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# Voice of Stakeholder: Scoping & Planning Guide

A practical guide to setting your voice of stakeholder initiative up for success



The scoping phase is your strategic foundation—where you transform good intentions into actionable plans. Investing time here ensures your Voice of Stakeholder initiative is connected to your business objectives and will deliver the intelligence you need for actionable insights and value delivery. This guide provides a comprehensive framework including a planning toolkit, stakeholder mapping tools, methodology selector, project charter template, and practical guidance for running an effective scoping workshop.

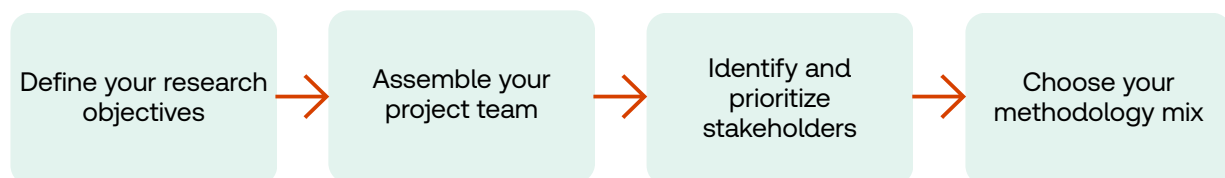
## Why scoping matters

Stakeholder feedback without proper scoping is like litigation without discovery—you might succeed, but it's mostly luck. Common mistakes include:

- **Fragmented approach:** Separate surveys for different groups with different questions create data that can't tell a coherent story
- **Isolated question writing:** Questions developed without methodology expertise yield unreliable data
- **Generic questions:** Standard satisfaction questions without clear objectives produce interesting but not useful data
- **Unrealistic expectations:** Response rates for internal surveys typically range from 5-60%, so plan accordingly

Proper scoping ensures you ask the right questions of the right people in the right way. This upfront investment prevents drowning in meaningless data or missing critical insights that transform how legal delivers value.

## Core components of effective scoping



### 1. Define your research objectives

Start with clarity on what success looks like. Common objectives include:

- Creating baseline measurement of stakeholder satisfaction
- Identifying specific areas of excellence and improvement opportunities
- Understanding stakeholders' upcoming needs and priorities
- Uncovering gaps between stakeholder expectations and current service
- Discovering opportunities to increase awareness of legal services

**Key Decision:** Choose 3-4 primary objectives maximum. Everything else is secondary.

## Strong vs Weak Objectives

Strong	Weak
Identify top 3 friction points in contract review process	Understand what stakeholders think about legal
Baseline satisfaction scores for quarterly tracking	Get feedback

## 2. Assemble your project team

Success requires the right mix of roles (even if some people wear multiple hats):

**Project Sponsor (typically GC):** Champions initiative, makes key decisions, has vested interest in outcomes

**Project Lead/Owner:** Drives initiative forward, accountable for success, leads scoping workshop

**Project Support:** Handles survey programming, compiles stakeholder lists, manages data analysis

**Project Manager:** Maintains momentum, ensures deadlines met, keeps team on track

## 3. Identify and prioritize stakeholders

Think beyond your regular contacts. Map influencers across the organization, then consider their relationship to legal. Stakeholder categories to consider:

- C-Suite executives
- Board members
- Regular business users across different units
- High-volume transaction partners
- Strategic initiative leaders

### Numbers game:

- Small organization with 7 key stakeholders? Your target is 7
- Larger organization? Aim for 100+ responses for reliable data and future benchmarking
- Remember: It's better to deeply understand a focused group than to poorly understand everyone

## 4. Choose your methodology mix

Don't force one approach on all stakeholders but consider the relationship, volume and availability of stakeholders you want to reach. A mixed approach is perfectly acceptable and often most effective.

Stakeholder type	Recommended method	Why
Senior executives	30 minute structured interviews	Prefer direct engagement, depth over scale
High-volume users	Web surveys	Efficient for large numbers, quantifiable data
Strategic partners	Interview or survey	Depends on relationship and time availability

For more a detailed approach to selecting the right methodology, see our **Methodology Guide** in the **Voice of Stakeholder** section of the [Value Alignment Toolkit](#).

## The scoping workshop: Your launch pad

Bringing your stakeholders together to pool existing knowledge, discuss and agree objectives and resourcing is the best way to set the program up for success.

