

Stakeholder Pathway and Communication Routing Playbook

Who to Send to Whom, When to Include or Exclude, and How to Build a Defensible Decision Path

The right answer sent to the wrong people, in the wrong order or through the wrong channel can become the wrong project outcome.

PREPARED BY

Manu Reynolds — Director

Buildit Admin Solutions Pty Ltd | ABN 35 677 590 082

0406 066 652 | manu@builditadminsolutions.com.au | builditadminsolutions.com.au

REVISION 1.0 | AUGUST 2026 | DRAFT FOR CLIENT REVIEW

Document Status and Use

CONTROLLED USE *This is an external Buildit development resource. It is not company policy, an industrial instrument, a competency matrix, legal advice or a guarantee of promotion, remuneration or retention. Adapt it to the client's delegations, systems, privacy requirements, project controls and formal people processes.*

Purpose

A major-project playbook for mapping stakeholder pathways, selecting audiences, sequencing pre-briefs, consulting about inclusion or exclusion, choosing channels and preserving clear approval and communication records.

Audience

Commercial, project, design, delivery and functional leaders working on complex projects with layered authority and material stakeholder consequence.

How to Use This Manual

1. Read the relevant chapter before a live conversation, review or decision—not after the consequence has already landed.
2. Apply the method to current project work. The suite is designed to change observable behaviour, not merely increase awareness.
3. Record the decision, action, owner, evidence and review date produced by the exercise.
4. Use the related manuals where the issue crosses career, communication, judgement, leadership or stakeholder boundaries.

Contents

- 5. 1. Why Stakeholder Routing Is Its Own Capability
- 6. 2. Start With the Decision and Consequence
- 7. 3. Map the Stakeholder Roles
- 8. 4. Separate Authority, Influence and Impact
- 9. 5. Decide Who Must Be Included
- 10. 6. Decide Who Should Be Excluded or Deferred
- 11. 7. Consult About Inclusion and Exclusion
- 12. 8. Sequence the Pathway
- 13. 9. Choose the Channel and Location
- 14. 10. Use Pre-Briefs Without Creating Shadow Decisions
- 15. 11. Route Bad News and Deteriorating Forecasts
- 16. 12. Route Client and Counterparty Issues
- 17. 13. Route Legal, Privileged and Sensitive Matters
- 18. 14. Route Joint-Venture, Alliance and Client Governance
- 19. 15. Avoid Common Routing Failures
- 20. 16. Record and Review the Pathway

1. Why Stakeholder Routing Is Its Own Capability

Complex projects fail through pathway errors as often as through analysis errors.

A matter may be technically sound yet stall because the decision owner was not engaged, a necessary verifier was omitted, a stakeholder was surprised publicly, confidentiality was breached or too many people were copied before the position was ready.

Not a distribution list

A stakeholder pathway describes decision, authority, influence, consequence, sequence, channel, confidentiality and record. Copying everybody may create noise, status threat, discoverability and unclear accountability; copying too few may create ambush or invalid approval.

2. Start With the Decision and Consequence

Audience selection begins with what must be decided and who carries the result.

State the decision, deadline, authority, material consequences, confidentiality and what will happen if the matter is delayed or mishandled.

If you cannot state the decision in one sentence, you are not ready to package the detail.

Before opening the spreadsheet or drafting the paper, write the approval sentence: “Approval is sought to...” or “A decision is required on...”. This forces clarity about scope, authority and timing.

Many weak submissions are informative but directionless. They describe the history, attach calculations and explain what happened without stating what the reader must decide. The approver is left to infer the question and may solve a different one.

The Five-Line Approval Brief

Lead with the decision. Put the detail behind it, not instead of it.

21. Decision required and by when.
22. Recommendation.
23. Basis and evidence.
24. Material consequences and alternatives.
25. Remaining uncertainty, control and next step.

Good judgement includes knowing when you can decide, when you can recommend and when you must escalate.

Delegated authority is not administrative decoration. It defines who can commit money, accept risk, issue positions, approve settlements, alter forecasts or bind the organisation. A well-prepared submission states the authority required and does not force the approver to discover that the decision belongs somewhere else.

Thinking like the approver also means respecting the boundary of your own role. You can analyse, recommend and prepare without presenting an unapproved position as though it has already been authorised.

EXAMPLE — The position issued before approval A draft subcontract position was technically strong but circulated externally before the delegated approver had reviewed it. The problem was no longer only the merits. The business had to manage an apparent commitment, relationship damage and a governance failure. Correct analysis was undermined by the wrong sequence.

