Workbook

Working Through the SMI:
Your Guide to Elevated
Stakeholder Engagement

Introduction

Understanding the Stakeholder Maturity Index (SMI)

The Stakeholder Maturity Index (SMI) is a structured framework designed to guide organizations through the stages of stakeholder engagement. It helps identify where an organization stands, from basic, reactive efforts to advanced, proactive strategies fully integrated into business operations. This workbook will help you understand each area of assessment of the SMI—Stakeholder Identification, Engagement Plan, Competitive Landscape, and Operations and Processes—and guide you through the steps necessary to evolve from a Crawler to a Flyer.

STAKEHOLDER IDENTIFICATION
- How are KOLs identified/prioritized?
- Are selection criteria aligned with strategic objectives?
- Is there a systematic process for reviewing and refreshing the KOL roster?

COMPETITIVE LANDSCAPE
- How well does the organization understand the competitive landscape and the evolving needs of KOLs?
- Is there a process for gathering and analyzing market intelligence?
- Are KOL insights systematically captured and shared across the organization?

ENGAGEMENT PLANNING
- How are interactions with KOLs planned, executed, and tracked?
- Is there a clear engagement strategy tailored to each KOL's unique profile and preferences?
- Are engagements coordinated across functions to provide a seamless KOL experience?

OPERATIONS & PROCESS
- Are robust systems and processes in place to support KOL engagement?
- Is data integrated across platforms to provide a holistic view of the KOL relationship?
- Are there clear roles, responsibilities, and governance structures for KOL engagement?

The first step in using the SMI is identifying where your organization currently stands. If you need more clarification, take a moment to complete the SMI quiz. Once you know your starting point, each section of the workbook will provide insights, strategies, and tips for applying the four elements of the SMI.

As you progress through each section, consider how to move to the next level of maturity and integrate more sophisticated strategies into your engagement efforts.

Crawler, Walker, Runner, or Flyer...what's the difference?

Each assessment area is divided into different stages of maturity. At the Crawler stage, your organization is just beginning to recognize the importance of stakeholder engagement. As a Walker, your organization has moved beyond reactive engagement and has a basic strategy. Runners work for organizations with a more advanced and proactive approach to stakeholder engagement. Flyers have a fully optimized, highly sophisticated, and seamlessly integrated stakeholder strategy with all aspects of their business.

When assessed across all four assessment areas, you may be a Walker with ongoing stakeholder relationships, a Runner with a sophisticated engagement plan, and a Crawler when examining operations and processes or competitive landscape analysis—and that's okay! Awareness and honest assessment are crucial, and you'll get more out of the SMI if you approach your current initiatives critically. Identifying your strengths and weaknesses will inform your next steps and opportunities for movement along the maturity curve.

So pick your priority and topic of interest—and let's get started.

There's something different here.

SECTION 1: STAKEHOLDER IDENTIFICATION

SECTION 1: STAKEHOLDER IDENTIFICATION

Stakeholder Identification is the foundation of any successful engagement strategy. It involves recognizing and mapping out all the key players who influence or are impacted by your organization's actions. This process ensures no crucial voices are overlooked, allowing for more targeted and effective engagement efforts.

Crawler Stage:

What It Means to Be a Crawler: At this stage, your organization is just beginning to identify key stakeholders, often ad-hoc.

What Defines This Stage

- Basic identification of key stakeholders
- A reactive approach, engaging stakeholders as issues arise
- Limited resources and strategy for stakeholder engagement

Strategies and Tips

- Start by creating a comprehensive list of potential stakeholders
- Allocate essential resources for stakeholder engagement
- Begin to engage your internal stakeholders and understand their external interactions

There's something different here.

Suggested Metrics and KPIs to Track

- Develop standardized KOL profile templates for cross-functional utilization
- Depth and diversity of stakeholder profiles
- Engagement prioritization success
  (e.g., alignment with strategic goals and internal feedback)
- Stakeholder satisfaction and feedback on their identification
  and involvement
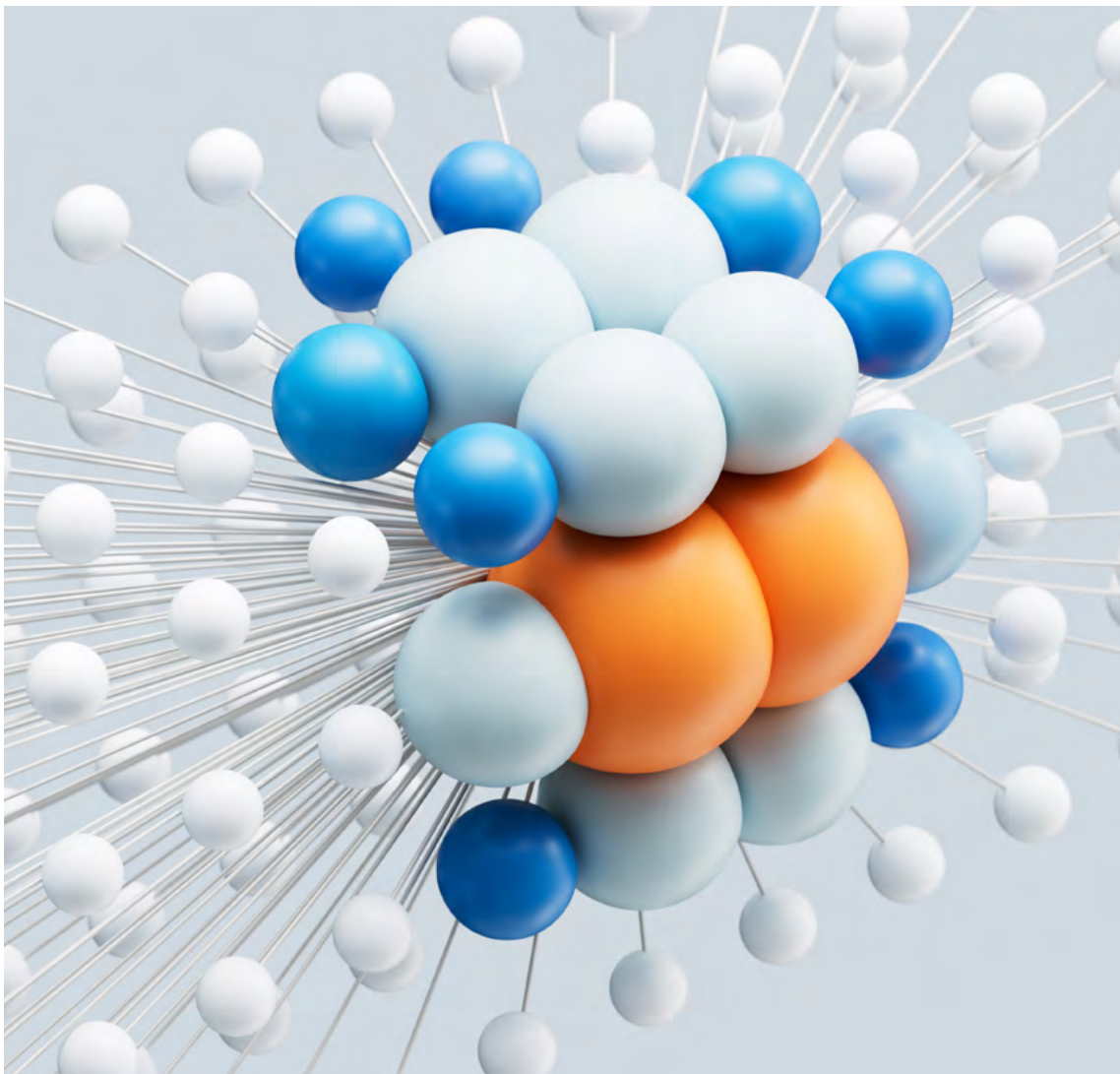
Activity

