



# Zephyr Industries

Project Axis

Change Communication Strategic Plan

## CRM CHANGE COMMUNICATION STRATEGIC PLAN

### Executive Summary

*The strategic plan outlined below supports the Customer Relationship Management (CRM) module implementation and Zephyr's strategic objectives of providing world-class customer service to its constituents, simplifying business processes and procedures, and providing enhanced information management and dissemination.*

**Audience:** Zephyr's audiences in the Marketing & Inquiry Management module consists of management support staff, marketing administration, and national marketing personnel and management. On the Operational side, audiences include Administrators and Recruitment Services staff.

**Research:** Research for the development of this plan was conducted by reviewing available project-related materials, by conferring with project team subject-matter experts, and by convening a communications advisory committee with management employees from various applicable departments. Communication planning incorporated current industry best practices in the field of corporate communication.

**Challenges and Opportunities:** *Employee Adaptability:* One of the challenges inherent in organizational change involves the need to help employees adapt to change. Resistance may occur due to myriad professional and personal concerns. This change communication plan incorporates resources and support mechanisms for leaders and managers to address employee concerns and engage employees in a positive manner.

**Communication Objectives:** The CRM Change Communication Plan objectives include the following:

1. Support Project Axis in effectively implementing planned change management activities and the impacted organizations and employees.
  - a. achieve 100% adoption of new business processes and systems changes related to the CRM module rollout within 30 days of implementation.
2. Prepare managers as front-line communicators.
3. Create awareness among managers and employees of CRM benefits.
4. Facilitate employee adaptability in a changing climate.

**Priorities:**

1. Develop/implement a Change Communications Strategic Plan.
2. Create a Manager's Toolkit to be used as a resource by managers.
3. Develop a targeted print, electronic and digital CRM awareness campaign.
4. Develop and implement an adaptability strategy.

### Change Communication Recommendations

The Change Communications Plan, supported by the CRM Adaptability Strategy, outlines critical activities to help support a successful implementation, which include the following:

Change Communications Activities	Timeline	Responsibility
Executive –level committee meetings	Ongoing	Bill Jones
Weekly senior leadership meetings	Ongoing	Mary Ann Edwards
Webinars for GVPs and VPAs	Completed in Mid-September	Regional Training Leads
Training materials/job aid development	Ongoing	Training Development
SFDC/Banner Admissions Webinars and Demos	March 15 - 23	CRM Team, R. Wimber
Training – Prepare managers as change agents	March 23	Regional Training Leads
CRM Training	March 23 – May 14	Regional Training Leads
Biweekly E-mail blast/Intranet postings	March 31 – ongoing biweekly	Roberta Wimber
Managers’ Communication Toolkit	April 5 – ongoing biweekly	Katrine McDougal
Print/Digital Newsletters	April 6 – ongoing biweekly	Roberta Wimber
Countdown Calendar	April 19	Roberta Wimber
Completion of Training Certificate	May 14	Regional Training Leads
Provide post-training environment tool	May 14	CRM Team
Post-training survey	May 14	Training
<b>CRM Launch</b>	<b>May 17</b>	<b>N/A</b>
Post-implementation support (war room, Help Desk)	May 17	Project Zephyr
Recognize employees’/groups’ achievements	June 17	Bill Jones
Lunch for highest compliance among groups	June 25	Metro/Center, Edwards

**Implementation and Timeframe:** Implementation of the CRM Change Communication Plan will commence immediately, with messaging to applicable managers and staff communicating the upcoming Salesforce.com demonstration, followed by executive leadership message. A messaging plan (which reaches its completion within 30 days after the implementation date) is being created; the plan will include communication activities in the following channels and modes:

- **Electronic:** biweekly e-mail messages to staff.
- **Digital:** messaging on the portal and the redesigned Project ZEPHYR Intranet.
- **Print:** department newsletters (DEM This Week; CC News, KINECT Newsletter; InFocus newsletter).
- **Other vehicles:** see “Communicate Frequently with All Levels (above).

**Evaluation:** A post-implementation survey inquiring about employee satisfaction with the rollout, communications, etc., will be distributed to employees via the intranet site. Employees may choose to respond to the survey, providing feedback through a rating system and/or open-ended questions.