Pathway Decision Frame

Field	Position
Decision required	
Deadline / trigger	
Accountable owner	
Material consequences	
Confidentiality / privilege	
Final record required	

3. Map the Stakeholder Roles

Name what each person contributes to the pathway before deciding whether they belong in it.

A useful map distinguishes preparer, verifier, subject-matter adviser, affected delivery owner, commercial reviewer, recommender, endorser, approver, sponsor, gatekeeper and informed party.

A submission can be correct for one reviewer and incomplete for the next.

Material work often travels through several gates: preparer, discipline reviewer, commercial lead, project director, business unit, client or corporate function. Each gate is asking a different question. A common failure is preparing only for the person immediately above you and forcing every later reviewer to rebuild the wider context.

Map the chain before the work is finished. Identify who recommends, who endorses, who approves, who must be consulted and who needs to be informed. Then identify the information each person requires and the sequence that avoids surprise or rework.

26. Who owns the underlying analysis?
27. Who has technical or contractual review responsibility?
28. Who has delegated authority to approve the decision?
29. Whose budget, forecast, client relationship or programme is affected?
30. Who may later challenge or audit the record?
31. Which people should be spoken to before the formal paper arrives?

Stakeholder Role Map

Stakeholder	Role in pathway	Authority / information	Risk if omitted

4. Separate Authority, Influence and Impact

The person with authority may rely on people who have no formal approval and be constrained by people the preparer cannot see.

Map formal delegation, practical influence and those materially affected by the outcome. Do not substitute a powerful influencer for the accountable approver or ignore a delivery owner who must implement the decision.

Three-Lens Map

Stakeholder	Authority	Influence	Impact / implementation

5. Decide Who Must Be Included

Include people whose authority, expertise, implementation duty or material exposure is necessary to a sound decision.

Mandatory inclusion may arise from delegation, contract, law, safety, assurance, client governance, joint-venture rules, specialist advice, affected operations or the need to preserve a relationship.

Operating Checks

32. Who owns the decision or delegation?
33. Who must verify facts, calculations, programme or technical basis?
34. Who carries implementation or downstream consequence?
35. Who must advise on legal, finance, tax, safety, design, insurance or people risk?
36. Who would reasonably be ambushed if the issue first appears in the formal forum?

6. Decide Who Should Be Excluded or Deferred

Exclusion should protect relevance, confidentiality and decision quality—not hide accountability or avoid challenge.

People may be deferred where they have no current role, the position is not sufficiently formed, privilege or privacy applies, premature circulation would damage negotiation, or a smaller working group is needed before broader governance.

Operating Checks

37. Exclude unnecessary recipients from sensitive personal, legal or commercial material.
38. Do not copy broad groups to create pressure or political cover.
39. Do not exclude a required approver, verifier or affected owner because they may disagree.
40. Record the reason where exclusion is material to governance or later defensibility.

7. Consult About Inclusion and Exclusion

Where the pathway is politically, legally or operationally sensitive, ask the accountable owner who else should be involved before circulation.

The preparer rarely sees the entire institutional field. A short question to the sponsor, approver or manager can reveal joint-venture, client, executive, legal, finance or stakeholder obligations.

Working Sequence

41. Show the proposed audience and purpose to the accountable owner.
42. Ask who must be consulted before the formal issue.
43. Ask who should not receive the material yet and why.
44. Confirm whether legal privilege, privacy or restricted distribution applies.
45. Record the agreed pathway where consequence is material.

Useful question

EXAMPLE *'I propose to pre-brief the Project Director and Planning Manager, obtain Legal's view on the notice position, then submit through the Commercial Director for approval before the client meeting. Is there anyone else who must be included or deliberately kept outside the working group at this stage?'*

8. Sequence the Pathway

Formal meetings should decide or govern; they should not be the first place material stakeholders discover the issue.

Use an intentional sequence: develop, verify, pre-brief, challenge, revise, endorse, approve, communicate and record. The exact route depends on urgency and authority.

The approval begins before the paper arrives.

Material or contested issues often benefit from a short conversation before formal submission. This gives the approver context, tests misunderstanding and avoids an important position arriving cold by email. The written record should then confirm the decision and basis proportionately.

Read the location. A challenge raised in front of a client, a correction made in an open office or a confidential issue discussed within earshot of others may be factually justified and professionally clumsy. Choose the setting that gives the truth the best chance of being heard without needlessly exposing someone's position.

Sequence for Material Issues

Talk first when meaning may be contested; write afterwards when the record matters.

46. Pre-brief the person carrying the decision.
47. Consult people whose evidence or accountability is affected.
48. Issue the concise written submission with supporting detail.
49. Answer stress-test questions without becoming defensive.
50. Record the decision, conditions, actions, owners and timing.

