Stakeholder Communications

Management Plan

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# CapraTek Stakeholder Communications Plan

## Executive Summary

The Alfred! iOS Upgrade project is critical for establishing CapraTek's reputation for reliability in the smart home market. The success of this upgrade relies not only on technical execution but on ensuring that every stakeholder, from the Executive Sponsor to the Technical Lead, receives the right information at the right time, in a usable format. This Communications Management Plan is the roadmap for achieving the clarity that all stakeholders require.

The core objective is to prevent communication failure from becoming a source of project risk. Given the project's focus on rapid bug fixes, driver updates, and feature implementation using user stories, the communication environment must be highly interactive and collaborative.

The chosen communications model for this plan is the Interactive Communication Model. This model functions with the understanding that information exchange is a two-way street that requires immediate feedback and uses various channels to ensure the message is not only received but understood. This is a critical distinction from the simple Sender-Receiver model, as it accounts for noise (like the excessive emails Brad Anderson explicitly wants filtered) and promotes understanding through platforms like Slack for technical collaboration (as requested by Brandon Matthews) and dedicated summary dashboards for executive governance. This interactive approach directly supports the project's likely hybrid-Agile development style, where frequent, informal feedback is necessary between the development team and the Business Analyst.

This document serves as the primary control mechanism for all project communication moving forward.

## 1. Project Stakeholder Artifacts

### 1.1. Stakeholder Registry

The complete Stakeholder Registry is maintained as an official, separate document. It includes full contact information, organizational position, power/interest analysis, and a high-level summary of influence and impact for all identified stakeholders. The registry is a living document and will be reviewed and updated monthly, or immediately following any change in project staffing or key stakeholder assignments.

**Project Name: Alfred! iOS Upgrade**

**Project Manager: Kate Herrick**

**Date: October 10, 2025**

**Project Owner/Client: Brad Anderson**

| **Stakeholder Name** | **Organization Position** | **Responsibility** | **Authority** | **Project Interest** |
| --- | --- | --- | --- | --- |
| **Brad Anderson** | **Vice President, Product Development** | **Executive Sponsor** | **Ultimate** | **Low** |
| **Reed Massey** | **Director, Smart Home Technologies** | **Project Owner** | **Control** | **High** |
| **Julie Ellsworth** | **Director, Product Alliances** | **Consultant** | **Advisory** | **Medium** |
| **Shannon Coleman** | **IT Business Analyst** | **Business Analyst** | **Control** | **High** |
| **Brandon Matthews** | **Software Architect** | **Technical Lead** | **Control** | **High** |

### 1.2. Stakeholder Communications Requirements Document

The detailed communication requirements, including the specifics of the what, why, when, how, and to whom for each core stakeholder identified in the registry, are contained within the Stakeholder Communications Requirements Document. This document formalizes the mutually agreed-upon "communication contract" between the Project Manager and each key individual.

| Stakeholder Name | Title | Responsibility | Authority | Project Interest | Information Required | Format | Frequency | Engagement Type |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Brad Anderson | Vice President, Product Development | Executive Sponsor | Ultimate | High | Project Status.  Sprint Review Executive Summary. | Report | Normal: Bi-weekly  Risks/Issues: Immediately | Normal: Email  Risks/Issues: Phone |
| Peter Kennedy | Director, New Product Development | Product Sponsor | Ultimate | High | Project Status.  Progress against the Product Backlog and Sprint Goals.  Confirmation of user story acceptance and functional implementation.  Any scope, schedule, or cost changes. | Report  Team reports  Confirmation via attendance at team meetings | Status: Bi-weekly  Other: Daily  Risks/Issues: | Normal: Email, Meeting  Complex Issues: Phone/Meeting |
| Julie Ellsworth | Director, Product Alliances | Consultant | Advisory | High | Project progress related to external functionality, partner integrations, and product features.  Notification of potential issues that could affect partner commitments or public-facing communications.  Details of the public communication strategy. | Report,  Requirements,  Design Documents | Weekly | Normal: Email  Complex Issues: Phone/Meeting |
| Reed Massey | Director, Smart Home Technologies | Project Owner | Control | High | Progress against the Product Backlog and Sprint Goals.  Confirmation of user story acceptance and functional implementation.  Any scope, schedule, or cost changes. | Project Status  Team reports  Confirmation via attendance at team meetings | Status: Bi-weekly  Other: Daily  Risks/Issues: Immediately | Normal: Email, Meeting  Complex Issues: Phone/Meeting |
| Shannon Coleman | IT Business Analyst | Business Analyst | Control | High | All development team communications and technical findings.  Detailed requirements, including status and progress.  User story and acceptance criteria feedback. | Team communications (Slack/Jira/Confluence)  Deliverables documentation (requirements, functional specifications, user stories) | Normal: Daily  Risks/Issues: Immediately | Normal: Email, Meeting  Complex Issues: Phone/Meeting |
| Brandon Matthews | Software Architect | Techincal Lead | Control | High | Stakeholder/Owner requirements and changes.  All team communications.  NOTE: Information must be concise and brief to allow for focus time. | Team communications (Slack/JIRA/Confluence) | Normal: Daily  Risks/Issues: Immediately | Normal: Email, Meeting  Complex Issues: Phone  NOTE: Meetings only if other means of discussion are ineffective |

