1

LINKING STAKEHOLDER METRICS TO PROJECT SUCCESS

Why Stakeholder Metrics Matter and How They Drive Better Outcomes

1 WHAT ARE STAKEHOLDER METRICS?

Measurable indicators that show how stakeholders feel, behave, respond, and influence the project.

- **EXPECTATIONS** – Are expectations clear, realistic, and being met?
- **ENGAGEMENT** – How involved, active, and informed are stakeholders?
- **TRUST** – Do stakeholders trust the team, intentions, and direction?
- **SUPPORT** – Are stakeholders supportive and advocating for the project?
- **RISK SIGNALS** – Are there concerns, frustrations, or blockers emerging?

Bottom line: These metrics reveal the human side of the project—critical to delivering results.

2 WHY THEY MATTER

EARLY WARNING SYSTEM
Detect issues in sentiment, trust, and confidence before they hit the plan.

BETTER DECISIONS
Use real stakeholder input to make smarter, faster, and more informed choices.

MANAGE RESISTANCE
Identify resistance early and address root causes before they escalate.

STRENGTHEN ALIGNMENT
Ensure stakeholders understand, agree, and pull in the same direction.

DRIVE ADOPTION & VALUE
Engaged, supported stakeholders adopt changes and help realize the benefits.

3 KEY CATEGORIES

ENGAGEMENT LEVEL
Participation, involvement, attention to project activities.

SATISFACTION LEVEL
Overall contentment with progress, communication, and outcomes.

COMMUNICATION EFFECTIVENESS
Clarity, frequency, channel quality, and information relevance.

RESPONSE / DECISION SPEED
How quickly stakeholders respond, decide, and remove blockers.

TRUST & CONFIDENCE
Belief in the team, plan, and ability to deliver results.

READINESS & PREPAREDNESS
Will stakeholders be ready for change or go-live?

ADOPTION & USAGE
Actual use of deliverables and new ways of working.

COMMITMENT & SUPPORT
Willingness to champion, fund, or prioritize the project.

INFLUENCE & RISK
Stakeholders who can help, hinder, or change the project trajectory.

4 THE SUCCESS LOGIC

A simple flow from insight to impact.

MEASURE STAKEHOLDER SIGNALS
Collect data on key metrics consistently through surveys, check-ins, and feedback.

↓

IDENTIFY TRENDS & RISKS
Spot patterns, rising concerns, and opportunities across stakeholder groups.

↓

TAKE TARGETED ACTIONS
Address root causes, improve communication, adjust plans, and remove obstacles.

↓

IMPROVE SUPPORT, DECISIONS & PROJECT OUTCOMES
Better alignment, faster decisions, higher adoption, and stronger results.

Good metrics → Good actions → Great outcomes.

5 WHO TO TRACK

Track the right people to protect focus and drive results.

- **INTERNAL TEAM** – Delivery team, PMO, and cross-functional contributors.
- **SPONSOR** – Project champion and decision authority.
- **EXECUTIVES & LEADERS** – Steering committee and leadership team.
- **USERS / CUSTOMERS** – End users, customers, and beneficiaries.
- **OPERATIONS / SUPPORT** – IT ops, service desk, and support teams.
- **VENDORS / PARTNERS** – Suppliers, contractors, and key partners.
- **REGULATORS / COMPLIANCE** – Regulatory bodies and audit stakeholders.
- **COMMUNITY / EXTERNAL GROUPS** – Public, communities, and other affected parties when relevant.

Focus on the stakeholders with the most influence and highest impact on success.

6 HOW TO USE THIS SERIES

This 30-card series gives you practical, repeatable ways to measure what matters most.

1. **ONE METRIC PER CARD** – Deep dive into a single key stakeholder metric.
2. **HOW TO MEASURE IT** – Simple, actionable methods and example questions.
3. **GOOD VS. BAD SIGNALS** – What strong and weak signals look like in real projects.
4. **HOW TO IMPROVE IT** – Tactical actions to move the metric in the right direction.
5. **LINK TO PROJECT SUCCESS** – How improving this metric drives better outcomes and value.

Use, adapt, and apply these metrics to lead people and projects with impact.

Created by TemplGate

CARD 1 OF 30

Linking The Most Important Stakeholder Metrics Every Project Manager Should Track Series

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STAKEHOLDER IDENTIFICATION COVERAGE

Make Sure You Know Every Stakeholder Who Can Influence or Be Affected by the Project

1 WHAT IT MEASURES

How completely you have identified all stakeholders who can influence or be affected by the project.

COMPLETENESS OF REGISTER
Are all relevant stakeholders captured?

CRITICAL STAKEHOLDER VISIBILITY
Are key decision makers and influencers identified?

HIDDEN INFLUENCERS
Have informal, behind-the-scenes influencers been surfaced?

AFFECTED GROUPS
Are all groups impacted—directly or indirectly—included?

COMPLETENESS vs RELEVANCE
It's not just more names—
it's the right names.

2 CORE FORMULAS

Use these metrics to quantify stakeholder identification coverage.

IDENTIFICATION COVERAGE %

$$= \frac{\text{Identified Relevant Stakeholders}}{\text{Expected Relevant Stakeholders}} \times 100$$

CRITICAL COVERAGE %

$$= \frac{\text{Identified Critical Stakeholders}}{\text{Expected Critical Stakeholders}} \times 100$$

DATA COMPLETENESS CHECKS
- % of stakeholders with role defined
- % with influence level defined
- % with interest level defined
- % with contact info (or owner)
- % with expected impact documented

3 WHERE TO FIND STAKEHOLDERS

Look everywhere people, decisions, information, or impact exist.

PROJECT CHARTER & INITIATION DOCS
Identify sponsors, objectives, constraints.

ORGANIZATIONAL CHARTS
Find decision makers, managers, and cross-functional links.

PROCESS MAPS & WORKFLOWS
Uncover roles and handoffs across steps.

CONTRACTS & LEGAL DOCUMENTS
Find obligated parties and approvers.

CUSTOMER JOURNEY & USER MAPS
Identify users, channels, and touchpoints.

COMPLIANCE & REGULATORY LISTS
Identify oversight bodies, auditors, agencies.

SUPPLIER & PARTNER LISTS
Include vendors, subcontractors, alliances.

SPONSOR & SME INTERVIEWS
Surface hidden influencers and concerns.

TEAM WORKSHOPS & BRAINSTORMS
Crowdsource names and test for gaps.

4 GOOD vs BAD SIGNALS

STRONG COVERAGE SIGNALS
- High coverage % across all categories
- All critical stakeholders identified
- Cross-functional and external included
- Few (or no) late surprises
- Stakeholders know they're involved early
- Clear roles, influence & impact defined

WEAK COVERAGE SIGNALS
- Missing key approvers or gatekeepers
- Surprise stakeholders late in the project
- No end users or customers identified
- Unplanned resistance or blockers
- Frequent scope or priority changes
- Stakeholder list only from one function

WHY IT MATTERS

Broad, accurate identification leads to better outcomes.

BETTER REQUIREMENTS
Incorporate diverse needs and constraints early.

FEWER SURPRISES
Anticipate concerns and reduce last-minute roadblocks.

STRONGER COMMUNICATION PLANS
Tailor messages to the right people at the right time.

LOWER PROJECT RISK
Surface risks and dependencies early and manage them.

FASTER APPROVALS & DECISIONS
The right people are informed, aligned, and ready to act.

6 IMPROVEMENT ACTIONS & OUTPUTS

Build a repeatable approach to achieve complete stakeholder coverage.

STAKEHOLDER IDENTIFICATION CHECKLIST
Use prompts to scan across all sources and categories.

POWER–INTEREST MAP
Plot stakeholders to prioritize engagement strategy.

REGISTER REFRESH CADENCE
Define how often the register is reviewed and updated.

STAKEHOLDER GAP LIST
Document missing or uncertain stakeholders and how to find them.

VALIDATED STAKEHOLDER REGISTER
Complete, categorized, and reviewed with owners and sponsors.

HIGH-PRIORITY WATCHLIST
Critical stakeholders to monitor closely for influence and impact shifts.

3

STAKEHOLDER ENGAGEMENT SCORE

Measure How Actively Stakeholders Participate, Contribute, and Support the Project

1 WHAT IT MEASURES

A snapshot of how actively stakeholders engage across key behaviors that drive project success.

PARTICIPATION
Shows up, joins, and contributes in project activities.

RESPONSIVENESS
Replies on time and responds when input or decisions are needed.

COLLABORATION
Works well with others, shares information, and helps solve issues.

SUPPORT
Champions the project, removes roadblocks, and advocates.

ACTION OWNERSHIP
Takes ownership, completes committed actions.

INVOLVEMENT IN DECISIONS
Provides input and is involved in important decisions.

2 SCORING METHOD

Use a weighted score with a 1–5 scale (1 = Very Low, 5 = Excellent) across six engagement dimensions.

- PARTICIPATION (20%)
- RESPONSIVENESS (20%)
- COLLABORATION (20%)
- SUPPORT (15%)
- ACTION OWNERSHIP (15%)
- INVOLVEMENT IN DECISIONS (10%)

FORMULA

Engagement Score (1–5) = Σ (Score$_i$ × Weight$_i$)

Max Score = 5.0

Score$_i$ = rating for each dimension (1–5)

Weight$_i$ = percentage weight of each dimension

3 EVIDENCE SOURCES

Use multiple data points to rate each dimension fairly and consistently.

MEETING ATTENDANCE
Presence in key meetings and events. Quality of participation matters.

RESPONSE LOGS
Email, chat, or portal response time and completion rate.

WORKSHOP INPUT
Ideas shared, feedback depth, and problem-solving contributions.

SURVEY ANSWERS
Pulse or periodic surveys on engagement and satisfaction.

ACTION CLOSURE
Rate of committed actions completed on time or proactively.

SPONSOR & LEAD OBSERVATIONS
Qualitative notes on enthusiasm, support, and influence.

4 EXAMPLE & BENCHMARKS

Sample scoring for a stakeholder.

DIMENSION	SCORE (1–5)	WEIGHT	WEIGHTED SCORE
Participation	4	20%	0.80
Responsiveness	5	20%	1.00
Collaboration	4	20%	0.80
Support	3	15%	0.45
Action Ownership	4	15%	0.60
Involvement in Decisions	3	10%	0.30
TOTAL ENGAGEMENT SCORE (1–5)			3.95

BENCHMARKS

HIGH ENGAGEMENT: 4.00 – 5.00
Actively engaged and strong supporter.

MODERATE ENGAGEMENT: 2.50 – 3.99
Engaged at times; room to improve.

LOW ENGAGEMENT: 1.00 – 2.49
Limited engagement; risk to project.

TREND MATTERS: Up ↑ Steady → Down ↓

5 WHY IT MATTERS

High engagement leads to better collaboration and stronger outcomes.

STRONGER BUY-IN
Engaged stakeholders are more committed and supportive.

BETTER ISSUE SOLVING
More perspectives lead to smarter ideas and faster solutions.

SUPPORTS CHANGE
Engaged people help drive adoption and reduce resistance.

FASTER DECISIONS
Timely input and alignment speed up decision-making.

REDUCED RESISTANCE
Clear communication and inclusion build trust and reduce pushback.

BETTER OUTCOMES
Engagement drives accountability, quality work, and business value.

6 HOW TO IMPROVE & OUTPUTS

Boost engagement and track it visually and consistently.

INVOLVE STAKEHOLDERS EARLY
Engage from the start in planning and decision points.

TAILOR COMMUNICATION
Use the right channels, format, and frequency for each group.

CLOSE THE FEEDBACK LOOP
Acknowledge input and act on it. Show what changed and why.

RECOGNIZE CONTRIBUTIONS
Thank people, highlight impact, and celebrate wins.

USEFUL OUTPUTS

ENGAGEMENT HEAT MAPS
See engagement levels by stakeholder, team, topic, or phase.

ENGAGEMENT SCORECARDS
Track scores over time and spot risks or improvement areas.

ENGAGEMENT ACTION PLAN
Target low scores with specific actions, owners, and due dates.

4

STAKEHOLDER SATISFACTION SCORE

Track How Satisfied Stakeholders Are with Progress, Communication, Responsiveness, and Results

1 WHAT IT MEASURES

OVERALL SATISFACTION
How satisfied stakeholders feel about the project overall.

COMMUNICATION
Clarity, frequency, and usefulness of project communications.

TRUST
Confidence in the team, process, and decisions being made.

RESPONSIVENESS
How quickly and effectively concerns and requests are handled.