Communication Sequence

Stage	Person / group	Channel / purpose	Timing
Develop			
Verify			
Pre-brief			
Challenge / red-team			
Endorse / approve			
Communicate			
Record			

9. Choose the Channel and Location

Channel and room signal urgency, confidentiality, authority and finality.

Use private conversation for testing and status-sensitive matters, a controlled working session for analysis, a decision brief for recommendation, formal notice for rights and a restricted channel for privileged, personal or conduct issues.

Communication is the transfer of meaning, confidence and action—not merely information.

Communication is not presentation polish added after the work. It is part of the work. Good communication allows other people to understand the issue, make a decision and act with less confusion.

At early levels this means clear writing, accurate records, concise updates and asking questions before proceeding on a false assumption. At senior levels it means framing complexity, tailoring detail to the audience, managing expectations and creating shared understanding across people who may want different outcomes.

The strongest communicators do not simply transmit information they organise it into packages and distribute it to the right stakeholders, in the right order at the right time. They distinguish the decision from the background, the material risk from the noise and the recommended action from the alternatives, and they listen well enough to understand what the other person is actually trying to solve.

The Channel Is Part of the Message

The same words land differently in an email, a phone call, a meeting room and a conversation on site. Match the channel to the consequence. Use writing to create a record and organise detail; use voice or face-to-face contact when tone, trust, resistance or ambiguity matter. Difficult news should rarely arrive naked in an email when a short conversation could provide the context needed to understand it.

A useful rule is: talk first when meaning may be contested; write afterwards when the record matters.

Body Language and Tone

People assess the message and the messenger at the same time. A calm pace, open posture, steady eye contact and a level tone make difficult information easier to hear. Folded arms, visible impatience, a smirk, looking at your phone or speaking too quickly can contradict otherwise sensible words. Senior presence is not theatrical confidence. It is congruence: your face, posture, tone and language all communicate that you understand the stakes and can remain constructive inside them.

When the room becomes tense, lower your pace and volume. Composure is often more persuasive than force.

Read the Room and the Location

Before speaking, notice where you are, who can hear, who has status in the room, whose ego is exposed and what each person needs from the interaction. Correcting a manager in front of a client, challenging a subcontractor in front of their workforce or raising confidential performance feedback in an open office may be factually justified and professionally clumsy. Location is not background; it changes the relational cost of the message.

Choose the room that gives the truth the best chance of being heard without needlessly making

someone defend their position.

Listen for Meaning, Not Your Turn

Listening is visible. Let the person finish. Do not rehearse your rebuttal while they are speaking. Ask one clarifying question before asserting your answer, and play back the issue in your own words when the stakes are high. Often the stated objection is not the real concern: a dispute about a number may actually be about precedent, cash flow, authority or fear of looking weak. The communicator who identifies the underlying concern can solve what the conversation is actually about.

You have not communicated because you spoke clearly; you have communicated when the other person has understood.

Control the Landing

End material conversations by confirming what has been decided, what remains open, who owns the next action and when it is due. Follow with a short written record proportionate to the risk. This is not bureaucracy. It protects shared understanding after memory, pressure and self-interest begin editing the conversation.

The last minute of a conversation often determines whether the previous thirty minutes produce anything.

Common mistakes

What good looks like

51. You choose the channel and setting deliberately rather than defaulting to email.
52. Your tone, pace and body language support the meaning of your words.
53. You notice who is present, who can hear and whose position is exposed.
54. You listen long enough to identify the concern beneath the stated position.
55. You make the decision, action, owner and timing explicit before the conversation ends.
56. You create a written record proportionate to the risk after important verbal conversations.
57. Using volume of detail to avoid making a clear recommendation.
58. Escalating a problem without explaining the consequence or proposed next step.
59. Waiting for certainty when an early warning would be more useful.
60. Treating every audience as though they need the same level of detail or language.
61. Assuming silence means agreement or understanding.
62. Thinking all emails are going to be read in a timely manner, or in the level of detail you are expecting.
63. Not speaking to people in person or by phone to provide the context or lens in which something should be understood.

EXAMPLE — One page, one decision Asked to brief the commercial manager on a cost overrun by the PM, a CA first sent a fourteen-page cost report with no covering summary. It sat there unread for a week. Coached to lead with the decision, they resent a five-line note: the forecast overrun, the two drivers, the recommended action, and the one approval required with the full report attached for those who wanted it. They then called up the CM with an overview and answered a few stress-test questions. The decision was made in five minutes.

KEY TAKEAWAY The purpose of professional communication is not to display how much you know. It is to help the right people understand what matters and what happens next quickly and accurately with the detail to backup your recommendation if they want to dig deeper to ensure the information is

accurate.

