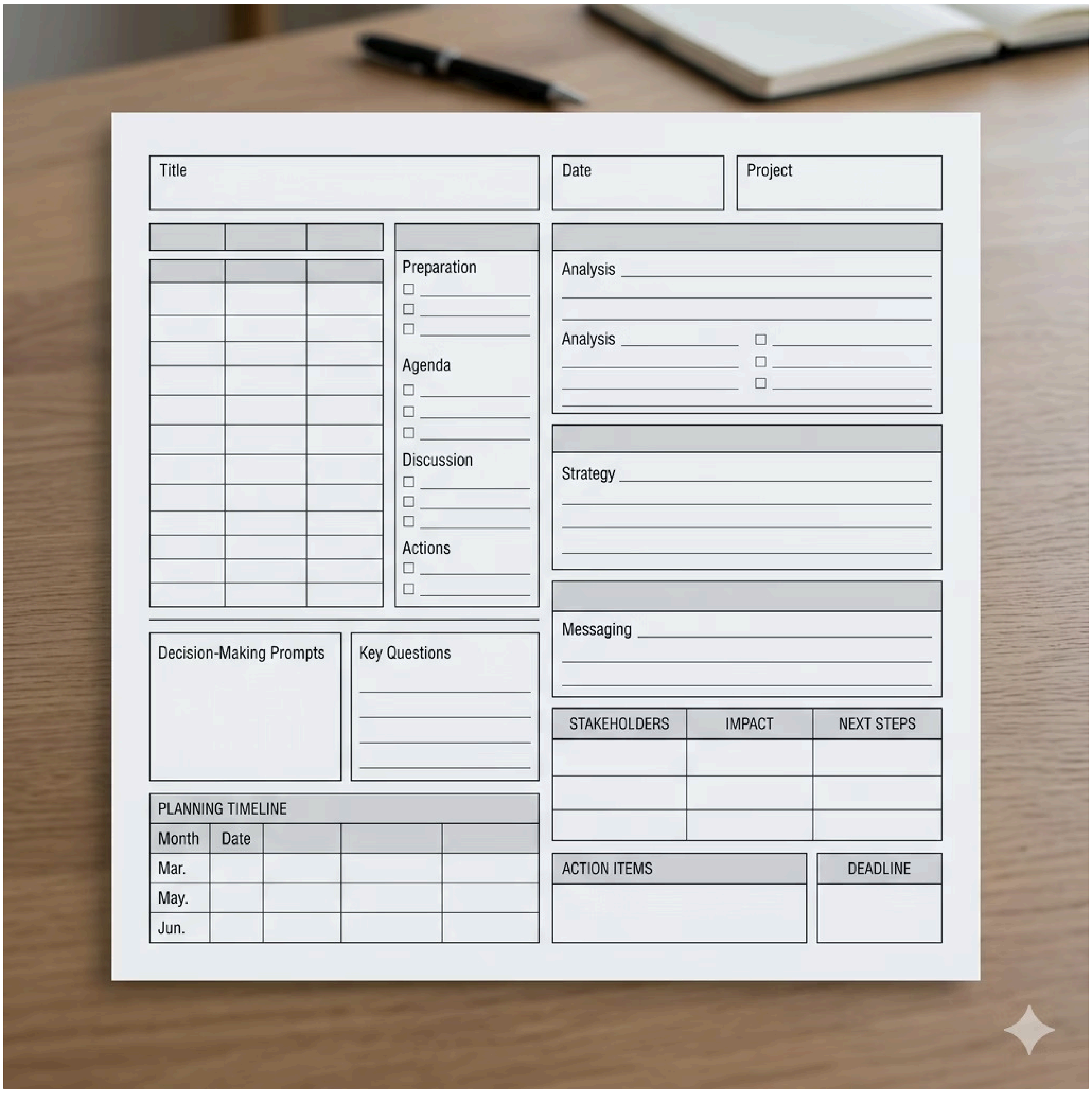
Communication Prioritization Worksheet (What to Say & When)

A practical, action-ready worksheet for working professionals who need to communicate with clarity, confidence, and strategic intent. Whether you are navigating a high-stakes meeting, managing up, or deciding what to put in writing — this worksheet gives you the frameworks, prompts, and decision tools to get it right, every time.



