maestro 2.X

Orchestrating Advanced Solutions to Exploit Integrated Clinical Data

Communications Strategy

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1 INTRODUCTION

Communications is one of the major tools used to drive Change Management efforts. It is a key component of all Change Management activities. This document defines the Communications Strategy to support the MAESTRO Release 2.X program Change Management program. It is integral to every part of the program.

1.1. COMMUNICATION OBJECTIVES

The communication strategy and tactics outlined will be used to achieve these objectives:

- Establish a clear, recognizable MAESTRO brand, image, and vision
  - Communicate regularly to increase MAESTRO's brand awareness and recognition
- Promote awareness of the MAESTRO solution and incremental MAESTRO enhancements
  - Series of releases focused on priority projects
  - Released with initial, limited functionality that will be enhanced
- Support the overall MAESTRO Change Management strategy and objectives
  - Minimize disruption to day-to-day business operations
  - Ensure business readiness
  - Ensure the program, releases, and solutions are operationally sustainable
  - Reinforce the Case for Change messaging
- Support MAESTRO program project management
  - Communicate status and progress to stakeholders
  - Provide a mechanism for submission of feedback and issues and communicate the status and resolution of those
- Engage stakeholders
  - Identify stakeholder communication needs and tailor communications to meet those needs
  - Encourage, capture, report, and acknowledge stakeholder feedback and collaboration
  - Continually deliver timely, relevant Case for Change messaging to stakeholders

1.2. COMMUNICATIONS STRATEGY OVERVIEW

To meet the Communications Objectives, an overall approach for managing and distributing communication over the duration of the program must be developed. That is the Communication Strategy. It is an overarching framework, structure, and approach that will be used throughout the MAESTRO program and for each release. The Communication Strategy components include:

- Principles that will guide communication-planning effort
- Strategic communications campaign phases and objectives
- Potential and planned venues and channels / media to leverage for delivering communications
- Conceptual communications campaign themes to establish, increase, and maintain MAESTRO brand recognition
- Approach to capturing and reporting performance and effectiveness metrics relevant to the communications program
- Approach to designing and building the program communication plan

The Case for Change is a dynamic assembly of persuasive communications, in multiple forms and formats, which can be directed to a group or individual with a clear, focused, timely message that answers the question "what's in it for me". The purpose of the Case for Change is to have an accessible inventory of messaging content that is vetted and available to be assembled into customized messages for regular and ad hoc communications. That content will be delivered through a variety of venues, channels, and media.

The MAESTRO Communications Strategy provides a framework, structure, and approach that will be used to plan and manage the actual delivery of the Case for Change messages. The diagram below shows the components and their interrelationship.
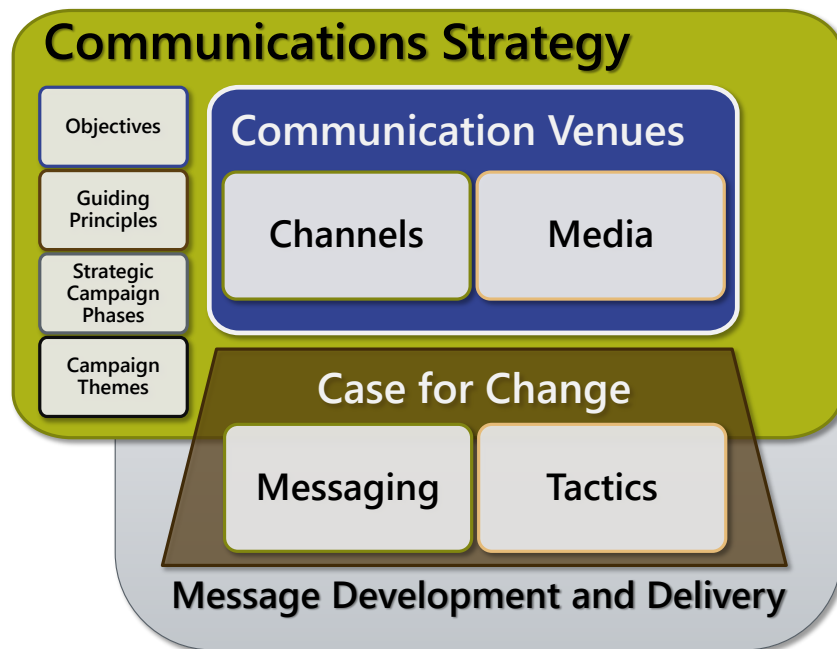
Guiding Principles establish the basic philosophy and values to be used in Communications Strategy, Planning, and Execution. The execution of communications will occur in four distinct strategic phases over each MAESTRO 2.X release. Each phase will have specific objectives. Message content from the Case for Change will support each phase. The Communications Plan will determine when specific Case for Change content should be disseminated within each communication phase for each release. It will be disseminated or delivered by one or more means that best assure the message will be read and acted upon.

Communications will be disseminated or delivered through various venues. The venues are the physical means of disseminating the communications. Within the venues a number of channels / media will be used. Channels / media are the tools for the physical assembly and delivery of the communications messaging content.

The "assembly" of communications means to put the messaging content into the right delivery format. For example, is the information best presented in a PowerPoint presentation or in an e-mail message? Part of the "assembly" process is formatting the messaging content in an appealing, visual format. For this reason it is important to have communications campaigns themes ready for use. The campaigns themes address strategic objectives and principles such as reinforcing the MAESTRO brand and applying creativity to our communications.

Measurement is an important part of the Communications Strategy. Metrics will be captured, tracked, and reported. There will be pre-communications assessment and testing to make sure messages are effective before they are sent. Post-communications reactions and responses will be tracked. All of the audience demographics and communications activities will be included in the reporting metrics. Additionally, more subjective feedback from stakeholders will be obtained at key points in the MAESTRO 2.X program and releases.

All of the components of the Communications Strategy will be utilized in developing the Communications Plan. It will be the blueprint that defines what messages will be sent to which audiences, when they will be sent, through which venues and channels / media, and using which campaign themes. The Communications Plan draws from the Case for Change, Communications Strategy, and Stakeholder Analysis to answer these types of questions:

- Why should the Message be Sent
- What Message Needs To Be Communicated
- Who Needs To Receive the Message
- How to Send the Message
- Timing and Frequency of the Message

2 GUIDING PRINCIPLES

A number of common principles emerge which should be followed to ensure successful communication. These will be used in designing the Communication Plan to support the MAESTRO initiative and will be used in the development of communications.

CATEGORY	PRINCIPLES
Ownership	• Communications carry executive endorsement and commitment
Communicators	• Appropriate communicators are chosen to provide credibility to specific messages and releases, and the overall program • Steering Committee members, Program Leaders, Workstream Leaders, and Maestro Change Agent Network (mCAN) members need to demonstrate visible support for the program
Timeliness	• Messaging will be distributed based on the needs of audiences on an on-going basis • As target audiences approach their actual date of change, communications will increase in frequency and specificity • Communication to managers will precede communication to the people who work for them
Content	• The dynamic content library from the Case for Change will provide the stream of messaging content that is appropriate for each audience at any point in time • Communication will be relevant, consistent, meaningful, accurate, and at the appropriate level of detail for each target audience group at any point in time
Context	• Messaging content developed as part of the Case for Change will continually reinforce how the audience's role is a part of the overall success of the program at any point in time during a release or during the overall program
Creativity	• Creative communication methods will be used to engage the target audience and deliver program information
Format / Delivery	• Communications will be sent in multiple channels whenever possible to make sure the message is received • Communication will be sent in an appropriate channels and media that are efficient, understandable, and accessible
Coordination	• Communications will be coordinated by the CaTM team
Feedback	• Communication will include channels for open feedback from all target audience groups • Feedback will be listened to and acted on as appropriate to respond to changing target audience needs

3 STRATEGIC COMMUNICATIONS CAMPAIGNS

As with the other components of the MAESTRO Change Management program, all aspects of the Communications Strategy must be repeatable across all MAESTRO releases. The Communications Strategy will be executed over four strategic campaigns for the overall program and for each release. There will be specific themes within each of these strategic campaigns.

The Case for Change provides the messaging content and specific target audience needs. Each strategic campaign will draw on that to deliver messaging through channels and media appropriate for audience needs. Each strategic campaign has an objective. Each strategic campaign has time-appropriate information to convey to specific audiences.

