

Pre-Engagement Checklist

Verify everything is in place before your first stakeholder interview

Executive Sponsorship

- ☐ Has the primary executive sponsor explicitly communicated the engagement's priority and authorization to their leadership team?
- ☐ Is there a scheduled recurring cadence (e.g., weekly) for progress updates with the sponsor?
- ☐ Has the sponsor reviewed and approved the final list of stakeholders to be interviewed?
- ☐ Is there a clearly defined escalation path for roadblocks requiring executive intervention?
- ☐ Have budget approvals been finalized and the purchase order (PO) signed?

Scope & Boundaries

- ☐ Is there a signed Statement of Work (SOW) clearly defining both in-scope and explicitly out-of-scope activities?
- ☐ Are specific business units, geographies, or technology platforms that are excluded documented?
- ☐ Is there a defined change control process for handling out-of-scope requests discovered during interviews?
- ☐ Are dependencies on other concurrent client initiatives identified and mapped?
- ☐ Have the constraints regarding project resources (budget caps, timeline limits) been re-confirmed?

Stakeholder Access

- ☐ Is the master stakeholder list complete with names, correct titles, roles, and contact information?
- ☐ Have 'warm-up' introduction emails been sent from a client leader to all targeted interviewees?
- ☐ Are initial interview timeslots actively being booked on stakeholders' calendars?
- ☐ Have administrative assistants or gatekeepers for senior leaders been briefed on the project's importance to facilitate scheduling?
- ☐ Is there an agreed-upon protocol for handling last-minute interview cancellations or rescheduling requests?

Data & Documentation

- ☐ Has access been granted to the Virtual Data Room (VDR), SharePoint, or shared repository for the project team?
- ☐ Are current organizational charts loaded and verified as accurate up to at least L3 leadership?
- ☐ Have relevant prior consulting reports, internal audit findings, or strategy documents from the last 3 years been provided?
- ☐ Are current-state process maps, system architecture diagrams, or performance dashboards available for review before interviews?
- ☐ Has a data request tracker been established and shared with the client project lead to monitor pending items?

Political Landscape

- ☐ Have known detractors, skeptics, or resistant pockets within the organization been identified privately by the project lead?
- ☐ Are there recent organizational traumas (e.g., recent layoffs, failed mergers, leadership shakeups) that will color interview responses?
- ☐ Have 'sacred cows' or topics that are completely off-limits for discussion been explicitly named by the sponsor?
- ☐ Is there awareness of competing internal initiatives that might conflict with this engagement's goals?
- ☐ Have cultural norms regarding communication style (hierarchy sensitivity, direct vs. indirect) been fully briefed to the consulting team?

Timeline & Logistics

- ☐ Are physical security badges, building access, and Wi-Fi credentials procured for consultants required on-site?
- ☐ Have remote access tools (VPN, VDI) and necessary client software licenses been provisioned and tested successfully?
- ☐ Is the high-level project calendar finalized with key milestones, workshops, and steering committee dates earmarked?
- ☐ Have travel arrangements and expense reimbursement policies been confirmed with client finance?
- ☐ Is a physical 'war room' or dedicated working space reserved for the consulting team when on-site?

Success Criteria

- ☐ Are the specific KPIs or business metrics that this engagement is intended to influence clearly baseline defined?
 - ☐ Is the required format of the final deliverables (e.g., executive presentation, detailed Excel model, written white paper) agreed upon?
 - ☐ Has the ultimate audience for final recommendations been identified to tailor the output appropriately (e.g., Board level vs. Operational level)?
 - ☐ Are the specific decisions the executive team needs to make based on the discovery findings articulated?
 - ☐ Have the criteria for formal sign-off on intermediary milestones been established in writing?
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Want to automate this?

FlowForge uses AI to conduct stakeholder interviews and synthesize findings automatically.

[Learn more at flowforge.ai](https://flowforge.ai)