VALUE DELIVERED
Perceived value, quality, and relevance of project outcomes.

EXPERIENCE
Overall experience of working with the project team.

2 HOW TO MEASURE IT

SHORT SURVEYS
Use 6–10 focused questions that are easy to answer.

1–5 SATISFACTION SCALE
1 = Very Dissatisfied
5 = Very Satisfied

PULSE CHECKS
Send at key milestones, phases, or after major events.

SEGMENT BY GROUP
Analyze by stakeholder type, role, department, or region.

SCORE CALCULATION
Use average score and top-box (4–5) rate.

3 SAMPLE SURVEY QUESTIONS

VALUE
The project is delivering value that meets my needs.

CLARITY
Communication about the project is clear and easy to understand.

INVOLVEMENT
I feel appropriately involved in decisions that affect me.

CONCERN HANDLING
My concerns or issues are addressed quickly and effectively.

CONFIDENCE
I am confident the project will achieve its intended outcomes.

OVERALL SATISFACTION
Overall, how satisfied are you with the project so far?
(1 = Very Dissatisfied, 5 = Very Satisfied)

4 EXAMPLE & THRESHOLDS

SAMPLE RESULTS
- Average Score: 4.2 / 5
- Top-Box (4–5) Rate: 78%

STRONG SEGMENTS
- Executive Sponsors: 4.6
- Operation Team: 4.3

WEAK SEGMENTS
- End Users: 3.1
- External Partners: 3.4

BENCHMARK LEVELS
- Excellent: Avg ≥ 4.2 and Top-Box ≥ 75%
- Good: Avg 3.6 – 4.1 and Top-Box 50% – 74%
- Needs Improvement: Avg < 3.6 or Top-Box < 50%

5 WHY IT MATTERS

BUILDS SUPPORT
Satisfied stakeholders are more likely to support and champion the project.

DRIVES ADVOCACY
Happy stakeholders speak up, share wins, and remove roadblocks.

STRENGTHENS TRUST
Trust grows when stakeholders see value and are heard.

ENABLES APPROVALS
High satisfaction helps secure decisions and needed approvals.

RENEWS SUPPORT
Continued satisfaction leads to ongoing funding and participation.

EARLY WARNING SYSTEM
Low scores flag issues and expectation gaps early.

6 HOW TO IMPROVE & OUTPUTS

TARGETED IMPROVEMENTS
Focus on low-scoring areas and weak stakeholder groups.

ACTION FROM COMMENTS
Review open-ended feedback, identify root causes, and take action.

TREND TRACKING
Track scores over time to measure improvement.

COMMENT THEMES
Identify common themes and recurring issues.

SATISFACTION DASHBOARD
Show overall score, top-box rate, trends, and segment breakdown.

OUTPUT: INSIGHT & ACTION
Use insights to improve experience, build trust, and drive better results.

5

COMMUNICATION EFFECTIVENESS SCORE

Measure Whether Project Communication Is Clear, Timely, Relevant, and Actionable

1 WHAT IT MEASURES

- **REACH** – How many of the right people received the message.
- **CLARITY** – How clear, easy to understand, and unambiguous the message is.
- **TIMELINESS** – How quickly messages are sent and received.
- **RELEVANCE** – How well the content matches stakeholder needs and priorities.
- **CONSISTENCY** – How aligned the message is across channels and messengers.
- **CHANNEL FIT** – How appropriate the channel is for the audience and message.
- **ACTIONABILITY** – How clearly the next steps, owners, and expectations are defined.

2 FORMULA AND SCORING

Weighted score across five core dimensions.

- Clarity (C)
- Timeliness (T)
- Relevance (R)
- Comprehension (P)
- Usefulness / Actionability (U)

→ Weights: C = 25%, T = 20%, R = 20%, P = 20%, U = 15%

Each dimension scored 1–5 (1 = Poor, 5 = Excellent).

$$CES = (C \times 0.25) + (T \times 0.20) + (R \times 0.20) + (P \times 0.20) + (U \times 0.15)$$

1.0–1.9	2.0–2.9	3.0–3.9	4.0–5.0
Poor	Needs Work	Good	Excellent

3 DATA SOURCES

- **STAKEHOLDER SURVEYS** – Ratings on clarity, timeliness, relevance, and usefulness.
- **EMAIL / ANNOUNCEMENT OPEN RATES** – Reach and initial engagement signals.
- **MEETING UNDERSTANDING CHECKS** – Quick polls or checks at the end of meetings.
- **REPEATED QUESTIONS** – Volume of recurring questions on the same topics.
- **MISSED ACTIONS** – Tasks not taken due to unclear or late communication.
- **COMMENT THEMES** – Qualitative feedback from channels and forums.

4 GOOD VS BAD SIGNALS

GOOD SIGNALS

- High reach and high understanding
- Few follow-up questions
- Actions taken as planned
- Consistent message across channels
- Stakeholders feel informed and prepared
- Positive feedback on clarity and usefulness

BAD SIGNALS

- High reach but low understanding
- Many repeated clarifications
- Stakeholder surprise or confusion
- Rumors or conflicting messages grow
- Low action completion due to unclear or missing information
- Message overload or too many updates without priorities

5 WHY IT MATTERS

- **BETTER ALIGNMENT** – Everyone understands the plan, the why, and their role.
- **FEWER ERRORS** – Clear messages reduce mistakes and rework.
- **FEWER DELAYS** – Timely communication keeps work moving.
- **STRONGER TRUST** – Transparency and clarity build confidence.
- **STRONGER ADOPTION** – People act when messages are relevant and actionable.
- **SMOOTHER DECISIONS** – Leaders have the right information at the right time.

6 IMPROVEMENT ACTIONS AND OUTPUTS

- **COMMUNICATION MATRIX** – Map audience, needs, channels, frequency, and message owners.
- **ROLE-BASED MESSAGES** – Tailor content by role, responsibility, and impact.
- **VISUAL UPDATES** – Dashboards, infographics, and timelines to simplify complex info.
- **FAQS & KNOWLEDGE BASE** – Capture common questions and keep answers updated.
- **COMPREHENSION CHECKS** – Quick polls, quizzes, or thumbs to confirm understanding.

OUTPUTS: Communication dashboard • CES trend by channel/audience • Hot topics • Action backlog from feedback

6

STAKEHOLDER RESPONSE RATE

Track How Reliably Stakeholders Respond to Requests, Feedback, Decisions, and Actions

1 WHAT IT MEASURES

Tracks how reliably stakeholders respond to requests, feedback, decisions, and actions.

USABLE RESPONSES
Responses that provide clear, decisionable input or action.

ON-TIME RESPONSES
Responses received by or before the due date.

COMPLETE RESPONSES
Responses that answer all required items or questions.

RESPONSE QUALITY
The usefulness, clarity, and relevance of the response.

Bottom line: Reliable responses keep decisions moving, reduce delays, and drive better project outcomes.

2 CORE FORMULAS

RESPONSE RATE %

$$\frac{\text{Usable Responses}}{\text{Total Requests Sent}} \times 100$$

ON-TIME RESPONSE RATE %

$$\frac{\text{On-Time Usable Responses}}{\text{Total Requests Sent}} \times 100$$

AVERAGE RESPONSE TIME

$$\frac{\text{Sum of (Response Time in Hours)}}{\text{Total Usable Responses}}$$

COMPLETE RESPONSE RATE %

$$\frac{\text{Complete Usable Responses}}{\text{Total Usable Responses}} \times 100$$

RESPONSE TIME = Date/Time Responded minus Date/Time Request Sent

3 DATA SOURCES & CONTROLS

ACTION LOGS – Track all requests, decisions, feedback, and actions.

APPROVAL & WORKFLOW TOOLS – Timestamps, statuses, and comments.

SURVEYS & FORMS – Collect structured feedback and inputs.

EMAIL REQUESTS – Track sent, opened, and replied items.

DUE DATES – Set realistic and clear response deadlines.

REQUEST QUALITY – Clear context, specific asks, and defined format.

REASONS FOR NON-RESPONSE – Not needed, unclear, busy, no authority, forgot, system issues, other.

4 EXAMPLE & THRESHOLDS

Sample (Last 30 Days)

Total Requests Sent	120
Usable Responses	96
On-Time Usable Responses	84
Complete Usable Responses	90
Total Response Time (Hours)	360

Response Rate	96/120 = 80%
On-Time Response Rate	84/120 = 70%
Average Response Time	360/96 = 3.75 hrs
Complete Response Rate	90/96 = 93.8%

Thresholds

GOOD	≥ 80% on-time | ≤ 4 hrs avg | ≥ 90% complete
MODERATE	60–79% on-time | 4–10 hrs avg | 70–89% complete
POOR	< 60% on-time | > 10 hrs avg | < 70% complete

5 WHY IT MATTERS

LESS DELAY
Timely responses prevent rework, bottlenecks, and schedule slips.

LOWER QUEUE TIME
Requests move faster through the pipeline to completion.

STRONGER ACCOUNTABILITY
Clear expectations and tracking drive ownership and follow-through.

BETTER FLOW
Consistent responses keep work unblocked and plans on track.

IMPROVED STAKEHOLDER DISCIPLINE
Better habits lead to higher reliability and trust across the project.

High response reliability = Faster decisions, happier teams, stronger results.

6 IMPROVEMENT ACTIONS & OUTPUTS

SIMPLIFY REQUESTS
Make asks specific, concise, and easy to answer.

CLEAR OWNERS & DEADLINES
Assign the right owner and set realistic due dates.

REMINDER RULES
Automated reminders at set intervals (e.g., 24h, 48h before due date).

ESCALATION PATHS
Define escalation steps for overdue or high-impact items.

RESPONSE DASHBOARD
Track rates, times, and trends by stakeholder and request type.

OVERDUE LIST
Daily view of overdue items with age and impact.

Outputs: Higher response rate, fewer overdues, faster decisions, better outcomes.

7

MEETING PARTICIPATION & CONTRIBUTION RATE

Measure Whether the Right Stakeholders Attend, Contribute, and Own Follow-Up Actions

1 WHAT IT MEASURES

ATTENDANCE
Overall participation—who was invited vs. who actually attended.

CRITICAL ATTENDANCE
Presence of key/required roles needed for decisions and progress.

PREPARATION
Participants review pre-reads and come prepared to engage.

CONTRIBUTION QUALITY
Active, relevant input that adds value to the discussion.

ACTION ACCEPTANCE
Participants agree to, and own, specific follow-up actions.

2 CORE FORMULAS

ATTENDANCE RATE %
= (Actual Attendees ÷ Invited) × 100
Shows overall engagement level.

CRITICAL ATTENDANCE %
= (Critical Roles Attended ÷ Critical Roles Required) × 100
Shows coverage of essential voices.

CONTRIBUTION RATE %
= (Active Contributors ÷ Actual Attendees) × 100
Active = spoke, asked, or added written input.

ACTION ACCEPTANCE RATE %
= (Actions Accepted ÷ Actions Proposed) × 100
Shows accountability and ownership.

3 EVIDENCE SOURCES

CALENDAR & INVITE DATA
Invited list, role labels, meeting type, recurrence, and time.

MEETING MINUTES
Recorded attendees, agenda topics, decisions, and action items.

CONTRIBUTION NOTES
Chat logs, verbal contributions, questions, and whiteboard notes.

POLLS & FEEDBACK
Live polls, reactions, surveys on clarity, value, and preparedness.

ACTIONS & DECISION RECORDS
Agreed actions, owners, due dates, and decision outcomes.

PRE-READ ACCESS DATA
Reads/downloads, time spent, and acknowledgments.

4 EXAMPLE & WARNING SIGNS

EXAMPLE (Good Meeting)
- Attendance Rate: 92%
- Critical Attendance: 100%
- Contribution Rate: 68%
- Action Acceptance Rate: 86%
- Strong, balanced discussion with clear decisions and committed owners.

WARNING SIGNS (Watch For)
- High attendance but low contributions (<30%).
- Same few people dominate (>60% talk time).
- Key decision makers frequently absent.
- Many arrive unprepared or skip pre-reads.
- Actions deferred or no owners assigned.
- Low action acceptance (<60%).

5 WHY IT MATTERS

STRONGER GOVERNANCE
Right people in the room ensure balanced decisions and accountability.

FASTER DECISIONS
Complete input up front reduces rework and follow-up loops.

BETTER RISK DISCOVERY
Diverse voices and active input surface issues earlier.

LESS WASTED MEETING TIME
Focused, prepared participants make meetings shorter and more valuable.