INTRODUCTION

Why Communication Prioritisation Is a Career Superpower

Most professionals are never taught *when* to communicate — only *how*. The result? Inboxes flooded with unnecessary messages, critical information buried in long email threads, meetings that could have been a Slack message, and urgent decisions delayed because the right person was not in the loop. Poor communication prioritisation does not just waste time — it erodes trust, slows careers, and signals poor professional judgement to those watching from above.

Communication prioritisation is the discipline of deciding: **What needs to be said? To whom? Through which channel? And when?** It is not about saying less — it is about saying the right thing at the right moment to the right person. Senior professionals and high-performers share one trait: they are ruthlessly intentional about their communication choices. They know that a poorly timed message can derail a project just as quickly as a poorly worded one.

This worksheet is designed to give you a structured, repeatable system for making those decisions quickly and confidently. It is built around real workplace scenarios — the kind you encounter in performance reviews, project updates, stakeholder conflicts, and career conversations. You will not find academic theory here. You will find frameworks you can use before your next meeting, templates you can fill in tonight, and checklists you can print and pin to your desk.

What Problem This Solves

- Overcommunication that overwhelms stakeholders
- Undercommunication that creates blind spots
- Wrong channel choices (email vs. call vs. meeting)
- Poorly timed messages that miss the moment
- Unclear ownership of communication responsibilities

How to Use This Worksheet

- **First pass:** Read through for context and framing
- **Active use:** Fill in the worksheets with a real current scenario
- **Reference:** Return to specific frameworks as situations arise
- **Share:** Use with your team to align communication norms

MODULE 1

The Communication Audit — Where Are You Right Now?

Before you can prioritise better, you need to see clearly where your current communication habits are helping — and where they are hurting you. Most professionals carry blind spots: they over-communicate in areas where they feel comfortable and under-communicate in areas that feel uncomfortable or politically sensitive. This audit is designed to surface those patterns quickly so you can take targeted action.

Take 10 minutes to answer the following honestly. There are no right or wrong answers here — only useful ones. Think about the past two to three weeks at work as your reference point.

1

Volume Check

How many messages (emails, Slack, WhatsApp, texts) did you send in a typical workday last week? Were most of them necessary, or could half have been avoided?

Reflection: Rate yourself 1–5 on: "I only communicate when it adds clear value."

2

Channel Audit

Think of your last five important communications. Did you choose the right channel each time? Did any cause confusion because of the medium chosen?

Reflection: Write down one instance where a different channel would have been more effective.

3

Timing Review

Were there moments in the past fortnight where you communicated too late — and it caused friction? Or too early — before you had enough information?

Reflection: Note one "too late" and one "too early" instance below.

4

Audience Awareness

Do your key stakeholders consistently feel informed — neither overwhelmed nor left in the dark? Who on your list might currently feel either extreme?

Reflection: Name one stakeholder you need to recalibrate your communication cadence with.