The four campaigns are:

- Awareness Campaign
- Understanding Campaign
- Commitment / Go-Live Campaign
- Follow-Up Campaign

The following diagram depicts how the strategic campaigns will be executed throughout the entire MAESTRO 2.X Roadmap. The four strategic campaigns are shown for each MAESTRO release. The phases will overlap. Release 2.0 audiences will be getting reinforcement messages in the Follow-Up campaign while Release 2.1 and 2.2 audiences are getting messaging for the Understanding and Commitment/Go-Live campaigns.
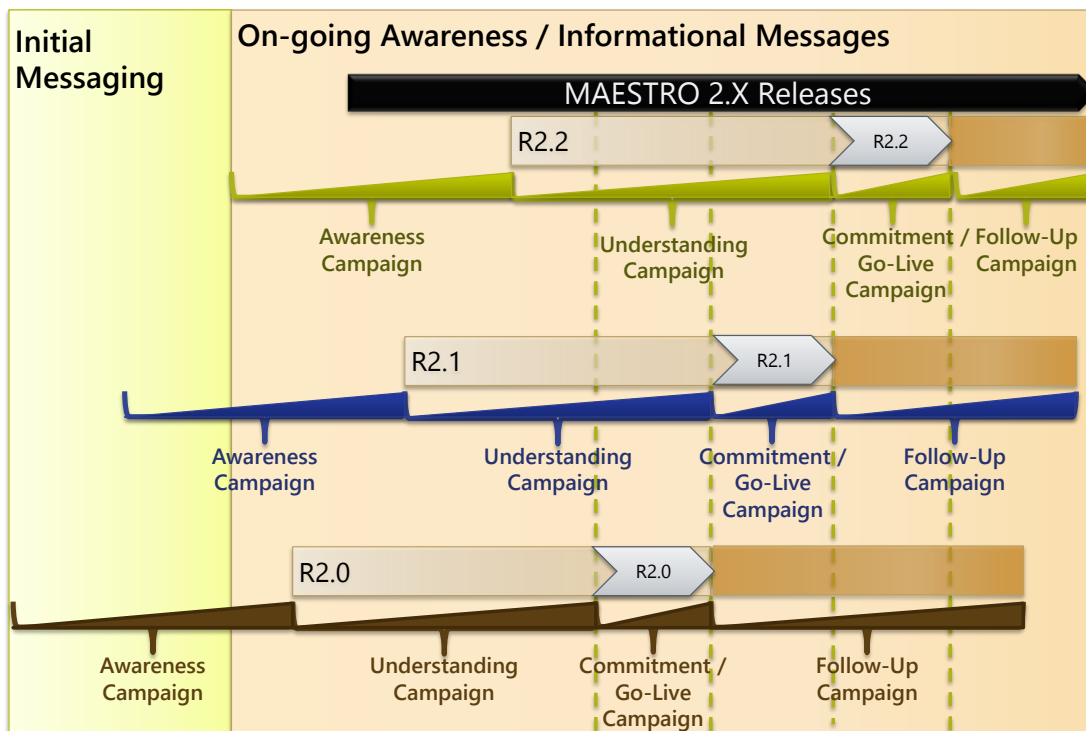
There are several reasons for using this four campaign approach:

- It provides numerous opportunities to create and raise awareness
- It allows messaging to develop audience understanding gradually
- It applies multiple venues and channels / media to build a dialog with the audiences
- It focuses messaging into more and more specific content as the change approaches
- It provides multiple opportunities for reinforcement of the Case for Change messages
- It is applied iteratively so messaging can be adjusted to meet evolving audience needs

3.1 CAMPAIGN: AWARENESS

Initially, all stakeholders will receive the same baseline awareness building messaging. Some targeted messages will be aimed at the business unit managers impacted by MAESTRO to increase their understanding of the program objectives. mCAN team members will be fully briefed on MAESTRO through their orientation process.

The objectives and expected outcomes of this campaign include the following:

- Impacted stakeholders will be aware of the MAESTRO program
- Impacted stakeholders will understand at a high-level how they are impacted
- The management of areas of the business impacted by MAESTRO will be able to explain the MAESTRO program and its objectives in their own words
- Members of the mCAN team will fully be able to explain the MAESTRO program and its objectives
- All executives and managers of indirectly impacted organizations will be aware of the MAESTRO program

Awareness messaging continues for all stakeholders but will be segmented into target audiences for each release. Release 2.0 will begin getting more focused awareness messaging while audiences impacted by releases 2.1 and 2.2 will get occasional reinforcement awareness messaging.

3.2 CAMPAIGN: UNDERSTANDING

During the Understanding campaign the stakeholders and impacted audience will begin receiving more detailed messaging addressing their Case for Change needs. Messaging will focus on building an in depth understanding of what the change means to them. Messaging will be heavily targeted at "what's in it for me" content.

Depending on the complexity of the changes and messaging content, the dispersal of messaging may be ramped up slowly to avoid confusing or overwhelming the target audiences.

The objectives and expected outcomes of this campaign include the following:

- The majority of the directly impacted stakeholders will be able to describe the MAESTRO program, its primary objectives, how they will be impacted, and "what's in it for them"
- mCAN team members aligned with the directly impacted stakeholders will be fully engaged with them including bi-directional communications and feedback
- The majority of executives will view the program as necessary to the long-term competitive positioning of the organization
- The majority of impacted personnel will have participated in at least one formal MAESTRO program presentation/workshop

3.3 CAMPAIGN: COMMITMENT / GO-LIVE PHASE

Messaging for the third campaign, Commitment/Go-Live will focus heavily on bringing anticipation and excitement to a crescendo. Several channels will be used and every possible attempt will be made to have some new, fresh content to pique the audience's interest. Some messaging content will depend on how the audience will be specifically impacted. Content such as training schedules and implementation requirements will be communicated to specific target audiences.

The objectives and expected outcomes of this campaign include the following:

- 100% of directly impacted personnel know the importance of training and know the training requirements for their position
- mCAN team members for the impacted stakeholders are fully engaged and active cheerleaders promoting the training requirements, "what to do if" information, and other important messaging content
- 100% of impacted personnel know how to obtain user support

3.4 CAMPAIGN: FOLLOW-UP PHASE

During the final campaign, Follow-Up, messages will be sent as needed for several reasons. Some examples are:

- Underscore the Case for Change messaging to keep the audience motivated during the transition
- Communicate best practices
- Communicate a state or condition that has arisen as a training or support issue
- Share any new information
- Solicit and convey success stories
- Recognize success
- Encourage feedback

The objectives and expected outcomes of this campaign include the following:

- The majority of directly impacted stakeholders can describe a benefit or success story associated with the MAESTRO program
- The majority of directly impacted stakeholders feel positively about their experience with the communication, training, transition, and change management process
- mCAN team members have solicited and reported all feedback

- All best practices, lessons learned, and success stories have been captured and updated in the appropriate Case for Change, Training, or other content repository
- Some of the impacted stakeholders have joined the MAESTRO User Group (MUG)
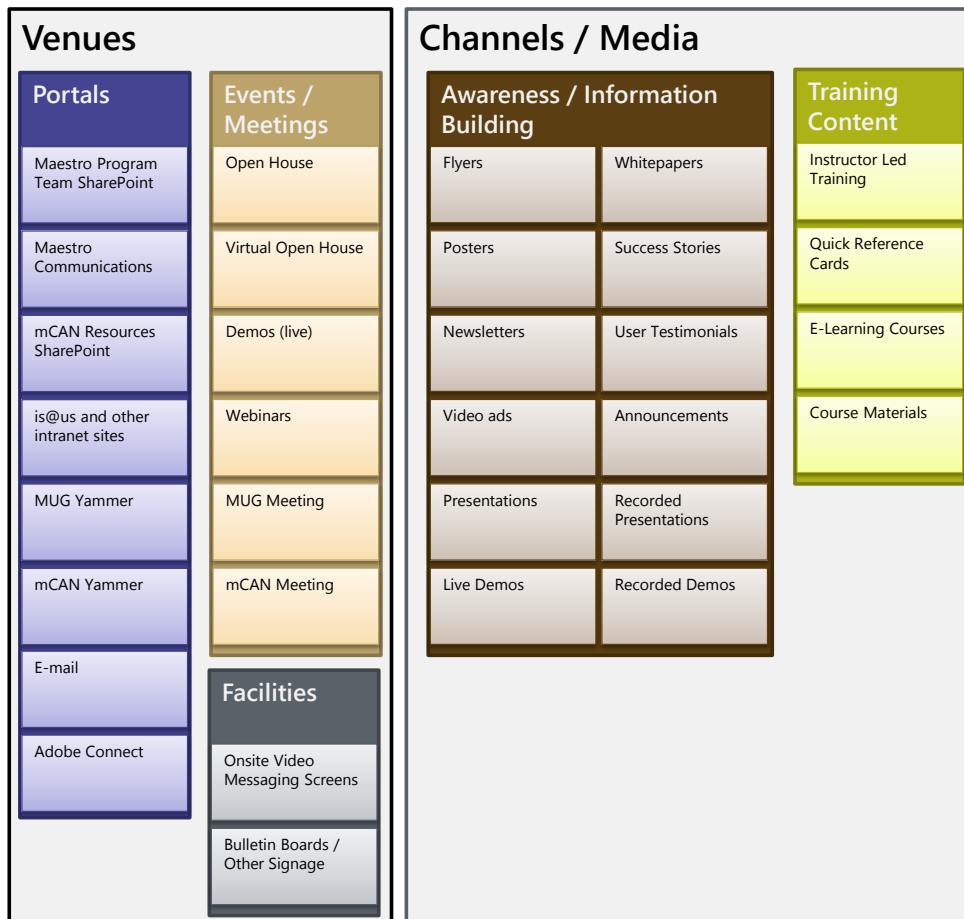
4 COMMUNICATION VENUES AND CHANNELS / MEDIA

