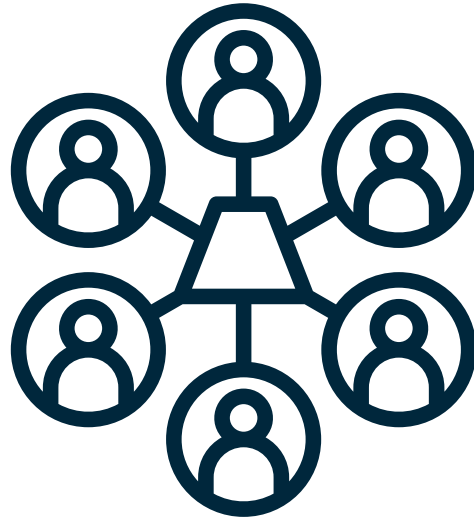


STAKEHOLDER MANAGEMENT

WORKBOOK  Evans Consulting





WHAT TO EXPECT

This workbook provides an overview of stakeholder management and stakeholder engagement best practices, as well as a customizable stakeholder analysis grid, stakeholder interview questions, and stakeholder engagement strategy grid to get you started!

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What is a Stakeholder?



Stakeholders are people and organizations impacted by a project. Stakeholders have varying interests, objectives, and attitudes which can align or conflict with the project objectives. Stakeholders also have varying power and influence over project decisions and outcomes. As such, their early involvement and continuous support is key for project success. Stakeholders can be categorized as:



Internal stakeholders

Employees, managers, board members, and other individuals within the organization.



External stakeholders

Customers, suppliers, investors, community members, and other entities outside the organization.



Primary stakeholders

Individuals or groups who are directly impacted by the organization's decisions and activities.



Secondary stakeholders

Entities who are indirectly impacted by the organization's decisions and activities.

Key Stakeholder Management Steps



1. Identify stakeholders

Make a comprehensive list of all individuals, groups, and organizations impacted by or with interest in the project.

2. Analyze stakeholders

Assess each stakeholder's level of interest in and influence on the project, as well as their attitudes about the project.

3. Engage stakeholders

Develop a stakeholder engagement strategy focused on those with high interest and influence. Keep lower priority stakeholders informed.

4. Manage stakeholders

Ensure continuous communication with stakeholders, share progress, and note any potential impediments or risks before they become big problems.



Stakeholder Analysis Grid

Use the space on the next page to begin your analysis of your stakeholders' interest, influence (power), and attitude regarding your project. You can further organize this information by color-coding your grid to call out the priority stakeholders based on their potential to impact the project.

Suggested scoring:

- Interest: High (H), Medium (M), Low (L)
- Influence: High (H), Medium (M), Low (L)
- Attitude: Positive (+), Neutral (0), Negative (-)

Suggested color code:

- **Red:** High Potential Negative Impact
(High Interest, High Influence, Negative Attitude)
- **Green:** High Potential Positive Impact
(High Interest, High Influence, Positive Attitude)
- **Orange:** Lower Potential Negative Impact
(High Interest, Low Influence, Negative Attitude; Low Interest, High Influence, Negative Attitude)
- **Purple:** Lower Potential Positive Impact
(High Interest, Low Influence, Positive Attitude; Low Interest, High Influence, Positive Attitude)
- **Gray:** Least Potential Impact
(Low Interest, Low Influence, Negative Attitude; Low Interest, Low Influence, Positive Attitude)

Stakeholder Analysis Grid



Stakeholder Name	Stakeholder Org	Interest	Influence	Attitude

Suggested scoring:

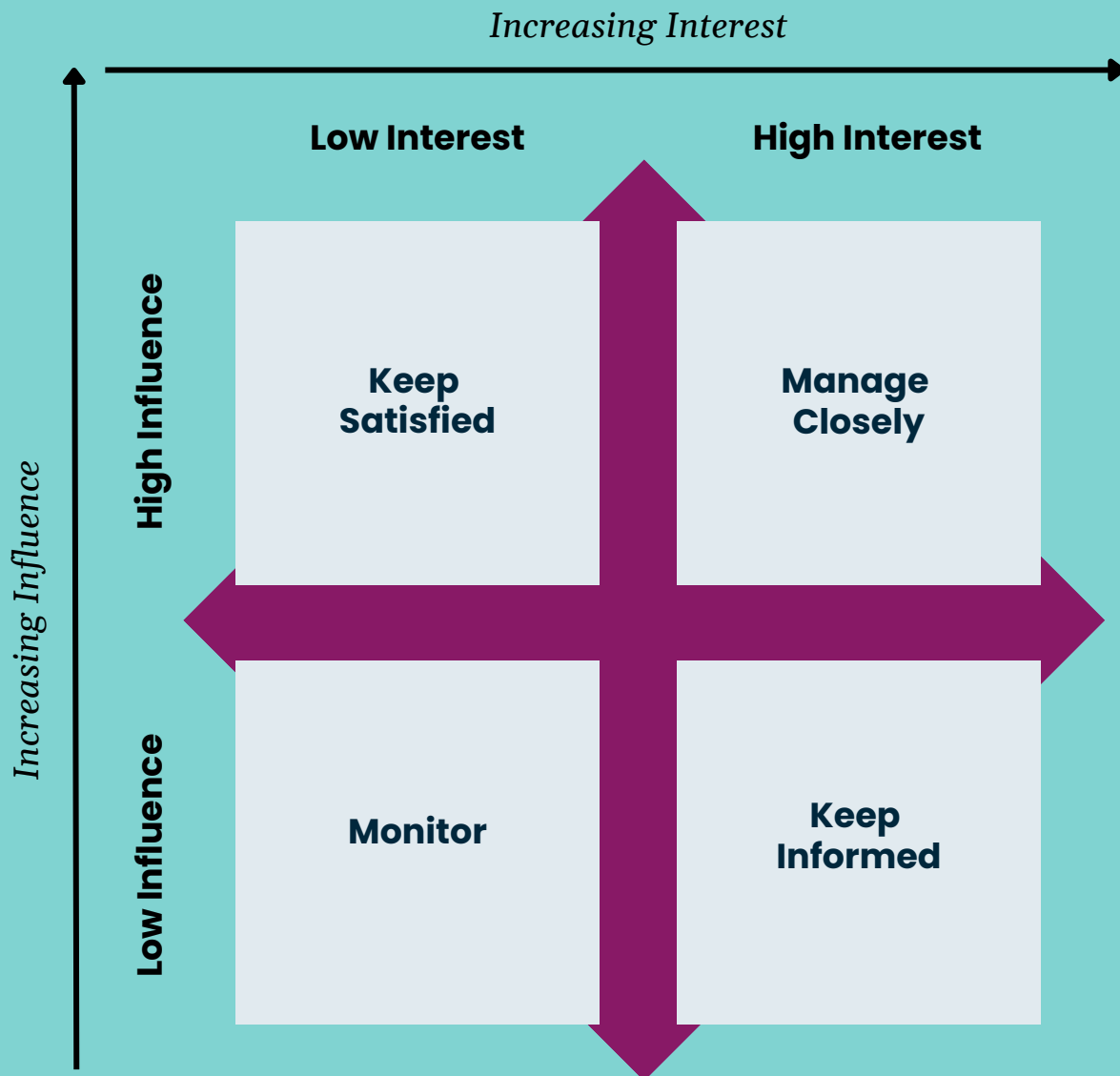
- High (H), Medium (M), Low (L)

Suggested color code:

- **Red:** High Potential Negative Impact
- **Green:** High Potential Positive Impact
- **Orange:** Lower Potential Negative Impact
- **Purple:** Lower Potential Positive Impact
- **Gray:** Least Potential Impact

STAKEHOLDER INFLUENCE/INTEREST

A simple way to summarize the level of backing you have from your stakeholders is to place them on this grid and color-code them. For example, show advocates and supporters in green, blockers and critics in red, and those who are neutral in orange.

