

1. PLAN IDENTIFICATION

Project name	Customer Portal Modernization
Project code	CPM-2026
Plan owner	J. Owens, Communications Lead (UX)
Sponsor	R. Patel, VP Digital Channels
Project manager	M. Tanaka, PMP
Version	1.2 — approved 2026-04-10
Next review date	2026-07-10 (quarterly)

2. COMMUNICATION OBJECTIVES

- Keep the sponsor and steering committee continuously informed of scope, schedule, budget, and risk status so that go/no-go decisions are never delayed for lack of information.
- Ensure every project team member knows the current sprint goal, blockers, and upstream/downstream dependencies within one business day.
- Provide the regulator liaison with evidence of mandate progress ahead of the 2026-12-31 deadline, with no last-minute surprises.
- Prepare 15,000 active customers for the portal change with sufficient lead time (≥ 21 days) and at least three touchpoints across email and in-app.
- Equip Customer Care and SRE with runbooks, FAQs, and talk-tracks before each release so frontline handling is consistent.
- Establish a crisis communications discipline so any P0 incident has an external holding statement within 30 minutes.

3. STAKEHOLDER AUDIENCE MAP

#	Audience group	Information need	Influence	Preferred channel
1	Executive sponsor & steering	Strategic status, budget, major risks, go/no-go evidence.	High	Monthly deck + Teams
2	PMO & portfolio office	Schedule health, resource usage, dependency conflicts.	Medium	Confluence + Jira dashboards
3	Core project team (14 FTE)	Sprint goals, backlog, blockers, design decisions.	High	Slack #cpm-core + Jira
4	Platform & SRE	API contracts, environments, deploy windows, runbooks.	High	Slack #cpm-platform + Confluence
5	Compliance & regulator liaison	Mandate progress, evidence artefacts, audit trail.	High	Email + monthly formal review
6	Customer Care (80 agents)	Release notes, FAQ updates, known issues, talk-tracks.	Medium	Teams channel + weekly huddle
7	End customers (15K active)	What is changing, when, what they must do.	Low	Email + in-app banner + SMS

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#	Audience group	Information need	Influence	Preferred channel
8	Vendors (3 contractor firms)	SOW status, invoicing, security attestations.	Medium	Email + bi-weekly Teams call
9	Security office	Threat model, pen-test results, change approvals.	High	Email + CAB meeting
10	Internal comms & marketing	Launch assets, brand alignment, press-ready material.	Low	Email + shared Figma/Drive

4. COMMUNICATIONS MATRIX

The core operational matrix — one row per audience x message type. Escalation column names the person to contact if the owner is unavailable or the message is not acknowledged.

Audience	Message / purpose	Frequency	Channel	Format	Owner	Escalation
Core team	Daily standup — goal, blockers.	Daily 09:15	Teams	15-min call	M. Tanaka	A. Silva
Core team	Sprint planning — backlog, goal.	Bi-weekly Mon	Teams + Jira	90-min call	M. Tanaka	A. Silva
Core team + stakeholders	Sprint review / demo.	Bi-weekly Fri	Teams (recorded)	60-min demo	J. Owens	M. Tanaka
Core team	Retrospective.	Bi-weekly Fri	Miro + Teams	45-min	M. Tanaka	L. Nguyen
Sponsor (R. Patel)	Weekly status — RAG, top 3 risks.	Weekly Thu	Email + Teams chat	1-page PDF	M. Tanaka	F. Abiola (PMO)
Steering committee	Strategic status, budget, decisions.	Monthly 1st Wed	Teams meeting	10-slide deck	M. Tanaka	R. Patel
Executive leadership	Portfolio briefing — CPM line item.	Quarterly	Exec dashboard	1-slide + memo	F. Abiola	R. Patel
Regulator liaison	Mandate progress evidence.	Monthly last Fri	Formal email + SharePoint	Evidence pack	Compliance (S. Reyes)	R. Patel
Platform & SRE	API contract changes, deploy plan.	Per release	Slack #cpm-platform	Confluence page	A. Silva	T. Okafor
Customer Care	Release notes, FAQ, known issues.	Per release (T-3 days)	Teams + Confluence	Release brief	L. Nguyen	J. Owens
End customers	Pre-launch awareness + MFA setup.	T-21, T-7, T-1 days	Email + in-app banner	HTML email	J. Owens	Marketing (D. Khan)