Identify three KOLs with whom your team has a relationship and evaluate how you will engage them in upcoming initiatives.

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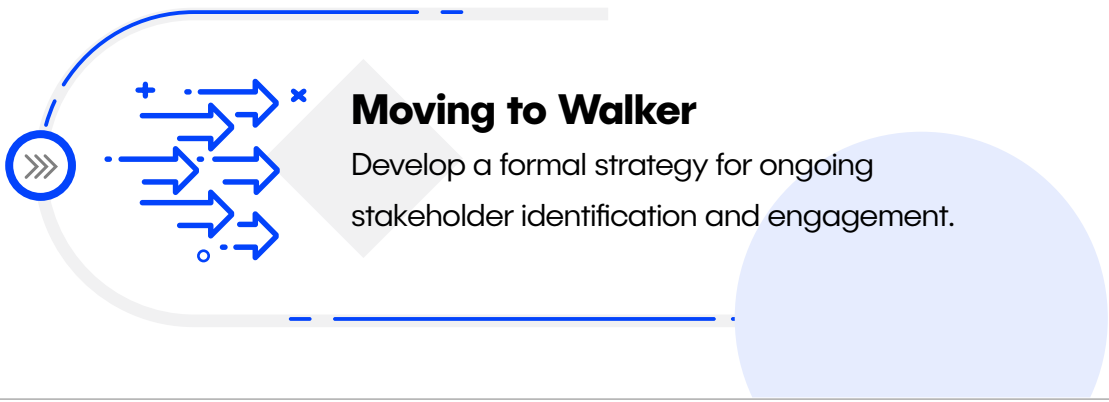
Moving to Walker

Develop a formal strategy for ongoing stakeholder identification and engagement.

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HEALTH

There's something different here.

Walker Stage:

What It Means to Be a Walker: You have moved beyond basic identification and developed a structured stakeholder-identification approach.

What Defines This Stage

- Regular updates to stakeholder lists
- Integration of stakeholder identification with broader business objectives
- Regular cross-functional team dialogue on key stakeholder engagement, issues, and opportunities

Strategies and Tips

- Use stakeholder mapping tools to understand relationships and influence
- Begin to develop stakeholder personas
- Begin aligning stakeholder personas with strategic goals

Suggested Metrics and KPIs to Track

- Develop standardized KOL profile templates for cross-functional utilization
- Depth and diversity of stakeholder profiles
- Engagement prioritization success (e.g., alignment with strategic goals and internal feedback)
- Stakeholder satisfaction and feedback on their identification and involvement

Activity

Align two SMART goals with your current stakeholder list and identify gaps.

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Moving to Runner

Start using data and analytics to refine your stakeholder-identification process and predict emerging stakeholders.

There's something different here.

Runner Stage:

What It Means to Be a Runner: Your organization proactively identifies and categorizes stakeholders using data-driven insights.

What Defines This Stage

- Proactive identification of stakeholder evolution using data analytics to drive key decisions
- Integration of competitive analysis and business strategy
- Highly integrated internal cross-functional team that continually evaluates the impact of stakeholder engagement

Strategies and Tips

- Use CRM systems to track and analyze stakeholder data
- Regularly update your stakeholder personas and criteria based on emerging trends (e.g., utilizing large language models and advanced analytics)

Suggested Metrics and KPIs to Track

- Accuracy of stakeholder insights and impact
- Number of new stakeholders identified through advanced methodologies
- Stakeholder engagement success is linked to the achievement of business goals

Activity

Use your internal resources and tools to forecast changes in stakeholder influence and plan your engagement accordingly.

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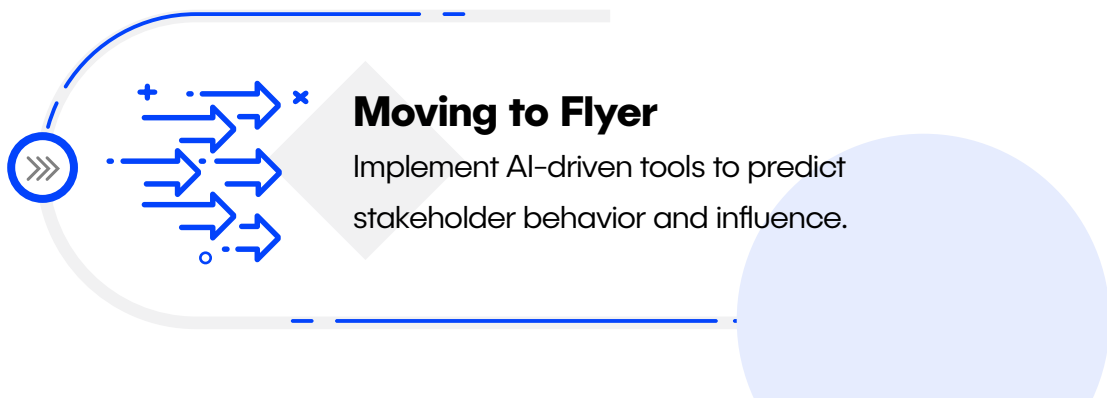
Moving to Flyer

Implement AI-driven tools to predict stakeholder behavior and influence.