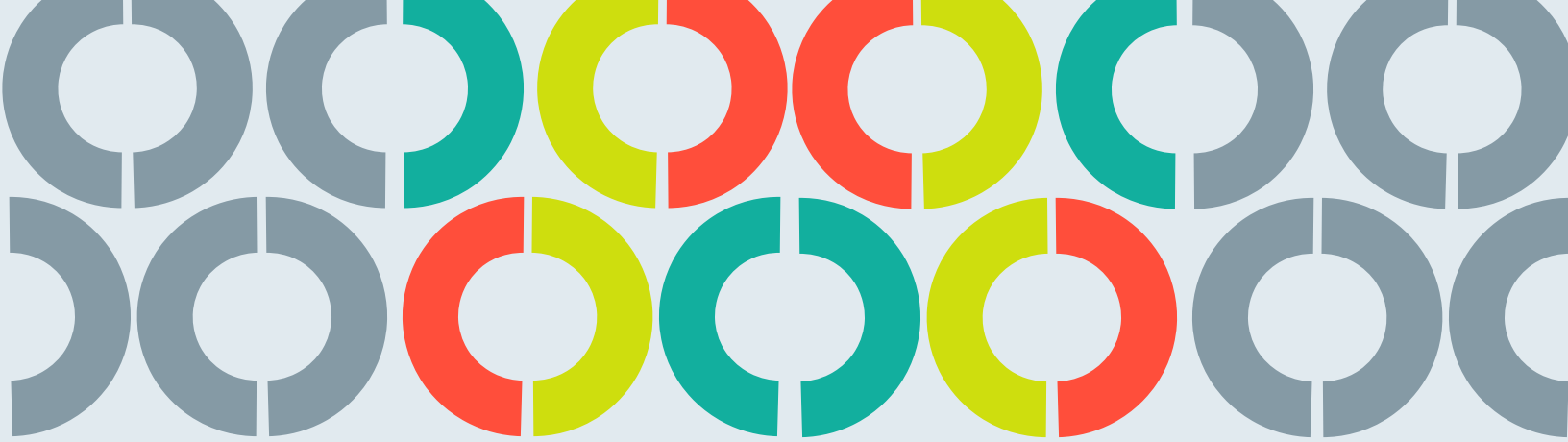


Stakeholder Analysis Questionnaire



Use this space to understand your stakeholders' motivations, objectives, and perceptions.

Q: What overarching motivations/objectives does this stakeholder hold when it comes to their work? (Ex. increasing influence of team/department, saving money, adopting new technologies, moving into leadership/higher leadership role, etc.)
A:
Q: What interest does this stakeholder have in the outcome of the work? Is it positive or negative?
A:
Q: What is this stakeholder's current opinion of the work? Is it based on accurate/up-to-date information?
A:
Q: If this stakeholder isn't likely to be positive, what might win them around to support the project?
A:
Q: If you don't think that you'll be able to win them around, how will you manage their opposition?
A:
Q: Who influences this stakeholder's opinions generally, and who influences their opinion of you/the work specifically? Do some of these influencers therefore become important stakeholders in their own right?
A:
Q: Who else might be influenced by this stakeholder's opinions? Do these people become stakeholders as well?
A:
Q: What information does this stakeholder want or need from you, and what is the best way of communicating with them?
A:



Stakeholder Engagement Strategy

Use this space to begin drafting a stakeholder engagement strategy. Example communication action steps could include: regularly scheduled meetings (formal or informal, group or 1:1 depending on stakeholder's preferred style of communication); regular email updates or written reports; ad hoc phone calls or Teams calls/messages; use of dashboards/KSN sites/Teams channel/newsletters.

	Stakeholder 1	Stakeholder 2	Stakeholder 3	Stakeholder 4
Interest/Influence (H/M/L)				
Attitude (+/0/-)				
Their Objective(s)				
My Objective(s)				
Communication Style				
Communication Action Steps				

Tips for Successful Stakeholder Management

Define the scope of the work. A clear and firm scope will be like the guardrails for your project, keeping everyone moving forward along the same path and preventing time-consuming detours. Be prepared to communicate the scope both at the start of the project and throughout the life of the project; people often need to be reminded.

Scope communication tip: Assure stakeholders at the start of the project and throughout that ideas/suggestions that are outside of the scope will be documented and reviewed for the potential to be brought into future iterations of the work. This will ensure that stakeholders feel their opinions are heard and valued, even if they lie outside the boundaries of the current project.

Set clear and realistic expectations. This applies both to stakeholders and to your project team and management. Expectations include things like documentation/governance requirements, project timeline and meeting cadence, resources (personnel, etc.) needed to successfully complete the work, and individual roles and responsibilities as applicable. Establishing these expectations at the start of the work will ensure that everyone is starting out on the same page.

Expectation communication tip: Give stakeholders and project team members time to process this information and the opportunity to provide constructive feedback. This could look like disseminating expectations via email prior to the kick-off meeting and then setting aside time in that meeting for feedback. While their feedback may or may not impact the expectations, stakeholders will walk away feeling heard and respected.

Be proactive and transparent (as much as possible). Take the initiative to engage stakeholders early in the work and communicate with them regularly (based on what you identified in your engagement strategy as effective communications). As much as you can, be transparent about the purpose and progress of the work. This will help stakeholders feel like valued partners.

Proactive communication tip: Proactive and transparent communication includes being up front about potential challenges and trade-offs inherent in the work. It can be tempting to gloss over or avoid uncomfortable topics of conversation, but you will be better served in the long run by making stakeholders aware of potential problems ahead of time so you can work together to come up with viable solutions.

