is conducted as needed
Presentation	AITS Overview Presentations	Used to inform Senior Executives about AITS Services	CIO Office	All Presenters	Annually	Provided to AITS Leadership Team for use throughout the year
Presentation	Conferences (Internal to UI and external to UI)	Sharing information with our colleagues about what we learned	All AITS	All Attendees	As needed	Presentation, packet information,
Presentation	Events (internal to AITS and external but within U of I)	Used to highlight AITS skills, interests, and projects	All AITS	All AITS	As needed	Event participants
Presentation	Infographics	Used to disseminate information about AITS services in a one page/graphic format	PPMO	PMO	Annually	Post on the AITS website, social media, meetings, AITS lobby screen
Report	AITS Annual Metrics Report	Used to inform the University community on AITS metrics kept throughout the year	PPMO	PMO Team	Annually	Posted to AITS Website, Announcements sent to All AITS
Report	AITS Annual Progress Report	Used to inform the University community on the progress of AITS during the past year.	PPMO	Leadership Team	Annually	Posted to AITS Website, Announcements sent to All AITS, DDDH on all 3 campuses,
Report	AITS Monthly Report	Highlight of AITS activities from the previous months as well as key upcoming events	CRM Team	CRM Team	Monthly	Posted to AITS Website, sent to All AITS Employees and IT Governance Representatives
Report	AITS Quarterly Meeting	Used to disseminate updates and important AITS information	CIO Office	Leadership Team	Quarterly	All AITS

		Communication Matrix—By Communication Method				
Category	**Communication Method**	**Purpose**	**AITS Owner**	**Access/Update**	**Frequency**	**Distribution**
Report	AITS Strategic Plan Performance Report	Used to inform the University community of the progress toward the AITS Strategic goals during each quarter of the year	PPMO	PMO Team	Quarterly	Posted to AITS Website, Sent to AITS employees
Report	AITS Strategic Plan Report	Used to inform the University community on the progress toward the AITS Strategic goals during the timeframe of that Strategic Plan, generally 3 years.	PPMO	Leadership Team	Every 3 years	Posted to AITS Website, Announcements sent to
Report	BPI Annual Report	Used to inform the University community on the BPI progress during the past year.	BPI Manager	BPI Team	Annually	Posted to the BPI website, announcements sent to BPI
Report	ITPC Annual Report	Used to inform the University community on the ITPC progress during the past year.	PPMO	ITPC Coordinator	Annually	Posted to ITPC Website, Announcements sent to all ITPC committees, DDDH list on all 3 campuses
Report	ITPC Quarterly Report	Used to inform University customers about the current state of ITPC reports	PPMO	ITPC Service Manager	Quarterly	Posted to the ITPC website, sent to IT Governance groups
Report	Project Reports (Example: IAM Sentinel)	Used to disseminate information on the project to stakeholders on a regular basis	Project Team	Project Team	As identified in the Project Charter	Project Stakeholders and Project Team(s)
Report	UIC Quarterly Report	A high level summary of AITS activities during the past year and highlight of key activities coming in the next month.	PPMO	Leadership Team	Quarterly	Used at meetings as they occur
Social Media	Social Media	Daily announcements to highlight AITS accomplishments, relevant campus or IT events, project news, other relevant IT topics, or AITS opportunities.	CRM	CRM Team	Daily	CRM manages the AITS social media accounts. Evaluation of other social media services is evaluated by CRM. AITS has Facebook and Twitter accounts. UA has a YouTube channel for AITS videos.
Website	AITS Website	Used to disseminate information about the AITS organization and services	CRM Team	CRM Team and Content Owners	Monthly and as information needs to be updated	Aits.uillinois.edu

Communication Matrix—By Communication Method						
Category	Communication Method	Purpose	AITS Owner	Access/Update	Frequency	Distribution
Website	CIO Monthly Update	A paragraph about a highlighted service offered by AITS or the UA CIO office. Used a quick reference to highlight the service and to give a contact person for the service.	CRM	CRM Team	Monthly	Posted to the CIO Website
Website	CIO Website	Used to disseminate information about the CIO office and the services it provides	CIO Office	CIO Rep, CRM Team	Monthly and as information needs to be updated	www.uillinios.edu/cio
Website	Project Websites	Used to disseminate Project information to the University community	Project Team	Project Team	As identified in the Project Charter	
Website	Web.uillinois.edu	Used as a vehicle to announce significant services that are considered Shared Services and not owned by a particular office or large projects that will be multi-year and need a reference place for customers.	SitePublish Service manager	SitePublish Service Manager, CRM Team	As need occurs. CRM and SitePublish Service Manager will evaluate the need for a new page on this site	Web.uillinois.edu