Reflection exercise 1: Refine your (and your organization's) approach to stakeholder engagement to strengthen relationships.

E D G E

A. Prioritization

Who are the most important stakeholders who impact your business?

Stakeholder name	Relationship strength

- Very strong
- Strong
- Amicable
- Weak
- No relationship or combative

B. Action plan

Use the following as a template to evaluate one stakeholder from your list, then repeat with others.

Stakeholder name

Their needs (their "why")

Our needs (our "why")

How do **our "whys" intersect?** (common interests)

Knowing this, how can you **interact differently?**

Note: Reflection exercise adapted from *A CEO for All Seasons* (Scribner, 2025).
Source: Carolyn Dewar, Scott Keller, Vikram Malhotra, and Kurt Strovink, *A CEO for All Seasons: Mastering the Cycles of Leadership*, Scribner, 2025

Reflection exercise 2: By answering the four W's—who, why, what, and when—new CEOs can begin building their personal narratives.

E D G E

Who

Why

What

When

Reflection exercise 3: Enroll your top team and ambassadors to engage critical stakeholders.

E D G E

Readiness level

- Fully ready
- Nearly ready
- Baseline readiness
- Somewhat ready
- Not ready

	Executive leadership team (representative list)				**Ambassadors** (rising or next-gen leaders)		
	[NAME] *[TITLE]*	*[NAME]* *[TITLE]*	*[NAME]* *[TITLE]*	*[NAME]* *[TITLE]*	*[NAME]* *[TITLE]*	*[NAME]* *[TITLE]*	*[NAME]* *[TITLE]*
Priorities							
Unique and proprietary **themes**							
Readiness level to speak on behalf of the organization	○	○	○	○	○	○	○
Format (eg, conferences, town halls, board interactions, media, customer sessions)							
Target time invested in stakeholder engagement							

Reflection exercise 4: The road map for a new CEO should holistically balance stakeholder commitments.

New CEO 6-month road map for key stakeholders

E D G E

		Month	Month	Month	Month	Month	Month
Internal	Board of directors						
	Leadership team						
	Top 250 employees						
	All employees						
External	Customers						
	Media						
	Investors						
	Strategic partners						
	Prospective talent						

Nail your firsts checklist: Evaluate your readiness to effectively engage stakeholders.

As you prepare your stakeholder engagement plan, ask yourself critical questions to define and prioritize your key stakeholders, develop your personal narrative, enroll multiple voices to help spread your message, and create a sustainable road map.

Draft your response for each prompt on the right-hand side.

EDGE	Guiding questions	Reflections
Expanded Set a bold communications agenda by understanding stakeholders' motivations, prioritizing engagements, and shaping your "crucial first" interactions	Who are the **stakeholders (internal and external)** essential to advancing the company's strategic direction?	
	What are **their sentiments** about the organization right now, and what are **their expectations?** What are we, as an organization, **ready to commit to now?** What can **I commit** to this journey?	
	What **outcomes** would meet or exceed their expectations? What does **shared success** look like?	
Distinctive Craft a narrative that engages stakeholders and rallies them around your vision and strategy	What is my **personal narrative,** building on the 4 W's (who, why, what, and when)? What **themes and stories** should I emphasize with key stakeholders?	
	What **common threads** am I reinforcing across audiences? What **analogies, phrases, or terms** should I weave into my narrative to do so?	
	How can I **continuously refresh my purpose** by effectively integrating and adapting themes vs recycling them? What **deeper sources of meaning** can I tap into?	
Growth-oriented As you strengthen your communications approach, determine how to best enable and empower your top team and ambassadors	What is my role in stakeholder engagement **vs my top team's?** Where can I **uniquely add value or create leverage?**	
	How can I further elevate and spotlight my top team to ensure they're engaging with critical stakeholders on behalf of the organization? What are each of their **high-value topics and "areas to win"** that I can leverage to showcase the breadth and depth of our company's expertise?	
	As a leadership team, how are we apprenticing and developing the next generation of leaders to cultivate this skill early? What can I teach them? And what can they teach me?	
Engaged Manage your energy, not just your calendar, to build deeper stakeholder relationships	How should I **engage each key stakeholder group?** What **context, format, and timing** would be most helpful?	
	What are **key timelines and milestones** for them? What **communications** do they need from us along the way and **when?**	
	How can I **sequence my engagements during my time as CEO-elect or in my first year** to prepare effectively and manage expectations? What **limits** (if any) should I set for external engagements?	