Category

Consulting

Trusted Advisor Stakeholder Mapping Playbook

Knowing exactly who the sponsors, influencers, and decision makers actually are, not just who you talk to most

- Practitioner
- Intermediate
- Template Included

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Overview

A framework for systematically mapping the sponsors, influencers, and decision makers around a client engagement — since the people an advisor interacts with most frequently are not always the people who most determine the relationship's and engagement's success.

Isn't the person I interact with most frequently usually the most

important stakeholder? Not necessarily — frequent interaction often happens with a day-to-day contact who isn't the actual decision maker or the most influential voice in whether the engagement or relationship succeeds, which is exactly why explicit mapping matters.

How often should the stakeholder map be updated?

At minimum whenever there's a significant organizational change on the client side, or at each major engagement milestone — stakeholder configurations shift more often than advisors sometimes realize.

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