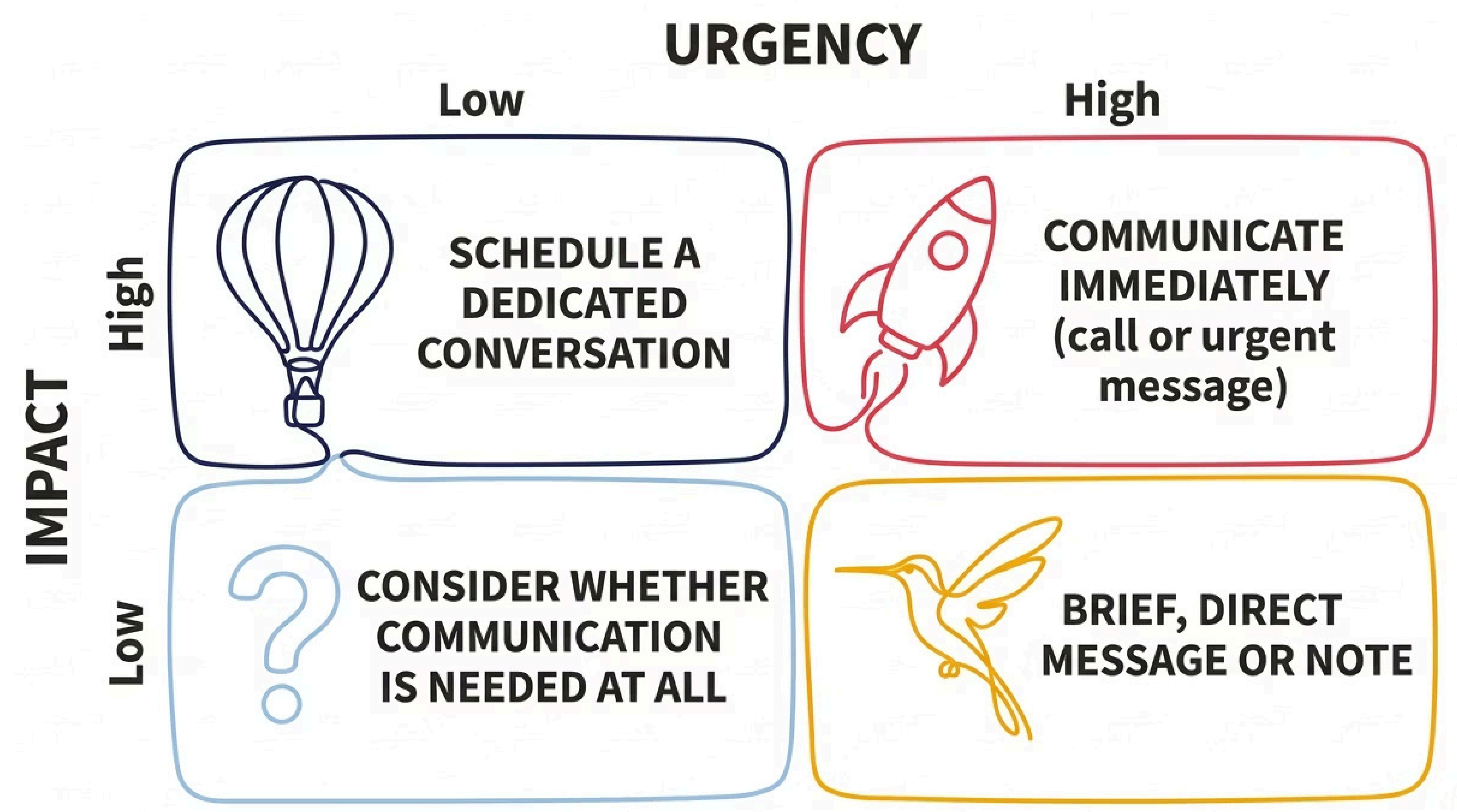
✏️ **Your Audit Notes:** Use the space below to jot your honest answers. This is your personal baseline — you will refer back to it at the end of this worksheet to measure your shift. **Biggest current gap:** ____ **One quick win I can act on this week:** ____

MODULE 2

The Priority Matrix — What Actually Needs to Be Said?

Not everything that crosses your mind needs to be communicated. One of the most underrated professional skills is the ability to filter — to distinguish between information that must be shared, information that should be shared, and information that simply does not need to travel beyond your own thinking. The Priority Matrix below gives you a repeatable decision tool for exactly this.

Every time you are about to send a message, schedule a conversation, or call a meeting, run it through this two-axis test: **Urgency** (how time-sensitive is this?) and **Impact** (how significantly does this affect others' decisions, actions, or wellbeing?). The intersection tells you what to do next.



The matrix is not a bureaucratic checklist — it is a fast mental model. With practice, you will run this filter in seconds. The goal is to reduce reactive communication (responding to everything immediately) and increase intentional communication (choosing when and how to engage based on real strategic value).