MORE ACCOUNTABILITY
Clear action acceptance drives ownership and follow-through.

6 IMPROVEMENT ACTIONS & OUTPUTS

BETTER MEETING DESIGN
Clear purpose, agenda, outcomes, and decision checkpoints.

TARGETED ATTENDANCE
Invite the right roles; manage optional attendees; track critical coverage.

FACILITATION TECHNIQUES
Round-robins, timeboxing, quiet time, and balanced participation.

PRE-READS & PREP CHECKS
Share early, set expectations, verify completion.

DECISION & ACTION LOGS
Capture decisions, rationale, owners, and due dates.

OUTPUT: PARTICIPATION REPORT
Track trends, identify gaps, and show improvement over time.

8

DECISION TURNAROUND TIME

Measure How Quickly Stakeholders Make the Decisions Needed to Keep the Project Moving

1 WHAT IT MEASURES

ELAPSED TIME FROM REQUEST TO DECISION
The actual time between when a decision is requested and when it is made and communicated.

DECISION QUALITY
How well decisions are informed, clear, implementable, and aligned with goals.

DELAY SOURCES
People, process, information, or governance factors causing late or stalled decisions.

REVERSAL RISK
Likelihood that a decision will be changed or overturned after execution begins.

2 CORE FORMULAS

DECISION TURNAROUND TIME (DTT)
Average time (calendar days) from request to final decision.

DTT = Σ (Decision Date − Request Date) ÷ Total Decisions

ON-TIME DECISION RATE
% of decisions made by or before their due date.

OTDR = (On-Time Decisions ÷ Total Decisions) × 100%

DECISION REVERSAL RATE
% of decisions changed after they are made.

DRR = (Reversed Decisions ÷ Total Decisions) × 100%

DECISION BACKLOG
Decisions requested but not yet made.

Backlog = # Open Decision Requests at a Point in Time

3 DATA SOURCES

DECISION LOG
Central log of all decision requests, owners, dates, status, and outcomes.

REQUEST COMPLETENESS
Information quality, clarity of the decision needed, and context provided.

DUE DATES & PRIORITY
Target decision dates, impact level, and time sensitivity.

OPTIONS & RECOMMENDATIONS
Alternatives presented, pros/cons, and recommended option.

GOVERNANCE CALENDAR
Committee meetings, approval gates, and review cycles.

TIMESTAMPS & COMMUNICATIONS
Request time, clarification time, decision time, and communication time.

DECISION IMPACT
Cost, schedule, scope, risk, and quality impact classification.

4 EXAMPLE & WARNING SIGNS

EXAMPLE
A vendor selection decision is requested on May 1 with a due date of May 10. Decision communicated on May 9.

- Turnaround Time = 8 days
- On-Time = Yes
- Impact = High
- Quality = Clear, documented

WARNING SIGNS
- High number of overdue critical decisions
- Many requests missing due dates
- Unclear or shifting decision authority
- Repeated deferrals without resolution
- Long approval chains and handoffs
- Decisions reversed after implementation
- Large backlog or growing decision queue
- Average time looks good, but some decisions take excessively long

5 WHY IT MATTERS

PROTECTS SCHEDULE FLOW
Timely decisions prevent tasks from stalling and keep dependencies moving.

REDUCES IDLE TIME & COST
Faster decisions mean less waiting, rework, and wasted resources.

IMPROVES ACCOUNTABILITY
Clear ownership and transparency drive ownership and follow-through.

LOWERS RISK
Quick, quality decisions reduce exposure to scope creep and late changes.

SUPPORTS CONFIDENCE
Stakeholders trust a project that decides well and decides on time.

6 IMPROVEMENT ACTIONS & OUTPUTS

DECISION BRIEFS
Clear problem, options, impact, and recommended path for each decision.

PRE-WIRING
Engage decision makers early and align before decisions are needed.

DELEGATED AUTHORITY
Empower owners to decide within approved limits and guardrails.

ESCALATION RULES
Define when and how to escalate stalled or overdue decisions.

DECISION AGING CHART
Visualize requests by age, priority, owner, and impact.

GOVERNANCE IMPROVEMENTS
Streamline meetings, reduce handoffs, and set SLAs for decisions.

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CARD 8 OF 30

Linking The Most Important Stakeholder Metrics Every Project Manager Should Track Series

9

APPROVAL CYCLE TIME

Track How Long Reviews and Approvals Take and Where Rework Is Created

1 WHAT IT MEASURES

ELAPSED REVIEW TIME
Total time from submission to final approval.

QUEUE TIME
Time items wait before a reviewer starts action.

REWORK TIME
Time spent on revisions and resubmissions.

FIRST-PASS APPROVALS
How often items are approved without changes.

RESUBMISSIONS
Number of times an item is returned for changes.

2 CORE FORMULAS

APPROVAL CYCLE TIME
= Final Approval Time − Initial Submission Time

FIRST-PASS APPROVAL RATE
$$= \frac{\text{First-Pass Approvals}}{\text{Total Submissions}} \times 100\%$$

REWORK LOOPS
$$= \frac{\text{Total Resubmissions}}{\text{Total Submissions}}$$

APPROVAL SLA COMPLIANCE
$$= \frac{\text{Items Approved Within SLA}}{\text{Total Items Due}} \times 100\%$$

Segment by approver, workflow step, item type, project, and priority.

3 DATA SOURCES

WORKFLOW TIMESTAMPS
Submission, start of review, decision, and completion times.

COMPLETENESS CHECKS
Evidence of required fields, attachments, and criteria met.

VERSION HISTORY
Edits, revisions, and version progression.

REVIEWER COMMENTS
Feedback, change requests, and clarifications.

REJECTION REASONS
Why items are returned for changes.

APPROVER WORKLOAD
Active items, capacity, and concurrent reviews.

4 EXAMPLE & WARNING SIGNS

EXAMPLE: SLOW PROCUREMENT APPROVALS

SUBMITTED	IN REVIEW	REVISION	APPROVED
Day 0	2 Days	1 Day	Day 6

WARNING SIGNS

- **LONG CYCLE TIMES:** Approvals take too long.
- **LOW FIRST-PASS RATE:** Many returns for changes.
- **DUPLICATED APPROVALS:** Multiple reviewers approving same content.
- **MISSING CRITERIA:** Incomplete submissions cause delays.
- **OVERLOADED APPROVERS:** Too many items, slow decisions.

5 WHY IT MATTERS

LESS DELAY
Reduces waiting and speeds up project progress.

LOWER REWORK
Better submissions lead to fewer returns and loops.

STRONGER PLANNING
Predictable approvals improve schedules and commitments.

FASTER DELIVERY & CASH FLOW
Approvals are a gating factor for execution and payments.

FEWER HIDDEN BOTTLENECKS
Exposes blocked steps and capacity issues early.

6 IMPROVEMENT ACTIONS & OUTPUTS

APPROVAL MATRIX
Define who approves what, at each stage.

PRE-CHECKS
Ensure completeness before submission.

STANDARD TEMPLATES
Use consistent formats and clear guidelines.

PARALLEL REVIEWS
Run reviews in parallel where possible.

AGING REPORT
Highlight items waiting too long in queues.

REWORK PARETO
Focus on the top reasons causing rework.

CYCLE-TIME DASHBOARD
Track trends by step, approver, item type, and project.

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10

EXPECTATION ALIGNMENT INDEX

Measure Whether Stakeholders Share the Same Understanding of Scope, Value, Priorities, Roles, and Success

1 WHAT IT MEASURES

The degree to which stakeholders have a shared understanding and aligned expectations across six key areas.

SCOPE CLARITY
Agreement on what is in-scope and out-of-scope.

PRIORITY ALIGNMENT
Shared view of what matters most and why.

VALUE UNDERSTANDING
Common understanding of expected benefits and value drivers.

TIMING REALISM
Aligned expectations on milestones, timeline, and constraints.

ROLE CLARITY
Clear understanding of who does what and who decides.

SUCCESS CRITERIA
Agreement on what success looks like and how it will be measured.

2 HOW TO SCORE IT

A weighted index (0–100) across six dimensions. Rate each on a 0–5 scale.

UNDERSTANDING (20%)
Do stakeholders truly understand the scope, context & constraints?

AGREEMENT (20%)
How much do stakeholders agree on key assumptions and outcomes?

ROLE CLARITY (15%)
How clear are roles, responsibilities, and decision rights?

PRIORITY FIT (15%)
How well are priorities aligned across stakeholders?

EXPECTATION GAPS (15%)
How large and frequent are expectation gaps?

CONSISTENCY (15%)
How consistent are messages across groups and channels?

FORMULA

$$EAI = (\Sigma (Score \times Weight) / 5) \times 100$$

Score Range: 0 (Poor Alignment) – 100 (Perfect Alignment)

3 QUESTIONS TO ASK

SCOPE CLARITY
What is in-scope? What is out-of-scope?
Are boundaries documented & agreed?

SUCCESS DEFINITION
What does success mean for you?
How will we know we achieved it?

VALUE EXPECTATIONS
What benefits do you expect?
Which outcomes matter most to you?

TIMELINE REALISM
Are timeline, milestones, and resources realistic and achievable?

DECISION RIGHTS
Who decides what, when, and how?
Where do you need to be involved?

Golden rule: If we were to explain this project to a new person, would we all describe it the same way?

4 EXAMPLE & WARNING SIGNS

EXAMPLE: HIGH ALIGNMENT (EAI 85+)
Stakeholders agree on scope, priorities, roles, and success. Decisions are fast, trade-offs are accepted, and execution stays on track.

WARNING SIGNS: LOW ALIGNMENT (EAI < 60)

EXPECTATION GAPS
Different answers to the same question.

CONFLICTING NARRATIVES
Multiple versions of scope, value, or success.

SURPRISE REACTIONS
"I didn't know that!" moments in meetings or reviews.

SCOPE DEBATES
Recurring arguments about what should be included.

ALIGNMENT TREND MATTERS
Stable or improving = Healthy
Declining = Act now

5 WHY IT MATTERS

FEWER DISPUTES
Shared understanding reduces friction and rework.

LESS SCOPE CREEP
Clear boundaries and priorities prevent uncontrolled changes.

STRONGER TRUST
Transparency builds confidence and collaboration.

FASTER TRADE-OFFS
Aligned priorities enable quick, high-quality decisions.

SMOOTHER EXECUTION
Aligned teams move in the same direction and deliver better outcomes.

High alignment is a leading indicator of project performance.

6 IMPROVEMENT ACTIONS & OUTPUTS

ALIGNMENT WORKSHOPS
Facilitate conversations to uncover, clarify, and align expectations.

VISUAL SCOPE MAPS
Create shared visuals of in-scope, out-of-scope, and assumptions.

SUCCESS MEASURES
Co-create measurable outcomes and acceptance criteria.

EXPECTATION GAP REGISTER
Log gaps, owners, impact, and resolution plan.

ALIGNMENT HEAT MAP
Visualize alignment scores by group and dimension.

REVALIDATION PLAN
Revisit alignment at key milestones and after major changes.

Outputs: Aligned stakeholders, clear decisions, confident execution.

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LIMITED-TIME OFFER

940 PREMIUM TEMPLATES

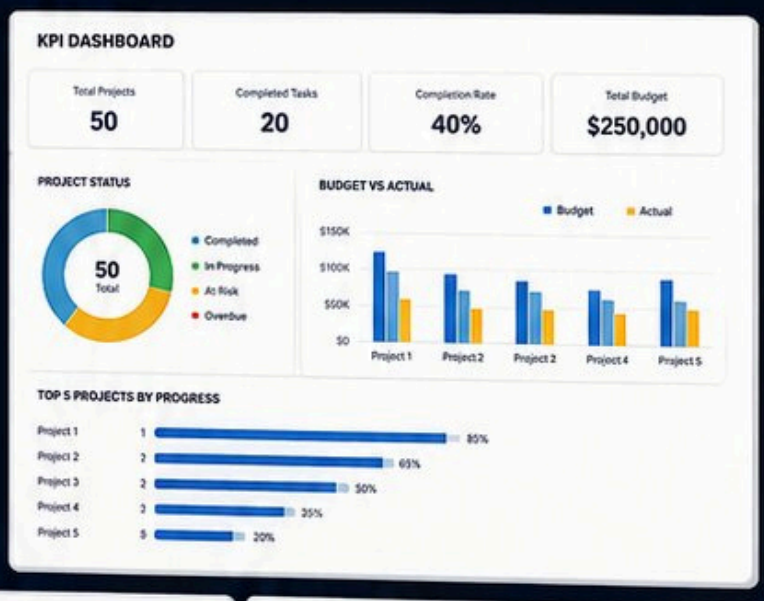
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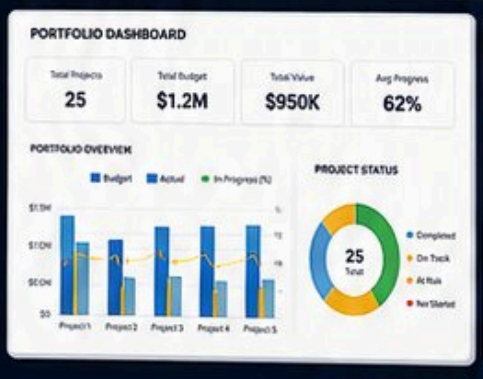
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11

REQUIREMENTS CLARITY & STABILITY

Measure Whether Stakeholder Requirements Are Clear, Testable, Complete, Prioritized, and Stable Enough for Reliable Delivery

1 WHAT IT MEASURES

- Clarity of business, user, technical, operational, and regulatory requirements.
- Completeness, testability, priority, traceability, and stakeholder ownership.
- Stability after baseline and how often requirements change.
- Distinguish healthy learning from uncontrolled requirement churn.
- Show that unclear requirements create rework, defects, and disputes.

