Stakeholder Mapping 201: What to Do When Everyone Changes

Episode 21 Companion Download

When stakeholders change, relationships built on a single champion fail. This framework helps you build relationship redundancy that survives turnover, re-orgs, and power structure shifts.

Three Core Questions

1. **Who Actually Makes Decisions?**
   Map the real decision-making structure, not just the org chart. Title and authority are not the same thing.

   Track:
   - Who controls budget?
   - Who has veto power?
   - Who needs to sign off on decisions?
   - Whose opinion changes the room?

2. **Who's Vulnerable to Change?**
   Every stakeholder has a different level of organizational stability. Track vulnerability to prepare for transitions before they happen.

   Vulnerability ratings:
   - High: Likely to change roles within 6 months
   - Medium: Likely to change within 1 year
   - Low: Stable, unlikely to change soon

3. **Who Can Provide Continuity?**
   Build stakeholder redundancy with 3-5 key relationships per account across multiple departments and levels. These relationships must be horizontal, not vertical reporting chains.

   Target roles:
   - Executive sponsor
   - Technical owner
   - Compliance or security lead
   - Business unit leader
   - Finance or procurement contact

Stakeholder Tracking Template

Name	Title	Tenure	Decision Role	Relationship Strength	Vulnerability
Jane Smith	VP Security	3 years	Budget owner	Strong	Medium

Five-Step Playbook: When Stakeholders Change

Step 1: Assess Impact Immediately

Within 48 hours of learning about a departure or re-org, understand what it means for your account.

Key questions:

- Who left? What was their role in decision-making?
- Did they control budget or have veto power?
- Who's replacing them? Internal or external?
- Do they have existing vendor preferences?

Step 2: Map the New Power Structure

Re-orgs shuffle influence, not just people. Understand the new decision-making landscape.

What to track:

- New reporting structures
- Consolidated or split budget authority
- New stakeholders with vendor decision rights
- Changed approval processes

Step 3: Re-Establish Value Quickly

New stakeholders don't care about historical performance. Translate your value into language that matters to them now.

Actions:

- Schedule an executive business review within 30 days
- Present current state, outcomes delivered, and alignment with new priorities
- Don't assume they know your historical value
- Match their metrics: cost efficiency, risk reduction, or consolidation

Step 4: Build New Relationships Without Abandoning Old Ones

Former champions still matter. They have institutional knowledge and relationships that can help you navigate transitions.

Best practices:

- Stay connected with reassigned or demoted contacts
- Treat them with respect during the transition
- They may return to influential roles or become informal advisors
- Focus on building new relationships while maintaining old ones

Step 5: Document Everything

Update your stakeholder map immediately. This becomes your institutional memory for the next transition.

What to document:

- Role changes and new decision-making structure
- Informal influence patterns you discovered
- New vulnerabilities in your relationship structure
- Lessons learned for the next transition

Prevention: Building Resilient Relationships

The best way to handle stakeholder turnover is to prepare before it happens.

Strategy 1: Diversify Your Champions

Build relationships with at least three people who can advocate from different angles: technical value, business value, compliance value, risk reduction.

Strategy 2: Involve Multiple Stakeholders in EBRs

Don't just invite the executive sponsor. Include technical owners, compliance leads, and business unit leaders who use your platform.

Strategy 3: Create Transferable Documentation

Build executive summaries, ROI reports, and case studies that can be handed to new decision makers to immediately demonstrate your value.

Strategy 4: Stay Connected to the Broader Organization

Talk to people beyond your platform users. Connect with finance, compliance, risk, and operations teams who care about your outcomes.

Strategy 5: Track Organizational Signals

Pay attention to LinkedIn profile updates, strategic review announcements, vendor consolidation talk, and leadership alignment discussions.

Relationship Risk Assessment

Use this checklist to evaluate the resilience of your stakeholder relationships:

Question	Yes/No
If my primary champion left tomorrow, could someone else fight for renewal?	
Do I have relationships across 3+ departments or business units?	
Have I documented value in a way that survives personnel changes?	
Do I know who actually makes decisions beyond the org chart?	
Am I tracking vulnerability ratings for key stakeholders?	
Do multiple stakeholders attend our executive business reviews?	
Could I explain our value to a new decision maker in 5 minutes?	
Do I have relationships that don't all report to the same executive?	
Am I monitoring organizational signals that predict change?	
Have I stayed connected to former champions who lost authority?	

Scoring: 8-10 Yes = Strong resilience | 5-7 Yes = Moderate risk | 0-4 Yes = High vulnerability

Next Steps and Resources

This guide is part of The Advanced Relationship Management mini-series on ClearPath Conversations:

- **Episode 21:** Stakeholder Mapping 201: What to Do When Everyone Changes
- **Episode 22:** How to Manage a CSM Portfolio During a Crisis
- **Episode 23:** The Art of Saying "No" as a CSM

Upcoming Episodes - The CS Strategy miniseries:

- **Episode 24:** The Internal CS Playbook You Wish You Had
- **Episode 25:** Building Your Personal CS Brand (Without Being Cringe)
- **Episode 26:** Customer Success Metrics That Actually Matter
- **Episode 27:** What Makes a CSM *Great*? My Non-Negotiables

Additional Resources:

- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at linkedin.com/in/markbernardin