✏️ Apply It Now: Your Current Top 5 Communications

List five communications you need to make this week. For each one, assign an Urgency score (1–5) and an Impact score (1–5), then decide: Immediate / Scheduled / Brief note / Skip.

Communication	Urgency (1–5)	Impact (1–5)	Decision
1. ________________	___	___	_________ _______
2. ________________	___	___	_________ _______
3. ________________	___	___	_________ _______
4. ________________	___	___	_________ _______
5. ________________	___	___	_________ _______

Quick Decision Rules

- **Score 8–10:** Communicate now, do not delay
- **Score 5–7:** Plan it intentionally
- **Score 3–4:** Consider async or brief note
- **Score 1–2:** Ask: does this need saying at all?

Trust your score. Most professionals over-communicate in the 1–4 range and under-communicate in the 8–10 range.

MODULE 3

The Channel Decision Guide — Right Medium, Right Moment

Choosing the wrong channel is one of the most common and most costly communication mistakes professionals make. A sensitive piece of feedback delivered over email instead of face-to-face can permanently damage a relationship. A project update buried in a meeting when a simple async note would do wastes everyone's time. A Slack message used for a complex, nuanced decision creates misunderstanding and back-and-forth that could have been resolved in a five-minute call.

Channel choice signals your judgement. When you consistently pick the right medium for the message, people notice — you come across as thoughtful, efficient, and trustworthy. The guide below breaks down the six most common workplace communication channels and tells you exactly when to use each one.

📧 Email

Use when: You need a formal record, the content is complex and benefits from being read at the recipient's pace, or you are communicating with multiple stakeholders who need the same information.

Avoid when: The topic is emotionally sensitive, requires back-and-forth dialogue, or needs immediate action.

💬 Instant Messaging (Slack, Teams, WhatsApp)

Use when: The message is brief, low-stakes, and benefits from quick response. Also effective for informal check-ins and sharing links or short updates.

Avoid when: The content is nuanced, confidential, or likely to be misread without tone and context.

📞 Phone / Video Call

Use when: You need real-time dialogue, the topic involves conflict or sensitivity, you need to read tone and body language, or you need to build or repair a relationship.

Avoid when: A written record is needed or the information is simple enough to summarise in text.

📅 Scheduled Meeting

Use when: Multiple stakeholders need to align, decisions require group input, or you are kicking off or closing a significant project phase.

Avoid when: The outcome could be achieved with an email, doc, or brief call — this is where "this meeting could have been an email" applies.

📄 Document / Shared Doc

Use when: The information is detailed, needs to be referenced over time, requires collaborative input, or needs to be accessible to a broad audience asynchronously.

Avoid when: Speed is critical — documents take time to write and read properly.

🤝 In-Person / Face-to-Face

Use when: Trust-building, performance conversations, sensitive feedback, negotiation, onboarding, or any high-stakes relational moment. Nothing beats it for emotional resonance.

Avoid when: Geography, time, or the nature of the content makes it impractical or disproportionate.

☐ ✏️ **Channel Audit Prompt:** Think of the last time you chose the wrong channel for a message. What happened? What would you do differently now using this guide? Write 2–3 sentences below.

