EVERFI
Communications
Playbook

Communications Playbook

Welcome to the EVERFI Communications Playbook. This resource was designed to provide communications best practices, strategies, and sample assets for organizations using EVERFI courses. Whether launching one or more EVERFI courses, it is important to promote the courses to not only your employees but other stakeholders as well. This resource can help you to create or improve your communication strategy and increase participation.

Before diving into these resources, we recommend finalizing your larger implementation strategy. **The EVERFI Implementation Best Practices Guide** provides strategies to consider.

How to use this Playbook

1. **Review this resource with your implementation team in order to discuss who should be involved in creating and implementing the course communication strategy.**

2. **Follow the steps below to create your communication strategy.**

3. **Finalize your communication plan for each target population (see Appendix for sample template).**

4. **Use the sample assets to create your personalized communication tools.**

How to Create a Communication Strategy

Step 1: Define your Goals	**Example goals:** » Gaining the organizations buy-in around mandated/required training » Achieving a participation rate of 85% » Communicating important policies and resources to employees
Step 2: Identify your Target Audiences (both employees and other stakeholders)	**Example employee populations:** » New employees » Specific subpopulations (e.g. part-time, full-time) » Specific departments (e.g. sales, engineering, HR) **Other stakeholder populations:** » Managers/supervisors » Department and division leaders
Step 3: Develop your Message	» What is the problem or issue are you trying to impact? » Why should the target audience care? » What action do you want your target audience to take?
Step 4: Select your Communication Channels	**Possible channels include: email, social media, organization website or portal, print materials, in-course videos, in-person messages shared via managers or department leads**
Step 5: Create your Communication Plan	» Outline a full communication plan, including a timeline (see below for a sample) » Identify the appropriate "messenger" for each strategy » Brainstorm resources needed (e.g. materials, departments/colleagues)
Step 6: Execute!	**Collect necessary materials, connect with organization partners as needed, and draft your communication materials. A few tips: get feedback from your target audience, proofread your materials, and follow specific organization branding requirements.**

Employee Communication Plan

Featured below is a sample plan that includes both employee-facing communications as well as strategies for reaching other stakeholders. In order to institutionalize the course implementation, it is imperative that groups across your organization are aware of the program and completion requirements.

Click each communication below to view sample assets and templates. You can also access a template communication plan in the Appendix. Please note that you may have a different strategy and timeline. We hope that these sample strategies and assets serve as a starting point for your communication plan.

One Month Prior to Course Launch

	Employee Communications	Engaging Other Stakeholders
Four Weeks Before Launch	☐ Announcement in newsletter ☐ Finalize in-course Welcome Letter	☐ Employee Handbook
Three Weeks Before Launch	☐ Training requirement posted on employee website	☐ Email sent to employees introducing course requirement
Two Weeks Before Launch	☐ Email sent to employees introducing training requirement	☐ In-person announcement from managers to individual teams
One Week Before Launch	☐ Announcement in employee portal	☐ In-person announcement from leads at department-wide meeting

Month of Course Launch (and Ongoing as needed)

	Employee Communications	Engaging Other Stakeholders
Day of Launch	☐ Training invitation sent to employees	☐ Email sent to managers about launch to help field questions
One Week After Launch	☐ Reminders sent to employees weekly or bi-weekly	☐ Email sent to managers reminding them of training requirement
Two Weeks After Launch	☐ Reminder messages in employee portal	☐ In-person reminders at department or team meetings
Three Weeks After Launch	☐ Reminder in company newsletter	☐ In-person reminder from leads at department-wide meeting

Sample Assets and Best Practices

Email Templates

»   Introduction Email to Managers

»   Introduction Email to Employees

»   Course Invitation (with Instructions)

»   Launch Email to Managers

»   Reminder Email to Employees

»   Reminder Email to Managers

Email Best Practices

To make the most of your email communications, we recommend the following tips and tricks:

»   Keep it brief - only include critical information that conveys your message

»   Choose a prominent entity as the "Sender" of the email (e.g. CEO Office), and an authority figure to sign the email body (e.g. President, VP, Director of HR)

»   Choose catchy subject lines that include a call-to-action, such as:

»   "Mandatory Employee Harassment Prevention Training - Complete by August 30, 2018"

»   "Help keep our culture safe - Required Data Security training course available NOW!"

»   Feature your call-to-action by making it BOLD and highlighted

»   Personalize the email (if possible) with a logo, photo, or video link

»   Use bullets where possible instead of thick rich text

»   Include a link to a website where employees can find further instructions, FAQs, etc.

Email Tools

Lacking a central email resource at your organization to facilitate large email sends? Try an email or automation tool to aid in the process, such as: MailChimp, Zapier or Google Mail Merge.