Communications is a complex process that involves the audiences, various channels and media, and a number of venues that can be used. Communications can be asynchronous (one-to-one) or synchronous (one-to-many). Communications can be personal (high touch, such as a one-on-one discussion) or impersonal (low touch, such as an e-mail announcement). An effective communication strategy and plan combines all of these attributes into a mix that addresses the needs of the audiences in a variety of ways that are appropriate for the message content to be conveyed.

Some additional characteristics of communications are that it is very synergistic and it is highly leverageable. The following are some examples:

- Materials from an open house event such as the presentations and demos can be recorded and added to a communications website for further distribution.
- The graphics from posters and flyers can be leveraged and used to reinforce messages by including them in newsletters and website announcements.
- An executive interview can be posted to the communications website and also used as a component of presentations, open house events, etc.

The diagram below shows the major proposed communications venues and media/channels grouped into categories:

Venues		Channels / Media	
Portals	**Events / Meetings**	**Awareness / Information Building**	**Training Content**
Maestro Program Team SharePoint	Open House	Flyers / Whitepapers	Instructor Led Training
Maestro Communications	Virtual Open House	Posters / Success Stories	Quick Reference Cards
mCAN Resources SharePoint	Demos (live)	Newsletters / User Testimonials	E-Learning Courses
is@us and other intranet sites	Webinars	Video ads / Announcements	Course Materials
MUG Yammer	MUG Meeting	Presentations / Recorded Presentations	
mCAN Yammer	mCAN Meeting	Live Demos / Recorded Demos	
E-mail	**Facilities**		
Adobe Connect	Onsite Video Messaging Screens		
	Bulletin Boards / Other Signage		

The Venues are the three categories of physical means of disseminating the communications.

- Portals
- Events/Meetings
- Facilities

Portals are various electronic network platforms such as SharePoint sites, intranet sites, e-mail, and Adobe Connect. This list is not all encompassing. There are several company or business unit intranet sites that can potentially be used to disseminate information. Events and Meetings are effective way of assembling large groups of stakeholders who need to receive similar communications. Any physical Facilities will be used also. The large flat-screen monitors that display informational messages can be used for electronic announcement and flyers. Similarly, physical bulletin boards and announcement spaces will be used to post communications.

Channels and Media are the physical assembly of the communications messaging content. There are two broad categories of content: Awareness / Information Building and Training. Awareness / Information Building are composed of many traditional communications media. These will be used early on for awareness building. As each release progresses they will be used to deliver increasing amounts of detailed information. There are numerous opportunities to leverage the materials throughout a release and across releases.

4.1 COMMUNICATIONS VENUES

4.1.1 Portals

Portals
Maestro Program Team SharePoint
Maestro Communications
mCAN Resources SharePoint
is@us and other intranet sites
MUG Yammer
mCAN Yammer
E-mail
Adobe Connect

Components
MAESTRO Program Team SharePoint
Continued usage of current program team site
MAESTRO Communications
Website or SharePoint site to disseminate information to end users
mCAN Resources SharePoint
An online version of the Change Agent Network Toolkit
is@us and Other Intranet Sites
Primarily for major announcement with a link to the MAESTRO Communications site for details
MUG Yammer
Yammer site for MUG members. Open to anyone but assumed to be self-filtering in that only MUG members/users would participate. Used for sharing tips, tricks, best practices, etc. A forum to discuss enhancements and other potential new features.
mCAN Yammer
A closed Yammer group for mCAN members only. Used to discuss issues, disseminate ideas, exchange lessons learned, etc.
E-mail
Used for announcements, reminders, and short, important messages.
Adobe Connect
Used for online meetings, presentation, demos, webinars, etc.

4.1.2 Events / Meetings

Components
Open House
Large scale event with multiple agenda topics held over a day. May be repeated in several locations. Possible formats include: product fair, conference, seminar, etc.
Virtual Open House
Similar to Open House event but held virtually. Due to virtual nature most likely more structured.
Demo (live)
Most likely held in conjunction with an Open House or Webinar, used to focus on a particular MAESTRO feature, function, and/or benefit.
Webinars
Online educational presentation of a MAESTRO topic.
MUG Meetings
Live and/or virtual meeting of MUG members to be held on periodic basis.
mCAN Meetings
Live and/or virtual meeting of mCAN members for orientation, release prep, product details, debriefs, etc.

Events / Meetings
- Open House
- Virtual Open House
- Demos (live)
- Webinars
- MUG Meeting
- mCAN Meeting

2.1.1. Facilities

Components
Onsite Video Messaging System
Use large mounted flat screen TVs in various buildings to display awareness and informational messages, flyers, etc.
Bulletin Boards / Other Signage
Use break room, coffee room, and other public areas to display flyers, posters, and other informational content.

Facilities
- Onsite Video Messaging Screens
- Bulletin Boards / Other Signage

2.1. COMMUNICATIONS CHANNELS / MEDIA

2.1.1. Training Content

Components
Instructor Led Training
Classroom training as needed.
E-Learning Courses
Online courses available LE@RN and MAESTRO Communications site.
Quick Reference Cards
Quick guide to specific MAESTRO products.
Course Materials
Any MAESTRO training/support materials.

Training Content
- Instructor Led Training
- Quick Reference Cards
- E-Learning Courses
- Course Materials

2.1.1. Awareness / Information Building

Components
Flyers
Printed flyers for awareness, specific events, etc.
Posters
General and release specific informational posters
Newsletters
Periodic newsletter for Maestro Users. Rotating topics
Video Ads
Similar to flyers but formatted for the large flat-screen monitors hanging on the walls within varous facilities.
Whitepapers
In depth articles on specific Maestro topics
Success Stories
News article detailing a MAESTRO success.
User Testimonials
Short quotes from users pertaining to feature, function, or benefit of MAESTRO they have realized.
Presentations
Prepared for an event or meeting, focusing on a specific topic. Designed to be presented live or via a webinar.
Recorded Presentations
Video / audio recording of live or webinar presentation
Live Demos
In conjunction with an event, meeting, or webinar, a demo of a MAESTRO feature, function, or benefit.
Recorded Demos
Recording of a demo presented at an event / webinar.

Awareness / Information Building

Flyers	Whitepapers
Posters	Success Stories
Newsletters	User Testimonials
Video ads	Announcements
Presentations	Recorded Presentations
Live Demos	Recorded Demos

Before any of these components are used the messaging content must be available and the appropriate templates for each platform. Content will be drawn from the Case for Change content library. The templates for each platform and component will be constructed in advance. Some components require very consistent templates. A newsletter should follow a specific layout and format from issue to issue. Posters and flyers do not have to be quite as structured but they should have easily recognizable brand elements such as colors and graphics that make them recognizable.

4.2 CHANNEL / MEDIA ADJUSTMENTS AND CHANGES FROM RELEASE 1.1 LESSONS LEARNED

Some of the Venues and Channels / Media are new, changed, or going to be applied differently based on the lessons learned from the MAESTRO Release 1.1 Communications program. The sections below describe some of these new approaches and updates planned for those used previously.

