

Timeframe	Communication Item	Medium	Target Audience	Objective	Sender	Template
Day 3	Announcement: Inform Management team of new PM tool initiative	Email	Management Team	<ul style="list-style-type: none"> • Why is this change happening? • Business reasons for change • What's in it for me? • Expectation of next steps and general timeline 	Executive Sponsor	Email Template #1 here
Day 5	Informational and Q&A for Managers / Supervisors	Meeting	Management Team	<ul style="list-style-type: none"> • Discuss questions and concerns • Identify and address potential areas of resistance • Understand the areas where managers and supervisors will find the most value in transitioning to LiquidPlanner • Note down important questions to include in your team Playbook 	Project Lead	
Day 10	LiquidPlanner Training for LiquidPlanner Administrators / Managers / Supervisors	Training	Management Team	<ul style="list-style-type: none"> • Explain the LiquidPlanner methodology and the key factors that drive the scheduling engine (priority, effort and resource availability) • Train team how to build out a project and tasks • Ensure everyone understands the purpose of each package in your workspace and how this aligns with your workflow • Discuss the 3 ways to keep the schedule up-to-date (tracking time, updating estimates and marking tasks done) • Discuss and explore ways to use data customization options for reporting and dashboards (ex: custom fields, clients, activities, and teams) 	Project Lead or Trainer	
Day 20	Announcement: Inform entire team of new PM tool initiative	Email	All Team Members	<ul style="list-style-type: none"> • Why is this change happening? • Business reasons for change • What's in it for me? • Expectation of next steps and general timeline • Questions now? Encourage team members to talk with manager further 	Executive Sponsor	Email Template #2 here
Day 25	Informationals or Q&A with Team Members	Meeting	All Team Members	<ul style="list-style-type: none"> • Build awareness around reason for change • Discuss questions and concerns • Identify and address potential areas of resistance • Understand the areas individual team members can find value • Identify hidden motivations and desires where LiquidPlanner can help support / benefit the team member 	Managers	

Timeline continued below...

LiquidPlanner® Communication Plan Timeline and Templates

Timeframe	Communication Item	Medium	Target Audience	Objective	Sender	Template
Day 30	Calendar Invitation for LiquidPlanner Training	Email	All Team Members	<ul style="list-style-type: none"> • Inform team members about date/time for LiquidPlanner training • Set expectations on agenda for training 	Managers	
Day 40	LiquidPlanner Team Playbook	Documentation	All Team Members	<ul style="list-style-type: none"> • Give team members time to review the playbook documentation and be ready to bring questions to kick-off meeting 	Project Lead	Playbook Setup Guide here
Day 45	Kick-off Meeting and LiquidPlanner Training	Training	All Team Members	<ul style="list-style-type: none"> • Revisit the business reasons for choosing LiquidPlanner • Share goals for success • Review the Playbook resource and address questions • Discuss what to expect after going-live with the tool, and plans for checking in with the team for ongoing usage • Train the team on how to use LiquidPlanner 	Project Lead and Managers	Kickoff Meeting PowerPoint Template here
Day 46	Post-Go Live: LiquidPlanner Resources and Follow-up	Email	All Team Members	<ul style="list-style-type: none"> • Provide team with a quick tip sheet to make the transition simple and straightforward for the first week • Remind them where to look for answers or who to contact for questions 	Managers	
Day 52	Post-Go Live: Team Check-in	Meeting	All Team Members	<ul style="list-style-type: none"> • Review the basic objectives for using LiquidPlanner in Week 1 • Review how teams have been using it so far • Discuss questions / troubleshooting 	Project Lead or Managers	

Email Template #1

Communication Item: Announcing roll-out of LiquidPlanner to Management team

Sender: Executive Sponsor

Target Audience: Management Team

Message:

Hello team!

I want to take a moment to share an exciting update with you. We've recently purchased a new tool - LiquidPlanner - to help our team *[insert primary goal here. Example: streamline collaboration and scheduling needs across all of the projects we have in motion]*.

You might be wondering why we're making this change. We've been experiencing challenges with *[insert problems and challenges here. List all if you have multiple]*. LiquidPlanner was selected because it is a tool that can help us address our specific challenges.

I believe this will be a critical and beneficial tool for each of you, as managers. You will be able to *[insert key benefits here]* by implementing LiquidPlanner as a part of your day-to-day process.

What's next? Expect to hear from *[name of LiquidPlanner Success Team Lead]* to schedule time with you to share more about how LiquidPlanner works, and talk with you about any questions you have as we prepare for this transition.

Thank you

[Executive Sponsor Name]

Email Template #2

Communication Item: Announcing roll-out of LiquidPlanner to Entire Team

Sender: Executive Sponsor

Target Audience: Entire Team

Message:

Hello team!

I want to take a moment to share an exciting update with you. We've recently purchased a new tool - LiquidPlanner - to help our team *[insert primary goal here. Example: streamline collaboration and scheduling needs across all of the projects we have in motion]*.

You might be wondering why we're making this change. We've been experiencing challenges with *[insert problems and challenges here. List all if you have multiple]*. LiquidPlanner was selected because it is a tool that can help us address our specific challenges.

I believe this will be a critical and beneficial tool for each team member. You will be able to *[insert key benefits here]* by implementing LiquidPlanner as a part of your day-to-day process.

What's next? We will be providing *[insert resources you'll provide such as training, videos, handouts]* to help you learn how to use LiquidPlanner. If you have specific questions now, please feel free to reach out to your manager and they can share more information about this update with you.

Thank you

[Executive Sponsor Name]