Task Instructions

Task ID: 540
Task Name: *Share Florida PALM Updates*
Task Start Date: *July 15, 2024*
Task Due Date: *July 26, 2024*
Project Impact: *N/A*

Task Description

Share Florida PALM updates and agency progress with key agency stakeholders.

Task Overview

Florida PALM is a statewide business transformation that requires each state agency to plan and execute activities necessary to ready their people, processes, technology, and data for implementation. For a successful transition within your agency, communication with key stakeholders must be a priority. Consistent and effective communication will ensure your stakeholders are aware of the change, the status of the change, and what they need to do to prepare.

You have recently documented your agency stakeholders by identifying future Florida PALM end users (Task 512) and updating your CCN and Project contacts (Task 534). You have surveyed your future end users and analyzed their awareness of Florida PALM (Task 524). And now, you are currently updating your Workforce Readiness Plan (Task 535), which includes your agency's communications strategy and identification of key stakeholders.

This task (Task 540) requires that you share Florida PALM updates and agency readiness progress with different stakeholders in your agency to help ready your people for key milestones including User Acceptance Testing (UAT) in April 2025, end user training in July 2025, and Florida PALM go-live in January 2026. This task recurs on a quarterly basis and will later be replaced by monthly tasks to execute a go-live campaign within your agency. Future tasks are listed below:

- Task 559: Share Florida PALM Updates (October 2024)
- Task 582: Share Florida PALM Updates (January 2025)
- Task 598: Share Florida PALM Updates (April 2025)
- Task 616: Share Florida PALM Updates (July 2025)
- Task 621: Execute Florida PALM Go-Live Campaign (October 2025)
- Task 629: Execute Florida PALM Go-Live Campaign (November 2025)
- Task 633: Execute Florida PALM Go-Live Campaign (December 2025)
- Task 637: Execute Florida PALM Go-Live Campaign (January 2026)

Task Elements

To effectively share Florida PALM updates and agency progress with key agency stakeholders, the following steps should be completed.

Identify Key Stakeholders	→	Tailor Communication	→	Provide Regular Updates

Figure 1: Project Update Cycle

Identify Key Stakeholders

Identifying key stakeholders for communications in a project is essential for aligning objectives, securing support, managing expectations, mitigating risks and transferring knowledge. Use the information you collected in Task 512 and Task 534 to ensure that you have identified individuals in these key stakeholder groups:

- Agency Leadership
- CCN and SMEs
- Implementation End Users

There may also be other specific sets of people to whom you need to share information. Consider individuals who will be impacted by Florida PALM to determine who in your agency will need to receive related information, such as those impacted by Chart of Account changes. Stakeholder mapping tools such as a Stakeholder Template or RACI chart, can also be used to support your agency's identification and categorization of your workforce.

Tailor Communication

Tailoring communication is essential for audience relevance, clarity, managing expectations, and maximizing engagement. Communication topics and messages should be tailored based on the specific interests and needs of each stakeholder group.

Selecting appropriate communication channels for different stakeholder groups, and for the nature of the message, is equally essential for reaching the intended audience effectively, enhancing message clarity and impact, and ensuring that the appropriate stakeholder group receives the information they need. Table 1 lists the stakeholder groups, example topics and channels.

Table 1: Stakeholder Group Communication

Stakeholder Group	Example Communication Topics	Example Communication Channels
Agency Leadership	- Agency progress towards milestones - Risks and mitigations - Resource needs (e.g., positions or funding)	Executive Briefings
CCN and SMEs	- Agency transformation activities - Agency readiness tasks	Workshops, Meetings, Emails
Implementation End Users	- Training opportunities - Key milestone dates (Project and Agency) - Change Impacts (e.g., COA changes, configuration values)	Posters, Newsletters, Meetings, Emails
Other	Information specifically affecting a team (e.g., Agency Business System team)	Briefings, Emails

NOTE: *This is a great opportunity to challenge your SMEs or managers to develop communications tailored specifically for their area.*

The Project has provided a [*Florida PALM Update Resource*](link) as an example and can be used as the basis for your communication. This resource includes the Florida PALM updates that you can share, along with topic considerations for agency-specific updates. You may use the information in the template to create and facilitate your own communication mechanism (e.g., posters, meetings).

