**Standard Operating Procedure (SOP) for Stakeholder Communication**

As a Business Analyst, effective communication is critical to ensuring smooth collaboration and timely project completion. Below are the three main communication tasks required, along with specific deadlines, documents, expected communication, and best practices.

**1. Monthly Meeting with Data Team**

**Objective:** Request necessary data for ongoing projects.

**Deadline:** First Monday of every month.

**Documents to Prepare:**

* Data Request Form
* Summary of ongoing projects requiring data

**Steps to Follow:**

1. One week before the meeting, review project data needs and compile a request list.
2. Send a calendar invitation to the data team with the meeting agenda.
3. During the meeting, clearly outline what data is needed, why it is required, and any specific formats or timelines.
4. Confirm expected delivery dates and address any questions from the data team.
5. Send a follow-up email summarizing data requests and agreed-upon deadlines.

**Example of a Good Job:**

* Business Analyst arrives prepared with a structured list of data needs.
* Clearly articulates data requirements and ensures mutual understanding.
* Follows up with an email documenting requests and expected delivery dates.

**Example of a Bad Job:**

* Attends the meeting without preparation, making ad-hoc requests.
* Fails to clarify data requirements, causing confusion.
* Does not follow up with an email, leading to missed deadlines.

**Email Template (Before Meeting):**

Subject: Monthly Data Request Meeting – [Month]

Dear [Data Team],

I would like to schedule our monthly meeting on [Date, Time] to discuss data requests for ongoing projects.

Agenda:

1. Review of current projects requiring data

2. Data formats and expected delivery timelines

3. Addressing any concerns from the data team

Please confirm your availability.

Best regards,

[Your Name]

**Email Template (Follow-up):**

Subject: Follow-up: Monthly Data Request Meeting – [Month]

Dear [Data Team],

Thank you for your time today. Here is a summary of our discussion:

- Requested Data: [List]

- Required Format: [Format]

- Expected Delivery Date: [Date]

Please let me know if you need any further clarification.

Best regards,

[Your Name]

**2. Quarterly Business Review with Directors**

**Objective:** Present project insights and findings to directors.

**Deadline:** Last Friday of every quarter.

**Documents to Prepare:**

* Business Insights Report
* Project Performance Dashboard
* Presentation Slides

**Steps to Follow:**

1. One month before the meeting, begin compiling insights from completed and ongoing projects.
2. Schedule a meeting with directors and confirm their availability.
3. Prepare presentation slides with clear visuals and actionable insights.
4. Practice the presentation and anticipate potential questions.
5. Deliver the presentation concisely, focusing on business impact and recommendations.
6. Follow up with an email sharing the presentation deck and any additional documents.

**Example of a Good Job:**

* Well-structured presentation with clear insights and recommendations.
* Addresses potential concerns with supporting data.
* Engages directors and facilitates a meaningful discussion.

**Example of a Bad Job:**

* Unorganized presentation lacking key insights.
* Fails to provide actionable recommendations.
* Unable to answer directors’ questions effectively.

**Email Template (Before Meeting):**

Subject: Quarterly Business Review – [Quarter]

Dear [Directors],

I would like to schedule our Quarterly Business Review on [Date, Time] to present key insights from recent projects.

Agenda:

1. Project Performance Overview

2. Key Business Insights

3. Recommendations for Next Steps

Please confirm your availability.

Best regards,

[Your Name]

**Email Template (Follow-up):**

Subject: Follow-up: Quarterly Business Review – [Quarter]

Dear [Directors],

Thank you for your time today. Attached are the presentation slides and the business insights report for your reference.

Please let me know if you have any questions.

Best regards,

[Your Name]

**3. Weekly Meeting with Manager**

**Objective:** Provide updates on project progress and ensure readiness for the quarterly review.

**Deadline:** Every Friday.

**Documents to Prepare:**

* Project Progress Report
* Updated Task List
* Risk Assessment (if necessary)

**Steps to Follow:**

1. Throughout the week, track project progress and note any blockers.
2. Prepare a concise project update document.
3. Meet with the manager to discuss progress, risks, and next steps.
4. Align on action items and update timelines as necessary.
5. Send a summary email post-meeting.

**Example of a Good Job:**

* Clearly communicates project status and any risks.
* Proactively suggests solutions for potential issues.
* Keeps manager informed to ensure quarterly deadlines are met.

**Example of a Bad Job:**

* Provides vague or incomplete updates.
* Fails to address roadblocks, causing project delays.
* Does not follow up with a summary email.

**Email Template (Before Meeting):**

Subject: Weekly Project Update Meeting – [Date]

Dear [Manager],

Here is a summary of this week’s progress on ongoing projects:

1. [Project 1] – [Current status]

2. [Project 2] – [Current status]

3. [Any Risks or Roadblocks]

Looking forward to discussing further during our meeting.

Best regards,

[Your Name]

**Email Template (Follow-up):**

Subject: Follow-up: Weekly Project Update Meeting – [Date]

Dear [Manager],

Thank you for the discussion today. Here is a summary of key points:

- [Project 1]: [Key takeaways]

- [Project 2]: [Next steps]

- [Action items and deadlines]

Please let me know if any changes are required.

Best regards,

[Your Name]

By following these structured processes, the Business Analyst can ensure smooth communication, efficient project tracking, and successful stakeholder engagement.