Service Definition: Engagement and Communication Planning

About SOCITM Commercial Ltd

SOCITM Commercial provides independent, vendor-agnostic advisory and delivery support to local authorities, mayoral combined authorities and wider public sector organisations.

Acting as a trusted advisor and critical friend, we help clients navigate complex technology, service and organisational change. Our collaborative and evidence-based approach connects technology decisions with strategic priorities, service outcomes, affordability, deliverability and public value.

We bring an understanding of local government reform, devolution, shared services, digital transformation and ERP, CRM and EAM programmes. We work alongside client teams to simplify complex decisions, provide objective challenge and identify practical options tailored to each organisation's needs.

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1. Service overview

Our Engagement and Communication Planning service helps local authorities, mayoral combined authorities and wider public sector organisations build understanding, participation and adoption throughout complex transformation.

Acting as a trusted advisor and critical friend, SOCITM Commercial develops inclusive engagement and communication strategies for local government reform, devolution, shared services, ERP, CRM and EAM implementation, data legacy modernisation, cloud migration and digital transformation.

We align audiences, messages, channels, timing and feedback with programme milestones and decision points. This helps organisations manage change, reduce resistance, support workforce and partner readiness, and maintain confidence throughout delivery.

2. Who the service is for

The service is designed for public sector organisations that are:

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- Preparing for local government reform or devolution
- Introducing shared services or new operating models
- Implementing ERP, CRM or EAM platforms
- Modernising, migrating or retiring legacy data
- Delivering cloud or digital transformation
- Planning workforce, partner or resident engagement
- Managing complex cross-authority stakeholder environments
- Seeking stronger adoption, transparency and accountability

3. Challenges the service addresses

- Fragmented stakeholder communications
- Limited understanding of change impacts
- Resistance to new ERP, CRM or EAM processes
- Concerns about legacy data migration or retirement
- Inconsistent messages across partners and services
- Low workforce or user adoption
- Insufficient feedback and engagement mechanisms
- Reputational, political or service continuity risks

4. Scope of the service

The precise scope is agreed with the client and may include:

Area	Examples
Stakeholder landscape	Staff, leaders, councillors, residents, partners, suppliers and regulators
Change impacts	ERP, CRM, EAM, data legacy, service, role and operating model impacts
Messages	Purpose, benefits, risks, decisions, actions and service implications
Channels	Briefings, workshops, digital channels, surveys and engagement events
Timing	Discovery, procurement, design, migration, implementation and transition
Feedback	Consultation, user insight, issue capture and response mechanisms

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Governance	Approvals, ownership, escalation, assurance and reporting
Inclusion	Accessibility, assisted digital, equality and audience-specific needs

5. Our approach

Our approach is collaborative, proportionate and evidence-based. It is tailored to the organisation, transformation context and decisions the engagement must support.

1. Mobilise and agree scope: Confirm outcomes, audiences, governance, milestones and evidence needs.

2. Map stakeholders and impacts: Identify audiences, influence, concerns and change effects.

3. Develop the narrative: Create clear, consistent and evidence-based messages.

4. Design channels and activities: Select proportionate methods for communication, consultation and participation.

5. Align to delivery: Connect engagement to ERP, CRM, EAM, data legacy and programme milestones.

6. Assess risks: Identify resistance, misinformation, dependencies and reputational risks.

7. Validate and refine: Co-design the plan with programme, change and communications teams.

8. Prepare for handover: Provide templates, schedules, ownership and measures for delivery.

6. Assessment and delivery framework

The framework is agreed with the client and may include:

- Stakeholder influence and interest
- Change impact and adoption readiness
- Audience accessibility and inclusion
- Message clarity and consistency
- Channel suitability and reach
- Programme milestone alignment
- Feedback quality and responsiveness
- Governance, ownership and approvals
- Risks, dependencies and escalation
- Measures of engagement and adoption

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7. Deliverables

Deliverables are tailored to the requirement and may include:

- Engagement and communication strategy
- Stakeholder map and segmentation
- Change impact and audience analysis
- Message framework and communications narrative
- Channel matrix and phased activity plan
- ERP, CRM and EAM adoption plan
- Data legacy migration communications plan
- Engagement risk and mitigation register
- Workshop, survey and briefing templates
- Feedback and insight framework
- Executive summary and governance presentation

Outputs are provided in accessible, commonly used formats suitable for integration into programme governance, business cases, procurement, implementation and internal delivery processes.

8. Example use cases

Context	How the service can help
Local government reform	Engage staff, members, partners and communities through structural change.
Devolution	Coordinate communications across authorities, partners and new functions.
ERP implementation	Support process change, workforce readiness and platform adoption.
CRM implementation	Prepare service teams for customer data and workflow change.
EAM implementation	Engage asset, property, highways and operational teams.
Data legacy modernisation	Explain migration, retention, archival and data-quality decisions.
Shared services	Build alignment across organisations, functions and workforces.
Digital transformation	Support inclusive user engagement and sustainable adoption.

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9. Public sector standards and good practice

Where relevant, the service considers applicable public sector guidance, legislation and client policies, including:

- Government Service Standard and GOV.UK Service Manual
- Accessibility and inclusive design requirements
- Data protection and information governance expectations
- Public sector consultation and engagement policies
- Organisational change and adoption good practice
- Client communications, equality and governance requirements

Applicable standards and assurance requirements are agreed during mobilisation. The client retains responsibility for formal compliance, approvals, procurement and investment decisions.

10. Engagement model

The engagement is scoped according to organisational complexity, evidence availability, stakeholder participation and the breadth of systems, services and organisations involved. Delivery can be remote, on-site or hybrid and may include interviews, workshops, evidence review, analysis, co-design and executive briefings.

Timescales, team composition, deliverables and commercial arrangements are agreed for each engagement, enabling focused support or a broader organisation-wide assignment.

11. Knowledge transfer

Knowledge transfer is embedded throughout the engagement. We work alongside client teams, explain the methods used and provide reusable artefacts where appropriate. This builds internal confidence and supports sustainable ownership after the engagement.

12. Why SOCITM Commercial

- Public sector focus across local government and combined authorities
- Independent, vendor-agnostic advice and objective challenge
- Trusted advisor and critical friend approach
- Understanding of reform, devolution and shared services
- Experience across ERP, CRM, EAM and data legacy modernisation
- Evidence-based recommendations designed for governance decisions
- Practical focus on affordability, deliverability and public value

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13. Service boundaries

Engagement and Communication Planning is an advisory and planning service. Unless separately commissioned, it does not include ongoing campaign management, media relations, consultation administration, graphic design, routine content production or channel operation.

14. Client responsibilities

- Provide timely access to relevant stakeholders and documentation
- Confirm scope, governance, decision authorities and priorities
- Provide available system, data, supplier and programme information
- Identify applicable policies, standards and assurance requirements
- Validate factual findings, assumptions and recommendations
- Retain responsibility for compliance, approvals and implementation decisions

15. Client outcomes

- Clear and consistent transformation narrative
- Improved stakeholder alignment and programme ownership
- Greater ERP, CRM and EAM adoption readiness
- Reduced resistance and misunderstanding
- Better management of data legacy concerns
- More inclusive engagement and feedback
- Stronger governance and accountability
- Improved confidence throughout transition

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Contact us

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