Website & Portal Messages

»   Website Announcement

»   Introduction Message

»   Reminder Message

Print Materials & Other Digital Assets

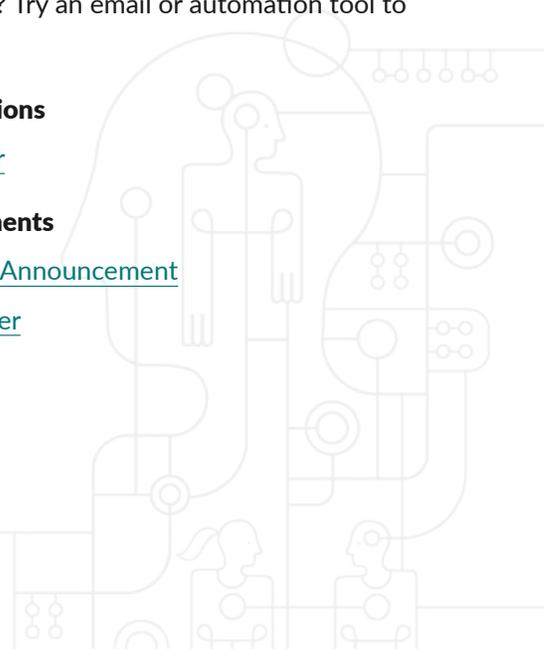»   Marketing Flyer

»   Employee Handbook

»   Newsletter Announcement

»   Newsletter Reminder

In-Course Customizations

»   Welcome Letter

In-Person Announcements

»   Course Launch Announcement

»   Course Reminder

Email Templates

Introduction Email to Managers

Dear Manager,

As you may know, <Organization name> has partnered with EVERFI to provide critical education and training to our employees. As part of our comprehensive training program, <Organization name> expects all employees to complete <Course Name(s)>. This online education will provide you and your fellow colleagues with important skills and resources to help foster a safe, inclusive, and healthy work environment.

<If you are requiring the course, this is a good place to state incentives/punitive measures. Using terminology noting the course is required/that participants must complete it or face a penalty has been found to yield greater participation. This is also a great place to reiterate the positive reasons that employees are being asked to take the course, including how it will benefit them.>

You and your colleagues will receive an email invitation with course access information on <DATE>. The training must be completed by <DATE>. As a supervisor, you play a critical role in modeling healthy behaviors. Please take time during your upcoming meetings to review this requirement with your colleagues. If you have any questions, please contact <Training Contact Name> at <insert email address> or at <insert phone number>.

Sincerely,

[Executive Name]

Introduction Email to Other Employees

Dear Employee,

As you may already know, <Organization name> has partnered with EVERFI to provide critical education and training to our employees. As part of our comprehensive training program, <Organization name> expects all employees to complete <Course Name(s)>. This online education will provide you and your fellow colleagues with important skills and resources to help foster a safe, inclusive, and healthy work environment.

<If you are requiring the course, this is a good place to state incentives/punitive measures. Using terminology noting the course is required/that participants must complete it or face a penalty has been found to yield greater participation. This is also a great place to reiterate the positive reasons that employees are being asked to take the course, including how it will benefit them.>

You will receive an email invitation with course access information on <DATE>. The training must be completed by <DATE>. If you have any questions, please reach out to your manager/supervisor or contact <Training Contact Name> at <insert email address> or at <insert phone number>.

Sincerely,

<Executive Name>

Course Invitation to Employees (with Instructions)

The invitation email template will differ depending on which EVERFI program you are utilizing. Your Customer Success Manager will provide additional guidance and resources.

> Dear <Organization name> Employee,
>
> Thank you for your commitment to <Organization name>. As part of our comprehensive training plan for employees, we are asking everyone to complete <Course Name(s)> by <DATE>.
>
> The trainings will provide you with important skills and resources to help foster a safe, inclusive, and healthy work environment. <Input information about mandate/punitive measures.>
>
> To get started, login here: <Insert login link and access instructions>.
>
> Thank you for your time and we hope you enjoy the training!
>
> Sincerely,
>
> <Executive Name>

Launch Email to Managers

> Dear Manager,
>
> You and your colleagues should have received a course invitation email today with information about accessing the required training. As a reminder, the training must be completed by <DATE>. Please be sure to complete the education in a timely manner and encourage your colleagues to do so as well. We appreciate your support in this process. If you have any questions, please contact <Training Contact Name> at <insert email address> or at <insert phone number>.
>
> Sincerely,
>
> <Executive Name>

Reminder Email to Employees

The reminder email template will differ depending on which EVERFI program you are utilizing.