Flyer Stage:

What It Means to Be a Flyer: Your organization is at the cutting edge of stakeholder identification, using advanced analytics and AI to predict and respond to changes.

What Defines This Stage

- Real-time, AI-driven stakeholder identification
- Integration with all business functions for holistic engagement

Strategies and Tips

- Continuously optimize your stakeholder identification using AI insights
- Innovate new methods to identify emerging stakeholders

Suggested Metrics and KPIs to Track

- Real-time accuracy of stakeholder profiles
- Number of stakeholders identified through AI-driven processes
- Global reach and effectiveness of stakeholder-identification efforts

Activity

Implement an AI-driven predictive-analytics tool to forecast stakeholder engagement trends.

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Sustaining Success

Maintain leadership by continuously refining your stakeholder-identification processes.

There's something different here.

Need help building or refining your initial stakeholder network?

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Klick's Strategic Stakeholder Engagement team believes in the diversity and expertise of a comprehensive stakeholder ecosystem and uses data–driven expert identification to achieve impactful engagement. We're here to help.
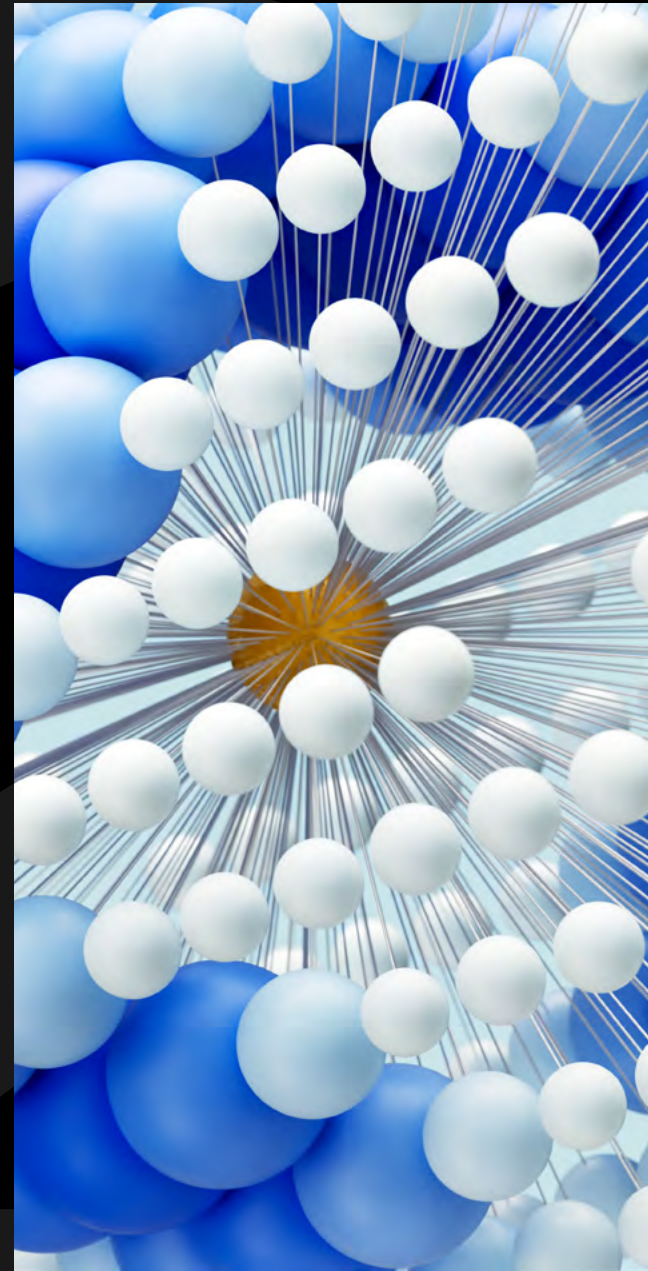
Randi Goeckeler
SVP, Strategic
Stakeholder Engagement

Get in Touch

There's something different here.

SECTION 2: ENGAGEMENT PLAN

SECTION 2: ENGAGEMENT PLAN

An Engagement Plan outlines how you will interact with your identified stakeholders. It moves beyond simply knowing who your stakeholders are to developing strategies for meaningful and consistent engagement. A well-crafted plan ensures that your interactions are purposeful, coordinated, and aligned with your business objectives.

Crawler Stage:

What It Means to Be a Crawler: Your engagement plan is basic and often reactive, and it needs a formal strategy.

What Defines This Stage

- Ad-hoc engagement without a clear plan
- Immediate needs rather than long-term goals drive engagement
- Limited understanding of stakeholder expectations

Strategies and Tips

- Identify key stakeholders' expectations and needs
- Start to develop key elements of an engagement plan that are aligned to your current business needs. This should include:
  - Regular internal and external touchpoints
  - Timing of key milestones (e.g., scientific congresses, data release, key life-cycle management events)