2 CORE FORMULAS

$$\text{Clarity Rate \%} = \frac{\text{Requirements Meeting Quality Criteria}}{\text{Total Requirements}} \times 100$$

$$\text{Volatility Rate \%} = \frac{\text{Approved Requirements Changed During Period}}{\text{Baseline Requirements}} \times 100$$

$$\text{Late Change Rate \%} = \frac{\text{Changes Raised After Design, Build, or Procurement Commitment}}{\text{Total Changes}} \times 100$$

$$\text{Traceability Coverage \%} = \frac{\text{Requirements Linked to Owner, Benefit, Design, Test, and Acceptance Evidence}}{\text{Total Requirements}} \times 100$$

Trends matter by project phase (Initiate → Plan → Build → Close).

3 QUALITY CHECKLIST

- One clear need per requirement.
- Named stakeholder owner and source.
- Measurable acceptance criteria.
- Priority and business rationale defined.
- Dependencies, assumptions, and constraints documented.
- Testable wording with no vague terms.
- Reviewed by delivery, operations, compliance, and testing.
- Traceable from requirement to outcome.

4 EXAMPLE & THRESHOLDS

EXAMPLE: 240 requirements, 204 pass clarity review = 85% clarity.

Monthly volatility = 9%.

Traceability coverage = 92%.

Most late changes came from operations because they were engaged too late.

TARGET: Critical requirements should reach 100% clarity before major commitment.

Volatility should trend downward as the project matures.

WARNING SIGNS

- ✕ Vague wording
- ✕ Repeated rework
- ✕ Frequent late changes
- ✕ Unclear priorities
- ✕ Acceptance disputes

5 WHY IT MATTERS

- Improves estimates and planning reliability.
- Reduces defects, rework, and scope disputes.
- Strengthens testing and acceptance.
- Improves stakeholder confidence and alignment.
- Helps procurement, design, and delivery flow better.
- Makes changes more visible and controllable.

6 IMPROVEMENT ACTIONS & OUTPUTS

- Use facilitated discovery workshops, prototypes, process maps, examples, and acceptance tests.
- Apply a definition-of-ready review before approval.
- Involve downstream stakeholders early.
- Analyze change causes instead of blaming users.

KEY OUTPUTS

- Clarity dashboard
- Volatility trend
- Change-cause Pareto
- Traceability matrix
- Requirement readiness gate
- Action plan

TAKEAWAY

Clear, complete, and stable requirements create the foundation for reliable plans, smooth delivery, fewer surprises, and outcomes that stakeholders trust.

Clarify → Baseline → Monitor → Improve → Succeed

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12

SPONSOR ENGAGEMENT SCORE

Measure Whether the Project Sponsor Is Providing Direction, Decisions, Protection, Resources, and Visible Leadership

1 WHAT IT MEASURES

Assesses how actively the sponsor provides leadership and support.

- Sponsor availability and presence.
- Decision responsiveness and timeliness.
- Strategic guidance and direction.
- Barrier removal and issue resolution.
- Advocacy for the project and team.
- Funding support and resource backing.
- Benefits ownership and accountability.
- Visible leadership and engagement.
- Commitment follow-through.

2 WEIGHTED SCORE

Sponsor Score = weighted average of key engagement dimensions.

Decisions (Decision Speed)	25%
Barrier Removal (Issue Resolution)	20%
Strategic Direction (Guidance)	20%
Advocacy (Visible Support)	15%
Resources (Funding & Support)	10%
Attendance (Steering Presence)	10%

Each dimension is scored 1 to 5 based on evidence.

1 = Very Poor 3 = Adequate 5 = Excellent

Sponsor Score = (Σ (Score × Weight))

3 EVIDENCE SOURCES

- Steering committee attendance records.
- Decision log and turnaround times.
- Escalation outcomes and resolutions.
- Funding approvals and releases.
- Resource interventions and support.
- Leadership communications (memos, updates, town halls).
- Benefit reviews and ownership actions.
- Stakeholder observations and feedback.

All commitments made by the sponsor should be tracked to closure.

4 EXAMPLE & THRESHOLDS

EXAMPLE: Sponsor Score = 3.6 / 5
Strong advocacy and resource support but weak decision speed and limited attendance in a critical phase.

SCORE GUIDE

4.3+	Strong Engagement	Visible, decisive, and consistently supportive.
3.5–4.29	Adequate Engagement	Generally supportive with some gaps.
2.8–3.49	Vulnerable Engagement	Inconsistent or reactive involvement.
Below 2.8	Critical Engagement	Insufficient leadership and support.

WARNING SIGNS

- ✕ Decisions delegated without authority.
- ✕ Inconsistent messages or shifting priorities.
- ✕ Escalations ignored or unresolved.
- ✕ Resources promised but not protected.

5 WHY IT MATTERS

- Stronger authority drives action and removes ambiguity.
- Faster decisions keep the project on track.
- Better cross-functional alignment and collaboration.
- Reduced resistance and fewer roadblocks.
- Improved governance and oversight.
- More resource stability and predictability.
- Higher benefit realization and business impact.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS (WHAT TO DO)

- Agree sponsor expectations early and revisit regularly.
- Define decision rights, boundaries, and cadence.
- Use concise executive briefs and dashboards.
- Prepare clear options with impacts and risks.
- Maintain sponsor commitment log.

OUTPUTS (WHAT YOU GET)

- Sponsor Scorecard (overall score & dimension scores).
- Decision Performance View (speed, quality, and follow-through).
- Escalation Outcomes Summary (open vs. resolved).
- Sponsor Coaching Discussion Notes and Action Plan.

13

EXECUTIVE SUPPORT INDEX

Measure the Breadth and Consistency of Senior Leadership Support Beyond the Formal Sponsor

1 WHAT IT MEASURES

- Leadership alignment across senior leaders on goals, priorities, and success.
- Visibility and active engagement with the project and its outcomes.
- Resource protection and timely release when needed.
- Barrier removal and issue escalation support.
- Strategic consistency with enterprise direction and commitments.
- Willingness to influence peers and reinforce decisions.

Support must exist across Finance, Operations, Technology, and Business Leaders.

2 INDEX DESIGN

Executive Support Index = weighted average of: alignment, visibility, resource support, barrier removal, and advocacy.

$$\text{Leadership Coverage \%} = \frac{\text{Supportive Required Executives}}{\text{Executives Whose Support is Needed}} \times 100$$

$$\text{Priority Protection Rate} = \frac{\text{Protected Critical Resources or Decisions}}{\text{Threatened Commitments}} \times 100$$

Individual leader scores matter because one powerful opponent can outweigh the average.

3 EVIDENCE & QUESTIONS

- Do leaders repeat the same priorities and success measures?
- Do leaders release resources and approve key decisions?
- Do leaders resolve conflicts and remove roadblocks?
- Do leaders defend the project against competing initiatives?
- Do leaders visibly reinforce the change and outcomes?

EVIDENCE SOURCES

- Steering committee notes and decisions
- Leadership communications and town halls
- Funding actions and priority moves
- Manager and stakeholder feedback
- Project artifacts and escalation logs

4 EXAMPLE & WARNING SIGNS

EXAMPLE: EXECUTIVE SUPPORT INDEX

- Index Score = 71%
- Alignment: 70% Visibility: 80%
- Resource Support: 60%
- Barrier Removal: 65%
- Advocacy: 70%

Leadership Coverage = 5 of 7
Finance and Technology supportive.
Operations leadership neutral.

WARNING SIGNS

- Conflicting priorities in leadership messages.
- Key leaders are silent or disengaged.
- Governance meetings cancelled or skipped.
- Resources withdrawn or reprioritized.
- Public doubt or negative commentary from senior leaders.

5 WHY IT MATTERS

- Provides cross-functional authority to act and decide.
- Enables better prioritization and faster decision-making.
- Builds credibility with teams and stakeholders.
- Secures stable resourcing and protection from disruption.
- Improves escalation outcomes and speed of resolution.
- Creates permission for middle managers to support and act.

6 IMPROVEMENT ACTIONS & OUTPUTS

- Map required executive support across functions and decisions.
- Connect the project to strategic goals and financial outcomes.
- Use sponsor-to-peer influence to build alignment and commitment.
- Resolve priority conflicts in leadership forums.

OUTPUTS

- Executive Alignment Map (who supports, neutral, opposes)
- Executive Support Trend (overall and by dimension)
- Priority Conflict Log (issues, impact, resolution)
- Executive Influence Plan (engagements and asks)

14

STAKEHOLDER TRUST & TRANSPARENCY INDEX

Measure Whether Stakeholders Believe the Team Is Honest, Reliable, Competent, Open, and Consistent

1 WHAT IT MEASURES

TRUST IN COMMITMENTS
Do we say what we'll do and do what we say?

INFORMATION ACCURACY
Is the information timely, complete, and truthful?

COMPETENCE
Do stakeholders believe we have the right skills?

FAIRNESS
Are decisions impartial and based on merit?

CONFIDENTIALITY
Do we protect sensitive information appropriately?

OPENNESS TO BAD NEWS
Do we share issues early, not hide them?

PSYCHOLOGICAL SAFETY
Can stakeholders speak up without fear?

TRANSPARENCY
Are we open about assumptions, risks, delays, and trade-offs?

2 SCORING MODEL

Trust Index (TI) = weighted average of six dimensions rated on a 1–5 scale.

HONESTY
We are truthful and upfront.

RELIABILITY
We deliver what we commit.

COMPETENCE
We have the knowledge and skills to succeed.

OPENNESS
We share information early and transparently.

FAIRNESS
We make fair and objective decisions.

SAFETY
It's safe to raise concerns and disagree.

COMMITMENT RELIABILITY %
(Commitments Completed as Agreed ÷ Commitments Due) × 100

EARLY DISCLOSURE RATE %
(Material Issues Disclosed Before Escalation ÷ Material Issues) × 100

Use survey ratings (1–5) plus supporting evidence.

3 QUESTIONS & EVIDENCE

- The team tells me what I need to know, even difficult information.
- Commitments are realistic and delivered as agreed.
- Decisions are explained fairly and I understand the why.
- I can raise concerns or disagree without negative consequences.
- Status updates and reports reflect reality, not spin.

EVIDENCE SOURCES

- Commitment logs and performance.
- Issue logs and early disclosures.
- Team communications and updates.
- Stakeholder survey comments and interviews.
- Observation of meetings and behavior.

4 EXAMPLE & WARNING SIGNS

EXAMPLE

- Trust Index (TI) = 3.7 / 5
- Commitment Reliability = 68%
- Users report late disclosure of two critical issues.

INTERPRETATION GUIDE

- 4.20 and above = Strong Trust
- 3.60 – 4.19 = Watch & Improve
- Below 3.60 = Recovery Needed

WARNING SIGNS

- ✕ Stakeholders bypass the PM
- ✕ Double-check everything
- ✕ Information is withheld
- ✕ Rumors fill the gaps

5 WHY IT MATTERS

- Faster decisions from aligned, confident stakeholders.
- Stronger candor leads to better ideas and solutions.
- Better risk reporting and earlier course correction.
- Reduced politics and blame, more focus on outcomes.
- Lower rework and fewer surprises and escalations.
- Preserves support and goodwill even in difficult phases.