4.2.1 E-mail Notifications

E-mail notifications are a broad category of messaging that will be used to keep existing stakeholders informed of upcoming MAESTRO activities and news. E-mail notifications represent the most frequent and consistent form of communication put forth. In order to prevent MAESTRO messages from being lost in inbox clutter, e-mail notifications will be used selectively. Messages will be formatted with a MAESTRO brand template and theme to make them distinctive.

Also, information contained with e-mail notifications will be distributed by other channels / media to increase the likelihood that messages will be seen and acted upon.

4.2.2 MAESTRO Websites

As noted above, in the Portals Venue section, several MAESTRO 2.X websites are envisioned. In addition to the Program Team site, a standalone MAESTRO Change / Communications site will be created. Other sites are envisioned or potentially may be needed. These are discussed in the following sections.

4.2.2.1 Current MAESTRO Websites

There is currently a SharePoint MAESTRO Program Team website that is intended to support the core and workstream teams throughout the design, development, and deployment of Release 2.X. Although this site might be accessed and viewed by some stakeholders it is not a source for the types of program communications necessary to support the MAESTRO Change Management requirements.

There is also a MAESTRO Program page on the CS&O website that was used during Release 1.1 as a source of MAESTRO Program information, communications, and training. That site is out of date and work is underway to physically relocate the site to TIM. During that relocation the current site contents will be reevaluated and updated.

4.2.2.2 New Focused MAESTRO Communications Website

A new MAESTRO Communications site will be build that will be one hundred percent focused on communicating news and information to the stakeholders most impacted by MAESTRO. Some of the key site elements that will be addressed and included during the site design and development:

- The site will be branded and it will be immediately clear that you are viewing a MAESTRO site
- The central focus on the site home page will be MAESTRO Communications
- There will be a menu level link to "Understand MAESTRO" which will include the following subtopics:
    - What is MAESTRO
    - Frequently Asked Questions (FAQs)
    - Meet the MAESTRO Team
- News as it becomes less current will be archived but still available via Search
- Events such as open houses, webinars, etc. will be highlighted. Users will be able to learn more about upcoming events and register for them. Older evens will be listed with links to any recordings, handouts, and other materials.
- The MAESTRO User Group (MUG) and it's Yammer site will be highlighted [Note: described below]
- Resources will be available including links to other related sites

- Links to training resources will be available
- Contact information will be readily available

Based on recommendations from the Release 1.1 lessons learned, this site will be hosted on the company SharePoint site. Since the MAESTRO program encompasses three clinical entities and is funded by R&D IS, the platform on which communication is delivered should not be "owned" and promoted by any one entity.

4.2.2.3   Other New MAESTRO Websites

There may be a need for a Change Agent Network (mCAN) group resources website. If this need arises is can most likely be created as a sub-site on the MAESTRO Program Team SharePoint site.

Other Yammer social media sites are also envisioned. Those are discussed in the following section, Social Media.

4.2.3   Social Media

Social media is another channel that can be used to effectively communicate, interact, and learn from stakeholders. The specific platform being targeted is company's Yammer site. There are hundreds of Yammer groups on the site. The following is a list of some of the types of groups that have been formed:

- Special interests or topics such as Innovation, Change Management, Technology, etc.
- Special events such as regional meetings
- Divisions
- Departments
- Products
- Teams (i.e., regional sales team)
- Systems (i.e., NEXTS)

There are some purely social groups also such as Pet Lovers. However most of the Yammer postings are business related. Groups can be open or private. Open group postings can be read by anyone with a Yammer account. You must be a member of a private group in order to read the posts within that group.

Potential uses for Yammer include the MAESTRO User Group (MUG) as an open group and the Change Agent Network (mCAN) as a private group. The purpose of these would be:

MUG Yammer   For MUG members. Open to anyone but assumed to be self-filtering in that only MUG members/users would participate. Used for sharing tips, tricks, best practices, etc. A forum to discuss enhancements and other potential new features.

mCAN Yammer   A closed group for mCAN members only. Used to discuss issues, disseminate ideas, exchange lessons learned, etc.

There are several important points to recognize in regards to the use of the Yammer portal. First is the group membership composition. The diagram below shows various stakeholder audiences that can and should interact with the mCAN Yammer group.

The group will be moderated by the MAESTRO Communications team. Obviously, the mCAN group will be the primary participants in the dialog. However, the MAESTRO Program Team should also have an active role monitoring the discussions and answering questions, offering advice, etc. Since this tool has not been used by the MAESTRO program team and the mCAN group, how the discussions evolve remains to be seen. It should provide a forum for the mCAN group members to share experiences, raise issues, describe best practices, etc.
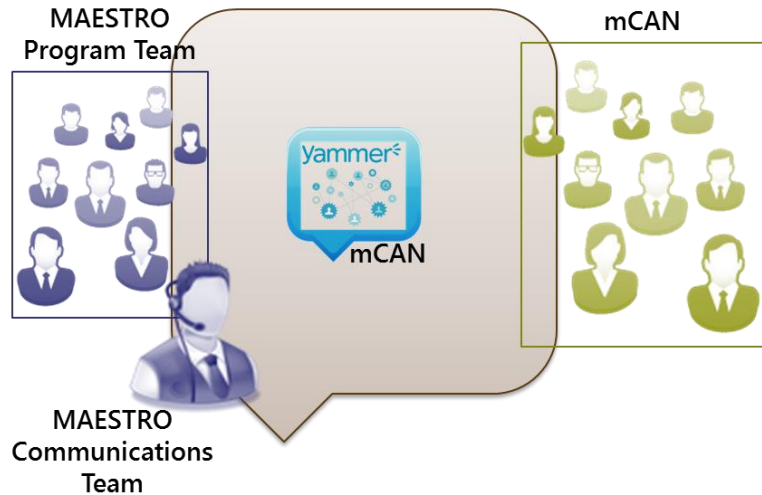
The MUG Yammer site will have more stakeholder audiences as shown in the diagram below:

As with the mCAN group, the MUG Yammer site will be moderated by the MAESTRO Communications team. The primary participants should be MAESTRO users. Both the mCAN group and the MAESTRO Program Team should follow this site to monitor the pulse of the comments, note any recommended enhancements, answer questions, provide suggestions, etc. Other program stakeholders such as sponsors and business management will be able to access the site and view posts. As with the mCAN group, this tool has not been used with MUG before so the level of engagement it generates remains to be seen.
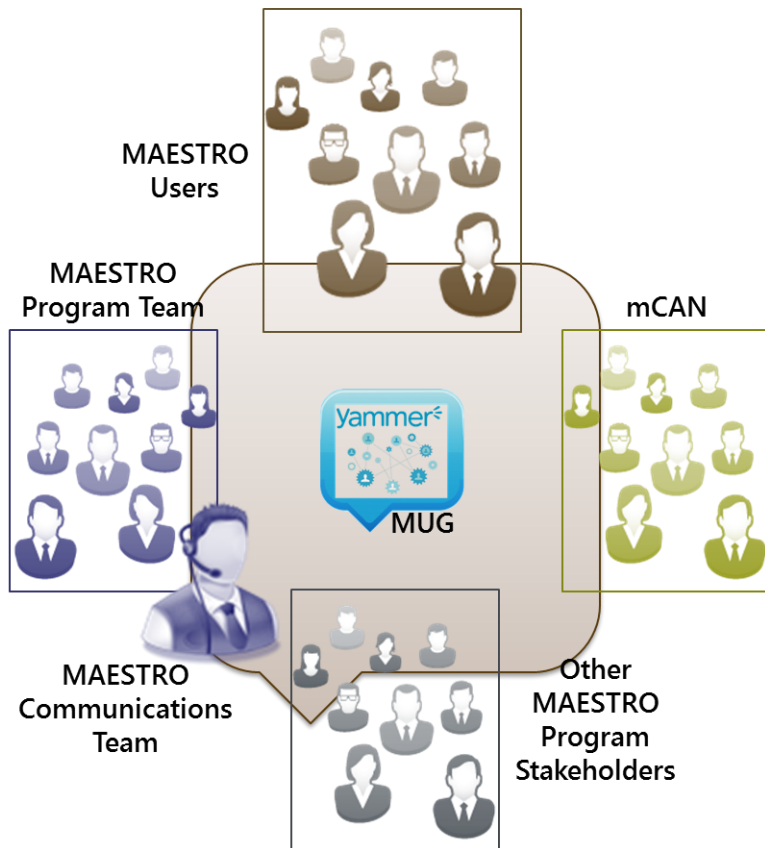
The second major point with regards to the use of Yammer is that the sites have to be monitored. This is not monitoring in the sense of trying to control or censor comments. Monitoring should be considered from several perspectives. First, all members should check

for new postings occasionally. In doing so, if they see a posting where then can answer a question or provide value-added commentary, they should post a reply.

