

The AI Growth Code

TOOL # 4A STAKEHOLDER

IMPACT ANALYSIS

WORKSHEET

EXAMPLE

Stakeholder Impact Analysis Worksheet Example

Example: Implementation of AI-powered Customer Service Chatbot

Stakeholder Group:

Customer Service Team

- ☐ **Direct Impact:** Shift from handling basic inquiries to complex issues
- ☐ **Support Needed:** Technical training, new workflow guides
- ☐ **Key Concerns:** Job security, skill adaptation, performance metrics
- ☐ **Communication Approach:** Small group training sessions, hands-on practice with the new system
- ☐ **Timing:** Week 1-2

Sales Team

- ☐ **Direct Impact:** Access to faster customer insights and qualified leads
- ☐ **Support Needed:** Integration training with CRM, new lead handling process
- ☐ **Key Concerns:** Lead quality, response time expectations
- ☐ **Communication Approach:** Demo sessions showing improved lead quality, weekly check-ins
- ☐ **Timing:** Week 2-3

Senior Management

- ☐ **Direct Impact:** Performance metrics changes, resource reallocation
- ☐ **Support Needed:** ROI tracking tools, progress reporting templates
- ☐ **Key Concerns:** Cost justification, team productivity, customer satisfaction
- ☐ **Communication Approach:** Executive dashboard, bi-weekly updates
- ☐ **Timing:** Ongoing

Thursday: Initial Setup

- ☐ **Direct Impact:** New interaction channel, faster response times
- ☐ **Support Needed:** Clear instructions, easy access to human support
- ☐ **Key Concerns:** Service quality, ease of use, personal touch
- ☐ **Communication Approach:** Email announcements, in-app tutorials
- ☐ **Timing:** Week 4

Action Items

Key Messages by Stakeholder Group

- ☐ **Customer Service:** "Enhancing your capabilities to handle complex customer needs"
- ☐ **Sales:** "Faster leads, better-qualified prospects"
- ☐ **IT:** "Robust system with comprehensive vendor support"
- ☐ **Management:** "Improved efficiency with clear ROI"
- ☐ **Customers:** "Faster, 24/7 support for common needs"

Support Resources Required

- ☐ **Training materials and sessions**
- ☐ **Technical documentation**
- ☐ **Performance monitoring tools**
- ☐ **Customer feedback system**
- ☐ **Help desk for internal support**

Follow-up Plan

- ☐ **Daily check-ins with the Customer Service team (first week)**
- ☐ **Weekly progress reviews with all teams**
- ☐ **Bi-weekly executive updates**
- ☐ **Monthly customer satisfaction surveys**
- ☐ **Quarterly ROI analysis**

Implementation Notes

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|--|---|
| | Prioritize early wins with Customer Service team |
| | Monitor customer feedback closely in the first month |
| | Regular check-ins with IT for system stability |
| | Track and share positive metrics with all groups |