6 IMPROVEMENT ACTIONS & OUTPUTS

- Make realistic commitments and set clear expectations.
- Report uncertainty, risks, and assumptions openly.
- Explain changes and trade-offs with data and rationale.
- Acknowledge errors quickly and share corrective actions.
- Publish decision rationale and owner follow-through.
- Protect confidentiality while remaining open and transparent.

KEY OUTPUTS

- Trust Index trend dashboard
- Commitment reliability chart
- Early disclosure incidents log
- Stakeholder comments summary
- Recovery actions and tracking

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STAKEHOLDER SENTIMENT SCORE

Track Whether Stakeholder Attitudes Are Positive, Neutral, or Negative and Identify the Drivers Behind the Trend.

1 WHAT IT MEASURES

The current emotional and attitudinal position toward the project, team, change, expected value, and personal impact.

Captures the direction (positive, neutral, negative), intensity (how strong), and the cause behind feelings.

Shows how stakeholder sentiment is trending over time and across groups.

2 CALCULATION OPTIONS

Net Sentiment =
% Positive - % Negative

Average Sentiment =
Weighted average across a scale (-2 to +2)
Very Negative to Very Positive

Critical Negative Rate =
High-Influence Negative Stakeholders ÷ High-Influence Stakeholders x 100

Driver Score =
Frequency of Cause x Impact (1-5)

3 DATA DISCIPLINE

- Collect from surveys, interviews, meetings, comments, support tickets, and approved text analysis.
- Validate automated classification and sampling for accuracy and fairness.
- Record reason, evidence, date, stakeholder group, and confidence level.
- Compare sentiment with behavior such as participation, feedback, and adoption.

4 EXAMPLE & WARNING SIGNS

EXAMPLE SNAPSHOT
58% Positive
27% Neutral
15% Negative

Net Sentiment = +43

BY GROUP EXAMPLE
Operations: -12 (Negative)
IT Team: +18 (Positive)
Executives: +68 (Positive)

WARNING SIGNS

- ✕ Sharp drops in sentiment after announcements.
- ✕ Spreading misinformation or rumor activity.
- ✕ Emotional or confrontational behavior in meetings.
- ✕ Growing silence, fewer questions, and low feedback.

5 WHY IT MATTERS

- Early indicator of support, resistance, and risk before it shows in results.
- Reflects trust, confidence, and belief in the project and team.
- Measures communication effectiveness and message resonance.
- Predicts adoption probability and likelihood of change success.
- Negative sentiment can drive delay, conflict, and attrition.
- Positive sentiment creates advocates, momentum, and higher performance.

6 IMPROVEMENT ACTIONS & OUTPUTS

IMPROVEMENT ACTIONS

- Listen directly and often.
- Segment by group and persona to understand unique concerns.
- Correct misinformation quickly with facts and transparency.
- Address real impacts and trade-offs with clear mitigation.
- Use credible leaders and local champions to influence.

KEY OUTPUTS

- Sentiment Trend Over Time
- Group Sentiment Heat Map
- Top Sentiment Drivers
- Critical Negative List
- Response Actions & Owners

TAKEAWAY

Sentiment is your pulse on people. Track it, understand the drivers, and act early to turn risk into support and emotion into momentum.

Measure Sentiment → Find Drivers → Act & Communicate → Improve Sentiment → Build Support

16

FEEDBACK QUALITY & ACTIONABILITY

Measure Whether Stakeholder Feedback Is Specific, Evidence-Based, Relevant, Timely, and Usable for Decisions or Improvement.

1 WHAT IT MEASURES

The usefulness of feedback, not only the quantity.

Dimensions include:

- Specificity – clearly describes the issue or opportunity.
- Evidence – supported by facts, examples, or data.
- Relevance – aligned to scope, benefits, or user needs.
- Feasibility – practical and implementable.
- Timeliness – provided early enough to be useful.
- Impact – has meaningful effect on decisions or outcomes.
- Ownership – identifies the source or affected party.

2 CORE FORMULAS

Actionable Feedback Rate % = $\frac{\text{Actionable Items}}{\text{Feedback Received}} \times 100$

Evidence Rate % = $\frac{\text{Items with Examples, Facts, or Data}}{\text{Total Feedback}} \times 100$

Timely Feedback Rate % = $\frac{\text{Feedback Received Before Relevant Decision}}{\text{Total Feedback}} \times 100$

Duplicate Rate % = $\frac{\text{Repeated Feedback Items}}{\text{Total Feedback}} \times 100$

Higher is better for Actionable, Evidence, and Timely. Lower is better for Duplicate.

3 QUALITY CRITERIA

- Clear issue or opportunity.
- Identifies affected person or process.
- Provides evidence or example.
- States desired outcome or improvement.
- Indicates urgency or time sensitivity.
- Explains business impact or user value.
- Relevant to scope, benefit, risk, or user need.

4 EXAMPLE & WARNING SIGNS

EXAMPLE:

- Total feedback items = 120
- Actionable items = 78 (Actionable Rate = 65%)
- Evidence-based items = 52 (Evidence Rate = 43%)
- Timely items = 66 (Timely Rate = 55%)
- Duplicate items = 25 (Duplicate Rate = 21%)

Main weakness: Vague, non-specific end-user comments.

WARNING SIGNS

- Feedback received too late to influence decisions.
- Contradictory feedback with no resolution.
- Unresolved recurring concerns.
- High duplicate feedback.

5 WHY IT MATTERS

- Drives better requirements and solution design.
- Improves usability, performance, and adoption.
- Strengthens risk response and compliance.
- Builds stakeholder trust and engagement.

Poor-quality feedback creates noise, debbate, and slow prioritization.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Ask structured questions that guide useful feedback.
- Request impact, example, and suggested outcome.
- Use prototypes, scenarios, or mockups to elicit specifics.
- Train facilitators to probe, clarify, and follow up.

KEY OUTPUTS

- Feedback Quality Scorecard (rates & trends).
- Theme analysis and top insights.
- Duplicate feedback trends.
- Prioritization queue of actionable items.
- Action plan with owners and dates.

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FEEDBACK CLOSURE RATE

Track Whether Stakeholder Feedback Is Evaluated, Decided, Acted On, Communicated, and Closed Within the Promised Time

1 WHAT IT MEASURES

The reliability of the feedback loop from receipt to resolution.

Closure may mean:

- Implemented
- Accepted for later
- Rejected with rationale
- Merged / Consolidated
- No action required

Include stakeholder confirmation for critical items to ensure true closure and accountability.

2 CORE FORMULAS

$$\text{Closure Rate \%} = \frac{\text{Closed Items}}{\text{Items Due for Closure}} \times 100$$

$$\text{On-Time Closure Rate \%} = \frac{\text{Items Closed by Target Date}}{\text{Items Due for Closure}} \times 100$$

$$\text{Average Closure Time (days)} = \frac{\text{Total Elapsed Days (Receipt to Closure)}}{\text{Closed Items}}$$

$$\text{Reopen Rate \%} = \frac{\text{Reopened Closed Items}}{\text{Closed Items}} \times 100$$

Lower is better for Average Closure Time and Reopen Rate.

3 DATA TO COLLECT

- Feedback ID
- Source (who provided feedback)
- Category (e.g., usability, process, scope)
- Impact (low / medium / high / critical)
- Priority
- Owner
- Received Date
- Target Date for Closure
- Decision (what was decided & why)
- Action Taken (and related artifacts)
- Communication Date (stakeholder notified)
- Acknowledgment (confirmed by stakeholder)

Link to Requirements, Changes, Risks, or Defects where needed.

4 EXAMPLE & THRESHOLDS

EXAMPLE:

- Items due for closure = 90
- Items closed = 72
- Items closed on time = 58
- Total elapsed days = 792
- Items reopened = 9

Closure Rate % = 72 / 90 × 100 = 80%

On-Time Closure Rate % = 58 / 90 × 100 = 64%

Average Closure Time = 792 / 72 = 11 days

Reopen Rate % = 9 / 72 × 100 = 12.5%

Stricter targets apply for safety, compliance, or go-live critical feedback.

WARNING: Rising closure rate with rising reopen rate may mean premature or incomplete closure.

5 WHY IT MATTERS

Demonstrates responsiveness and accountability to stakeholders.

Prevents recurring escalation and duplicate complaints, saving time and improving stakeholder satisfaction.

Creates traceable evidence of evaluation, decisions, actions, and communications for governance and audit.

Builds trust by honoring promises and closing the loop within the committed timeframe.

6 IMPROVEMENT ACTIONS & OUTPUTS

Set service levels for closure by priority (e.g., Critical ≤ 5 days, High ≤ 10 days, Medium ≤ 20 days).

Assign one accountable owner for every feedback item.

Review aging items weekly and escalate overdue items.

Communicate the decision and rationale to the stakeholder.

Confirm closure with the stakeholder and capture acknowledgment.

KEY OUTPUTS

- Closure Funnel (Received → Evaluated → Decided → Acted → Communicated → Closed)
- Aging List and Backlog by Priority
- Overdue Critical Items Report
- Reopen Analysis (causes and trends)
- Stakeholder Notification Report

18

ISSUE ESCALATION RATE

Measure How Often Stakeholder Issues Require Higher Authority, How Quickly They Escalate, and Whether Escalation Resolves the Problem.

1 WHAT IT MEASURES

The proportion of issues that cannot be resolved at the current level and require sponsor, steering, legal, or executive intervention.

Measures appropriateness, timeliness, outcome, and recurrence of escalations.

Evaluates if problems are escalated at the right time to the right authority and actually get resolved.

Helps ensure governance is effective without unnecessary escalation.

Improves trust by making escalation a clear, fair, and constructive process.

2 CORE FORMULAS

$$\text{Escalation Rate \%} = \frac{\text{Escalated Issues}}{\text{Total Issues}} \times 100$$

$$\text{Timely Escalation Rate \%} = \frac{\text{Escalations Raised Before Impact Threshold}}{\text{Escalations}} \times 100$$

$$\text{Resolution Success \%} = \frac{\text{Escalations Resolved with Agreed Outcome}}{\text{Escalations Closed}} \times 100$$

$$\text{Repeat Escalation Rate \%} = \frac{\text{Issues Escalating Again After Closure}}{\text{Closed Escalations}} \times 100$$

TARGET GUIDELINES

Escalation Rate: 5–15% Timely: ≥ 80% Success: ≥ 80% Repeat: ≤ 10%

3 DATA & CLASSIFICATION

Key Data

- Severity level
- Issue owner / reporter
- Date discovered
- Local actions attempted
- Escalation trigger
- Authority level needed
- Impact (scope, cost, schedule, quality)

Cause Categories (examples)

- Resource conflict
- Decision gap
- Policy / process gap
- Contract / legal
- Technical risk
- Stakeholder conflict
- Compliance / regulatory

Classification

- Severity: Low / Medium / High / Critical
- Escalation Path: Sponsor / Steering / Legal / Executive / External
- Status: Open / Escalated / Resolved / Closed

4 EXAMPLE & WARNING SIGNS

EXAMPLE: 46 ISSUES

- Total issues = 46
- Escalated = 9
- Timely escalations = 6
- Resolved = 7
- Repeated after closure = 2

RESULTING METRICS

- Escalation Rate = 9 / 46 = 19.6%
- Timely Escalation Rate = 6 / 9 = 66.7%
- Resolution Success = 7 / 9 = 77.8%
- Repeat Escalation Rate = 2 / 9 = 22.2%

WARNING SIGNS

- ✖ Issues age without escalation.
- ✖ Leaders are surprised by problems.
- ✖ Escalation used as punishment.
- ✖ The same issue keeps coming back.

5 WHY IT MATTERS

- Protects the project when issues exceed the PM's authority or control.
- Prevents small problems from turning into crises by getting the right help in time.
- Balances governance by ensuring escalation is used appropriately, not excessively.
- Improves resolution speed and outcome quality with the right decision-makers.
- Builds trust that issues will be heard, handled, and resolved at the right level.

6 IMPROVEMENT ACTIONS & OUTPUTS

- Define objective escalation triggers (severity, impact, risk, thresholds).
- Define authority levels, decision rights, and escalation paths.
- Set response time targets and acknowledge requirements.
- Specify required information and evidence for escalation.
- Escalate with facts, analysis, options, and recommended action.
- Review repeated escalations to find structural or systemic root causes.