MAESTRO Program Team members should also monitor the posts and respond with comments when they can. The mCAN group members should not only monitor their Yammer site, they should also monitor the MUG group site. The MUG Yammer site will provide them with feedback as to how the change is being accepted. They will also be able to identify MUG members within their sphere of influence to can be engaged directly.

From the standpoint of the MAESTRO Communications team, monitoring will include:

- Assessing the volume and pace of comments
- Watching for comments that need a response for which none was provided
- Assessing negative comments and formulating appropriate responses
- Determining whether the group postings need to be "seeded" with new posts to generate discussion and engagement

The issue of "seeding" raised the third issue to consider with social media. Messages should be authentic and natural. Scripted messages simply do not work. Genuine engagement requires dialog that meets the needs of the audience.

The last point to consider with social media is that it is "self-updating". It is not like a static web page that needs new content periodically. The natural interaction of participants generates new content constantly. This is why it is important to assess the volume and pace of comments. Participation can and will increase if the comments are engaging and informative to the audience.

One advantage to Yammer is that there are many groups and a great deal of participation. You can choose to view the stream of all comments or only those from groups you are following. Our audience will not just be limited to seeing what is in our group. They will have the option of seeing general comments and comments from other groups. Ideally, if they do focus their view on the MUG Yammer group only, there will be enough new and compelling comments to foster more participation. It is going to be important to tie the MUG Yammer group to the physical and virtual MAESTRO User Group (MUG).

4.2.4   MAESTRO Events

4.2.4.1   Make Events and News More Visible on the Website

A "MAESTRO TODAY" panel on the MAESTRO Communications homepage would draw attention to upcoming events and other updates. Each event or news item should have attention grabbing headlines associated with it:

- Don't Miss It! Register By 10/1 for the [Subject] Workshop
- [Subject] Workshop Webinar Now Available for Viewing Online
- [Subject] FAQs Updated with Answers to Your Questions
- Coming Soon! What for the Open House Event coming to your office soon

4.2.4.2   Hold Events at Least Once per Month

The Communications team can use the stream leaders, stakeholders, and mCAN to gather ideas for event themes and topics. Possible ideas include events around program deliverables, capabilities, stream focused events, etc. There are several ways events can be

presented as noted below. Offering more short, focused events has the advantage of being easier to execute and easier for the intended audience to attend.

1. **Expand Participation in Events Virtually:** MAESTRO can offer virtual events through webinars. The ability of MAESTRO to do this will depend on the technology and the security restrictions at the facility where the event is held. There are a range of options of how live/virtual events could be structured as shown in the table below.

Type of Event	Description	Notes
Simultaneous In-Person and Live Virtual Event	While the event is happening streaming audio and video would be available	Edit recorded stream for posting on website
In-person Event without Virtual	Live hosted event for attendees	Record and edit for posting on website
Live Virtual Event	Live event hosted virtually. Attended via Adobe Connect or similar application	Record and edit for posting on website
Recorded Virtual Event	Scripted, recorded event. Possible interactions with multiple presenters.	Intention is for this type of event to be recorded for posting on website

2. **Follow Up Events With Additional Online Information:** For topics that receive many questions, MAESTRO can offer additional online materials such as FAQs or even a whole page devoted to the topic with links, downloadable brochures, directions, job aids, etc. The posting of new material will be highlighted in the "News" box on the homepage.

4.2.5   Increase Engagement with MAESTRO User Group (MUG)

The MUG was formed for two primary purposes:

- To serve as a user community venue for sharing, collaborating and helping to resolve issues regarding to the new technology, processes, and reports
- Vet requests for new reports, upgrades, improvements or changes to the processes or systems

The group will be engaged actively through regular communications. However, more effort will be made to facilitate MUG meetings through In-person and Virtual events.

The group will also be engaged through a Yammer social media site as noted above to facilitate more regular on-going interaction and dialog.

Additional value may be obtained from this group by including them in early development reviews, user acceptance testing, and other MAESTRO 2.X events.

### 4.2.6   Repeat Messages through Various Channels / Media

This lesson learned is important enough that it was included in the Guiding Principles noted above. The more ways a message can be communicated, the more likely it is to be seen and acted upon. Using different channels / media ensures repetition without individuals "tuning out".

5 COMMUNICATIONS CAMPAIGN THEMES

With multiple releases and a four phase strategic communication approach for each release, there will be a substantial need for communications. Also, our plan to communicate across multiple channels and media requires that our communications be creative and interesting. Variety within the communications will be important as long as it is consistent with the MAESTRO brand and identity.

5.1 THE MAESTRO BRAND AND IDENTITY

The MAESTRO logo establishes our brand and identity. The maestro and music staff (with ones and zeroes instead of notes) combines to create a recognizable brand. Our identity is further solidified with the use of the word "orchestrating". The conductor, orchestrating theme is interesting and has potential to be leveraged to create unique campaign themes.
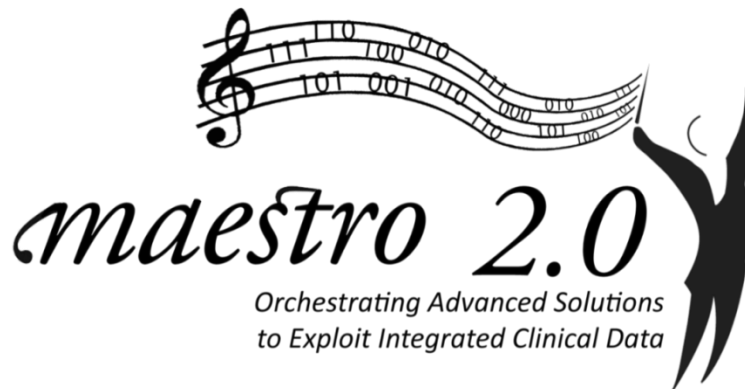
5.2 DEVELOPING AND EXTENDING THE BRAND THEME

Starting with the concept of a maestro or conductor leading or orchestrating, a number of related key words and phrases were developed. Those are shown below:

- Performance
- Applause
- Bravo
- Backstage
- Spotlight
- Score
- Arrangement
- "The Pit"
- "Play it again"
- Encore

Each of these has been explored for use to create a campaign based on the theme or idea behind the word or phrase. The thinking behind using each word or phrase is detailed below. Conceptual designs samples are also included for many of these.

5.2.1 Performance

The word performance could be used several ways. First, instead of having MAESTRO Events we could have MAESTRO Performances. There are interested ways to spin this with Performance Schedules and Repeat Performances. An example below of a conceptual newsletter shows how MAESTRO Performances is used to promote events (performances).

his theme could be carried further by building on the performance idea in actual events. The conceptual flyer to the right promotes a Bridgewater "performance" and uses a ticket as a visual tie-in with the event information prominently displayed. Another tie in with this idea is for any recorded events to be referred to as "Repeat Performances". The second way the term performance could be used is when reporting MAESTRO results. For example, a newsletter article titled MAESTRO Performance could report on results and increased productivity from a MAESTRO capability or function.

2.1.1. Applause and Bravo

These two words can potentially be used to discuss or highlight MAESTRO project successes. If a core domain or a workstream receives kudos or accomplishes something significant, there is an opportunity to promote that with a newsletter article or an e-mail announcement with a heading such as "Applause for MAESTRO" or "Bravo, MAESTRO".