Suggested Metrics and KPIs to Track

- Number of stakeholder interactions initiated
- Stakeholder awareness and engagement levels
- Feedback collection rate and initial stakeholder satisfaction
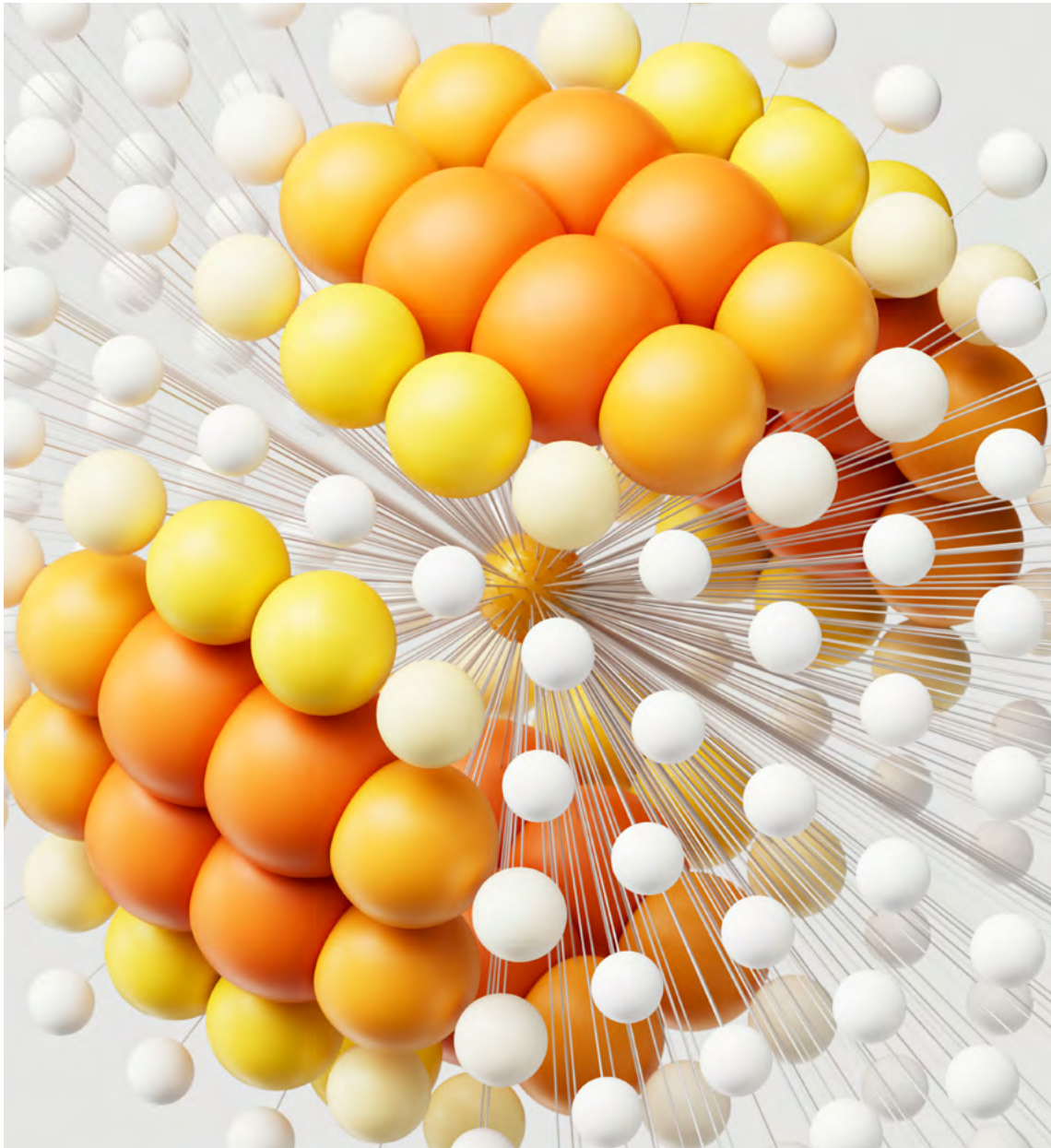
Activity

Set up regular meetings with critical stakeholders to learn more about them and how they can inform future initiatives.

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Moving to Walker:

Formalize your engagement plan with clear objectives and regular communication channels.

Walker Stage:

What It Means to Be a Walker: Your organization has developed a basic engagement plan but needs to add depth and integrate it with broader business goals.

What Defines This Stage

- Regular, planned interactions with stakeholders
- Engagement efforts aligned with key business objectives
- Initial feedback mechanisms in place

Strategies and Tips
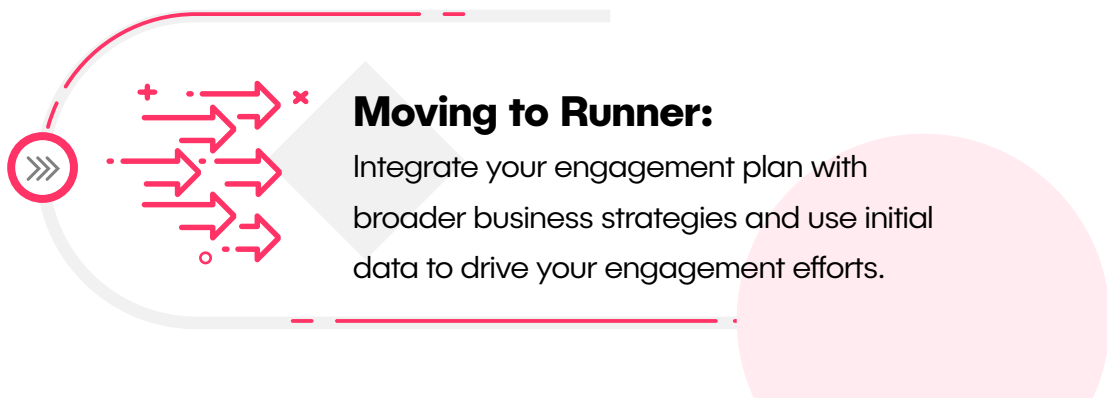
- Start to develop key stakeholder objectives
- Inform tailored communication strategies for different stakeholder groups
- Start using feedback to refine your engagement approach
- Conduct a stakeholder benchmarking survey to evaluate your industry position and reputation with key stakeholders

Suggested Metrics and KPIs to Track

- Stakeholder engagement quantity is measured through the volume of engagements
- Stakeholder insights inform select business decisions
- Effectiveness of tailored communication strategies
- Improvement in stakeholder satisfaction and feedback scores

Activity

Establish a formalized cross-functional review process of stakeholder strategies and goals.Start to map key stakeholders against priority initiatives and organize them in alignment with the calendar.

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Moving to Runner:

Integrate your engagement plan with broader business strategies and use initial data to drive your engagement efforts.

Runner Stage:

What It Means to Be a Runner: Your engagement plan is proactive, data-driven, and strategically aligned with business objectives.

