Is it Time to Stop Using Spreadsheets for Your Stakeholder Information?

FREE 10 QUESTION CHECKLIST

Check all that apply!

Do you currently use multiple spreadsheets to manage all your stakeholder information (e.g. one for managing communications, another for contact info, commitments, issues, tasks etc.)?

With multiple spreadsheets, it's hard, if not impossible, to search through and keep track of all your data.

Do you often hear complaints from your team about using spreadsheets or are they avoiding adding data?

Due to concerns like the significant amount of time it takes to input data, the lack of collaboration across departments, and the frustration on how to find necessary information, spreadsheets don't offer a user-friendly experience.

Is it possible that some of your stakeholder information is stored somewhere other than in the spreadsheets? (i.e. on someone's desktop, a USB, in a personal notebook etc.)

When the data inputting process is undefined or unenjoyable, you'll often find important information stored in different places because your team are avoiding the current tedious process.

If you were asked you to run a report on all your data, would you be able to bring everything together in a comprehensive and understandable way?

Digging through multiple spreadsheets, with no clear way to know if you've compiled all the information you need leaves you at risk of missing critical information and of having an incomplete report.

Are you unsure what your last touchpoint was with a stakeholder who was part of multiple projects? (i.e. can you search through their engagement history to find out where you left-off and quickly see any previous issues or commitments?)

Having easy access to your full history of engagement with stakeholders or organizations helps you and your team to stay aligned with what's been previously discussed, such as the last conversation, or any issues or commitments associated with stakeholders. This is helpful so you don't get blindsided by previous engagements and you're not asking them the same questions repeatedly.

Are you worried about forgetting to address a stakeholder issue or commitment, especially as the volume of data you're managing grows?

Managing issues and commitments can be tricky, especially when they can't be fulfilled until many years into the future. If members of the project team leave or new members join, it's easy for these long-term commitments or issues to get lost or forgotten in spreadsheets.

Do you feel like your spreadsheets would become more challenging to manage if your stakeholder information doubled?

With spreadsheets, it's difficult to bridge the gap between your teams, projects and programs to understand the history of engagement (i.e. all communications, issues, commitments and tasks) to fully understand what's relevant and important as you move forward.

Is it difficult to understand how all your information links together?

Traceability is essential in learning about your stakeholders and building stakeholder relationships because it helps you to know how your information is linked together for a full understanding.

Is it challenging to attach documents to your data?

With spreadsheets, there's no clear way to add attachments (like pdfs, images, etc.), which leaves you and your team at risk of missing essential insights or critical data, which is counterproductive when you're trying to manage your stakeholder engagement information effectively.

Are you unsure as to when updates were last made in the spreadsheets?

Spreadsheets don't have an audit trail, meaning it's hard to know when information has been updated, by whom, or whether the document you're reviewing is the most current version, which is extra problematic for reporting.

Ready for a Better Solution?

If you'd like to learn more about Jambo and how our Stakeholder Relationship Management (SRM) software can help you simplify and improve how you manage your stakeholder engagement projects, visit our website: www.jambo.cloud

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