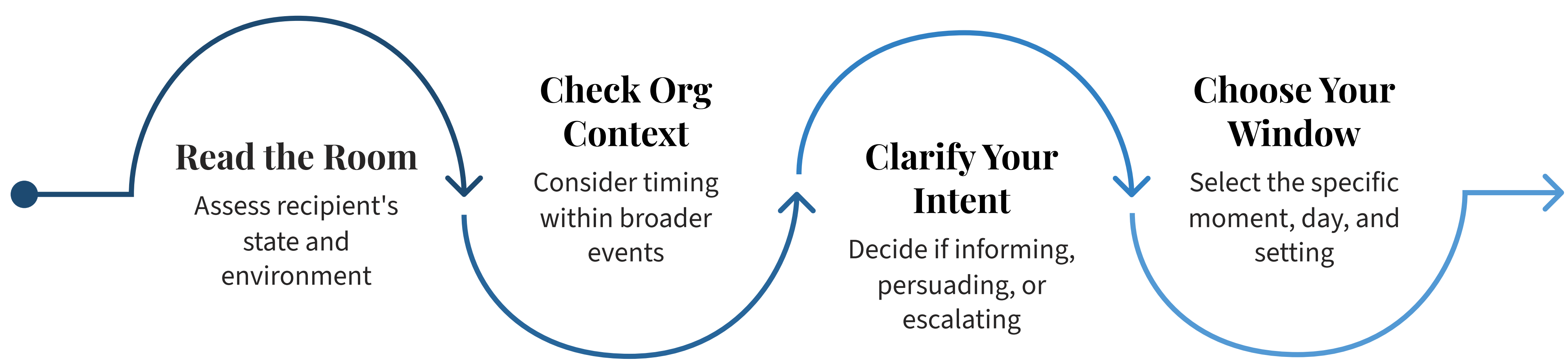
____

MODULE 4

The Timing Framework — When Is the Right Moment?

Timing is the invisible variable in communication — the one most professionals never consciously consider. The same message, delivered at the wrong moment, can be ignored, misunderstood, or even create a crisis. Delivered at the right moment, it lands with impact, builds credibility, and drives the action you need. Professionals who understand timing are perceived as politically astute, emotionally intelligent, and strategically sharp.

Timing is shaped by three factors: **the recipient's current mental state** (stressed, open, distracted), **the organisational moment** (end of quarter, post-conflict, pre-review), and **the communication's purpose** (inform, persuade, escalate, resolve). Getting all three right gives your message the best possible chance of being received well and acted upon.



The framework above is designed to be run mentally in under 60 seconds before any significant communication. It becomes a habit quickly — and the payoff is immediate. Your messages get better responses, your conversations feel less combative, and your stakeholders begin to see you as someone who communicates with purpose rather than impulse.

Timing Red Flags — Never Communicate When:

- You or the recipient are in the middle of a high-stress moment
- The organisation is mid-crisis and your message is not crisis-related
- You are emotionally activated and have not had time to reflect
- The recipient has just received difficult news
- It is a Monday morning or Friday afternoon for anything nuanced
- You are rushing and cannot give the communication proper thought

Timing Green Lights — Ideal Windows:

- Mid-week mornings for complex or sensitive conversations
- After a shared success — momentum creates receptivity
- When you have scheduled, uninterrupted time with the recipient
- Post-project-close, when people are reflective and open
- At the start of a new cycle — new quarter, new project, new role
- When you have done your prep and have clear context to offer

✏️ **Timing Practice:** Pick one important conversation you have been delaying. Use the four-phase framework to plan your timing. Write your plan here: **Read the Room:** _______________ **Org Context:** _______________ **Your Intent:** _______________ **Your Window:** _______________

MODULE 5

The Stakeholder Communication Map — Who Needs to Know What

One of the most frequent communication failures in professional life is getting the audience wrong. Either critical stakeholders are left out of conversations they needed to be part of, or too many people are copied on messages that dilute focus and create noise. Both extremes carry professional risk. Strategic communicators know exactly who needs to be in each conversation — and who should be kept informed without being pulled into every exchange.

The Stakeholder Communication Map is a simple but powerful tool for mapping your communication responsibilities across key relationships. It is particularly useful at the start of a new project, role, or quarter — and as a regular recalibration exercise when communication starts to feel chaotic or misaligned.

Must Know — Always In the Loop

These are the people whose decisions, actions, or authority are directly affected by your work. Leaving them out, even once, can create trust deficits that take months to repair. Identify 2–3 people who fall into this category for your current role or project.

Examples: Your direct manager, the project sponsor, the client lead.

Should Know — Regular Updates

These stakeholders benefit from knowing what is happening but do not need to be consulted or involved in decisions. They need enough information to stay aligned, but not so much that they become a bottleneck or feel responsible for your work.