What Defines This Stage

- Proactive, strategic engagement efforts
- Data-driven approach to stakeholder engagement
- Use of multiple engagement channels and feedback loops
- Formalized cadences to internal cross-functional stakeholder engagement strategies and tactics

Strategies and Tips

- Enhance your engagement strategies by using data to predict stakeholder needs
- Ensure your engagement efforts are closely aligned with organizational goals
- Set a schedule for engagement plan refresh and updates

Suggested Metrics and KPIs to Track

- Impact of engagement efforts on business outcomes
- Stakeholder satisfaction across different channels
- Frequency and quality of proactive stakeholder interactions

Activity

Conduct a sentiment-analysis workshop to identify and address gaps in your engagement strategy.

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Moving to Flyer:

Use AI-driven tools and real-time data analytics to scale your engagement efforts.

There's something different here.

Flyer Stage:

What It Means to Be a Flyer: Your engagement plan is highly sophisticated, fully integrated across the matrix organization, and driven by real-time data and AI insights.

What Defines This Stage

- Fully integrated, real-time engagement strategies
- A data-driven approach is used to predict and respond to stakeholder needs
- Continuous optimization and innovation in engagement tactics

Strategies and Tips

- Use a data-driven approach to continuously refine and optimize your engagement strategies
- Innovate new engagement methods that anticipate stakeholder needs

Suggested Metrics and KPIs to Track

- Real-time engagement effectiveness
- Stakeholder retention and sentiment-analysis metrics
- Impact of data-driven engagement strategies on satisfaction and outcomes.

Activity

Implement a predictive-analytics tool to identify potential engagement opportunities and tailor your strategies accordingly.
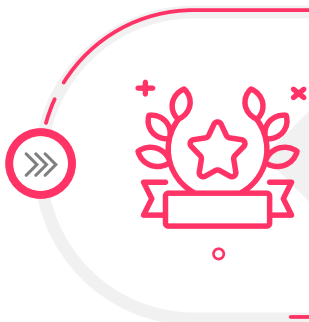
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Sustaining Success

Regularly review and update your engagement plan to maintain your leadership position.Share best practices across the matrix organization and begin to establish yourself as a Center of Excellence.

Ready to explore how your engagement strategy can align with and elevate your business goals?

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With experience on both the agency and client sides, Klick's Strategic Stakeholder Engagement can help you develop a proprietary planning framework to build lasting relationships with HCPs, KOLs, and DOLs. Contact us now.
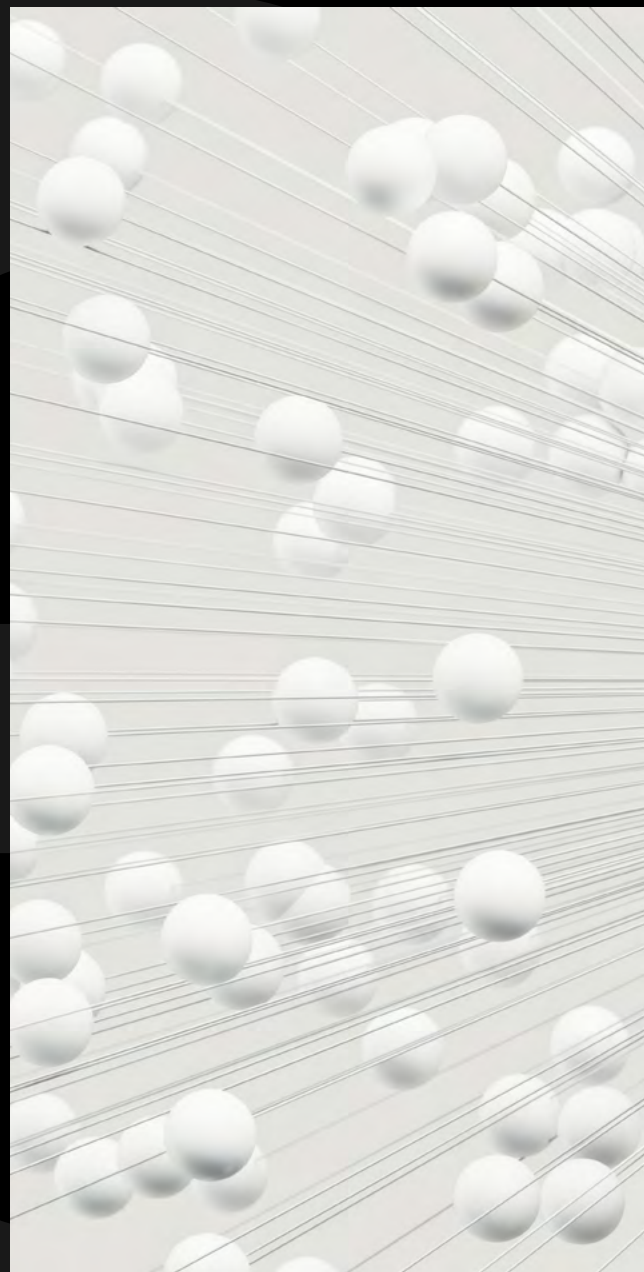
Randi Goeckeler
SVP, Strategic
Stakeholder Engagement

Get in Touch

There's something different here.

SECTION 3: COMPETITIVE LANDSCAPE

SECTION 3: COMPETITIVE LANDSCAPE

Understanding the Competitive Landscape means knowing where you stand relative to others in your industry. This category involves analyzing your competitors' strategies, identifying your competitive advantages, and positioning your organization to meet stakeholder needs better. Leveraging unique strengths and opportunities helps you stay ahead in a dynamic market.

Crawler Stage:

What It Means to Be a Crawler: At this stage, your organization needs more awareness of the competitive landscape and how it affects stakeholder engagement.