Another example from the conceptual newsletter is show below:

5.2.2 Backstage

The term backstage is being considered as a way to present "behind the scenes" information or access to a unique, special content or a project sponsor. For example, a "Backstage Pass" article could present an interview with a senior executive discussing their insights on the MAESTRO program. A conceptual example is shown to the right:

5.2.3 Spotlight

The term spotlight is being considered for a campaign such as "Spotlight on MAESTRO 2.0". Samples of graphics that could be used in flyers, newsletters, and other media are shown below:

5.2.4 Score

The term score has a several potential uses. First, it is being considered as a label in reporting facts. For example, in a newsletter, a callout title "MAESTRO Score" could provide interesting facts or insights into the benefits and value of MAESTRO. A conceptual sample highlighting product defense is shown below:

A slight variation of that is to use the term "2nd Score" which ties in to in being the MAESTRO second release.
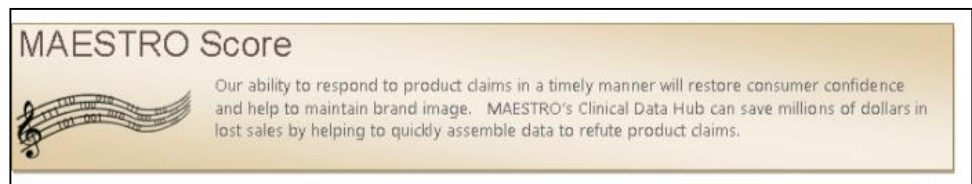
Another way to use the term score is based on what a musical score is. A scored is written for a combination of instruments. It is usually written on multiple bar staffs, one on top of another, to show how different instruments are playing different notes at the same time. There may be some ways to use this for interactions among the various MAESTRO core domain teams. It could also be used as a theme for a story about components of MAESTRO coming together. No conceptual samples have been created for this idea yet.

5.2.5 Arrangement

Arrangement is related to Score. In music an arrangement is a modified variation of an original score. This term may have potential for use in describing how an off the shelf applications is used or customized for MAESTRO purposes. No conceptual samples have been created for this term yet.

5.2.6 "The Pit"

"The Pit" refers to the orchestra pit. If you consider MAESTRO the conductor, orchestrating the various groupings of instruments, there is a nice parallel to the MAESTRO core domain and workstream teams.

Orchestras are typically set up in semi-circular layouts with groupings of similar instruments. A couple of conceptual ideas have been assembled for using this idea. The first is to overlay the MAESTRO logo over a graphical layout of an orchestra pit as a masthead:

Orchestrating Advanced Solutions to Exploit Integrated Clinical Data

A similar diagram could be used as part of an article explaining the MAESTRO team and its components. The various core domain and workstream groups could be depicted on a graphic layout of an orchestra:

Another idea is to create a newsletter section for "News from the Pit" which would feature a story focusing on one of the MAESTRO teams each month.
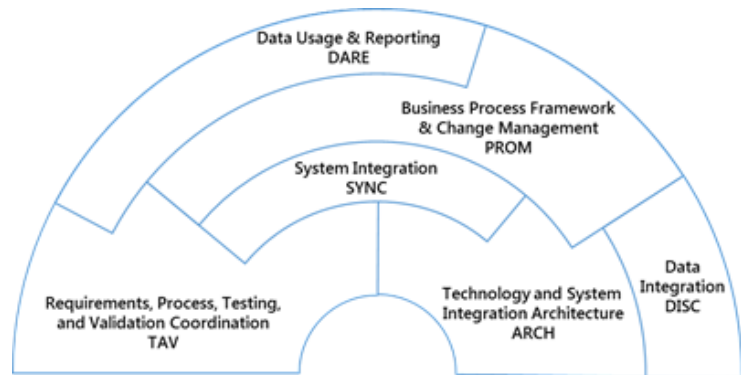
5.2.7 "Play it again"
The phrase "Play It Again" has some possible uses and also ties in with the being release two for MAESTRO.

5.2.8 Encore
The term Encore has been eliminated from consideration since it is already used in the Cruise project as a system name.

6 COMMUNICATION EFFECTIVENESS MEASUREMENT APPROACH AND METRICS

This Communication Strategy has overall objectives. Each of the four communications phases has objectives. Objectives have also been established to use new channels and media and to use existing channels and media more effectively. Many of these objectives are targeted at Awareness rather than Communications per se. Also, awareness and communications are going to occur throughout the entire MAESTRO program and each release within the framework of the four strategic phases.

For these reasons, the measurement of communications will occur in four interrelated ways.

- Communications campaigns, media, and messages will be assessed and tested prior to distribution to establish and verify audience reaction.
- Reaction and response from each campaign, media, and message will be gathered from a feedback process to improve and refine subsequent communications.
- Capture, track, and report metrics relative to the release and program communications effort by campaign, media, and/or message.
- Collect feedback from Stakeholders at key points to determine their reaction to and opinion of the effectiveness of the awareness and communications effort.

The first two items above, pre-testing messages and gathering post message feedback, are shown diagrammatically below. Steps 1 and 2 reflect the pre-test process. Steps 3-5 show the message being sent and received, followed by the feedback step.
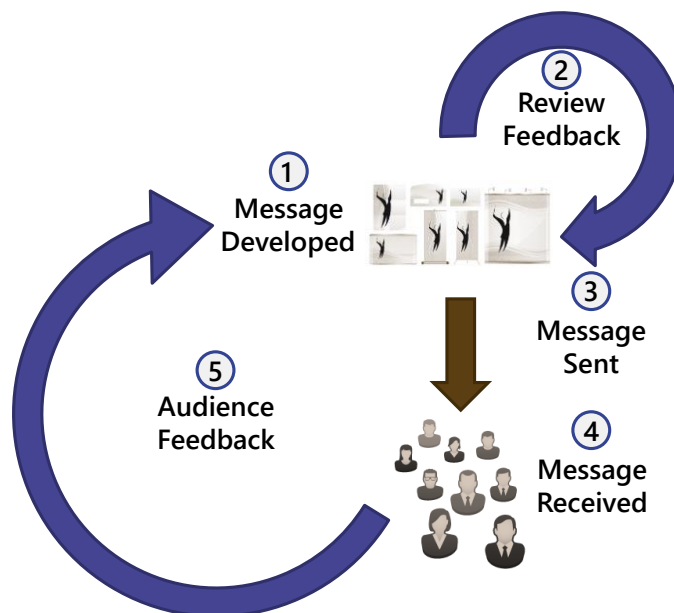
6.1 PRE-COMMUNICATIONS ASSESSMENT AND TESTING

The members of the MAESTRO Change Agent Network (mCAN) will be used as a review panel to assess the reaction and response to various communications campaigns, media,

and/or messages. The entire group will be surveyed when appropriate. For more specific reviews related to a particular release or stakeholder group, the CAN members for those areas will be used.

Pertinent review points would include:

- Does the theme convey the message?
- Is the message on target for the audience?
- Does the message convey the case for change?
- Do the theme / message fit the overall MAESTRO brand?
- Is the message complete and contain all the necessary information?
- Is there anything in the message that is not clear?
- If the message requires a response, is there a strong call to action and is it clear what to do next?
- Is the selected media the most appropriate for the message?
- Should the message be sent through additional media?

6.2 POST-COMMUNICATIONS REACTION AND RESPONSE REVIEW

Every venue and channel / media used will incorporate a mechanism for stakeholders to submit comments and feedback or ask questions. All SharePoint sites or websites will contain a prominent link for viewers to use to contact us. Every e-mail will contain a link for the reader to use to ask a question, make a comment, or provide feedback. All demos, events, meetings, presentations, and webinars will offer an evaluation and feedback form at the end of the event. Any flyers, posters, newsletters, and other printed or posted material will provide contact information. Training courses will have post-training evaluations and will also include a mechanism for providing other feedback.

When asking for comments and feedback, the results can be varied. They can be positive or negative. They can be contradictory or follow a common theme. Regardless of the content, the comments or feedback should be acknowledged. The comments or feedback also need to be evaluated.

When any stakeholder submits a comment or feedback or asks a question, they will be acknowledged. If a response can be made with that initial acknowledgement, it will be included. Otherwise, when any decision is made on their input or the issue they raise, the result of that decision will be provided to them. This is simply good customer service.

6.3 CAPTURE, TRACK, AND REPORT METRICS

Measurements will be applied to both Awareness and Communications. All measurements include both objective and subjective metrics. There are many metrics that can be tracked and reported. Those metrics can be used to measure Demographics, Activity, Efficiency and Effectiveness.