Examples: Cross-functional partners, senior peers, indirect managers.

Good to Know — Occasional Visibility

These are stakeholders who benefit from high-level visibility — typically once a milestone is reached or a significant outcome is achieved. Over-communicating with this group creates noise; under-communicating misses a visibility opportunity.

Examples: Senior leadership, board members, large cross-functional teams.

✏️ Your Stakeholder Communication Map

Complete the table below for your current primary project or role. Be specific — name people, not just titles. This becomes your communication cadence guide.

Stakeholder Name	Category (Must / Should / Good)	Preferred Channel	Frequency / Trigger
_______________	_______________	_______________	_______________
_______________	_______________	_______________	_______________
_______________	_______________	_______________	_______________
_______________	_______________	_______________	_______________
_______________	_______________	_______________	_______________
_______________	_______________	_______________	_______________

REAL-WORLD APPLICATION

Case Study: Priya's Communication Reset

Priya is a mid-level project manager at a mid-sized technology company. She has been in her role for three years and is well-liked — but she has started to notice that she is rarely included in senior-level conversations. When she asked her manager for feedback, she was surprised: *"You communicate a lot, but it is hard to tell what is urgent and what is just an update. And sometimes I find out about problems through others before you tell me."*

This landed hard. Priya was not under-communicating — she was communicating a lot. But she was communicating reactively, without prioritisation, to the wrong people, through the wrong channels, at the wrong times. She decided to use this worksheet as a reset.

Week 1: Audit

1

Priya completed the Communication Audit (Module 1). She discovered she was sending 40+ Slack messages daily — most of them unnecessary. She had zero structured stakeholder update cadence.

Week 2: Matrix

2

She applied the Priority Matrix to every communication for a week. She reduced her daily message volume by 60% and started scheduling two proactive updates instead of reactive ones.

Week 3: Channel + Timing

3

Priya moved all project risk updates to email with a clear subject line format. She shifted sensitive conversations to video calls. She began timing her manager updates for Tuesday mornings.

Week 6: Stakeholder Map

4

She built her first Stakeholder Communication Map. Her manager noticed the change within two weeks. Within six weeks, she was invited to a senior strategy meeting for the first time.

> "I had no idea how much my communication habits were holding me back. The shift was not about saying more — it was about saying the right thing, to the right person, at the right moment. It felt uncomfortable at first, but within a month it became second nature."
>
> — **Priya, Project Manager (composite case study)**

Common Mistakes and Fixes

Common Mistake	What Goes Wrong	The Fix
Copying everyone on emails "just to be safe"	Creates noise, dilutes accountability, overwhelms inboxes	Use the Must / Should / Good stakeholder tiers
Using Slack for sensitive topics	Tone is lost, message is misread, trust is damaged	Switch to call or in-person for anything nuanced
Waiting until a problem is critical to escalate	Manager feels blindsided, trust erodes quickly	Create a weekly proactive update ritual
Communicating under stress or when reactive	Messages are poorly worded, defensive, or premature	Use the Timing Red Flags checklist before sending
No cadence — communicating only when pushed	Stakeholders feel out of the loop, seek info elsewhere	Build a communication calendar using your Stakeholder Map

ACTION TOOLKIT

Your Weekly Communication Prioritisation Checklist

This checklist is designed to be used every Monday morning — or at the start of any new project phase. It takes under 10 minutes and dramatically improves the intentionality and quality of your communication for the week ahead. Print it, keep it in Notion, or screenshot it to your phone. The goal is consistent, habitual use — not perfection on day one.

Before You Send Anything

- Have I asked: does this need to be said at all?
- Have I chosen the right channel for this content?
- Is this the right moment for the recipient?
- Am I communicating with enough — or too much — context?
- Is there a clearer, shorter way to say this?

Weekly Stakeholder Check

- Who needs a proactive update from me this week?
- Is anyone on my "Must Know" list currently in the dark?
- Have I escalated anything that should have been escalated sooner?
- Do I have any sensitive conversations I have been avoiding?
- Are my cadences with key stakeholders still appropriate?

