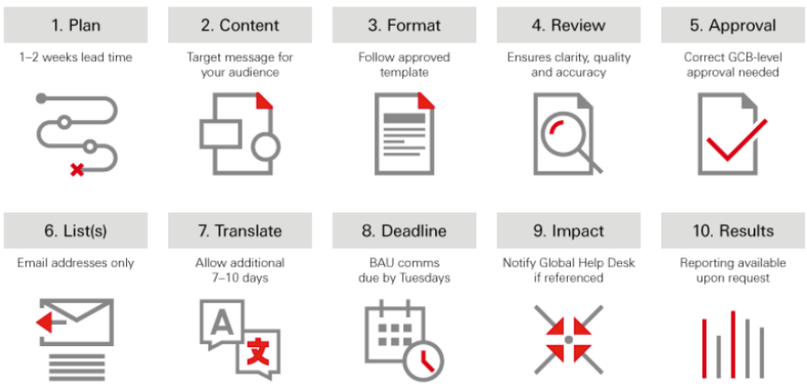

10 steps to successful communications

Step No. 1 - Plan: Communications should be taken into account in the earliest stages of projects and programmes:

- At least one week's notice is needed for all communications (see step 8).
- Same-day communications cannot be accommodated unless there is a genuine emergency or business need. GCB3 approval (or higher) is required.
- Dedicated resource may be required for large projects with multiple communications. Please reach out to ian.mercer@hsbc.com to discuss requirements.

Step No. 2 - Content: Consider what the recipient needs to know and what action they might need to take. Questions to ask:

- Is the message relevant?
- Is there action to take or avoid?
- What is the impact and for how long?
- Are there steps to follow?
- Have you included screenshots or supporting imagery?
- Will you be including a survey or questionnaire? (This needs review/approval by our team before sending.)
- Will you be referencing or linking to any documents? Are they up to date? Are they brand compliant? (These need review/approval by our team before sending.)
- If you link to a Service Now article, is it accurate and up to date?
- If you want an article sent to all colleagues: These messages must be on point and relevant to everyone. The message should be clear and concise.

Step No. 3 - Format: Use this template to help create and structure your message. Include appropriate image(s) if they support the message.

Step No. 4 - Review: The review process differs depending on whether the communication is for Tech Tuesday, Dashworks, or is a stand-alone comm. Tech Tuesday is reviewed by CS ExCo, CS Product Management/Customer Experience and all requestors. Editorial changes may be made during the process; you will be informed of significant changes wherever possible.

For Dashworks: The CX Communications team will review and edit the messaging as required, before sharing with the Dashworks team for process ratification.

Step No. 5 - Approval: How many people are receiving this communication? See the chart below for approval requirements. A forwarded email from the approver is preferred, rather than just providing the name. **Please note:** It's up to the requestor to secure all GCB approvals. The CX Communications team will seek HOST Comms approval.

For Dashworks: If you don't know the expected number of recepients, GCB4 and Host Comms approval are required as a minimum.

Number of recepients	GCB approval required	HOST Comms approval required?
Up to 5,000	GCB4	No
5,001- 25,000	GCB3	No
25,000+ / all colleagues	CS ExCo member OR ITID ExCo member	**Yes (arranged by CX Comms team)**

Step No. 6 - List(s): Provide **email address and country** for each recipient in an Excel spreadsheet. For best results:

- Use external formatted email addresses only, e.g. firstname.secondname@hsbc.com or firstname.secondname@noexternalemail.hsbc.com
- Do not use Outlook hashtag groups, movi, gmail or any other external email addresses. These will be removed.
- We do not communicate to Saudi Arabia. Typically those emails are "sabb.com," @sabbtakaful.com" and "hsbcsa.com." These will be removed.
- Employee data in our email system is updated weekly. When your email list(s) are uploaded, the system checks each address against the most recent data. As a result, the final recipient count may be fewer than what you provided.
- **Special note about Executives:** Distribution lists may now include Executives (in most countries that is GCB 0; in the U.S. and Hong Kong Execs are GCB 0-2). All messages to Executivess will be reviewed and approved prior to distribution. If approval is not granted for Executives to receive a particular comm, they will be removed from the distribution list.
- **Special note about comms to Switzerland:** If your distribution list includes people in Switzerland, additional review and approval are needed prior to distribution. If approval is not granted, those colleagues will be removed from the distribution list.

For Dashworks: Distribution lists and process need to be coordinated with the Dashworks team.

Step No. 7 - Translate: If the recipient needs the information to do their job, the communication must be translated. Translation is undertaken by a third party; please allow an additional 7-10 days.

- Canada (French-Canadian) - **MANDATORY**
- France (French) - **MANDATORY**
- Latin America (Spanish) - Mexico, Colombia, Argentina, Uruguay, Chile, Peru - **MANDATORY**
  - Translations to Latin America require additional approval, so allow more time.
- Turkey - **MANDATORY**
- China – **PREFERRED**
- Other countries may have translation requirements, depending on the nature of the communication.

For Dashworks: The requester needs to confirm which (if any) translations are needed.

Step No. 8 - Deadline: Communications that don't need translation should be submitted by Tuesday for publication the following Tuesday. (Unsure if translation is needed? We can tell you after you provide the list.) If translation is required, please allow an **additional 7-10 days**. Translations are arranged **after** the English version is finalised.

Step No. 9 - Impact: If your communication could have an impact on the Global Help Desk, please notify them in advance: cs.projects.and.pilot.hdpi@noexternalemail.hsbc.com.

Step No. 10 - Results: Reporting is available upon request. This includes number of recipients, opens, clicks, bounces and other data which can be made available to you 3-5 days after your communication is sent.

For Dashworks: Not available for communications sent from Dashworks.