> Dear Employee,
>
> This is a reminder to complete your required training by <DATE>. In order for <Organization name> to create a safe, inclusive, and healthy work environment, it is imperative that all employees complete this education. If you have any questions, please contact <Training Contact Name> at <insert email address> or at <insert phone number>.
>
> Sincerely,
>
> <Executive Name>

Reminder Email to Managers

> Dear Manager,
>
> We recently sent a reminder to all employees who have not yet completed the required training. If you or a colleague received this email, remember that you must complete the education by the deadline of <DATE>. Please make time during any upcoming meetings to confirm this requirement with your colleagues. f you have any questions, please contact <Training Contact Name> at <insert email address> or at <insert phone number>.
>
> Sincerely,
>
> <Executive Name>

Website & Portal Messages

Website Announcement

If possible, place this announcement on a prominent banner on your organization's main website.

> <Organization Name> <Course Name(s)> will be available starting <DATE>. Check your email or visit our website here <insert link> for further instructions. Thank you for your commitment to maintaining a safe and supportive workplace!
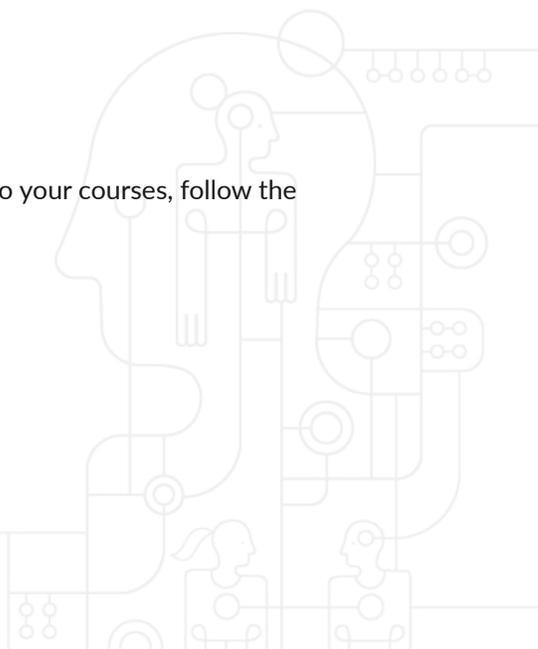
Introduction Message

If possible, create a notification that will appear when employees sign into the organization portal.

> EVERFI courses are now open! All assigned courses must be completed by <DATE>. Click here for further instructions: <insert link>.

Reminder Message

> Don't forget - EVERFI course assignments are due by <DATE>. To log in to your courses, follow the instructions here: <insert link>.

Print Materials & Other Digital Assets

Marketing Flyer

Post flyers in common areas where faculty and staff members will see them (e.g. break/lunch rooms, department offices, health center, gym).

> Key Information to Include:
>
> - Who is required to take the courses
>
> - Key dates and deadlines
>
> - Where to go to learn more (website, employee portal, etc.)

Employee Handbook

Note: We recommend adding information about required training to new employee orientation materials or handbooks.

> **Required Training for Managers/Supervisors**
> <Organization name> has partnered with online education leader EVERFI to provide an extended catalog of online compliance and prevention courses. These trainings address critical topics such as harassment and discrimination, FERPA, data security, diversity and inclusion, and more. <Organization name> employees will be asked to take many of these courses that must be completed each year or every other year.
>
> You will be receive information about each course assignment and access instructions through your organization-provided email address. Please note that you must utilize this email address to comply with our training standards. Each department will be responsible for deployment and tracking of the course requirements. To find out who your administrator is (and for other assignment questions), please contact <Training Contact Name> at <insert email address> or at <insert phone number>.

Newsletter Announcement

> **Required Training for Employees**
> <Organization Name> is excited to announce that we have partnered with online education leader EVERFI to provide critical compliance and prevention training to our employees.
>
> As part of our comprehensive training program, all employees are expected to complete <Course Name(s)>. You will receive an email communication on <DATE> with additional information about the course as well as instructions for accessing the education. You will also receive reminders via email, online, and in-person, so be on the lookout!
>
> If you need technical support, please utilize the "Help" button located within the course. For non technical questions, please contact <Training Contact Name> at <insert email address> or at <insert phone number>.
>
> We are excited to be offering such comprehensive information to better serve you as a member of our community at <Organization name> and beyond!

Newsletter Reminder

Newsletter placement tip: *Add this to a prominent spot within the newsletter (e.g. above a header on the front page)*

> Don't forget to complete your EVERFI courses: <Course Name(s)>! You have until <DATE> to complete any assigned training.
>
> Experiencing technical difficulties? Check out our website <insert link> for troubleshooting tips. You can also visit EVERFI's 24/7 support page where you can call, chat, or email a support representative. The support page is accessible via the "Help" button located within the course.