### 1.3. Communications Flow Chart

A visual representation of all established communication pathways, reporting lines, and escalation routes is detailed in the Communications Flow Chart. This chart visually depicts the flow of status reports to sponsors, technical data to the team, and external information to consultants like Julie Ellsworth. The flow chart also visually delineates the difference between routine daily team flow and formal executive reporting flow.

[Placeholder: Insert Communications Flow Chart Here (e.g., Visio Diagram)]

## 2. Communications Activities Schedule

The Communications Activities Schedule is a narrative description of the routine communication events that will take place from the current planning phase through to the product launch. The schedule functions on an iterative cadence, supporting the project’s need for rapid input and feedback.

### 2.1. Daily Activities (Team Level)

The primary communication mechanism for the technical team (Shannon Coleman, Brandon Matthews, Darren Stokes, Pranav Chowdury) is the Daily Stand-up (no more than fifteen minutes) and persistent communication via Slack. The stand-up focuses on progress, planned work, and immediate blockers. The Technical Lead, Brandon Matthews, will be included in these stand-ups, emphasizing the "shorter the better" rule, and will receive all core technical decisions via the Slack channel for documentation and review. Technical findings from Pranav (QA) and Darren (Dev) will be shared immediately on the internal channel.

### 2.2. Weekly Activities (Reporting Level)

A formal Weekly Status Report will be compiled by the Project Manager. This report is the primary source of information for the Project Sponsor, Peter Kennedy, and the Project Manager will tailor the executive summary specifically for him, focusing on scope completion, high-impact risks, and key decisions required. The full report will be distributed to all 'High Interest' stakeholders, including Julie Ellsworth (Product Alliances), who needs detailed updates on partner integrations and public-facing communications.

### 2.3. Bi-Weekly Activities (Governance and Review)

Every two weeks, the team will hold a Sprint Review. Peter Kennedy, the Product Sponsor, will be required to attend the Executive Summary portion of this review. This meeting serves as the primary governance gate, where the Project Manager will formally request Peter’s ultimate authority on any critical scope or timeline changes. Casey Walters (Customer Service Manager) will also receive detailed bi-weekly updates focused specifically on bug resolution metrics and the final deployment timeline to prepare his support team.

### 2.4. Monthly Activities (Executive and Strategic Level)

The Executive Summary Dashboard will be updated and reviewed monthly. This high-level summary, featuring Red/Yellow/Green status indicators for schedule, budget, and major risk, is the only routine communication delivered to Brad Anderson (Executive Sponsor). This honors his preference for filtered, pull-based information, avoiding unnecessary CCs and meetings. The Project Manager will ensure all raw status reports are archived in the central project repository so Brad can "pull key information... if and when I need it."

## 3. Communication Control and Monitoring Process

Communication control ensures that the right information reaches the right person effectively and efficiently, adhering to the principles of the Interactive Communication Model.

### 3.1. Standardized Templates and Repository

All formal documents (Project Charter, Status Reports, Decision Logs) will use standardized CapraTek templates. All formal communication, including meeting minutes and decision records, will be archived in the central project repository. This guarantees that Brad Anderson and other stakeholders can easily retrieve information when they choose to, rather than relying on push communication.

### 3.2. Feedback and Audit Loop

The Project Manager will conduct a Communication Effectiveness Audit one month into the project execution phase. This involves surveying key stakeholders, particularly Brandon Matthews (Technical Lead) and Peter Kennedy (Product Sponsor), to ensure their established communication preferences (e.g., conciseness, use of Slack/Email) are being honored. If a key stakeholder indicates that the information is too verbose or non-specific, the communication format will be immediately adjusted.

### 3.3. Managing Noise

A specific rule will be enforced to filter routine communication. Only information requiring a decision, flagging a critical risk, or confirming a milestone will be distributed widely. Routine technical discussions will be restricted to the team's dedicated Slack/Jira channels. This strictly adheres to Brad Anderson's and Brandon Matthews' requests to avoid "useless" meetings and routine CCs.

## 4. Escalation Process for Conflicts and Issues

This process defines the hierarchical path for addressing issues that cannot be resolved at the level where they are first identified. Clear escalation ensures that ultimate decisions are made by the appropriate authority (Peter Kennedy) without delay, thereby protecting the project’s timeline and scope.

### 4.1. Level 1: Project Team Resolution

*Trigger*: A technical disagreement, a minor resource conflict within the core team (Devs/BA/QA), or a blocker requiring outside assistance.