### Essential agenda items:

#### 1. Set the context

- Why this initiative, why now?
- Connection to business strategy
- What success looks like

#### 2. Research objectives & measures

- Confirm primary objectives
- Define success metrics
- Identify assumptions to test

#### 3. Stakeholder mapping

- Identify target groups
- Determine methodology for each
- Set response rate targets

#### 4. Coverage & questions

- Map question areas to objectives
- Prioritize must-have vs. Nice-to-have
- Consider analysis requirements (segments, classifications)

#### 5. Project logistics

- Timeline and milestones
- Communication plan
- Resource allocation
- Team responsibilities

### Key outputs

- **Project charter:** document capturing all decisions, roles, responsibilities, and scope
- **Project plan:** Gantt chart or timeline with milestones and accountabilities
- **Workshop notes:** detailed record for questionnaire development and analysis
- **Communication templates:** email introductions, internal announcements
- **Stakeholder list framework:** template for others to populate with contact details

## Practical tools

### Stakeholder Mapping Matrix

Map stakeholders by their strategic importance and frequency of interaction with legal:

	High Strategic Importance	Medium Strategic Importance	Lower Strategic Importance
High frequency	C-Suite, Board (Interview)	Business Unit Heads (Survey or Interview)	Regular Users (Survey)
Medium frequency	Strategic Partners (Interview)	Department Heads (Survey)	Occasional Users (Brief Survey)
Low frequency	Special Projects (Consider including)	Infrequent Users (Optional)	Rare Contact (Exclude)

### Sample Size Guide

- Qualitative insights only: 5-10 interviews sufficient
- Baseline metrics: 30+ responses minimum
- Statistical reliability: 100+ responses ideal

## Your project charter

A key output from your scoping work is a Project Charter that documents all decisions, creates clarity on roles and responsibilities, and serves as your reference point throughout the initiative. Complete this template during or immediately after your scoping workshop.

### Project charter template

Initiative Name: Voice of Stakeholder

Executive Sponsor: \_\_\_\_\_ Project Lead: \_\_\_\_\_

Research Objectives (Max 4)

- 1.
- 2.
- 3.
- 4.

Target stakeholders and methodology

Stakeholder Group	Number	Method (Survey/Interview)

Team and accountabilities

Role	Name	Key responsibility
Sponsor		
Lead		
Support		

Timeline

- Scoping complete: \_\_\_\_\_
- Questions finalized: \_\_\_\_\_
- Launch: \_\_\_\_\_
- Analysis complete: \_\_\_\_\_
- Results presented: \_\_\_\_\_

Approved by: \_\_\_\_\_ Date: \_\_\_\_\_

## Resource reality check

### Be ambitious but realistic

Start with what's achievable within your resources. Consider:

Phase 1: small senior leader interview program (5-10 interviews)

Phase 2: scale to broader web survey (100+ responses)

Phase 3: annual comprehensive program

### Skills assessment

Do you have expertise in:

- Survey design?
- Statistical analysis?
- Interview techniques?

If not, identify partners (internal or external) early.

### Timeline expectations

- Scoping workshop: 2-3 hours
- Full scoping phase: 2-3 weeks
- Complete when: all questions answered, methodology clear, team aligned

## Common pitfalls & solutions

Pitfall	Solution
"We need to ask 50 questions"	Prioritize 20 max, save rest for Phase 2
"5% response rate"	Switch to interviews for quality over quantity
"Different surveys for each group"	One survey with smart routing/skip logic
"No budget for analysis"	Scale back scope or delay until resourced
"GC too busy to sponsor"	Reschedule - no sponsor = no success
"We need results in 2 weeks"	Run pulse poll now, proper VoS later

## Red flags checklist

Stop if any are true:

- ☐ No clear plan for acting on results
- ☐ Trying to answer every question in one survey
- ☐ No clear connection between objectives and questions
- ☐ One person writing all questions alone
- ☐ No executive sponsor committed
- ☐ Timeline under six weeks total
- ☐ Insufficient resources allocated for analysis and action planning

## Quick wins to build momentum

If resources are limited or you need to demonstrate value quickly:

- ✓ Start with 5 senior interviews - fast, high impact
- ✓ Piggyback on existing meeting for focus group
- ✓ Add 3 questions to existing company survey
- ✓ Test with friendly stakeholder group first

## Next steps checklist

- ☐ Schedule scoping workshop with key stakeholders
- ☐ Prepare draft research objectives for discussion
- ☐ Map potential stakeholder groups
- ☐ Assess internal resources and skills
- ☐ Identify potential partners/support
- ☐ Book follow-up sessions for questionnaire design
- ☐ Create central project folder with access for all team members

**Remember:** A well-scoped Voice of Stakeholder initiative is already halfway to success. The time you invest here will pay dividends in clear, actionable insights.

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## Value Alignment Toolkit

[Access toolkit](#)



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