What Defines This Stage

- Minimal understanding of the competitive landscape
- Engagement efforts not informed by competitive analysis

Strategies and Tips

- Begin researching competitors' stakeholder engagement strategies
- Identify gaps in your engagement approach compared to competitors

Suggested Metrics and KPIs to Track

- Number of competitors identified and analyzed
- Frequency of industry-benchmarking exercises
- SWOT-analysis results and action plans
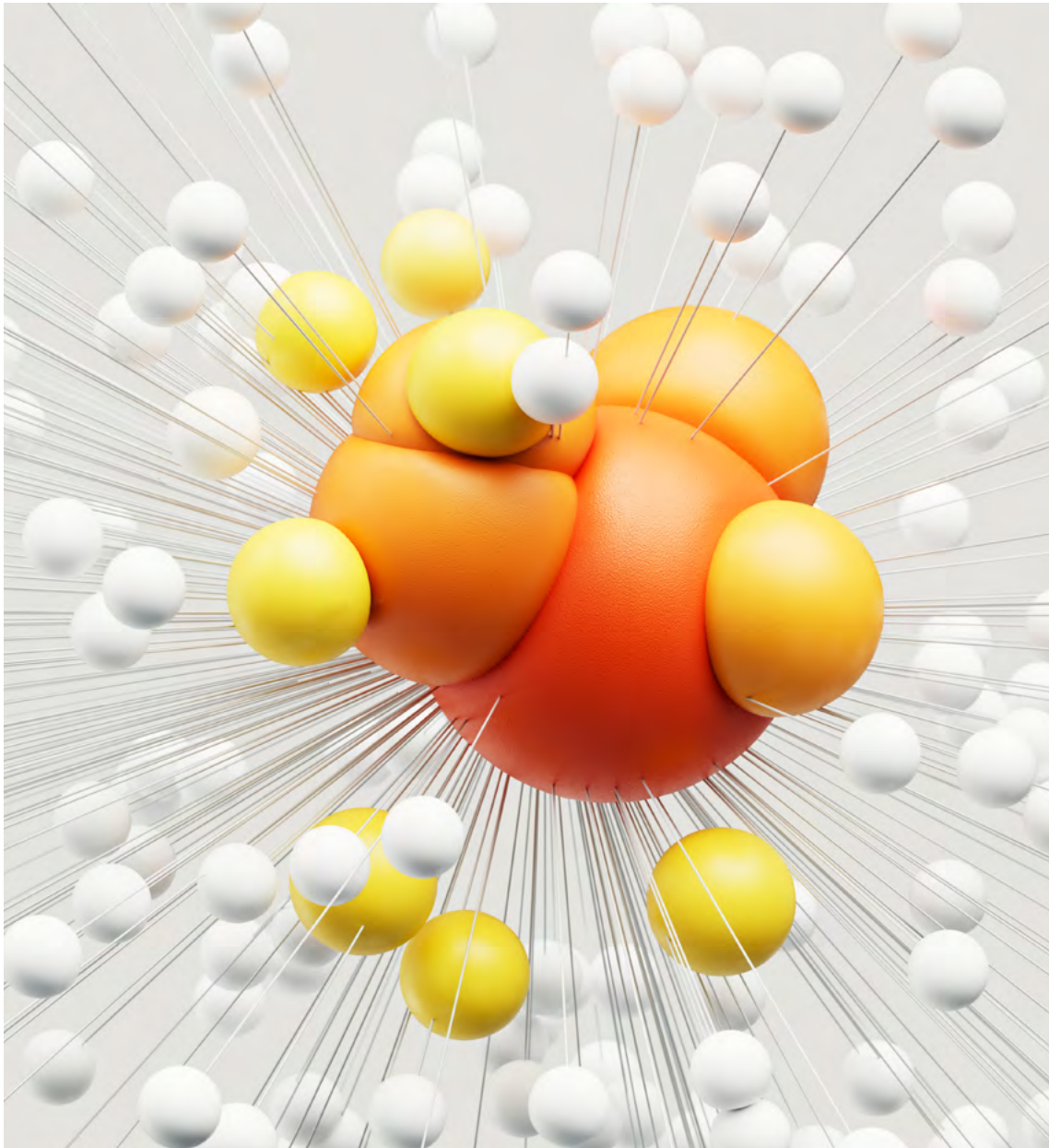
Activity

Conduct a basic SWOT analysis of your stakeholder engagement efforts relative to key competitors.

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Moving to Walker:

Integrate competitive insights into

your stakeholder engagement strategy.

There's something different here.

Walker Stage:

What It Means to Be a Walker: Your organization has started considering the competitive landscape in its stakeholder engagement efforts.

What Defines This Stage

- Basic competitive analysis informs engagement strategies
- Initial efforts to differentiate your engagement approach
- Basic understanding of your priority KOLs and their level of engagement with your competitors

Strategies and Tips

- Basic competitive analysis informs engagement strategies
- Initial efforts to differentiate your engagement approach
- Basic understanding of your priority KOLs and their level of engagement with your competitors

Suggested Metrics and KPIs to Track

- Competitor engagement strategy effectiveness (e.g., market share, stakeholder satisfaction)
- The success of your positioning strategy in differentiating your organization
- Development and reinforcement of competitive advantages

Activity

Identify three key differentiators in your stakeholder engagement strategy compared to competitors and build on them.

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Moving to Runner:

Use competitive intelligence to adjust your stakeholder engagement strategies proactively.

There's something different here.

Runner Stage:

What It Means to Be a Runner: Your organization proactively uses competitive intelligence to inform and refine stakeholder engagement strategies.

What Defines This Stage

- Regular use of competitive intelligence to drive engagement decisions
- Proactive adjustments to engagement strategies based on competitor actions

Strategies and Tips

- Use competitive intelligence tools to stay ahead of industry trends and competitor actions
- Continuously refine your engagement strategies based on competitor analysis

Suggested Metrics and KPIs to Track

- Competitor activity tracking
- Success rates of strategic response plans in countering competitor actions
- Rate of innovation and differentiation compared to industry benchmarks

Activity

Organize a competitive-intelligence review to identify new and emerging trends, then adjust your engagement strategies accordingly.

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Moving to Flyer:

Fully integrate competitive intelligence with real-time data analytics to anticipate and respond to competitive pressures.

Flyer Stage:

What It Means to Be a Flyer: Your organization leads the market in stakeholder engagement by using advanced competitive intelligence and real-time data to stay ahead.

What Defines This Stage

- Advanced use of competitive intelligence and real-time data
- Continuous innovation in engagement strategies to maintain market leadership

Strategies and Tips

- Leverage AI and data-driven tools to anticipate competitor actions and adjust your real-time strategies
- Innovate new engagement methods that set industry benchmarks

Suggested Metrics and KPIs to Track

- Speed and effectiveness of real-time competitive response efforts
- Impact of market-shaping initiatives on industry trends and standards
- Global market share growth and competitive positioning in key regions

There's something different here.

