

Stakeholder Engagement Toolkit



Purpose

Identify and engage effectively with those who have a vested interest in or impact on an initiative

Who this is for

- Project Leads
- Team Members (use for orientation and communication)

When to use

Planning and scoping the initiative

Throughout implementation / at key milestones

Closing the initiative

Introduction

Identification Guide

Stakeholder Assessment

Communication Plan

Stakeholder Communication Plan

Why is this tool important?

Once identified and assessed, key stakeholders require deliberate communication. This tool includes prompts to help develop the structure, format, and cadence of the stakeholder communication plan to make it a regular workstream within the initiative timeline.

Building a Communication Plan

Begin by reviewing the structure of the template provided below. Download the template and use the guided questions to complete the table step by step.

Guiding Questions

1 Determine the why & what for communication with each key stakeholder.

Roles & responsibilities in the initiative

Are they an active participant, do they belong to an approving body, are they a source of specific expertise, etc.?

Spheres of impact or information

Reference and add details about the "Who will it take?" group and "Consulted & informed" group from the [Stakeholder Identification Guide](#).

What are we trying to accomplish through our communication?

For example, how can we increase awareness, keep in the loop, provide training, reinforce/follow up, or increase buy-in?

Key themes to highlight

What do they care about/need to know? You can use the [Stakeholder Assessment Tool](#) to help determine what to highlight.

2 Map out when & how to communicate with each key stakeholder.

When do we need input, review, or feedback from each stakeholder?

For example: Minimal, launch and end only? At Key milestone(s) during initiative? Frequent, regular updates (e.g., weekly)?

What do we need from them?

For example, do you need input, review, feedback, or sign-off?

How to engage?


What communication channels & formats are best? Are there specific meetings to attend (e.g., Faculty Senate)? Do they prefer email or in-person updates?

Template

[Download spreadsheet template](#) ↓

Project Title

1 Why & what to communicate

Stakeholder name	Role & responsibilities in the initiative	Spheres of impact and information	Goals of communication <i>For example, how can we increase awareness, keep in the loop, etc.?</i>	Key themes to highlight
		Select  <input checked="" type="checkbox"/> Budget stakeholder <input checked="" type="checkbox"/> Champion <input type="checkbox"/> Consulted & informed <input checked="" type="checkbox"/> Impact group <input type="checkbox"/> Resister <input type="checkbox"/> Other		

2 When & how to communicate

Stakeholder name	What do we need from them?	How to engage?	Key touchpoints <i>For example: dates, feedback loop buffer, etc.</i>

 **Tip** It may be helpful to sync this information with the [Project Timeline](#) component from the Project Charter Template.

3 Next steps

Inquire and plan for anticipated turnaround times for input, review, feedback or sign-off from stakeholders in your project timeline.

Plan for and mark internal review deadlines on stakeholder communication in your project timeline.