KEY OUTPUTS

- Escalation trend (rate over time)
- Escalation aging (open escalations)
- Trigger compliance (met / not met)
- Resolution outcomes (success rate)
- Recurrence rate (repeat escalations)
- Systemic actions & process improvements

Quick Escalation Flow

Issue Occurs & Assessed → Local Actions Attempted → Trigger Met → Escalate to Right Authority → Decision & Resolution → Monitor & Follow Up

Golden rule: Escalate the issue, not the person. Provide clear facts, impact, and options—then partner on the solution.

Common Escalation Authorities

Sponsor · Steering Committee · Legal / Compliance · Executive · External Authority

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CONFLICT FREQUENCY & RESOLUTION TIME

Track Stakeholder Conflicts, Their Causes, Severity, Duration, Recurrence, and Impact on Delivery

1 WHAT IT MEASURES

- Disagreements affecting priorities, resources, requirements, roles, decisions, or relationships.
- Distinguish healthy challenge from destructive conflict.
- Measure how long conflicts take to resolve (duration).
- Measure how often resolved conflicts return (recurrence).
- Track the impact of conflict on delivery, morale, and quality.

2 CORE FORMULAS

Conflict Frequency = Recorded Conflicts / Time Period (Month or Phase)

(conflicts per month or phase)

Average Resolution Time = Total Elapsed Resolution Time (Days) / Conflicts Closed

(days per conflict)

On-Time Resolution % = (Conflicts Resolved Within Target / Conflicts Closed) × 100

(target time per severity)

Recurrence Rate % = (Resolved Conflicts That Return Within Defined Period / Conflicts Closed) × 100

(e.g., within 60 or 90 days)

3 DATA TO COLLECT

- Parties involved.
- Issue or topic in dispute.
- Interests and positions.
- Root cause of conflict.
- Severity level (Low / Med / High / Critical).
- Impact on scope, time, cost, quality, trust.
- Facilitator or leader involved.
- Resolution method used.
- Outcome & agreements reached.

CLASSIFY CAUSES (Examples)

Role ambiguity, resource competition, scope changes, values & priorities, incentives, information gaps, trust issues.

4 EXAMPLE & WARNING SIGNS

EXAMPLE (Quarter Q2)

- Total conflicts recorded = 12
- Average resolution time = 9 days
- On-time resolution = 75%
- Recurrence rate = 25%

Most conflicts stem from competing operational priorities and unclear decision rights.

WARNING SIGNS

- Personal attacks instead of issues.
- Avoidance or withholding concerns.
- Repeated disruption of the same topics.
- Hidden coalitions and side conversations.
- Falling reported conflict (may indicate fear, silence, or loss of trust).

5 WHY IT MATTERS

- Unresolved conflict delays decisions and drains schedule.
- Consumes leadership time and meeting bandwidth.
- Damages trust and team relationships.
- Creates rework, change orders, and cost overruns.
- Constructive resolution leads to better trade-offs and solutions.
- Improves accountability, clarity, and stakeholder alignment.

6 IMPROVEMENT ACTIONS & OUTPUTS

- Clarify interests, facts, and decision criteria.
- Use facilitation or mediation to resolve.
- Document agreements, decisions, owners, and follow-ups.
- Track recurrence and close the loop.
- Strengthen conflict norms and governance.

KEY OUTPUTS

- Conflict log (live, searchable).
- Cause Pareto (top conflict drivers).
- Resolution time trend (by severity).
- Recurrence rate chart.
- Governance improvements & policy updates.

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CHANGE RESISTANCE INDEX

Measure the Level, Source, Intensity, and Business Impact of Stakeholder Resistance to Project-Driven Change

1 WHAT IT MEASURES

The behaviors and signals that indicate resistance to project-driven change.

Resistance behaviors such as objections, delay, non-participation, workarounds, negative influence, or refusal to adopt.

Distinguishes legitimate concerns from:

- Misinformation
- Fear or uncertainty
- Incentive conflicts
- Capability gaps
- Change fatigue

Focuses on impact, intensity, and sources of resistance.

2 INDEX DESIGN

A composite index scored on a 1–5 scale (1 = Low Resistance, 5 = Severe Resistance).

RESISTANCE INDEX (1–5)

Weighted score of negative sentiment, non-participation, delay, noncompliance, and influence impact.

CRITICAL RESISTANCE RATE

High-influence resistant stakeholders ÷ High-influence stakeholders × 100

BEHAVIORAL RESISTANCE %

Target users showing avoidance or workarounds ÷ Target users × 100

EVIDENCE-BASED SCORING (1–5)

Each dimension scored 1–5 using observed, verifiable evidence.

FORMULA (EXAMPLE)

Resistance Index = (0.25S + 0.20NP + 0.20D + 0.20NC + 0.15II) × 5

Where: S = Sentiment, NP = Non-Participation, D = Delay, NC = Noncompliance, II = Influence Impact

3 DATA SOURCES

- Interviews and 1:1 conversations
- Pulse surveys and feedback polls
- Meeting attendance and participation
- Missed actions, late deliverables, and delays
- Complaints, help desk, and feedback
- Escalations and issue logs
- Adoption analytics and usage data
- Manager and sponsor feedback

Map resistance to underlying drivers: Awareness, Desire, Knowledge, Ability, Incentives, Trust, Workload, and Leadership Support.

4 EXAMPLE & WARNING SIGNS

EXAMPLE INDEX

- Resistance Index = 3.1 of 5 (Moderate Overall)
- One high-power Operations leader scores 4.6 and influences 300 users.
- Main drivers: workload increase, unclear benefits, and fear of disruption.

WARNING SIGNS

- Public support with private obstruction
- Growing workarounds and shadow processes
- Training avoidance or low completion
- Leaders contradicting the change in public

5 WHY IT MATTERS

- Resistance can delay approvals, decisions, and go-lives.
- Reduces adoption, usage, and realized benefits.
- Undermines quality, compliance, and increases operational risk.
- Drives up costs through rework, exceptions, and inefficiency.
- Early measurement enables targeted involvement and redesign before positions harden.

Unchecked resistance today becomes roadblocks tomorrow.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Listen actively and validate concerns.
- Involve affected people in shaping solutions.
- Communicate impacts, benefits, and support clearly.
- Redesign or remove harmful aspects where feasible.
- Use credible sponsors and champions to influence and reinforce.
- Track both sentiment and behavior over time.

OUTPUTS

Resistance Heat Map | Driver Analysis | Influence Risk | Intervention Plan | Post-Action Trend



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CHANGE READINESS SCORE

Measure whether stakeholders are prepared, willing, equipped, and supported to move from the current state to the future state.

1 WHAT IT MEASURES

The level of readiness across key dimensions that drive successful adoption and sustained change.

AWARENESS
Do stakeholders understand why the change is happening?

DESIRE
Are they motivated and willing to support the change?

KNOWLEDGE
Do they have the understanding they need to succeed?

ABILITY
Do they have the skills, tools, and confidence to perform?

LEADERSHIP SUPPORT
Are leaders visible, aligned, and actively backing the change?

PROCESS & OPERATIONAL READINESS
Are processes, systems, and resources ready to support the change?

2 SCORING MODEL

Weighted Readiness Score (WRS) on a 1–5 scale.

FORMULA

$$WRS = \frac{\Sigma\ (Score \times Weight)}{\Sigma\ Weights} \times 100$$

DIMENSIONS & EXAMPLE WEIGHTS

Awareness	15%
Desire	15%
Knowledge	15%
Ability	20%
Leadership Support	20%
Process & Operational Readiness	15%
TOTAL	100%

SCORING SCALE (for each dimension)
1 = Very Low 2 = Low 3 = Moderate
4 = High 5 = Very High

OPERATIONAL READINESS COMPONENTS

- Systems configured & tested
- Data accurate, available, and migrated
- Processes documented & approved
- Tools and resources available
- Role clarity & access in place
- Support channels and SLAs defined

3 EVIDENCE TO COLLECT

- Stakeholder surveys (awareness, desire, confidence, readiness)
- One-on-one interviews & focus groups
- Training completion & assessment results
- Manager readiness plans and action logs
- Role mapping & responsibility clarity
- Process walkthrough completion & sign-offs
- Support model capacity & coverage
- Rehearsal / dry-run outcomes
- Workload analysis & competing priorities
- Local constraints and dependency status

Collect both leading indicators (sentiment, capability) and trailing indicators (training, tests, sign-offs) for a complete view.

4 EXAMPLE & THRESHOLDS

EXAMPLE OVERALL SCORE: 3.8 / 5
Component Breakdown (1–5 Scale)

Awareness	4.2
Desire	3.6
Knowledge	3.4
Ability	3.9
Leadership Support	4.3
Process & Operational Readiness	3.5

READINESS BANDS

- 4.2 – 5.0 READY TO PROCEED
  High readiness; monitor and reinforce.
- 3.2 – 4.1 PREPARE & ADDRESS GAPS
  Address gaps before go-live.
- 2.2 – 3.1 HIGH RISK
  Significant gaps; delay and mitigate.
- 1.0 – 2.1 NOT READY
  Critical issues; do not proceed.

GATE RULE:
No critical component should be below the minimum gate (2.5) to go-live.

5 WHY IT MATTERS

- Predicts implementation success and user adoption.
- Reduces go-live risk and disruption.
- Prevents productivity loss and rework after launch.
- Identifies gaps early so you can act with time to spare.
- Provides an objective, data-driven go-live decision.

High readiness creates momentum.
Low readiness creates resistance.
Measure it. Improve it. Succeed.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Increase communications and awareness.
- Build desire with benefits and success stories.
- Deliver targeted training and learning paths.
- Provide hands-on practice and job aids.
- Engage leaders; make support visible.
- Complete process, system, and data readiness.
- Run pilots and dry-runs to prove readiness.
- Strengthen support model and coverage.

OUTPUTS

- Readiness Heat Map
- Critical Gaps List
- Go-Live Gate Decision
- Action Owners
- Transition Support Plan
- Training Plan
- Rehearsal Results
- Readiness Trend

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TRAINING PARTICIPATION & COMPLETION

Measure whether affected stakeholders attend, complete, understand, and apply the learning needed for successful adoption.

1 WHAT IT MEASURES

Enrollment
Who signs up for training.

Attendance
Who attends each session.

Completion
Who finishes the training.

Knowledge Gain
What learners understand.

Confidence
How confident learners feel.

Application to the Job
Whether learners apply it on the job.

2 CORE FORMULAS

PARTICIPATION RATE

$$\text{Participation Rate} = \frac{\text{Enrolled}}{\text{Target Audience}} \times 100\%$$

COMPLETION RATE

$$\text{Completion Rate} = \frac{\text{Completed}}{\text{Enrolled}} \times 100\%$$

ASSESSMENT PASS RATE

$$\text{Assessment Pass Rate} = \frac{\text{Passed Assessments}}{\text{Assessments Taken}} \times 100\%$$

APPLICATION RATE

$$\text{Application Rate} = \frac{\text{Applied on the Job}}{\text{Completed}} \times 100\%$$

Track by role, location, topic, and time period for best insights.

3 DATA TO COLLECT

- Target audience and scope
- Role and training curriculum
- Enrollment records
- Attendance (live or virtual)
- Completion status
- Assessment scores and attempts
- Confidence ratings (pre/post)
- Manager sign-off or validation
- Reasons for non-completion
- Simulations or practical tests (for high-risk tasks)

4 EXAMPLE & WARNING SIGNS

EXAMPLE RESULTS (SAFETY TRAINING)

Target Audience: 250 employees

- Enrolled: 240 — Participation Rate: 96%
- Completed: 220 — Completion Rate: 91.7%
- Pass Rate: 210 — Assessment Pass Rate: 95.5%
- Applied on Job: 198 — Application Rate: 90.0%
- Avg Confidence (Post): 4.2 / 5

WARNING SIGNS

- High completion but low confidence scores
- Large gap between attendance and completion
- Low assessment pass rate
- Repeated assessment attempts
- High non-completion with unclear reasons
- Low application rate after training

5 WHY IT MATTERS

- Builds competence and readiness for new ways of working.
- Reduces errors, rework, and safety incidents.
- Lowers support and help desk burden.
- Supports operational continuity during change.
- Ensures compliance, regulatory alignment, and safety protection.

Learning that is understood and applied delivers real results.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Design role-based training paths matched to job tasks.
- Create job aids, checklists, and quick reference guides.
- Schedule training close to when it will be used.
- Provide extra support for low confidence or failed assessments.
- Restrict access to high-risk tasks until training is complete.

OUTPUTS

- Training Dashboard
- Critical Role Gaps
- Assessment Analysis
- Support Plan

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USER ADOPTION RATE

Measure whether target stakeholders are using the new product, process, system, or behavior deeply enough to create value.

