GSA SmartPay®
Supporting Your Mission

Transition Communications Planning Tool

Purpose

This Transition Communications Planning Tool, provided by the Center for Charge Card Management (CCCM), is a resource for agencies/organizations to use as they transition to GSA SmartPay® 3 (SP3). Communications planning is an essential part of program and transition management. During the planning and execution of the transition to SP3, each agency/organization will need to communicate with various stakeholders – from agency executives to account holders – to complete a successful transition. It is absolutely critical that the agency/organization inform and obtain input from these groups to plan for and execute the transition.

A/OPCs will need to work closely with other agency/organization departments (e.g., IT, finance, procurement) throughout the transition process. For example, in the planning phase, IT personnel should be asked to provide input to help define the agency's/organization's needs under SP3. After the agency's task order has been awarded, the cooperation between agency IT personnel and the SP3 contractor will be crucial to the implementation and the success of the transition.

Agencies/organizations will also need to communicate with agency executives, Contracting Officers, other A/OPCs, and account holders. These are just a few examples of the groups that need to be informed about and support the transition to SP3.

How to Use this Tool

This tool is meant to help you effectively plan, develop, and implement communications about your agency's/organization's transition to SP3. It will help you identify:

- **Who**[1] needs information – the audience;
- **Why** the audience needs the information – what the audience should do or know, or what you hope to achieve with the information communicated;
- **What** information the audience needs – the message;
- **When** the information should be communicated – the best timeframe for delivering this information (based on when it is needed); and
- **How** the information should be communicated – the communication channels (e.g., meetings, email, newsletter, phone call) that will be used to distribute the information.

[1] This document includes a number of hyperlinks (denoted by **blue, underlined text**). These links may redirect you to a related web-page, an email address, or to another related section or question in this document.

This tool should be used as a guide for planning your agency's/organization's transition communications activities. While some sample transition communications have been included, your communications plan should be customized to include agency/organization-specific communications, as well.

Instructions for developing your agency's/organization's transition communications plan are included on the following pages. Once you have completed the steps outlined in "Getting Started" below, your **Transition Communications Plan Template** (on page 7), you will have an actionable communications plan that can be aligned with your overall transition project plan.

Use of this tool is not mandatory. This document is meant to be a resource to support your transition efforts. Should you have any questions, please contact CCCM at gsa_smartpay@gsa.gov or (703) 605-2808..

Step 1: Defining the Purpose and Scope

Begin by identifying the **purpose** of your communications plan. Write a brief statement or two in the Purpose section below.

Your purpose may be something like: *"This plan provides a framework for informing, involving, and obtaining buy-in from all program participants during of the [AGENCY/ORGANIZATION]'s transition to GSA SmartPay 3."*

Purpose:

The next step is to identify a **scope** for your communications plan. The scope will detail the activities and timeframes that will be included in the plan. If your agency/organization has already developed a transition project plan or identified key milestone dates for the transition to SP3, you will want to reference this information and include it in your scope. Write a scope for your plan in the Scope section below.

Your scope statement may say something like: *"This communications plan is prepared for the [AGENCY/ORGANIZATION]'s transition to GSA SmartPay 3. It includes a series of meetings and presentations, as well as other means of communication (such as email) to all parties involved in the transition to SP3, from September 2017 through November 2018."*

Scope:

Step 2: Identifying Your Audience

You are now ready to begin identifying the components of the communications plan. You may want to involve your charge card program colleagues in a brainstorming session to get started. Complete each section below by thinking through the topic area, and listing your answers in the **Transition Communications Plan Template** provided on page 7. A sample for this section is provided in **Table 1** on the following page.

Identifying "Who" You Will Communicate With and "Why"

Who:

Your agency's/organization's transition activities may involve numerous stakeholders. Identify all of the people and/or groups that you will need to communicate with – they may be directly involved in performing a specific transition activity, responsible for making decisions, or simply need to be aware of transition efforts. List all of your stakeholders/audiences in the "Who" column in the **Transition Communications Plan Template** on page 7.

Tips:

When considering which audiences you will need to communicate with throughout the transition, don't forget to:

- ✓ Include audiences within your agency/organization that will need to complete transition activities (e.g., finance department, Contracting Officers, IT department), or will be affected by the transition (e.g., account holders).
- ✓ Include any audiences outside your agency/organization that will be affected by, provide input to, or have an impact on the transition (e.g., current bank representatives, future bank representatives, other contractors, Center for Charge Card Management).
- ✓ Include audiences that will have final approval/authority over the transition (e.g., agency executives).