Provide Regular Updates

Providing regular updates during a project promotes transparency, unity, engagement, feedback, and success. Keeping stakeholders informed and involved during the project will enhance communication effectiveness, foster collaboration, and increase a successful implementation.

This is a recurring task that requires you to share information quarterly for each stakeholder group. However, we encourage that you share information more than once a quarter. This task (Task 540) has a two-week turnaround, but all update communications sent during May – July are relevant for this task.

How will agencies use this information?

In addition to promoting awareness, buy-in, and readiness, you can gather feedback from the communications you send. This will allow you to make data-driven decisions on effective communication methods, enhance agency engagement, and ensure that your entire agency is ready for Florida PALM Implementation (January 2026).

What will the Florida PALM Team do with this information?

The Project team will review your task submission based on the following criteria to confirm completion:

Table 2: Task Completion Rubric

Task Completion Rubric
Share Florida PALM updates with each of the required stakeholder groups: • Agency Leadership • CCN and SMEs • Implementation End Users (i.e., those listed in your Agency's Implementation End Users worksheet)
Complete the required fields in the Agency Communications sheet in Smartsheet for each communication.
Attach supporting documentation for each communication (e.g., PowerPoint presentation, newsletter, meeting agenda, meeting minutes).
The Task Tracker has been marked 100% submitted for this task.

Task Instructions

Using your Communication Strategy documented in your Workforce Readiness Plan (Tasks 503 and 535), Change Management Liaisons and Training Liaisons will communicate Florida PALM updates and agency progress with identified stakeholders on a quarterly basis. Communications shared between May – July should be included for this task submission.

If you have not already done so within the quarter, share Florida PALM and agency progress update information with each stakeholder group; your agency's message should be customized for each group. Complete the Agency Communication worksheet in Smartsheet for each communication sent, confirming that this task has been completed.

Smartsheet Navigation:
> *Florida PALM Workbook for (Agency) > Agency Readiness > Agency Engagement*
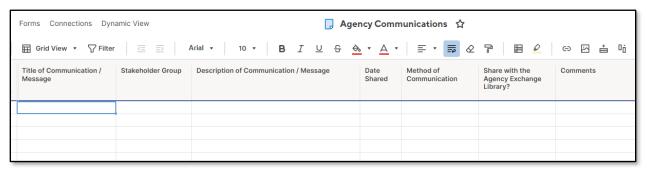

Figure 2: Agency Communications Worksheet

Table 3: Agency Communications Worksheet Instructions

Column Title	Required/ Optional	Column Instruction
Title of Communication / Message	Required	Insert a short title of your agency's communication / message.
Stakeholder Group	Required	Select the appropriate audience, one stakeholder group per communication.
Description of Communication / Message	Required	Describe the purpose of your communication and/or message.
Date Shared	Required	Select the date the communication / message was shared.
Method of Communication	Required	Select the method in which you communicated the message or type in your own method.
Share with the Agency Exchange Library?	Required	Select 'Yes' or 'No' if you give or do not give Florida PALM permission to share this communication in the Agency Exchange Library on the Florida PALM website.
Comments	Optional *(except when 'Other' selected)*	Add additional information in this column, including the specific stakeholder group / audience for the communication if you select 'Other' in the Audience column (e.g., All Agency, Third Party).
Attachment	Required	Attach the communication that was shared. If it was a meeting, attach what was discussed during the meeting.

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 2.

Table 4: Summary of Task Completion Steps

Summary of Task Completion Steps
1) With your Change Management and/or Training Liaison, review what you have previously shared and determine if additional updates are needed to be shared during this task duration.
2) If additional updates need to be shared, using the provided template or another communication prepared by your agency, share Florida PALM updates with each of the three agency stakeholder groups, *at a minimum,* and to 'Other' agency stakeholder groups, *optionally.*
3) Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator.
4) Complete task by **July 26, 2024,** by completing the Agency Communications worksheet in Smartsheet.
5) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
6) If you have questions regarding this task, participate in the *Thursday Task Talk* on **Thursday, July 18**, or contact your RC.

Supporting Materials & Resources:

- Florida PALM Update Resource
- Stakeholder Template
- RACI chart