



Evaluating Your Stakeholder Engagement Strategy



Introduction

This checklist provides a structured framework for evaluating your current stakeholder engagement strategy using Klick's Stakeholder Maturity Index (SMI) framework. This framework can help organizations like yours identify areas of strength and opportunities for improvement, ensuring a more effective and impactful engagement process.

After completing this checklist, download our detailed workbook to transform your stakeholder engagement strategy into a competitive advantage.

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.

Tasks:

Develop personas and attributes for stakeholders to inform insight generation

Regularly update and refresh the database of existing KOLs/DOLs

Identify emerging leaders and rising stars as business needs evolve

Evaluate intersectional opinion leaders and their roles within the ecosystem

Maintain relationships and analyze historical engagements

Foster long-term relationships with rising stars/emerging leaders

Indicators of Success:

Comprehensive and up-to-date KOL/DOL database

Clear criteria for stakeholder tiering and prioritization

Strategic alignment of KOLs/DOLs with organizational objectives

Areas for Improvement:

Enhance the use of data-driven methods for identifying new stakeholders

Invest in the analysis of KOL data and attributes aligned to your business objectives

Invest in data sharing and accessibility initiatives across internal teams

Build or refine your network to ensure interactions with KOLs and stakeholders are impactful and informed. Klick's Strategic Stakeholder Engagement team is ready to help you shift from transactional to transformational. [Reach out now.](#)



Randi Goeckeler
SVP, Strategic
Stakeholder Engagement

[Get in Touch](#)

2. Engagement Planning



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.

Tasks:

Shift from ad-hoc outreach to a comprehensive engagement plan

Develop stakeholder engagement strategies aligned with organizational objectives

Refresh engagement plans regularly to adapt to new insights and market conditions

Equip internal stakeholders to move from siloed transactional engagements to collaborative strategic engagements

Indicators of Success:

Documented engagement plans with clear objectives and timelines

High levels of internal stakeholder alignment and collaboration

Positive feedback from KOLs/DOLs on engagement quality

Become recognized within your matrix organization as a Center of Excellence in stakeholder strategies, processes, and engagement

Areas for Improvement:

Improve coordination and centralization of engagement activities

Increase the use of data to inform and adapt engagement strategies

Ready to leverage AI insights to advocate for innovative research, secure internal support, and refine engagement strategies? Klick's Strategic Stakeholder Engagement team can help you develop a proprietary planning framework to connect with a more diverse group of experts. [Contact us now.](#)



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3. Competitive Landscape Analysis



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 stakeholders' needs better. Leveraging unique strengths and opportunities helps you stay ahead in a dynamic market.

Tasks:

Identify competitors and assess their stakeholder engagement strategies across multiple initiatives

Use competitor-landscape analysis to drive stakeholder initiatives and market differentiation

Identify KOLs to serve as advocates and strategic partners

Assess your existing KOL cohort and identify their opportunities with your competitors

Indicators of Success:

Detailed and actionable insights from competitor analysis and KOLs

Clear differentiation of stakeholder engagement strategies from competitors

Areas for Improvement:

Enhance the depth and breadth of competitive intelligence

Regularly update competitor analysis to reflect market changes

Establish a consistent cadence to refresh your stakeholder cohort and identify key stakeholders that are aligned to your strategies who may also serve as experts to your competitors

Ready to build a network of advocates and strategic planners to stand out from the competition? Connect with our Strategic Stakeholder Engagement team to help you develop data-driven expert identification and proprietary planning frameworks.
We're here to help.



Randi Goeckeler
SVP, Strategic
Stakeholder Engagement

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4. Operations and Process Optimization

Operations and 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.

Tasks:

Establish transparent processes for capturing and sharing KOL insights across the organization

Implement advanced technology platforms for managing and delivering engagement activities

Integrate digital tools (e.g., CRM systems and data analytics platforms) to enhance efficiency and effectiveness

Regularly monitor and analyze metrics to ensure engagement activities are meeting objectives

Partner with your compliance and legal teams to ensure processes and operations are compliant within your organization

Indicators of Success:

Streamlined processes for data collection and sharing

High adoption and effective use of technology platforms

Measurable improvements in engagement outcomes

Ongoing cross-functional dialogue with other internal teams regarding integration and synergy of other systems across your matrix organization

Areas for Improvement:

Enhance cross-functional transparency and resource optimization

Foster a culture of continuous improvement and learning

Embracing new tools and platforms will empower us to break down organizational silos, enhance collaboration, and provide targeted support. Klick's Strategic Stakeholder Engagement team will help you refine your investments in capabilities, culture, and talent. [Reach out now.](#)



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SVP, Strategic
Stakeholder Engagement

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