High-Stakes Message Review

- For any message scored 8–10 on the matrix: have I drafted this carefully?
- Have I stress-tested the tone — is it clear, confident, not defensive?
- Have I been specific about what action, if any, I need in return?
- Have I given the recipient enough time to respond before a decision is needed?
- Have I confirmed receipt of critical communications where needed?

The 3-Sentence Rule — A Template for Every Update

When you need to communicate an update quickly and clearly — to a manager, client, or stakeholder — use this three-sentence structure. It works for email, Slack, verbal updates, and meeting check-ins alike. It is the simplest communication framework in this worksheet, and often the most powerful.

1

The Situation

State where things stand right now — one sentence, factual, no editorialising. Example: *"The Q3 client report is 80% complete and on track for the Friday deadline."*

2

The Complication

Share one relevant challenge, risk, or blocker — even if minor. This signals transparency and situational awareness. Example: *"We are waiting on one data input from the finance team, which I have flagged with them."*

3

The Next Step

Close with a clear next action — yours or theirs. This creates momentum and signals ownership. Example: *"I will send you the draft by Thursday EOD for your review before we finalise."*

✏️ **Practice This Now:** Think of an update you owe someone this week. Write your three sentences here: **Situation:** ____ **Complication:** ____ **Next Step:** ____

SUMMARY

Key Takeaways — What You Now Know How to Do

You have worked through five modules and a full toolkit. You have audited your current habits, applied a decision matrix, mapped your channels, timed your communications, and built a stakeholder map. The most important thing to remember as you close this worksheet: communication prioritisation is a skill, not a talent. It is learnable, practicable, and improvable — and the returns compound quickly when you apply it consistently.

The professionals who communicate best are not those with the most charisma or the sharpest vocabulary. They are the ones who have internalised a few powerful principles and apply them habitually. You now have those principles. What matters now is the doing — start with one tool from this worksheet this week, and build from there.

→ Not everything needs to be communicated

The most powerful first question is always: "Does this need to be said at all?" Applying the Priority Matrix before you communicate is the single highest-leverage habit in this worksheet.

→ Channel choice is a judgement signal

Every channel mismatch chips away at your professional credibility. Choosing the right medium for every message — especially the sensitive ones — marks you as thoughtful and strategic.

→ Timing separates good communicators from great ones

The four-phase Timing Framework takes 60 seconds and can be the difference between a message that lands with impact and one that creates more problems than it solves.

→ Your stakeholder map is your communication compass

Know who needs to know what — and build a cadence that keeps them informed without overwhelming them. Review your map at the start of every new project or quarter.

→ Structure your updates with the 3-Sentence Rule

Situation. Complication. Next Step. This simple template makes every update you send clearer, more confident, and more actionable — and it takes under two minutes to write.

→ Communication prioritisation is a career accelerant

When the right people consistently receive the right information at the right moment, you build trust, reduce friction, and create the kind of professional reputation that opens doors. This worksheet is your starting point — now make it a system.

Your 7-Day Commitment

Choose one action from this worksheet to implement every day for the next seven days. Start small — even using the 3-Sentence Rule once a day creates measurable improvement in how you are perceived as a communicator. Track your progress against your Module 1 audit baseline at the end of the week.

- Day 1: Complete your stakeholder map
- Day 2: Apply the Priority Matrix to all outgoing messages
- Day 3: Audit one conversation for channel appropriateness
- Day 4: Use the Timing Framework for one important message
- Day 5: Write one update using the 3-Sentence Rule
- Day 6: Identify one communication you should have made earlier
- Day 7: Reflect on your baseline — what has shifted?

Resources to Go Deeper

- **PlanetSpark Communication Masterclass** — live cohort programme
- **Executive Presence Workshop** — half-day intensive
- **Stakeholder Management Playbook** — companion resource
- **Email Clarity Toolkit** — 10 templates for common workplace messages

Visit **planetspark.in** to explore the full professional development library.