Why:

For each audience you have identified above, determine why you are targeting this group or individual, or what the outcome(s) of communicating with this audience should be (i.e., what the audience will need to know or do to support the transition). For example, account holders will need to be communicated with because they need to know when to stop using their old cards, and how and when to activate their new cards. Include this information in the **Transition Communications Plan Template** on page 7. Keep in mind that there may be several reasons "Why" you need to communicate with an audience; include a separate line for each "Why" (see example, **Table 1**, next page).

Tips:

When considering the purpose of communicating with each audience, you may want to think about the following:

- ✓ Why does this audience need information?
- ✓ What do you want the audience to do?
- ✓ Why is this target audience important to the success of the transition?
- ✓ What is their role in transition?

Table 1: “Who” and “Why”

Who?	Why?
Agency Executives	Approve/support requests for transition resources (e.g., additional FTEs, budget, contractor support)
Agency Executives	Decide which task order type is used
Agency Executives	Decide whether to allow other agencies to tag-along
Agency Executives	Approve the transition timeline, proposed project plans
Agency Executives	Support intra-agency coordination/communication (e.g., between CFO and CIO organizations)
Account holders	Know when to use the new card
Account holders	Know what to do with the old card
Account holders	Know when/how to cancel recurring charges on the old card
Account holders	Know how to reconcile old accounts
Account holders	Know what records to retain from the old account, and how to store them

Step 3: Developing Your Communications Plan

So far, you have completed two of the five main components of your communications plan. Before you begin step 3, and as you move through each subtask, it may be helpful to refer to the sample communications plan (see **Appendix A**).

What:
Now that you have identified who you will be communicating with, and why you need to communicate with them, you can determine exactly what you need to communicate. This information can be described as the “key messages” that need to be conveyed to each audience throughout the transition process. Include key messages for each audience in the “What” column in the **Transition Communications Plan Template** on page 7.

Tips:

✓ Consider whether each audience is receiving an appropriate number of communications throughout the transition period. If they receive too few communications, they may lack the information needed to do what they need to do. If they receive too many, they may be overwhelmed, and may not give each message the attention it deserves.

✓ You can determine what message(s) need to be communicated by considering several questions:

- What does my audience need to know or do? (i.e., “Why”)
- What message is my audience expecting at this time? (e.g., is there specific information the audience would expect to hear from you during each phase of the transition?
- What messages may need reinforcement?
- What messages may need to be clarified? (e.g., rumors, incorrect assumptions)

How:
The next step in the process is to think through all of the possible channels your agency/organization might use to communicate information to your identified audiences (e.g., email, in-person/virtual meetings, conference calls, training sessions, agency/organization newsletters, your agency’s/organization’s website). Write all channels which might be used for communications in the box below.

How:

Next, review all of the communication channels or vehicles which you identified above and select the most appropriate channel for each message (i.e., “What”) and populate the “How” column in the **Transition Communications Plan Template** on page 7.

Tips:

- ✓ The communications channel (i.e., “How”) should be appropriate for the message and the audience. Different channels/vehicles have a different impact. For example, key messages that will likely result in a discussion are best presented at in-person meetings; messages that include factual information (e.g., important deadlines, statistical data) are best communicated in writing.
- ✓ The same message can be delivered through multiple channels, as appropriate.

When:
Finally, complete the “When” column in the **Transition Communications Plan Template** on page 7 by determining when the audience should receive each message.

- Start with the messages that need to be delivered to support specific milestones or deadlines (i.e., based on the “Why”). Include a specific date where possible, or a general time frame (e.g., “late June 2018”).
- If a message does not have a deadline or timeframe that must be included, leave the cell blank for now.
- Some messages will be repeated on a regular basis (e.g., monthly newsletters); indicate this information in the “When” column as well.
- Be sure that messages are communicated more than once to ensure complete comprehension, especially complicated messages.

Tips:

- ✓ Communicate messages in a timely manner. Plan enough time for your audience to know what you need them to do in advance of deadlines.
- ✓ Communicate the same message at least three times. People may not “get it” until they’ve heard the message multiple times.

Transition Communications Plan Template

When?	Who?	Why?	What?	How?

Step 4: Finalizing Your Communications Plan

At this point, you have completed all five components of your communications plan. The next step is to adjust your plan to make it easier to implement. Return to the **Transition Communications Plan Template** on page 7 to make these adjustments. Or, it may be more convenient to work with your communications plan in a spreadsheet format.