In-Course Customizations

Welcome Letter

Note: *When writing your Welcome Letters, be sure to utilize positive framing and include specific learning outcomes and reasons why employees are being asked to take the course. You can access course descriptions in the administrative portal or through your Customer Success Manager. Below is an example for a Harassment & Discrimination course.*
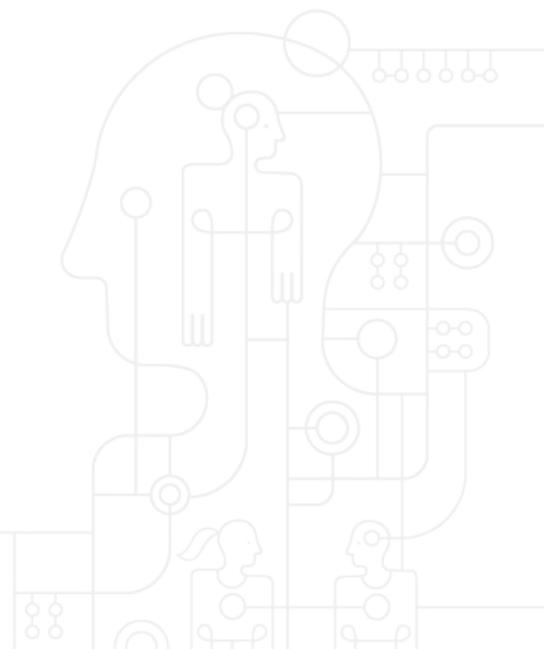
> Dear Employee,
>
> <Organization name> is committed to providing a safe and supportive learning and working environment. As such, the members of our organization will not tolerate any offenses from sexual harassment to data security breaches. This program is intended to help you learn more about these issues as you play an important role in keeping our work environment safe.
>
> The deadline for completing this course is <DATE>. If you have any questions about policies, procedures, or support resources related to harassment, discrimination, data security, or workplace bullying, please contact <Name, Contact Information>. We hope you enjoy the course, and we thank you for your service at <Organization name>!
>
> Sincerely,
>
> <Executive Name>

In-Person Announcements

Note: Enlist managers, team and department leads, and workgroup leads to help with communications. We recommend that they share the course launch information, deadlines, and reminders with their employees in person during regular meeting, as well as in newsletters or emails.

Course Launch Announcement

Below is a list of items to include in the announcement:

» The purpose and importance of the course(s)

» Who is required to take the course(s)

 » If employees are being required to complete a similar course, share the timeline and expectations for that course as well

» Course launch dates and deadlines

» The mandate or consequences for non-completion

» Explain that the education is powered by EVERFI so that the name is familiar to them when they receive the email(s) in their inbox

» How they will learn about the course and how to log in

 » For example: an email (and subsequent reminder emails) will be sent to their .com email address, which will include login directions and links to the platform

» How to access support for technical questions and where to go for non-technical questions

Course Reminder

Below is a list of items to include in the announcement:

» Reminder emails have been sent if they have not completed the course(s) yet

» Course due dates

» The mandate or consequences for non-completion

» How to access support for technical questions and where to go for non-technical questions

Appendix - Communication Plan Template

Goals for Implementation

- »
- »
- »
- »
- »
- »

Prior to Launch

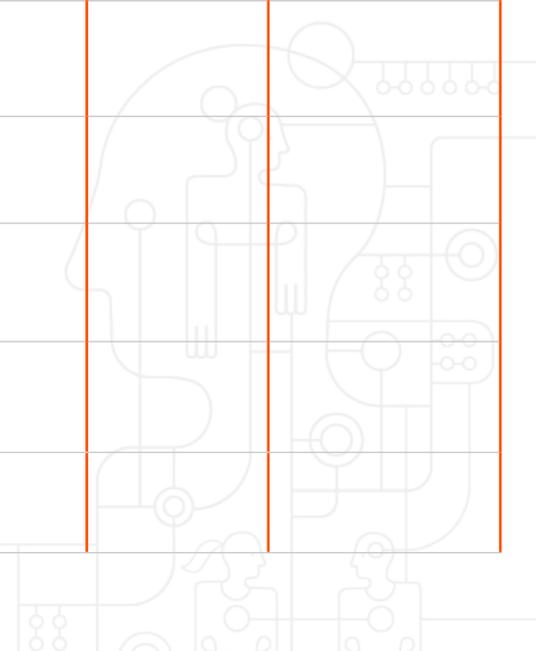| Date of Communication	Course	Type/Channel	Target Population	Message	Messenger	Resources Needed

Appendix - Communication Plan Template

Launch

Date of Communication	Course	Type/Channel	Target Population	Message	Messenger	Resources Needed

Post-Launch

Date of Communication	Course	Type/Channel	Target Population	Message	Messenger	Resources Needed

EVERFI

EVERFI is the leading education technology company that provides learners of all ages education for the real world through innovative and scalable digital learning.

everfi.com/corporate-compliance