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Audience	Message / purpose	Frequency	Channel	Format	Owner	Escalation
End customers	Launch-day confirmation + help link.	Go-live day	Email + SMS + in-app	Short notice	J. Owens	L. Nguyen
Vendors (3 firms)	SOW check-in, blockers, invoicing.	Bi-weekly Tue	Teams call + email	Agenda + notes	M. Tanaka	F. Abiola
Change Advisory Board	Change request for prod deploy.	Weekly Wed (as needed)	ServiceNow + Teams	CAB form	T. Okafor	Security (H. Cole)
Security office	Threat model review, pen-test close-out.	Per phase gate	Email + meeting	Report + sign-off	H. Cole	R. Patel
Internal all-hands	Launch readiness highlight.	Monthly (T-2, T-1, launch)	Company town-hall	3-min slot	R. Patel	J. Owens
PMO dashboard viewers	Live RAG, burn-up, risk count.	Continuous (real-time)	Confluence + Jira widget	Dashboard	PMO (F. Abiola)	M. Tanaka

5. MEETING CATALOG

Meeting	Cadence	Duration	Chair	Attendees	Decision authority
Daily standup	Daily 09:15	15 min	M. Tanaka	Core team (14 FTE)	Team self-organise
Sprint planning	Bi-weekly Mon 10:00	90 min	M. Tanaka	Core team + product owner	PM approves scope
Sprint review / demo	Bi-weekly Fri 14:00	60 min	J. Owens	Team + sponsor + guests	Sponsor accepts demo
Retrospective	Bi-weekly Fri 15:30	45 min	Rotating	Core team	Team (continuous improvement)
Weekly PM sync	Weekly Thu 11:00	30 min	M. Tanaka	PM + sponsor + PMO	PM + sponsor
Steering committee	Monthly 1st Wed 09:00	90 min	R. Patel (Sponsor)	Sponsor, PM, PMO, Compliance, Security	Sponsor has final call
Change Advisory Board	Weekly Wed 16:00	60 min	T. Okafor (SRE)	SRE, Security, PM, Release mgr	CAB votes; veto by Security
Vendor check-in	Bi-weekly Tue 15:00	45 min	M. Tanaka	PM + 3 vendor leads	PM approves scope/SOW

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Meeting	Cadence	Duration	Chair	Attendees	Decision authority
Regulator review	Monthly last Fri 10:00	60 min	S. Reyes (Compliance)	Compliance, PM, Sponsor, Architect	Compliance signs evidence
Launch readiness	T-21, T-7, T-1 days	60 min	M. Tanaka	PM, SRE, Care, Comms, Security	Sponsor go/no-go at T-1

6. REPORT CATALOG

Report	Audience	Frequency	Owner	Format / tool
Weekly status (RAG)	Sponsor, PMO	Weekly Thu EOD	M. Tanaka	1-page PDF in Confluence
Monthly sponsor update	Sponsor, Exec leadership	Monthly 1st Wed	M. Tanaka	10-slide deck (PPTX)
Quarterly steering pack	Steering committee	Quarterly	F. Abiola (PMO)	20-slide deck + memo
RAID log (risks/issues)	PM, PMO, Sponsor	Live, reviewed weekly	M. Tanaka	Jira RAID board
Burn-up & velocity chart	Core team, PMO	Per sprint (bi-weekly)	Scrum master (D. Lee)	Jira dashboard
Budget variance report	Sponsor, Finance, PMO	Monthly 5th business day	Finance (N. Hart)	Excel + Power BI tile
Regulator evidence pack	Regulator liaison	Monthly last Fri	S. Reyes (Compliance)	SharePoint folder + cover memo
Security posture report	Security office, Sponsor	Per phase gate	H. Cole	PDF + Jira security board

7. ESCALATION MATRIX

Trigger / condition	Audience	Channel	Response time	Owner
RAG turns Red on any week.	Sponsor + PMO	Phone call + email	Within 2 hours	M. Tanaka
Budget variance > 10%.	Sponsor + Finance	Email + Teams call	Same business day	M. Tanaka
Schedule slip > 5 business days on milestone.	Sponsor + Steering	Email + ad-hoc meeting	Within 1 business day	M. Tanaka
New P0 risk identified.	Sponsor + Security	Slack + email	Within 4 hours	Risk owner

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Trigger / condition	Audience	Channel	Response time	Owner
Security defect found in pen-test.	Security office + PM	ServiceNow ticket (P1)	Within 4 hours	H. Cole
Regulator sends a clarification request.	Sponsor + Compliance	Email + call	Same business day	S. Reyes
Vendor misses a committed deliverable.	PM + Procurement	Email + call	Next business day	M. Tanaka
Team reports sustained blocker > 3 days.	PM + affected lead	Slack #cpm-core	Immediate	Scrum master

8. CRISIS / INCIDENT COMMUNICATIONS

Applies to any P0 (customer-impacting) incident in the production portal from go-live onwards. The Incident Commander (SRE on-call) owns the technical response; the Communications Lead (J. Owens) owns all external messaging. All timelines are measured from incident declaration.