First, sort rows by "Who" and then "When" such that they fall in chronological order within each audience. See sample below.

2 1

When?	Who?	Why?	What?	How?
June 1, 2017	Agency Executives			
June 10,2017	Agency Executives			
October 2017	Agency Executives			
July 2017	Account holders			
November 2017	Account holders			

SAMPLE

Next, review the “When” section for each communication, and identify those that fall within the same general timeframe. Where appropriate (e.g., shared audience, related topics), you may choose to combine 2-3 messages into one communication. See sample below.

When?	Who?	Why?	What?	How?
June 1, 2017	Agency Executives		Our agency needs 3 FTEs to support transition	Meeting
June 10, 2017	Agency Executives		We need you to make a decision on task order type by July 15	Meeting
October 2017	Agency Executives			

When?	Who?	Why?	What?	How?
June 1, 2017	Agency Executives		1. Our agency needs 3 FTEs to support transition 2. We need you to make a decision on task order type by July 15	Meeting
October 2017	Agency Executives			

You may also choose to combine communications meant for different audiences that will need to hear the same messages at the same time (e.g., send the same email message to multiple audiences).

Once you have combined any messages that should be sent together, go back and fill in timeframes for any "When" cells that had been left blank. Sort the list as necessary to show all your planned communications in chronological order (i.e., sort by "When"). See the sample below.

When?	Who?	Why?	What?	How?
June 1, 2017	Agency Executives			
June 10, 2017	Agency Executives			
July 2017	Account holders			
October 2017	Agency Executives			
November 2017	Cardholders			
December 2017	Agency Executives			

Step 5 (OPTIONAL): Adding Further Detail

The above instructions provide information for completing a basic communications plan. For most agencies/organizations, this level of complexity will be sufficient for planning transition-related communications. However, if your communications plan is lengthy and complex, you may find it helpful to include a few additional pieces of information to help your team stay organized and on track.

- **Communication Title:** If you have identified a large number of different communications for the same audience, you may want to assign a title to each communication.
- **Message Owner:** If there are a number of individuals or groups involved in developing and delivering your communications, it may be useful to identify the person(s) responsible for each one.
- **Comments:** It may be helpful to include a "Comments" section where you can capture any relevant issues, concerns, or "lessons learned" to keep in mind as you implement your plan. This might include notes on the status of a specific communication (e.g., "sent 6/1/17"), feedback received, or how much lead time is needed to distribute communications through a specific channel (e.g., to post to your agency's/organization's website).

A sample table with these additional columns is included as **Appendix B**.

Step 6: Implementing Your Communications Plan

Now that you have created a first draft of your communications plan, ask your colleagues and agency executives for their feedback, as needed. Update the plan as appropriate, and seek the support required to develop and distribute the planned communications. As any project will encounter changes along the way, be sure to revisit your communications plan regularly and revise it as needed (e.g., to align with changed transition timelines).

Tips:

As you implement your communications plan, you will want to keep the following in mind:

- ✓ Support of agency executives is key to the success of the communications plan, and the agency's/organization's transition overall. Ensure that executive level personnel and other decision-makers are involved as appropriate, and understand and support the communications being developed to facilitate the transition.
- ✓ When writing the communications, messages should be clear, concise, and consistent.
- ✓ If your agency/organization has a transition project plan, make sure that your communications plan includes the same dates and milestones, and that the two plans are closely tied to one another. When the project plan changes, you will likely need to alter the communications plan, as well.
- ✓ If your agency/organization offers more than one business line, A/OPCs from all business lines should work together to ensure that transition plans and communications plans are coordinated with one another. Where appropriate, agencies/organizations may want to develop one communications plan across all business lines.
- ✓ When planning to distribute communications, ensure that you have a clear understanding of the processes for getting various communications distributed (e.g., the process for posting a document to the agency's/organization's website).
- ✓ Before distribution of communications, obtain or create the lists of individuals who fall within the audience categories that you have defined in your "Who" section. For example, if you have indicated that you will need to communicate with the A/OPCs within your agency/organization, you will need to obtain or create the distribution list of the individual A/OPCs so that you can communicate with them.

Further Assistance

For further assistance or guidance with this transition tool, please contact CCCM **gsa_smartypay@gsa.gov** or (703) 605-2808.