The first three categories of metrics are objective. They are items or results that can be counted or tallied. Effectiveness on the other hand is much more subjective. Even an objective that is very clear and seemingly measurable can be hard to evaluate without subjective data based on stakeholder audience perceptions.
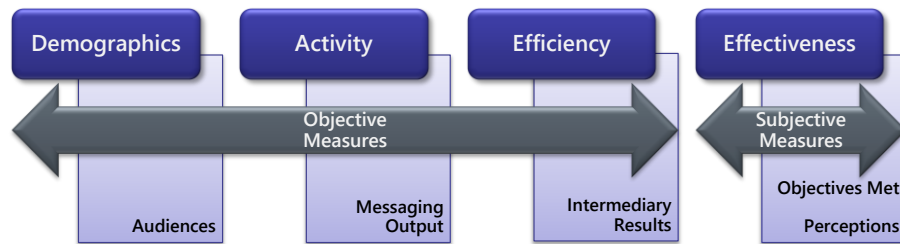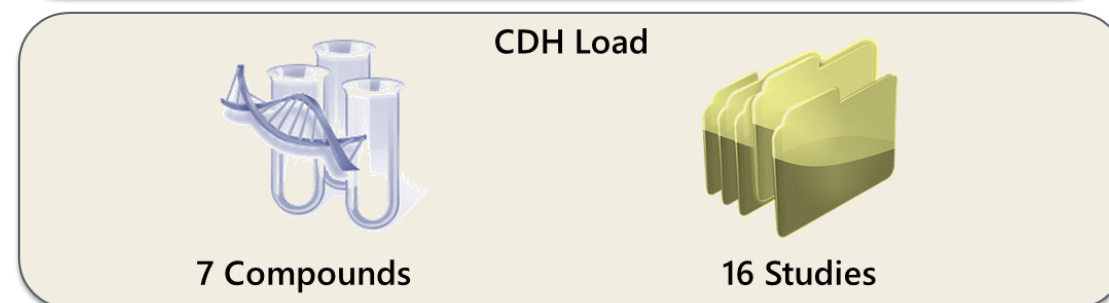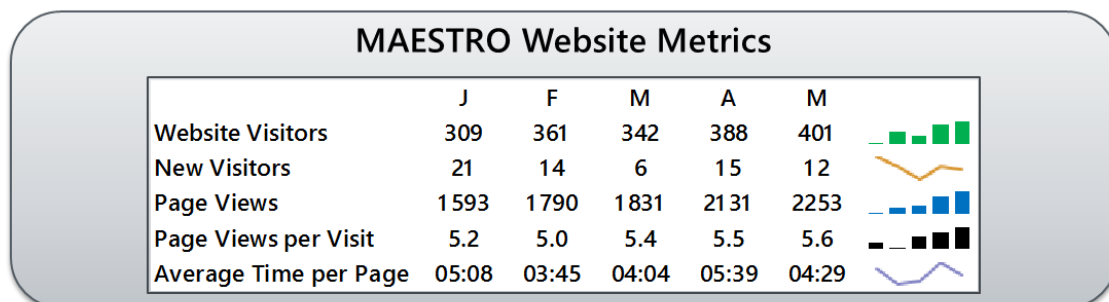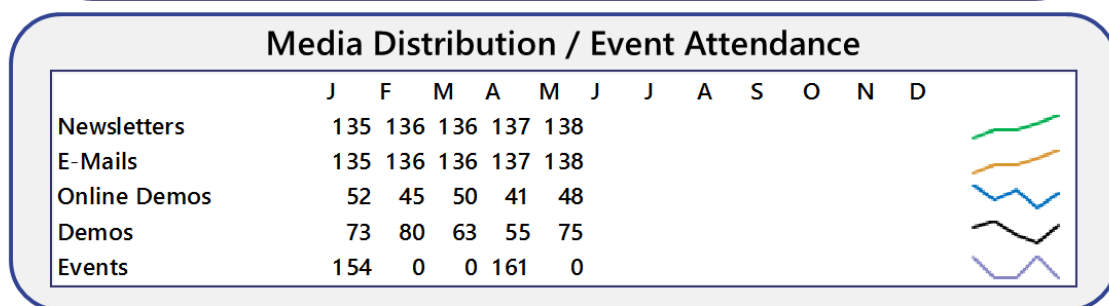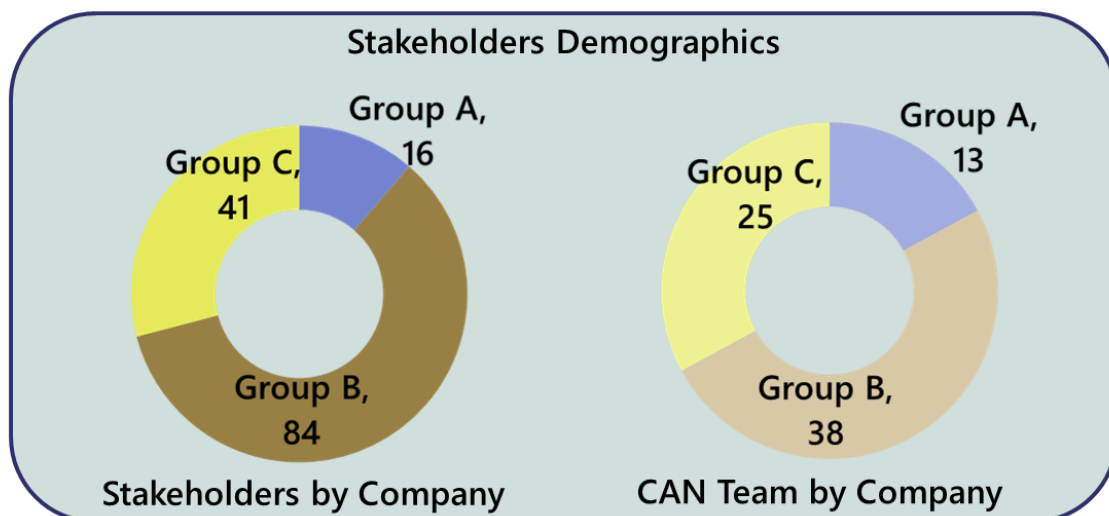
The table below provides an explanation of each category with examples. Metrics captured, tracked, and reported will provide measurement of the first three categories. They will also provide some degree of measurement of Effectiveness. However, that category requires more subjective assessment and measurement as will be discussed in the next subsection.

Category	Description
Demographics	Demographics are measures or metrics about our audience size. Examples: • number of stakeholders • number of SAFIR users • number of names on an e-mail distribution list • number of subscribers to a newsletter
Activity	Activity measures track the effort and production of messaging. Examples: • Number of newsletters created and distributed • Number of workshops hosted • Number of social media posts • Number of e-mail updates sent
Efficiency	Efficiency measures track the intermediary outcomes or results of activities. Examples: • Number of attendees at an open house event • Number of responses to a survey • Number of comments to a social media post • Number of downloads of a video presentation
Effectiveness	Effectiveness is the most difficult area of measurement. It can be defined as the obtainment of the objectives of the communications activity. However, effectiveness can have its own subjective criteria. Examples: • Percentage of impacted users aware of MAESTRO's major features • Percentage of impacted users able to explain MAESTRO benefits Examples: For the communications program to be effective overall or for a particular phase, release, campaign, or message it must be: • Complete - Communicate all relevant information • Clear - Convey information that is plainly understood • Brief - Communicate the information in a concise manner • Timely - Offer and request information in an appropriate manner

Demographics, Activity, and Efficiency measures will be reported on a dashboard. The dashboard will be updated regularly with the latest data. Any current Effectiveness data will be reported also. The graphic below is mockup of what a Communications Dashboard might look like and what types of information it might contain.

MAESTRO Communications Dashboard May 2014

Stakeholders Demographics

Group C, 41
Group A, 16
Group B, 84
Stakeholders by Company

Group C, 25
Group A, 13
Group B, 38
CAN Team by Company

Media Distribution / Event Attendance

	J	F	M	A	M	J	J	A	S	O	N	D	
Newsletters	135	136	136	137	138								
E-Mails	135	136	136	137	138								
Online Demos	52	45	50	41	48								
Demos	73	80	63	55	75								
Events	154	0	0	161	0								

MAESTRO Website Metrics

	J	F	M	A	M	
Website Visitors	309	361	342	388	401	
New Visitors	21	14	6	15	12	
Page Views	1593	1790	1831	2131	2253	
Page Views per Visit	5.2	5.0	5.4	5.5	5.6	
Average Time per Page	05:08	03:45	04:04	05:39	04:29	

CDH Load

7 Compounds   **16 Studies**

6.4 COLLECT FEEDBACK FROM STAKEHOLDERS AT KEY POINTS

Effectiveness is many things. It can be called success, useful, helpful, and valuable among other terms. Some of our objectives state the result we want, such as a stakeholder knowing the purpose of MAESTRO or knowing the major benefits of MAESTRO. To determine if we are meeting those objectives, measurements must be made. Many of these measurements require performing an assessment. These are difficult to obtain without administering them as a "test". Other ways of obtaining these measures will be considered. A post event survey for example might be interwoven with a few assessment questions.

