NEW STAKEHOLDER ONBOARDING PROCESS & TEMPLATE

THE Art & Science OF LEADING PROJECTS

teamgantt

It's a fact: New stakeholders join teams all the time.

If you're mid-project and your main stakeholder contact gets replaced or a new expert joins the team, you can very quickly lose momentum and get bogged down by details that had already been debated and approved. As the project leader, it's your job to protect the timeline and budget, communicate project impacts, and, most of all, build trust with the new partner.

When a new stakeholder joins the project, schedule some time to walk them through the project history and explain how their entry could affect the work—whether they're new to the organization or not. Gently express any budget or timeline concerns you may have, and run through all the pertinent project details. Showing your understanding and dedication to the work will go a long way in establishing trust.

STAKEHOLDER ONBOARDING PROCESS

Let's take a look at the basic onboarding process so you know what steps to take when a new stakeholder enters the project scene.

THE OBJECTIVES OF ONBOARDING ARE TO:

1. Discuss the current state of the project, including scope, current budget status, timeline status, requirements, and what's left to complete
2. Discuss project goals and review any related documentation
3. Review the decision-making process and how your teams arrived at that process
4. Review all approved deliverables, including their goals and effects on other project work
5. Re-establish communication standards for the partnership
6. Answer as many questions as needed

NOTE:
How you'll communicate may change with a new stakeholder, and that's fine. Adapt as much as possible to make onboarding easier for this new person.

This process can be quite frustrating, but your best approach is to remain calm and friendly and stick to the documented details because those are non-negotiable when it comes to scope!

SAMPLE DELIVERABLE ONBOARDING TEMPLATE

Here's a template you can use to detail project deliverables. This example illustrates how you can document project progress outside of your TeamGantt plan by offering more information around the process for creating and approving your deliverables. More importantly, it makes the deliverable status and implications for change explicitly clear for stakeholders (experienced and new) who want to switch things up.

Adapt this template to your needs, and keep it updated as you progress through your projects. It'll save time on onboarding and show new stakeholders you're 100% invested in tracking and discussing the details in the easiest possible way.

DELIVERABLE:

Site HTML Wireframes (thumbnail to the left)

ACCESSIBLE AT:

<URL or accessible file storage location>

GOAL:

To define site content hierarchy on home, landing, and detail pages. These are not intended to provide direction on graphic design or final content.

DESCRIPTION:

The Agency delivered 8 wireframes with variations on each page. These variations helped the team make decisions on content hierarchy, length, and placement.

DATE OF DELIVERY:

January 4, 2019, with final approval on February 5, 2019.

HISTORY:

Our team revised this deliverable 3 times and presented it twice in-person to the core team and executive committee. Major points of feedback centered around navigation order and representation of blog content on the home page. Arnold Stakeholder was the final approver of this deliverable.

IMPACTS:

This deliverable involves decisions that are critical to the entire project. Changes to any details would affect the graphic design, content, and front- and back-end development efforts, resulting in timeline and scope adjustments

CURRENT STATUS:

Approved on February 5, 2019. Not up for revision without scope and timeline implications.