APPENDICES

APPENDIX A: Sample Communications Plan

When?	Who?	Why?	What?	How?
Spring 2017	Agency Executives	Need to obtain support, resources	• Importance of the program to the agency • Timing and tasks involved • Executive and other support needed (decisions, financial, personnel) • If needed, request dedicated resources	• Initial face-to-face meeting(s) using Executive Briefing Tool
Spring 2017	Agency Executives (Contracting Official)	Need their support of the transition so that they communicate its importance to their staff Need to complete and/or delegate various contracting-related tasks for transition	• Time frame/ Milestones • Agency needs • What help will be needed to develop the task order	• One-on-one meeting
Spring 2017	Agency Executives (CIO)	Need their support of the transition so that they communicate its importance to their staff Need them to complete and/or delegate transition activities	• Time frame/ Milestones • What help will be needed to define agency IT needs	• One-on-one meeting
Following initial meeting: Ongoing (monthly)	Agency Executives	Need to keep updated on transition progress and activities	• Time frame/ Milestones • Possible impacts: IT, Budget, Contracts,	• Status meetings • Reports/memos

			Finance/Accounting, Cost ● If the agency is a tag-along, updates on the lead agency's progress, decisions, etc.	
Spring/Summer 2017	Contracting Officer	Need to plan procurement	● Need assistance to plan and execute the procurement ● Timing ● Available task order types (e.g., standard, tailored) ● Products/services offered under SP3 ● Preliminary agency needs (e.g., whether the agency should use Visa or MasterCard) ● Need to develop evaluation criteria	● Meeting(s)
Spring/Summer 2017	Account holders	Need to know our agency will be transitioning to SP3	● Change is coming ● Why we're changing ● When we're changing	● Intranet ● Email ● Newsletter
Summer/Fall 2017	Contracting Officer	Need to develop task order request, including Statement of Work (SOW)	● Final task order type ● Final agency needs (including IT systems requirements) ● Their help is needed: o Identify evaluation criteria o Develop & award the Task Order o Coordinate tag-along agencies (if applicable)	● Meetings ● Email

TBD (prior to task order award)	Contracting Officer	Need CO to facilitate the task order award process	• Periodic "check-ins" to determine status	• Calls • Emails
After task order award	Account holders	Reminder: Need to know our agency will be transitioning to SP3	• Reminder: Change is coming • Reminder: Why/when we're changing • Vendor change information (e.g., the new bank's name) • New features/ functionality	• Intranet • Email • Newsletter • "Town Hall" style briefings as needed
After task order award	Account holders	Need to know when to stop using old ("SP2") card Need to know new cards are coming to replace old cards	• Stop using SP2 card on termination date/ end of contract • How to dispose of the old card • When new cards are coming	• E-mail • Newsletter • Website • Memo • Card insert
Closer to the "cut-over" date (e.g., several months after task order award)	Account holders	Reminder: When to stop using old ("SP2") card	• Stop using SP2 card on termination date/ end of contract • How to dispose of the old card	• E-mail • Newsletter • Website • Memo • Card insert
At least 6 months prior to "cut-over"	Contracting Officer	Need to plan for current contract closeout activities	• Will need to begin planning for closeout activities	• Meeting
In advance of card receipt	Account holders	Need to know what to do with the new (SP3) cards	• How cards will be distributed • Activation date • What to do if on travel during transition	• Email • Card insert
In advance of card receipt	Account holders	May need training on new systems, policies, etc.	• Instruction on policies/procedures for the new card (if applicable)	• Email • Web-based training • Reference guide

Approximately 3-4 months prior to “cut-over”	Account holders	Need to understand account holder responsibilities after “cut-over” date (i.e., closeout activities)	• Cancel recurring charges • Reconcile last statement (following any new reconciliation procedures, if applicable) • Record retention policies/procedures • Electronic Access System (EAS) training (if applicable)	• E-mail/Memo • Card insert
When new card is received	Account holders	Need to know how to use the new card	• Verify information on new card is correct • How to activate the card • When to begin using the card • What to do with the old card (reminder)	• Card insert
After the “cut-over”	Contracting Officer	Need to conduct contract closeout activities	• Closeout activities need to be completed by	• Email
After the “cut-over”	Account holders	Reminder: Account holder responsibilities after “cut-over” date (i.e., closeout activities)	• Verify cancellation of recurring charges • Alert them to any transition procedures/processes (e.g., special vouchering procedures) • Reconcile last statement • Resolve any disputes • Record retention policies/procedures	• E-mail/Memo • Card insert

APPENDIX B: Sample Communications Plan Template with Additional Detail

When?	Communication Title	Who?	Why?	What?	How?	Message Owner	Comments