Other gauges of effectiveness are subjective. What do the stakeholders think of the communications? How are they reacting to specific messages or campaigns? Do they feel that they are fully informed? This type of data must be gathered through interviews or questionnaires. These will be broader and more opinion and perception oriented than post-event surveys.

In order to not overly burden stakeholders the use of surveys and interviews will be limited to key points in the MAESTRO Roadmap and key points in the execution of the Communications Plan. Examples would include the end of a MAESTRO Release or the end of a specific campaign.

6.5 COMMUNICATION MEASUREMENT AND TRACKING TOOLS

There are a variety of methods and tools that can be used to capture and track communications metrics. Some of those have been mentioned in the previous sections. Since there are both objective and subjective measures the methods and tools that will be used to capture metrics will vary. Some will serve a single purpose. Others will be applied in multiple ways

6.5.1 Stakeholder / Audience Database

Keeping track of audience members and stakeholders is necessary to facilitate communications. It is also a rich source of demographics and serves as an absolute and relative measure for many metrics.

6.5.2 Communications Activity Tracking

Similar to tracking audience members and stakeholders, all communications activity will be tracked. This will include distribution frequency and statistics where appropriate. Attendance and response data will be tracked for events and other in-person activities.

6.5.3 Communication Surveys

Surveys will be provided for Stakeholder feedback at key points in the MAESTRO 2.X program and release. These will be delivered via an online tool to captures their input and feedback.

Since the audience will shift with each release these surveys need to be constructed carefully to deal with the changing MAESTRO demographic in such a way that the data is not skewed or distorted.

6.5.4 Event Surveys

Event Surveys encompass several types of assessments. First, surveys can be used before an event to solicit topics or assess interest in specific topics. Second, during registration for

an event a survey can be used to determine the attendee's role, understanding of MAESTRO, need for information on specific topics, and other useful information. Lastly, post-event surveys can be used to measure the attendee's satisfaction with the event, understanding of the event program, interest in future events, etc. Post-event surveys can also delve into details such as rating specific event programs, presentations, topics, etc.

6.5.5   Voluntary Feedback

As mentioned before all communications pieces will contain feedback requests and / or a link to ask questions, make a comment, request more information, etc. These types of ad hoc contacts and requests will be tracked. They will be tracked by their source such as from a newsletter or a website. If they are part of an event they will be reported as a part of the feedback for that event.

6.5.6   Focus Groups

Focus groups will be used in several ways. First, the mCAN and MUG groups will be on-going large scale focus groups. They will also provide a source for smaller more release or topic specific focus groups.

Other special purpose focus groups will be convened as necessary to deal with specific topics such as developing case for change topics and review/walk-through of training courses.

6.5.7   Individual Stakeholder Discussions

Individual feedback based on phone calls, in person discussions, event question and answer sessions, and e-mail feedback.

6.5.8   Robust Website Feedback Tool

A tool is required for website tracking that effectively records web traffic, page views, time spent per page, etc. This is need for websites, SharePoint sites, and the Yammer groups. What capabilities exist with the company needs to be explored.

7 DEVELOPMENT OF THE COMMUNICATION PLAN

As noted in the Introduction, every aspect of the entire Change Management Strategy is interrelated. The Communications Plan will be the final step that defines what messages will be sent to which audiences, when they will be sent, through which venues and channels, and applying which campaign themes.
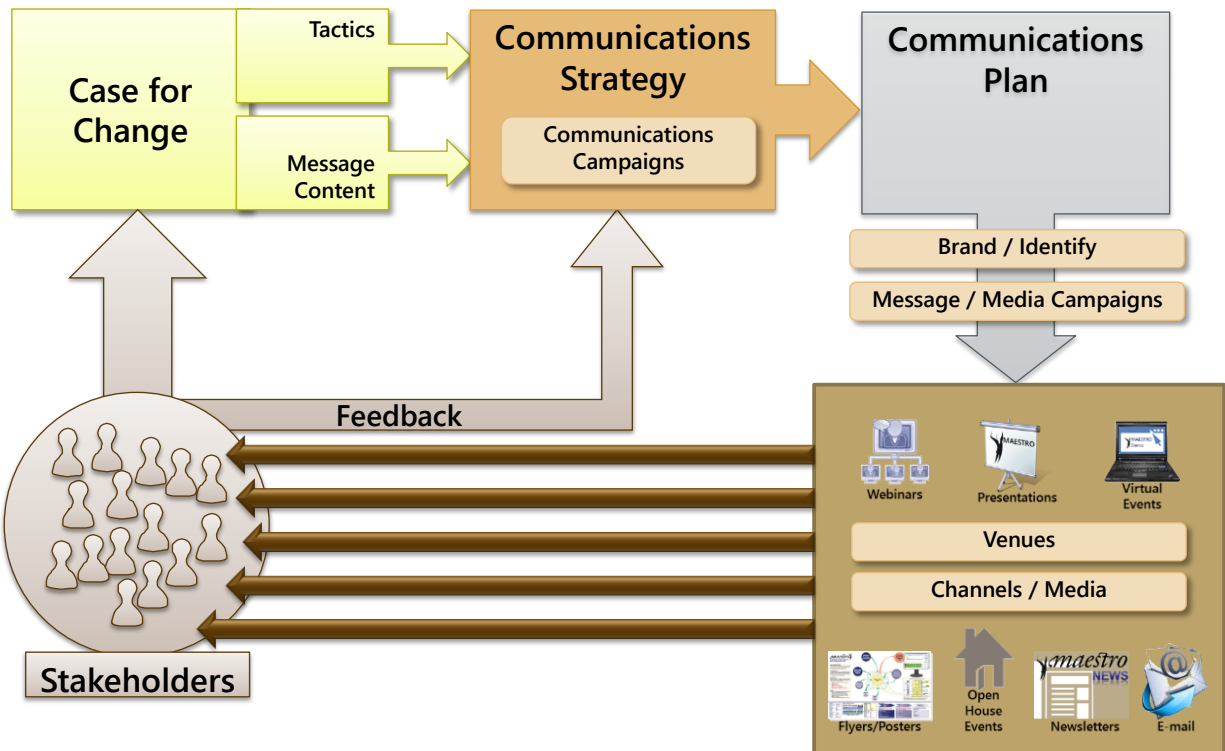
The Communications Plan draws from the Case for Change, Communications Strategy, and Stakeholder Analysis to answer these types of questions:

- Why should the Message be Sent
- What Message Needs To Be Communicated
- Who Needs To Receive the Message
- How to Send the Message
- Timing and Frequency of the Message

The four strategic Communications Campaigns will be executed for each MAESTRO 2.X Release.
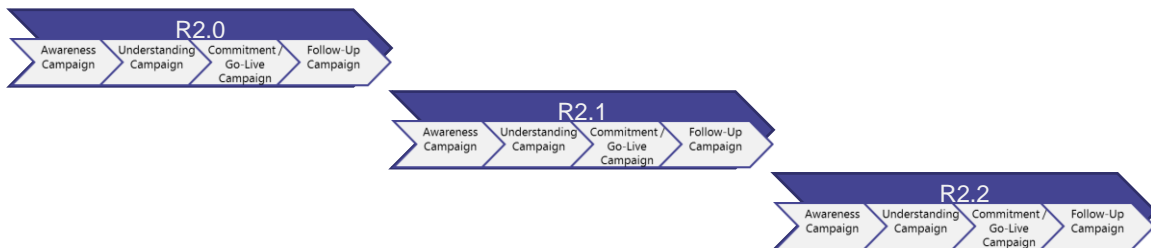
The Case for Change will supply the tactical messaging content for each audience throughout the four strategic Communication Campaigns for each release. Depending on the nature of the message it can be branded through one of the Communications Campaign Themes. Then the message is prepared for delivery using one or more of the Communications Venue and/or Channels / Media.

The Communications Plan is developed and executed for the MAESTRO 2.X Program overall and for each 2.X Release.