

STAKEHOLDER DECISION MATRIX PROCESS & TEMPLATE

Making decisions on projects can be tough. Figuring out who will make those decisions can be even tougher.

Use this document to work with your stakeholder contact or project sponsor and determine how the decision-making process will impact your project. Whether you're working with a client or an internal stakeholder, mapping out their hierarchy and involvement level will help you make decisions about what to deliver and how those deliverables will be circulated through the organization.

Let's start by looking at the most important items to consider.

THE
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 teamgantt



THE PLAYERS

The size of the stakeholder organization and number of approval layers will affect any plan.

Organizational roles tend to stay the same, no matter the size of the company. So even if you work with a small team, be sure to ask about the organization's hierarchy so you know how many iterations you can expect on deliverables.

And don't forget: Always ask if there's someone you haven't met and should consider. You want to uncover hidden stakeholders early in the game so there are no surprises in the last inning.

THE WORK

The type of deliverable can affect how easily decisions are made.

Think through the types of deliverables your team will create during the course of the project. List them out by project phase, and discuss them with your key point of contact on the stakeholder team. Talk about the types of documents, designs, templates, etc., you'll deliver. Dig in to uncover their intent, dependencies, and overall importance to project success.

An in-depth conversation will lead to decisions about who will need to be involved in review and response at the deliverable level. Never forget to ask, "Who is the final approver on this deliverable?"

The following worksheet can guide you through a discussion with your stakeholders. Keep your process flexible, and do everything you can to make it easy and comfortable for your stakeholders. Remember, politics can get heavy at organizations, so it might take a little time to sort this out.

Whether you do this as a whiteboard exercise, homework, or a discussion, be sure you clearly communicate the intent. That way you get clarity on who will be involved in the project at what level so you can plan your project properly with all parties' time and involvement accounted for.

STAKEHOLDER DECISION MATRIX TEMPLATE

The stakeholder groups you'll most likely find on your projects are listed here. These headers could change, depending on your project. If you're unsure, go back to the description of stakeholder groups in Class 09 for reference.

Once you've determined your groups, list all project stakeholders on this sheet. Some may appear on more than one list. This should include everyone from the project manager and project sponsor to the highest levels of decision-makers.

PROJECT OWNER(S)/CORE GROUP

- _____
- _____
- _____
- _____
- _____

PRIMARY STAKEHOLDERS

- _____
- _____
- _____
- _____
- _____

SECONDARY STAKEHOLDERS

- _____
- _____
- _____
- _____
- _____

MGMT-LEVEL STAKEHOLDERS

- _____
- _____
- _____
- _____
- _____

EXECUTIVE STAKEHOLDERS

- _____
- _____
- _____
- _____
- _____