Activity

Implement an AI-driven competitive-intelligence tool to continuously monitor industry trends and refine your engagement strategies.

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Sustaining Success

Maintain your leadership by regularly updating and enhancing your competitive-intelligence tools and strategies.

There's something different here.

Ready to evaluate and understand the competition.

Connect with our Strategic Stakeholder Engagement team to stand out from the crowd through data-driven expert identification and proprietary planning frameworks.

Randi Goeckeler
SVP, Strategic Stakeholder Engagement

Get in Touch

There's something different here.

SECTION 4:
OPERATIONS
& PROCESSES

SECTION 4: OPERATIONS & PROCESSES

Operations & Processes refer to the internal mechanisms that support stakeholder engagement. This includes the systems, workflows, and technologies that enable your organization to engage stakeholders efficiently and effectively. As your organization matures, these processes should become more sophisticated, integrating advanced tools and data to drive continuous improvement.

Crawler Stage:

What It Means to Be a Crawler: At this stage, your organization's operations and processes for stakeholder engagement are basic, informal, and not well-documented.

What Defines This Stage

- Ad-hoc processes with minimal documentation
- Limited resources dedicated to stakeholder engagement tracking and coordination

Strategies and Tips

- Start by documenting your current engagement processes
- Allocate basic resources for process improvement

Suggested Metrics and KPIs to Track

- Process efficiency (e.g., time taken to complete key tasks)
- Frequency of process reviews and updates
- Resource allocation effectiveness in supporting process improvements
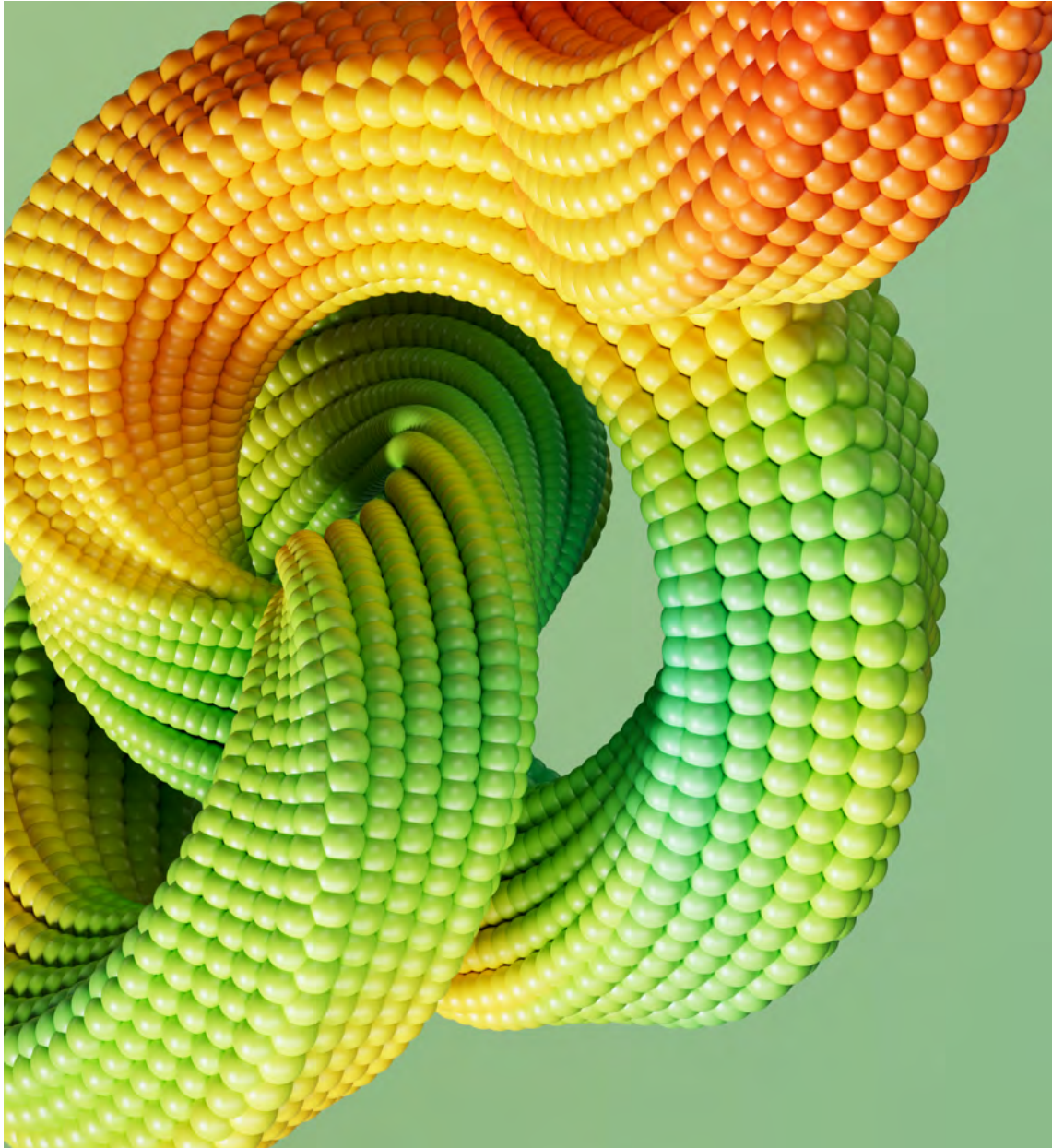
Activity

Create a simple process map for your current stakeholder engagement efforts.

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Moving to Walker:

Begin formalizing your processes with clear documentation and assign dedicated resources to manage stakeholder engagement. Start to work collaboratively and cross-functionally with other internal stakeholders.

There's something different here.

Walker Stage:

What It Means to Be a Walker: Your organization has begun formalizing its stakeholder engagement processes, ensuring consistency and better alignment with business goals.

