NEW STAKEHOLDER ONBOARDING PROCESS

It's a fact: New stakeholders join client teams all the time. If you're mid-project and a new expert joins the team, you can very quickly lose momentum and get caught up on details that had already been debated and approved. As the project manager, it's your job to protect the timeline and budget, to communicate project impacts, and most of all to build trust with a new partner.

When a new stakeholder joins your client's team, set up some time with that person to make sure they understand the project history and how their entry could affect the work. Gently express your concern about timeline and budget, and run through all the pertinent project details. Showing your understanding and dedication to the work will help to build trust.

The objectives of on-boarding are:

1. To discuss the current state of the project, including scope, current budget status, timeline status, requirements, and what is left to complete.

2. To discuss project goals and review any documentation related to them.

3. To review the decision making process, and how your teams arrived at that process.

4. To review all approved deliverables, including their goals and affects other project work.

5. To reestablish communication standards for the partnership (how you will communicate may change due to this new stakeholder, and that is fine. Adapt as much as possible to make on-boarding for this new person easier).

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We all operate our projects differently. When it comes to a project and its execution, we use many similar tactics.

This checklist is meant to help you guide a conversation about project history–and its future–with your new clients. Only you and your team will know these details, but these are high-level topics to keep in mind:

- [ ] Scope document
- [ ] Invoicing
- [ ] Creative brief; project goals
- [ ] Requirements document
- [ ] Stakeholder decision matrix
- [ ] Project plan
- [ ] Communication tools, preferences
- [ ] Deliverable
- [ ] Research
- [ ] UX
- [ ] Content Strategy
- [ ] Design
- [ ] Front End Development
- [ ] Back End Development
- [ ] Usability Testing

Several of these items will require some time on your new clients' part. Be sure to provide those documents in advance of a discussion. During the meeting you should discuss the most relevant items within each.

Keep in mind, that the further along you are in a project, the more information there will be for someone to absorb. It can be overwhelming. Talk to your new partner and ask how you can help. Maybe a high-level review of deliverables would be helpful. Suggest a format that communicates the right level of details and decisions. Maybe this format will work for you:

1. Link to deliverable
2. Goal of deliverable
3. Description of the deliverable
4. Date of delivery
5. History of iteration; Issues discussed
6. Impact on remaining deliverables
7. Current status of deliverable

An example follows.

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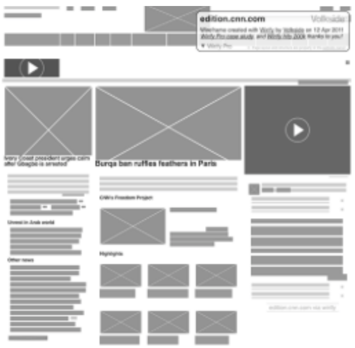
Sample Deliverable On-boarding Sheet



Deliverable: Site HTML Wireframes (thumbnail to the left)

Accessible at: <URL>

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 to make decisions on

Date of delivery: January 4, 2014; Final approval on February 5, 2014

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

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

Current status: Approved on <DATE>

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