

Stakeholder Alignment and Scope Management Checklist

Stakeholder Alignment and Engagement (FEL-1 and FEL-2)

☐ Identify Key Stakeholders Early

☐ **Map out all key stakeholders**, including internal and external groups such as investors, regulators, project sponsors, operational teams, and contractors.

☐ Categorize stakeholders based on their level of interest and influence, prioritizing high-influence individuals or groups for regular engagement.

☐ Engage Stakeholders in Project Shaping

☐ Include key stakeholders in **early-stage discussions** during FEL-1 to shape the project's strategic direction. Ensure their objectives and concerns are documented and considered in the decision-making process.

☐ Use structured interviews or stakeholder workshops to gather input on the project's scope, risks, and alignment with business goals.

☐ Communicate the Project Charter and Objectives

☐ Share the **project charter** with all stakeholders, ensuring they have a clear understanding of the project's objectives, scope, and success criteria.

☐ Schedule a formal **kick-off meeting** to align all stakeholders on the project's goals and secure their buy-in.

☐ Create a Stakeholder Communication Plan

☐ Develop a detailed communication plan that outlines **how, when, and what to communicate** to each stakeholder group throughout the project lifecycle.

☐ Define the channels (email, meetings, reports) and frequency of communication based on stakeholder needs and project phases.

☐ Monitor Stakeholder Engagement

☐ Continuously monitor stakeholder satisfaction and involvement through regular check-ins, surveys, or feedback sessions.

☐ Assign a **stakeholder engagement manager** to ensure consistent communication and address any concerns or misalignments early.

☐ Manage Conflicts Between Stakeholders

- ☐ Establish a formal process for identifying and addressing conflicts between stakeholders early in the project.
- ☐ Use **mediation or escalation paths** to resolve conflicts before they escalate and impact project performance.

Scope Definition and Control (FEL-2 and FEL-3)

☐ **Develop a Clear Scope Statement**

- ☐ Create a detailed **scope statement** that outlines project deliverables, exclusions, and assumptions. Ensure the scope is aligned with stakeholder expectations and business goals.
- ☐ Involve key stakeholders in scope discussions to ensure consensus on critical aspects of the project and to avoid misalignment.

☐ **Freeze the Scope at the End of FEL-2**

- ☐ Conduct a formal **Scope Freeze** at the conclusion of FEL-2. Lock in the project scope to prevent unauthorized changes.
- ☐ Communicate the frozen scope to all stakeholders and establish a **scope change control process** to handle any future requests.

☐ **Establish a Change Management Process**

- ☐ Implement a **structured change control process** that requires any proposed changes to be formally evaluated, including cost, risk, and schedule impacts.
- ☐ Use a **change request form** for documenting the rationale, expected benefits, and risks of proposed changes. Ensure approvals are obtained before any changes are made.

☐ **Develop a RACI Matrix for Scope and Stakeholder Management**

- ☐ Develop a **RACI diagram** (Responsible, Accountable, Consulted, Informed) to clarify roles and responsibilities for scope control and stakeholder alignment.
- ☐ Ensure that the **SOPs** for scope change management are clearly defined and that the RACI diagram is integrated into the communication process for clarity.

☐ **Implement Scope Monitoring and Reporting**

- ☐ Set up regular **scope reviews** and **progress tracking** to ensure that the project remains within the defined boundaries. Report on scope adherence during regular stakeholder updates.

- ☐ Use **Key Scope Indicators (KSIs)** to monitor any deviations from the defined scope and flag potential issues before they escalate.

- ☐ **Align Scope Changes with Business Objectives**

- ☐ Ensure that all scope changes are aligned with the project's strategic objectives and have the full approval of key stakeholders.

- ☐ Regularly review scope modifications to confirm that they add value to the project without compromising timelines, budgets, or overall success criteria.

Post-Scope Freeze and Execution (FEL-3 and Beyond)

- ☐ **Ensure Stakeholder Buy-In for Scope Adjustments**

- ☐ Any scope adjustments during FEL-3 must be communicated clearly to all stakeholders. Ensure that any adjustments are approved through the formal change control process and supported by all parties.

- ☐ Conduct regular **stakeholder alignment meetings** to provide updates on project performance, risk management, and scope control.

- ☐ **Conduct Regular Stakeholder Updates**

- ☐ Ensure that stakeholders are kept informed through **regular updates** on project progress, risks, and any potential scope changes.

- ☐ Use a variety of communication tools (reports, dashboards, meetings) to ensure full transparency and maintain trust throughout the project lifecycle.

- ☐ **Implement Scope Change Audits**

- ☐ Conduct **scope audits** at key project milestones to review any changes made since the scope freeze and ensure that they were properly evaluated and authorized.

- ☐ Use audit results to inform future decision-making and identify any process improvements in change management.

- ☐ **Close Out Stakeholder Concerns**

- ☐ As the project approaches completion, ensure that all stakeholder concerns are addressed, and final approvals are obtained.
- ☐ Conduct a **final review** with stakeholders to ensure all deliverables meet their expectations and align with the agreed-upon scope.