8.1 Ownership and roles

- Incident Commander (IC): SRE on-call — technical coordination, bridge call.
- Communications Lead: J. Owens (primary), D. Khan (backup) — all external messaging.
- Customer Care Liaison: L. Nguyen — agent briefing, script updates.
- Executive Notifier: M. Tanaka — keeps sponsor & steering informed.
- Regulator Notifier: S. Reyes — if incident meets the reportable threshold.

8.2 Holding statement template (first 30 minutes)

"We are aware that some customers are currently experiencing issues signing in to the [Bank] customer portal. Our engineering team is actively investigating and we will share an update within 30 minutes. We apologise for the inconvenience. For urgent banking needs, please use the mobile app or call 1-800-xxx-xxxx."

8.3 Update cadence

From	Update to customers	Internal update	Executive update	Regulator
T+0 (declared)	Status page banner	Bridge open, #incident	Sponsor paged	Assess reportability
T+30 min	Holding statement (email/in-app)	Every 15 min on bridge	Sponsor briefed by phone	Pre-draft notice
Every 60 min	Status page refresh	Every 30 min on bridge	Written update by email	Notice if threshold met ("d 72h)
Resolution	"Resolved" notice + apology	Post-mortem scheduled	Closeout email + next-day call	Formal closeout letter

9. CUSTOMER-FACING COMMUNICATIONS PLAN

Pre-launch, launch day, and post-launch communications to the 15,000 active customer base. Every customer receives a minimum of three touchpoints across email, in-app banner, and SMS.

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Phase	Key date	Audience	Channel	Message	Owner
Pre-launch	2026-11-15 (T-21)	All 15K active customers	Email (HTML)	"Your portal is getting an upgrade — here is what is changing."	J. Owens
Pre-launch	2026-11-22 (T-14)	All active customers	In-app banner (legacy portal)	Countdown + link to FAQ and MFA setup.	J. Owens
Pre-launch	2026-11-29 (T-7)	All active customers	Email + SMS reminder	MFA enrolment call to action.	J. Owens
Pre-launch	2026-12-05 (T-1)	Customer Care agents	Teams huddle + Confluence	Final talk-track, known-issues list.	L. Nguyen
Launch day	2026-12-06 06:00	All active customers	Email + in-app splash + SMS	"The new portal is live. Sign in here."	J. Owens
Launch day	2026-12-06 06:00	Internal all-hands	Company Teams channel	Launch announcement + thank-you.	R. Patel
Post-launch	2026-12-13 (T+7)	All customers who logged in	Email (NPS survey)	"How did your first week go?" — SUS + NPS.	J. Owens
Post-launch	2026-12-20 (T+14)	Non-migrated customers	Email + SMS (targeted)	Reminder that the legacy portal is retiring.	J. Owens
Post-launch	2027-01-15 (T+40)	Executive + board	Exec dashboard + memo	Adoption, ticket volume, NPS headline.	M. Tanaka

10. RECORDS AND ARCHIVAL

Meeting minutes	Confluence space CPM !' "Minutes" — one page per meeting, tagged by date.
Decision log	Confluence CPM !' "Decision Log" — numbered (D-001...), linked from minutes.
Status reports	Confluence CPM !' "Status" — one page per week; PDF snapshot emailed to sponsor.
RAID log	Jira project CPM, board "RAID" — live; weekly snapshot archived to Confluence.
Regulator evidence	SharePoint !' Compliance !' CPM-2026 !' 2026-MM — immutable, access-controlled.
Customer comms assets	Figma + Google Drive !' Marketing/CPM — final PDFs archived with send-date.
Retention period	7 years for regulator evidence; 3 years for meeting minutes and status reports; indefinite for decision log.

APPROVALS

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Sponsor

R. Patel

VP, Digital Channels

Signature

Date

Communications Lead

J. Owens

UX / Comms Lead

Signature

Date

Project Manager

M. Tanaka

Senior PM, PMO

Signature

Date

PMO Director

F. Abiola

PMO, Retail Banking

Signature

Date