What Defines This Stage

- Begin documented processes for stakeholder engagement
- Start assigning resources and roles for managing engagement

Strategies and Tips

- Develop standard operating procedures (SOPs) for stakeholder engagement activities and align with your compliance and legal partners
- Train your team on these SOPs to ensure consistency

Suggested Metrics and KPIs to Track

- Adoption rates of standardized processes across the organization
- Impact of technology integration on process efficiency
- Training effectiveness as measured by team performance and engagement outcomes

Activity

Develop an SOP for a key stakeholder engagement process, such as feedback collection or event management.
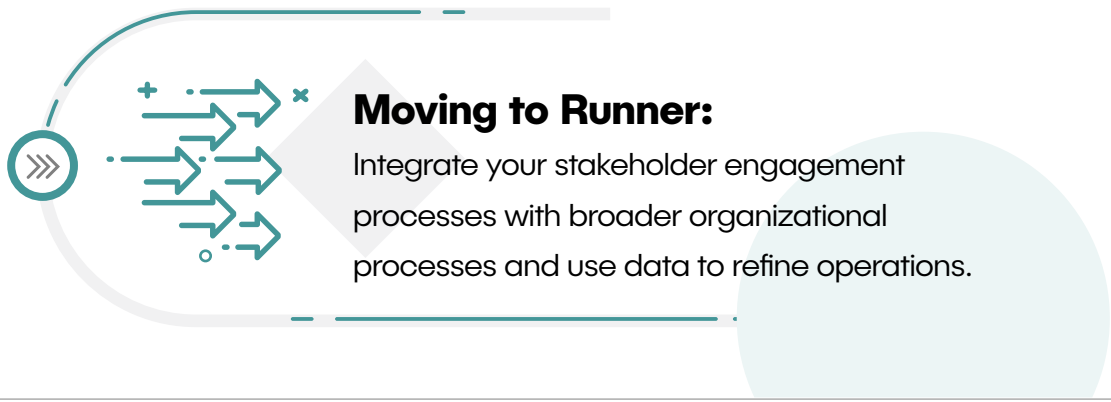
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Moving to Runner:

Integrate your stakeholder engagement processes with broader organizational processes and use data to refine operations.

Runner Stage:

What It Means to Be a Runner: Your organization's stakeholder engagement processes are integrated with broader business operations and are data-driven.

What Defines This Stage

- Integrated stakeholder engagement processes that align with organizational objectives
- Use of data to optimize and refine engagement operations

Strategies and Tips

- Implement a CRM system to manage and analyze stakeholder interactions
- Regularly review and update processes based on data insights

Suggested Metrics and KPIs to Track

- Efficiency gains from process optimizations
- Scalability of processes as measured by the ability to handle increased workload without loss of quality
- Success of cross-functional collaboration in supporting stakeholder engagement

There's something different here.

Activity

Use your CRM system to analyze and improve the efficiency of a key process, such as stakeholder engagement activities or communication follow-up.

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Moving to Flyer:

Scale your operations using advanced technology and automation to ensure seamless stakeholder engagement.

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There's something different here.

Flyer Stage:

What It Means to Be a Flyer: our organization's stakeholder engagement operations are fully optimized by leveraging advanced technology and automation to achieve seamless and efficient engagement.

What Defines This Stage

- Highly automated and optimized engagement processes
- Use of AI data-driven tools for real-time process optimization

Strategies and Tips

- Implement AI and automation tools to streamline and scale your engagement operations
- Continuously refine your processes based on real-time data and feedback
- Work to integrate your stakeholder operations and processes into the larger organization's SOPs

Suggested Metrics and KPIs to Track

- Real-time process efficiency and adaptability
- Impact of AI data-driven automation on operational capacity and cost savings
- Global consistency and effectiveness of stakeholder engagement processes
- Organizational recognition as a Center of Excellence for stakeholder operations and processes

Activity

Implement an AI data-driven automation tool to optimize a specific engagement process, such as personalized communication or real-time data analysis.

Sustaining Success

Regularly audit and refine your processes to maintain efficiency and effectiveness at scale.

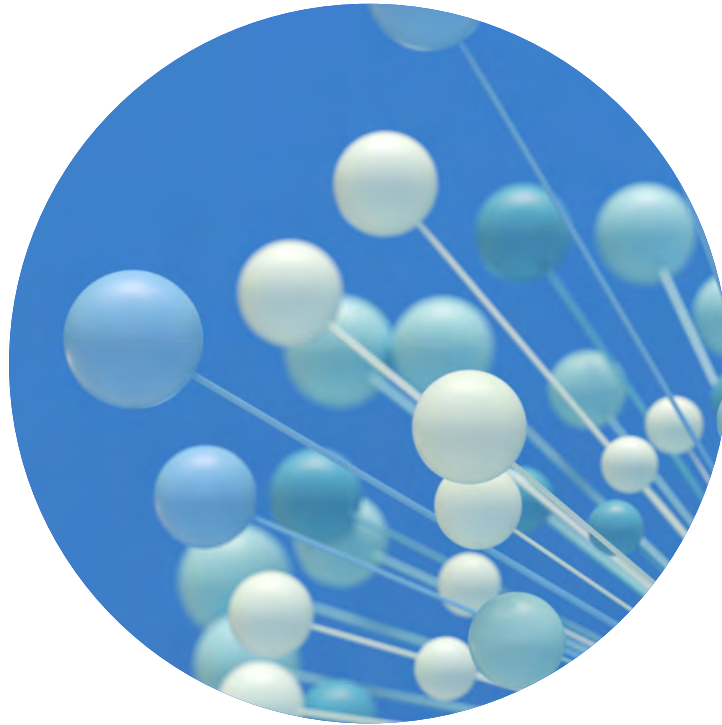# What tools could help you simplify your stakeholder engagement initiatives?

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With both agency and client-side experience, Klick's Strategic Stakeholder Engagement team is ready to help you find your competitive edge. Reach out now.

Randi Goeckeler
SVP, Strategic
Stakeholder Engagement

Get in Touch

There's something different here.

Conclusion

The Stakeholder Maturity Index (SMI) provides a clear roadmap for advancing your stakeholder engagement from basic, reactive strategies to sophisticated, proactive approaches that deliver real impact. Whether you're just beginning or refining an advanced strategy, this workbook offers the tools, tips, and insights needed to succeed.

By progressing through the SMI stages, you'll unlock the potential to transform your organization's engagement strategy, ensuring it is both effective and future-proof. To see how we've helped our global clients elevate their stakeholder engagement strategies, check out our case study.

Transform your stakeholder engagement strategy from good to great. Reach out today to see how Klick Health can help you become a leader in your industry.