*Action*: The team (led by Brandon Matthews or Shannon Coleman) will attempt to resolve the issue within four hours via Slack discussion, a quick stand-up, or a focused problem-solving meeting.

*Outcome*: If resolved, the resolution is documented in the Daily Status Summary. If unresolved, it is immediately escalated to Level 2.

### 4.2. Level 2: Project Manager / BA Resolution

*Trigger*: Conflicts involving external parties (e.g., Product Alliances, Engineering Director) or scope creep identified by the Business Analyst.

*Action*: The Project Manager consults with Shannon Coleman (BA) and Jordan Doyle (Director of Engineering) or Julie Ellsworth (Director of Product Alliances) to negotiate a solution. The Project Manager must prepare a Decision Memo outlining three possible solutions, the recommended solution, and the impact on the budget/schedule. Resolution must be sought within one business day.

*Outcome*: If the solution impacts the core scope, budget, or timeline, it is immediately escalated to Level 3.

### 4.3. Level 3: Project Sponsor Resolution (Ultimate Authority)

*Trigger*: Unresolved conflicts, changes to the critical path, unmitigated major risks (e.g., a complex driver update fails), or any issue requiring the authority to reallocate significant resources or reject scope changes.

*Action*: The Project Manager contacts Peter Kennedy (Product Sponsor) via phone call (as per his high-risk preference) or a very concise email summary. The Project Manager presents the pre-vetted options from Level 2.

*Outcome*: Peter Kennedy exercises his Ultimate Authority to make the final decision. The decision is formally logged in the project's Decision Log and the Executive Summary Dashboard is updated to reflect the status.

### 4.4. Level 4: Executive Sponsor Notification

*Trigger*: Escalation to Peter Kennedy is complete, and the issue poses an immediate, critical threat to the overall project business case (CapraTek brand reliability).

*Action*: The Project Manager updates the Executive Summary Dashboard and sends a concise email to Brad Anderson notifying him of the issue, the decision made by Peter Kennedy, and the resulting change in the project's overall health (Red/Yellow status change).

## 5. Detailed Stakeholder Communications

This section describes the communication flow for the nine key stakeholders identified, ensuring alignment with their preferences and their role in protecting the project's core goal of brand reliability.

#### Brad Anderson (Vice President, Product Development - Executive Sponsor, High Interest)

*Information Communicated*: High-level project health (Red/Yellow/Green status), critical risks and mitigation status, and final deployment confirmation.

*How Communicated*: Monthly Executive Summary Dashboard and the central project repository. No routine emails or meeting invites.

*Communicated To*: All executive management and the CEO (for awareness of portfolio health).

*Purpose*: To confirm the project is aligned with strategic business goals and that the investment is protected, adhering to his need for filtered, summary-level data.

#### Peter Kennedy (Director, New Product Development - Product Sponsor, Ultimate Authority, High Interest)

*Information Communicated*: Detailed Weekly Status Report, key scope changes (e.g., feature prioritization), ultimate decisions required (e.g., resource conflicts).

*How Communicated*: Weekly Status Report via email, Bi-weekly Sprint Review attendance, and Phone Call for immediate, high-priority risk escalation.

*Communicated To*: Project Manager, Brad Anderson (via filtered updates), and key directors (for coordination).

*Purpose*: To allow him to exercise his Ultimate Authority to resolve blockers and ensure the project scope remains focused on brand reliability and core benefits.

#### Shannon Coleman (IT Business Analyst - Control, High Interest)

*Information Communicated*: All development team communications, detailed requirements status, user story creation and feedback, and QA findings.

*How Communicated*: Daily Stand-ups, team Slack channels, and formal user story documentation in the project tracking system.

*Communicated To*: Technical Team (Brandon, Darren, Pranav) and Project Manager.

*Purpose*: To facilitate the creation and acceptance of high-quality user stories that define the project requirements accurately.

#### Brandon Matthews (Software Architect / Technical Lead - Control, High Interest)

*Information Communicated*: Stakeholder requirements and changes, all team communications, and technical findings. NOTE: Information must be concise and brief.

*How Communicated*: Daily Stand-ups, Slack for immediate team communication, and Email for formal decision sign-offs. Meetings are to be minimized and only used when other methods fail.

*Communicated To*: Development Team, Project Manager, and Shannon Coleman.

*Purpose*: To maintain focus on the technical design and execution while remaining aware of stakeholder priority shifts.

#### Julie Ellsworth (Director, Product Alliances - Consultant, Advisory, High Interest)

*Information Communicated*: Project progress related to external functionality, partner integrations, notification of potential issues that could affect partner commitments, and details of the public communication strategy.

*How Communicated*: Weekly Status Report, Requirements Documents, and formal email for consultation.

*Communicated To*: Peter Kennedy, Project Manager, and Marketing.

*Purpose*: To advise on the external impact of the upgrade and ensure the project does not compromise existing product alliances.