Channel Test

Channel	Best use	Primary risk
Private conversation / call	Test, warn, protect status	Weak record if not closed
Teams / working meeting	Coordinate and develop	Audience drift and ambiguity
Email / decision brief	Recommend and record	Premature circulation
Formal notice	Protect rights / trigger process	Relationship surprise if badly sequenced
Restricted legal / HR / safety channel	Sensitive specialist matter	Over-distribution / privilege loss

10. Use Pre-Briefs Without Creating Shadow Decisions

Pre-briefing prepares the formal pathway; it must not secretly replace required governance.

Share the issue, likely recommendation, weak point and decision need with stakeholders who should not be surprised. Do not obtain informal commitments that bypass delegation or exclude required challenge.

Operating Checks

- 64. State that the formal decision remains pending.
- 65. Invite material corrections before circulation.
- 66. Avoid promising the outcome based on private support.
- 67. Capture new facts or conditions in the formal submission.

11. Route Bad News and Deteriorating Forecasts

Material bad news should move early, narrowly and with a containment plan before broad reporting.

Notify the immediate accountable manager, verify the core movement, map required specialist input, pre-brief the Project Director or sponsor and then use the formal forecast or governance route.

Scenario — forecast deterioration

EXAMPLE *A package deteriorates by \$4 million days before the monthly review. The package lead first verifies the driver with finance and delivery, briefs the Commercial Manager privately, tests the legal recovery assumption, then the Commercial Manager pre-briefs the Project Director. The board pack states the movement, range, containment and decision. The wider team is informed after authority and message are aligned.*

12. Route Client and Counterparty Issues

The relationship owner, contractual authority and delivery implementer may be different people.

Map who can commit the company, who manages the relationship, who owns the technical or operational facts and who must issue the formal record. Avoid unapproved side commitments.

Scenario — disputed access

EXAMPLE *A superintendent indicates informally that weekend access will be granted, but the contract administrator has not issued direction. Delivery wants to mobilise. The pathway includes delivery verification, commercial notice, Project Director relationship pre-brief and formal client confirmation before cost is committed.*

13. Route Legal, Privileged and Sensitive Matters

The wider the distribution, the harder it is to preserve confidentiality, privilege and a clean factual record.

Engage Legal through the required channel, mark purpose and distribution accurately, separate legal advice from ordinary project records and avoid forwarding advice into broad operational threads.

Operating Checks

- 68. Do not label ordinary advice 'privileged' without legal basis.
- 69. Keep personal conduct, health and employment information restricted.
- 70. Separate facts needed for delivery from sensitive advice or allegations.
- 71. Ask Legal or the accountable owner who may receive the material.

14. Route Joint-Venture, Alliance and Client Governance

Layered governance creates multiple legitimate pathways that must be reconciled before commitment.

Identify project delegation, joint-venture reserved matters, alliance leadership, independent certifier, client governance, lender or public accountability requirements. One approval may not satisfy all layers.

Layered Governance Map

Governance layer	Decision / threshold	Representative / route	Record
Project			
Business unit			
Joint venture / alliance			
Client / certifier			
Executive / board / external			

15. Avoid Common Routing Failures

Pathway discipline prevents noise, ambush, bypass and decision paralysis.

Common failures include copying everyone, excluding the implementer, bypassing the manager, confusing reviewer with approver, seeking support before facts are tested, disclosing sensitive information, and issuing a formal notice before the relationship owner knows the issue.

Red-Team Routing Check

Check	Yes / action
Decision and accountable owner are named	
Mandatory verifiers and implementers are included	
Inclusion / exclusion was tested with the owner	
Pre-briefs prepare rather than bypass governance	
Channel and location fit sensitivity	
Final record and distribution are controlled	

16. Record and Review the Pathway

A defensible record shows who knew, who advised, who decided, what conditions applied and what was communicated.

Keep the decision brief, material advice, approvals, conditions, issue record and distribution. After material matters, review whether the pathway created avoidable delay, surprise or rework.

Pathway Review Log

Matter	Pathway used	What worked / failed	System change

Commitments and Review

Use this page to convert the manual into a small number of observable commitments. A manual has no value if the reader cannot identify what will be done differently, where it will be practised and what evidence will prove the change.

Commitment	Practice ground	Evidence / reviewer	Review date

Related Buildit Manuals

- 72. 02 — Think Like the Approver
- 73. 04 — Communicating Under Pressure
- 74. 09 — The First 90 Days on a Major Project
- 75. 10 — Recovering a Difficult Package
- 76. 11 — The Commercial Manager's Field Guide

Closing Position

The right answer sent to the wrong people, in the wrong order or through the wrong channel can become the wrong project outcome.

Notes
