Stakeholder Communication Matrix

Client-Side Engagement Framework — Systems Integration & Subscription Management

FIELD & LEDGER
REFERENCE TEMPLATE

A reusable guide for calibrating frequency, channel, and depth of communication across the six client-side stakeholder tiers typically present on a delivery engagement. Detail level should track decision-making need, not seniority — the goal is giving each tier exactly what they need to act, no more and no less.

Stakeholder	Frequency	Channel	Content Type	Detail	What "Detail" Looks Like	RACI
C-Suite	Milestone-based only (kickoff, go-live, major risk)	Async executive summary	Business case validation, major risks, budget/ timeline impact	VERY LOW	One paragraph or 3 bullets max. Dollar/time impact and one ask if any. No feature names, no system detail. "Integration is on track for the Q4 renewal cycle; no budget or timeline changes."	Informed
Executive Sponsor	Bi-weekly or milestone-based	Async email + monthly live check-in	Status, risks/decisions needed, ROI/business impact	LOW	Traffic-light status, 2–3 bullet summary, business impact of decisions — not mechanics. "One open decision on proration logic needs your input by Fri; affects renewal timing, not cost."	Accountable
Project Owner	Weekly	Scheduled call + shared doc	Progress vs. plan, blockers, upcoming decisions, trade-offs	MEDIUM	Milestone-level detail, named blockers with owners, trade-off options with pros/cons — enough to decide without needing system fluency.	Responsible
Director / Manager	Weekly or bi-weekly, milestone-driven	Email/Slack + relevant working sessions	Departmental impact, workflow or process changes affecting their team, timeline for their group	MEDIUM	What's changing for their team specifically, when, and what they need to prep for (staffing, process, training) — not full architecture.	Consulted
End Users	At key milestones (kickoff, UAT, go-live)	Live demo + written summary	Workflow changes, training, what's changing for them day-to-day	LOW	Task-level: what they click, what's different in their daily workflow. Screenshots/walkthroughs, zero architecture or jargon.	Informed
Client System Admins	Weekly or as-needed	Slack/Teams + working sessions + documentation handoff	Architecture decisions, integration specs, field mappings, config, maintenance procedures	HIGH	Field-level mapping, API/webhook behavior, error handling, what breaks if X changes — since they own it after handoff. Full reasoning, not just conclusions.	Consulted → Responsible post-handoff

STRUCTURAL NOTE

Client System Admins sit apart from the seniority ladder — they need architecture-level detail regardless of where they fall on the org chart, because they inherit ongoing ownership after the engagement closes. Flag it early if the client's assigned admin wasn't part of original discovery; documentation handoff becomes the only real transfer mechanism in that case.