1 WHAT IT MEASURES

- **Access** — Users can get in.
- **Activation** — Users take the first key action.
- **Frequency** — Users return and use regularly.
- **Depth** — Users explore and use more features or capabilities.
- **Correct Use** — Users follow the new process or behavior as intended.
- **Retention** — Users keep using over time.
- **Legacy Abandonment** — Users stop using the old way.

2 CORE FORMULAS

ADOPTION RATE

$$\text{Adoption Rate} = \frac{\text{Active Users}}{\text{Target Users}} \times 100\%$$

FEATURE ADOPTION

$$\text{Feature Adoption} = \frac{\text{Users of Feature}}{\text{Active Users}} \times 100\%$$

RETENTION RATE

$$\text{Retention Rate} = \frac{\text{Users Active in Period N}}{\text{Users Active in Period 1}} \times 100\%$$

LEGACY USE RATE

$$\text{Legacy Use Rate} = \frac{\text{Users of Legacy System}}{\text{Total Users}} \times 100\%$$

Definitions: Active User = Completed a meaningful action within the period. Target User = In scope and expected to use. Periods: Week, Month, or Quarter.

3 DATA TO COLLECT

- Usage analytics (logins, sessions, events)
- Transactions and key actions
- Workflow / process completion rates
- Support tickets (type, topic, volume)
- User surveys (ease, satisfaction, usage)
- Observations and job shadowing
- Manager confirmation and feedback
- Meaningful-use definition (what counts as real adoption)
- Exclusion rules (test users, bots, admins, one-time users)

Golden rule: Focus on meaningful, sustained use that creates value, not just signups or logins.

4 EXAMPLE & WARNING SIGNS

EXAMPLE ADOPTION FUNNEL (MONTH)

Invited / Available	1,000
Accessed (Logged In)	800 (80%)
Activated (Key Action)	520 (52%)
Used Weekly (≥1x)	300 (30%)
Used 3+ Features	180 (18%)

RETENTION (MONTH 2)	LEGACY USE RATE	TOP FEATURE ADOPTION
300 / 800 = 37.5%	150 / 800 = 18.8%	Reports 260 / 520 = 50%

WARNING SIGNS

- Spikes in logins with low activation or action.
- High support volume for basic tasks.
- Workarounds or exports to spreadsheets.
- Drop in retention after initial use.
- Legacy system still used at high levels.

5 WHY IT MATTERS

- Ensures the solution delivers the intended benefits.
- Reduces dual-process cost from old + new ways.
- Improves data quality and process consistency.
- Builds social proof and encourages peer adoption.
- Reveals what's working and what needs better support, communication, or design.

Adoption is the bridge between deployment and realized value.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Remove usability and workflow barriers.
- Improve performance and reliability.
- Enable champions and peer advocates.
- Send targeted nudges and reminders.
- Add in-product guidance and tips.
- Run office hours and Q&A sessions.
- Retire or restrict legacy options.

OUTPUTS

Adoption Funnel | Cohort Retention | Feature-Depth Report | Adoption Action Plan

Created by TemplGate

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BENEFITS REALIZATION CONFIDENCE

Measure stakeholder confidence that planned business benefits remain credible, achievable, owned, and measurable.

1 WHAT IT MEASURES

Overall confidence that planned business benefits will be realized. It covers confidence in:

- Benefit definition
- Baseline and current state
- Forecast and target
- Ownership and accountability
- Dependencies and enablers
- Adoption and usage
- Measurement and tracking

2 SCORING MODEL

Composite confidence scored 0–100% across key dimensions.

CONFIDENCE SCORE (0–100%)
Overall stakeholder confidence in benefits realization.

BENEFIT AT RISK (%)
% of total benefit value at medium or high risk.

OWNER COVERAGE (%)
% of total benefit value with a named, engaged owner.

MEASUREMENT READINESS (%)
% of benefits with baselines, metrics, and tracking in place.

FORMULA (EXAMPLE)

Confidence Score = 100 − (Weighted Risk Penalty)
Where Risk Penalty = Σ (Risk % × Impact Weight)
Score Range: 0% (No Confidence) – 100% (High Confidence)

3 EVIDENCE TO COLLECT

- Benefit profiles and definitions
- Financial model and forecasts
- Baseline and current data
- Key assumptions and constraints
- Dependency and enabler status
- Adoption and usage outlook
- Operational and change plans
- Uncertainty ranges and scenarios

More complete and validated evidence leads to higher confidence.

4 EXAMPLE & WARNING SIGNS

EXAMPLE: STRONG CONFIDENCE

- Confidence Score = 82%
- Benefit at Risk = 18%
- Owner Coverage = 92%
- Measurement Readiness = 88%

WARNING SIGNS: LOW CONFIDENCE

- Benefits without named owners
- Missing or outdated baselines
- Assumptions not tested or documented
- Potential double counting of benefits
- High-risk dependencies with no plan

5 WHY IT MATTERS

- Keeps the focus on outcomes, not just outputs and activities.
- Drives disciplined value governance and decision-making.
- Enables earlier, better investment and resource decisions.
- Strengthens accountability and stakeholder trust.

High confidence today increases the chance of realized value tomorrow.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Assign and engage benefit owners.
- Validate formulas, logic, and assumptions.
- Establish and refresh baselines.
- Test assumptions and dependencies.
- Update forecasts and targets.
- Continue post-transition measurement.

OUTPUTS

Confidence Trend | Benefit-at-Risk Heat Map | Owner Gaps | Realization Actions

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STAKEHOLDER COMMITMENT SCORE

Measure whether stakeholders convert verbal support into reliable actions, resources, decisions, and advocacy.

1 WHAT IT MEASURES

- Promises kept
- Actions completed
- Resources provided
- Decisions made
- Visible support (advocacy, communication)

Focuses on turning words into measurable outcomes.

2 CORE FORMULAS

COMMITMENT RELIABILITY

$$= \frac{\text{Completed Commitments}}{\text{Total Commitments}} \times 100$$

ON-TIME COMMITMENT %

$$= \frac{\text{On-Time Completed}}{\text{Total Commitments}} \times 100$$

CRITICAL COMMITMENT COVERAGE %

$$= \frac{\text{Critical Commitments Completed}}{\text{Total Critical Commitments}} \times 100$$

COMBINED COMMITMENT SCORE

= (Reliability × 40%) + (On-Time × 30%) + (Critical Coverage × 30%)

3 DATA TO COLLECT

- Commitment owner
- Committed action or deliverable
- Commitment dates (due & review)
- Evidence of completion
- Dependency and prerequisites
- Impact if not completed
- Completion reason (if late/missed)
- Meeting commitments
- Funding commitments

Keep a commitment register updated and visible.

4 EXAMPLE & WARNING SIGNS

EXAMPLE: STRONG COMMITMENT

- Reliability = 82%
- On-Time = 70%
- Critical Coverage = 88%
- Combined Score = 79%

WARNING SIGNS: LOW COMMITMENT

- Many commitments overdue
- Verbal support but weak follow-through
- Dates keep slipping
- Dependencies not removed
- Excuses, not solutions

5 WHY IT MATTERS

- Projects depend on stakeholder actions, not just plans.
- Improves predictability and schedule confidence.
- Builds accountability and ownership.
- Strengthens trust and collaboration.
- Better dependency management reduces risk and delays.

High commitment score = execution power behind the plan.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Confirm commitments in writing.
- Check authority and capacity.
- Review commitments weekly.
- Remove blockers and provide support.
- Escalate repeated or high-impact non-compliance.

OUTPUTS

Commitment Register · Reliability Trend · Critical Coverage · Recovery Plan

Created by TemplGate

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INFLUENCE COVERAGE & POWER-INTEREST RISK

Measure whether every high-power stakeholder has an engagement strategy and whether influential gaps threaten the project.

1 WHAT IT MEASURES

- **High-power coverage:** Do we engage all stakeholders with high power?
- **Interest level:** How interested or affected they are.
- **Potential impact:** Ability to help or hinder project outcomes.
- **Informal influence:** Hidden or behind-the-scenes influence.
- **Current vs desired position:** Where they stand now vs where we want them.

2 CORE FORMULAS

HIGH-POWER COVERAGE (%)

$$\text{High-Power Coverage} = \frac{\text{Engaged High-Power Stakeholders}}{\text{Total High-Power Stakeholders}} \times 100$$

INFLUENCE RISK SCORE (1–5)

$$\text{Influence Risk Score} = (\text{Uncovered Power} \times \text{Impact} \times \text{Interest})$$

Scaled to 1–5

ENGAGEMENT GAP (1–5)

$$\text{Engagement Gap} = |\text{Desired Position} - \text{Current Position}|$$

(Absolute value)

STRATEGY FRESHNESS (%)

$$\text{Strategy Freshness} = \frac{\text{Stakeholders with Strategy Updated in Last 90 Days}}{\text{Total High-Power Stakeholders}} \times 100$$

Score Range: 1 (Low Risk) – 5 (High Risk)

3 DATA & MAPPING

- Stakeholder interviews (ask about influence & concerns).
- Governance & decision roles (official authority).
- Network analysis to find informal influence.
- Resource ownership (budget, people, assets).

Map stakeholders by position:

- SUPPORTERS – Likely to help
- NEUTRALS – Uncertain or undecided
- OPPONENTS – Likely to resist
- HIDDEN INFLUENCERS – Informal power

4 EXAMPLE & WARNING SIGNS

EXAMPLE: GOOD COVERAGE (88%)

18 of 20 high-power stakeholders have an active engagement strategy. Two are monitored with plans in place.

WARNING SIGNS: HIGH RISK

- Key regulator not engaged (High power, high impact).
- Operations leader resistant but has strong informal influence.
- Relying only on org chart — missing hidden influencers.
- Stakeholders shifting positions without warning.

5 WHY IT MATTERS

- Reduces political surprise and last-minute resistance.
- Guides where to focus time and resources.
- Improves routing and coalition building.
- Prevents neglect of decision makers and influencers.

High coverage + low risk means a smoother path ahead.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Refresh influence map regularly.
- Assign relationship owner for each high-power stakeholder.
- Use sponsors and champions to open doors and reduce resistance.
- Engage early and communicate value clearly.
- Monitor position changes and update strategies.

OUTPUTS

Power-Interest Map | Influence Heat Map | Coverage Gaps | Engagement Strategy List

27

COMMUNICATION REACH & MESSAGE COMPREHENSION

Measure whether target stakeholders receive critical messages and correctly understand what the information means for them.

1 WHAT IT MEASURES

REACH
Extent to which target audience receives the message.

AWARENESS
Stakeholders are aware the message exists.

COMPREHENSION
Correct understanding of key message points.

ACTION UNDERSTANDING
Clarity on what action is expected or available.

IMPLICATIONS FOR ROLE
Understanding how the message applies to their role.

2 CORE FORMULAS

REACH RATE (%)

$$\text{Reach Rate} = \frac{\text{Messages Delivered}}{\text{Target Audience Size}} \times 100$$

COMPREHENSION RATE (%)

$$\text{Comprehension Rate} = \frac{\text{Correct Responses}}{\text{Total Responses}} \times 100$$

ACTION CONVERSION (%)

$$\text{Action Conversion} = \frac{\text{Intended Actions Taken}}{\text{Aware Audience}} \times 100$$

MESSAGE LEAKAGE RATE (%)

$$\text{Message Leakage Rate} = \frac{\text{Incorrect / Distorted Views}}{\text{Total Responses}} \times 100$$

EXAMPLE: Reach 80%, Comprehension 55%, Action Conversion 35%, Leakage 12%

3 DATA TO COLLECT

- Delivery analytics (opens, views, clicks, time spent)
- Attendance at briefings, webinars, meetings
- Acknowledgments and read confirmations
- Pulse questions on awareness and understanding
- Quizzes or checks of key message points
- Manager checks and team discussions
- Completed actions or next steps
- Barriers reported (language, channel, access, complexity)

4 EXAMPLE & WARNING SIGNS

EXAMPLE: GOOD RESULTS

- Reach 85%, Comprehension 75%, Action Conversion 60%, Leakage 8%
- Clear messages, multiple channels, reinforced by managers

WARNING SIGNS

- High reach but low comprehension
- Many "I didn't understand" or "What does this mean for me?"
- Rumors or conflicting interpretations
- Strong open rates but weak quiz or pulse results

5 WHY IT MATTERS

- Avoids false assurance that messages landed.
- Ensures stakeholders can execute correctly.
- Improves adoption, compliance, and safety.
- Strengthens decision quality and performance.
- Builds trust through clarity and transparency.

Clear communication drives the right actions and results.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Use plain language and visuals.
- Make messages role-specific and relevant.
- Provide FAQs and examples.
- Equip managers with talking points.
- Test understanding and close gaps.

OUTPUTS

- Communication Reach Funnel
- Comprehension Report
- Message Leakage Analysis
- Communication Action Plan

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STAKEHOLDER RISK EXPOSURE INDEX

Quantify project risk arising from low support, weak engagement, high influence, unresolved concerns, and dependency on stakeholder action.

1 WHAT IT MEASURES

The level of risk exposure from each stakeholder based on:

- **BEHAVIOR** – Support level, responsiveness, reliability.
- **AUTHORITY** – Decision power, control, veto ability.
- **DEPENDENCIES** – How critical their action is to project success.
- **UNCERTAINTY** – Lack of clarity, unknowns, volatility.
- **SENTIMENT** – Attitude, trust, willingness to collaborate.
- **UNRESOLVED ISSUES** – Open concerns, objections, and conflicts.

Combines probability and impact of risk to project outcomes.

2 INDEX DESIGN

STAKEHOLDER RISK EXPOSURE (SRE)

$SRE = P \times I \times Inf \times (1 - E)$

Where:
P = Probability of risk (1–5)
I = Impact on project (1–5)
Inf = Stakeholder influence (1–5)
E = Mitigation effectiveness (0%–100%)

RESIDUAL EXPOSURE

$RE = SRE \times (1 - E)$

(Remaining risk after mitigations)

PORTFOLIO EXPOSURE

Total Exposure = $\sum$ RE (All Stakeholders)

(Sum of residual exposures)

CONFIDENCE RATING

CR = 1–5
(1 = Very Low Confidence)
(5 = Very High Confidence)

High Exposure + Low Confidence = Highest Priority Risk

3 DATA TO COLLECT

- **STAKEHOLDER POSITION** – Role, organization, decision authority.
- **ENGAGEMENT LEVEL** – Level of interaction and participation.
- **TRUST / RELATIONSHIP** – Trust level and working history.
- **INFLUENCE LEVEL** – Ability to help or hinder outcomes.
- **UNRESOLVED ISSUES** – Open concerns, conflicts, objections.
- **COMMITMENTS & DEPENDENCIES** – Promises made and dependencies.
- **RESISTANCE INDICATORS** – Signs of opposition or non-cooperation.
- **RECENT CHANGES** – Changes in scope, org, leadership, priorities.
- **RISK STATEMENTS** – Stated and inferred risk conditions.

Good data = accurate risk exposure.
Poor data = hidden risk.

4 EXAMPLE & WARNING SIGNS

EXAMPLE CALCULATION

P (4) × I (5) × Inf (4) × (1 – E) (0.60) = 19.2 SRE

Mitigation Effectiveness (E) = 40%
Residual Exposure: RE = 19.2 × (1 – 0.40) = 11.52
Confidence Rating: RE = 2 (Low)

WARNING SIGNS

- High influence + low support or trust
- Many unresolved issues or complaints
- Strong dependencies with weak engagement
- Resistance rising or commitments missed
- Recent changes increasing uncertainty
- Low confidence in risk assessment (CR ≤ 2)
- High exposure concentrated in few stakeholders

5 WHY IT MATTERS

Stakeholder risk exposure can trigger project failure in multiple ways.

- **SCHEDULE RISK** – Delays from approvals, decisions, or lack of cooperation.
- **COST RISK** – Rework, escalations, and unplanned mitigation costs.
- **QUALITY RISK** – Poor decisions, weak inputs, or rushed approvals.
- **SCOPE RISK** – Scope changes, rework, or added constraints.
- **REPUTATION RISK** – Negative perception, complaints, and stakeholder backlash.
- **BENEFIT RISK** – Reduced adoption, utilization, and return on investment.

Manage stakeholder risk proactively.
Prevent issues before they impact results.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Target root causes of high exposure.
- Assign real owners for engagement.
- Engage early and communicate clearly.
- Define triggers and contingencies.
- Reduce uncertainty with facts and clarity.
- Strengthen trust and commitments.

OUTPUTS

- Stakeholder Risk Register
- Risk Exposure Heat Map
- Residual Exposure Trend
- Risk Response Plan
- Risk Status Dashboard
- Response Effectiveness Review

Created by TemplGate

CARD 28 OF 30

Linking The Most Important Stakeholder Metrics Every Project Manager Should Track Series

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EXTERNAL PARTNER COLLABORATION SCORE

Measure how effectively vendors, consultants, suppliers, clients, and delivery partners coordinate with the project.

1 WHAT IT MEASURES

How well external partners collaborate across key dimensions.

- **Responsiveness** — Speed and timeliness of replies and support
- **Information Sharing** — Openness, accuracy, and proactive updates
- **Quality** — Work quality, conformance, and right-first-time
- **Reliability** — Dependability and delivery on commitments
- **Issue Resolution** — Effectiveness in resolving problems quickly
- **Joint Planning** — Alignment in planning, risks, and priorities
- **Trust** — Mutual trust and transparency
- **Contractual Cooperation** — Following terms, obligations, and spirit of the contract

2 WEIGHTED FORMULA

Composite score on a 1–5 scale
(1 = Poor Collaboration, 5 = Excellent)

COLLABORATION SCORE (1–5)

Average across the eight collaboration dimensions in Section 1.

INTERFACE RELIABILITY (%)

% of interface committments delivered on time and in full.

JOINT ACTION CLOSURE (%)

% of joint actions closed by target date.

DISPUTE RATE (%)

Value of active disputes or claims as % of contract value.

FORMULA (EXAMPLE)

Collaboration Score = (0.50 × CS + 0.20 × IR + 0.20 × JAC + 0.10 × (1 − DR)) × 100

Where: CS = Collab Score (1–5), IR = Interface Reliability
JAC = Joint Action Closure, DR = Dispute Rate (0–1)
Score Range: 0 (Poor) – 100 (Excellent)

3 DATA TO COLLECT

- Delivery records and milestone logs
- Defect reports and quality records
- Response times and turnaround logs
- Action item and issue logs
- Change requests and approvals
- Claims and dispute records
- Forecast accuracy and variance data
- Interface data exchange records
- SLA performance and reports

Collect both quantitative data and qualitative feedback from both sides of the interface.

4 EXAMPLE & WARNING SIGNS

EXAMPLE: GOOD COLLABORATION

- Collaboration Score = 4.2 of 5
- Interface Reliability = 92%
- Joint Action Closure = 88%
- Dispute Rate = 3%
- Overall Score = 86 (Excellent)

WARNING SIGNS

- Unclear acceptance criteria or handoff expectations
- Defensive or delayed reporting of issues
- Repeated claims or unresolved disputes
- Missed commitments and poor follow-through

5 WHY IT MATTERS

PARTNERS CONTROL CRITICAL-PATH WORK

Strong collaboration prevents delays and bottlenecks.

IMPROVES FORECASTING AND INTEGRATION

Better data flow leads to more accurate plans and outcomes.

REDUCES CLAIMS AND REWORK

Fewer misunderstandings and defects when partners work as one.

BUILDS LONG-TERM VALUE

Trust and teamwork create durable relationships and better results.

High collaboration is a leading predictor of project success.

6 IMPROVEMENT ACTIONS & OUTPUTS

ACTIONS

- Align on shared goals and success metrics
- Define clear interface responsibilities
- Establish common data standards
- Create and maintain shared plans
- Hold integrated risk and issue reviews
- Use partner scorecards and feedback loops

OUTPUTS

Interface Heat Map | Partner Scorecard | Dispute Trend | Improvement Plan

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INTEGRATED STAKEHOLDER HEALTH DASHBOARD

Combine the most important stakeholder metrics into one decision-focused view that shows risk, trend, causes, and required action.

1 WHAT THE DASHBOARD MUST SHOW

- 72 — Current Score – Where we are now.
- Target – Where we want to be.
- Trend – Direction over time.
- Confidence – Data quality & reliability.
- Owner – Who is accountable.
- Next Review – When we'll recheck.
- Business Impact – Why it matters.
- Exceptions – What needs attention.

2 RECOMMENDED METRIC GROUPS

COVERAGE & INFLUENCE
Reach, engagement, and stakeholder power.

RELATIONSHIP HEALTH
Trust, satisfaction, alignment, and sentiment.

EXECUTION FLOW
Responsiveness, cycle time, handoffs, and quality.

CHANGE & VALUE
Adoption, benefits, value realization, and ROI.

3 SCORE & TREND DESIGN

NORMALIZATION
0 100
Score all metrics on a 0–100 scale for clarity.

SHOW ACTUAL & SCORE
85
Display actual value beside normalized score.

VARIANCE
+12
Show difference from target and last period.

ROLLING TREND
Track 4–8 periods to see patterns.

DATA QUALITY
Rate confidence: High, Medium, Low.

4 EXAMPLE EXECUTIVE SUMMARY

OVERALL HEALTH
72
Good
(Target: 80)
+6
Trend: Improving
Confidence: High

TOP RISKS
- Resistance rising in Key Operations
- Decision delays impacting timeline
- Change fatigue in multiple teams

POSITIVE SIGNALS
- Sponsor alignment at record high
- Adoption trending up in pilot teams
- Benefits tracking ahead of plan

REQUIRED DECISIONS
- Remove approval bottlenecks
- Increase comms in at-risk areas
- Fund capability gaps in execution

5 GOVERNANCE & ACTION

REVIEW CADENCE
Update weekly or biweekly.
Deep dive monthly.

RED METRIC RESPONSE
Define trigger levels.
Act fast. Reassess impact.

ESCALATION
Clear path for raising issues.
Document decisions.

LEARNING ARCHIVE
Capture what happened, why, and what we learned.

Govern the dashboard.
Act on the signals. Improve.

6 FINAL SUCCESS CONNECTION

Metrics turn relationships into visible conditions.

The goal is better action, not perfect scores.

Healthy stakeholders drive project success and value.

KEY DASHBOARD OUTPUTS

- Integrated Dashboard
- Stakeholder Heat Maps
- Action Register
- Sponsor Brief
- Trend Report
- Lessons Learned

One view. Shared truth.
Better decisions. Better results.

LIMITED-TIME OFFER

940 PREMIUM TEMPLATES

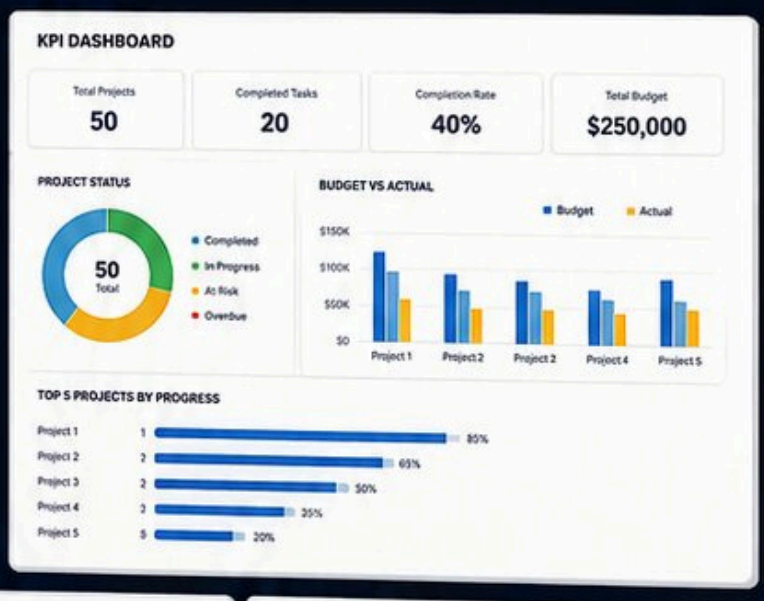
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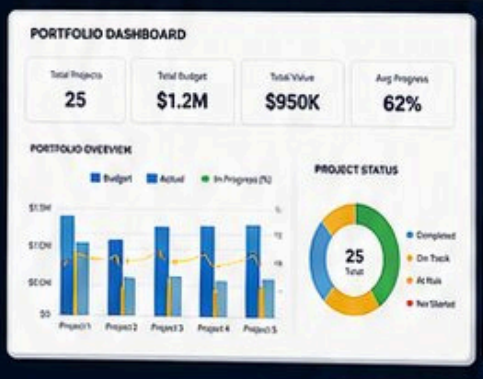
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