Define the purpose and value of the work. We all buy into things – products, processes, and projects – much more easily and willingly when we understand the “why” behind them. Let your stakeholders know why this work is important, why their participation is essential, and how this work will benefit them.

Purpose/value communication tip: Use this old marketing trick: Try to think about the “product’s product” or even the “product’s product’s product.” What does this mean? Product’s product: Instead of saying a project is necessary because policy requires it, which intellectually we understand is important but doesn’t have a whole lot of emotional pull, you can frame it as, “The work will bring us into compliance with Policy X, which will make us better prepared for and more successful in future regulatory audits.” Product’s product’s product: “By doing this work proactively, we will be better prepared for regulatory audits, which will ultimately streamline workloads, reduce last-minute urgent requests, and allow us to maintain focus on our core mission.” The product’s product’s product is the more efficient use of time and overall less stressful workloads – something everyone wants!

More Tips for Successful Stakeholder Management

Establish a conflict resolution framework up front. Conflicts will inevitably come up throughout the life of your project. Having a plan ahead of time for how to address and solve these conflicts will help keep them from escalating and derailing the work. There are multiple conflict resolution frameworks out there, so do your research and think about which might align best with the nature of your work and the personalities of your team and stakeholders. Some of the most common frameworks include:

- **Thomas-Kilmann Model:** This model identifies five styles of conflict management: competing, collaborating, compromising, avoiding, and accommodating. The model helps you assess your own preferred style, as well as the style of the other party, and choose the most appropriate for the conflict at hand.
- **Interest-Based Relational Approach:** This is otherwise known as the Win-Win Model because it prioritizes finding a solution that works for all parties. It emphasizes maintaining positive relationships, respecting each other's interests and needs, and communicating openly and honestly in order to look for a mutually beneficial outcome.
- **Circle of Conflict:** This model allows you to analyze the sources of conflict and identify the best strategies to address them by categorizing causes into six categories: data, relationship, interest, structural, value, and style. This model helps diagnose the root cause and tailor your response accordingly.
- **Conflict Resolution Process:** This framework lays out six stages for resolving conflict: preparing for resolution, creating a safe space, listening actively, exploring the situation, building solutions, and following up. The framework helps to structure the conversation around the conflict and establish a clear plan to reach a solution.
- **Back-to-Basics:** Oftentimes the best way to head off or address a conflict is simply to get people in a room and have a candid, respectful conversation. This can seem daunting but done correctly, it can encourage stronger relationships, deeper respect, and a renewed commitment to the team and the work. You may consider bringing in a neutral third-party facilitator to help with these types of conversations.

Conflict resolution communication tip: Make your stakeholders aware of your planned conflict resolution model at the start of the project and give them time to provide feedback or suggest other courses of action. By giving everyone the opportunity to discuss and (hopefully) to agree on a way to resolve future conflicts, you'll make it easier to gain their buy-in and active engagement in the moment when those conflicts arise.

Establish a change management plan. Just like conflict, changes are nearly inevitable in most projects. Team members leave unexpectedly, management priorities shift, and external factors impact the work. By having a plan in place for how to handle those changes, you can help mitigate their negative impacts on your project. Some common change management frameworks include:

- **ADKAR:** This framework advocates a bottom-up approach. The acronym stands for: Awareness, Desire, Knowledge, Ability, Reinforcement.
- **Lewin:** This simple model encourages organizations and teams to shift their resistance to change by 1. unfreezing existing perceptions and processes, 2. changing those perceptions and processes through training and education, and 3. refreezing the new way of doing things.
- **McKinsey 7-S:** This framework helps organizations and teams understand its current structure and identify what needs to change and, most importantly, why. The seven S's are: shared values, structure, systems, style, staff, skills, and strategy.

Change management communication tip: Just like you did with your conflict resolution framework, communicate to your stakeholders how you plan to address any necessary changes in the project's process or structure. Allow them time for feedback to encourage their buy-in.

Final Tip for Successful Stakeholder Management

Reassess engagement strategies and plans regularly. Take the time to regularly look at your stakeholder engagement plan, as well as your change management plan and conflict resolution plan, to make sure they still make sense. While your project scope should be firm, the way you engage with your stakeholders needs to be flexible. Don't be afraid to make changes to your plans as needed to better support your stakeholder relationships and the work!

Reassessment communication tip: Ask your stakeholders themselves if your communications strategies are working for them!



Meet the author

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Sara is an experienced writer, editor, and strategic communications consultant with a passion for creating compelling content that drives missions and inspires teams. She is driven by collaboration and the “big picture.” Sara has communications experience in numerous industries, including government consulting, international non-profit, academic editing, travel writing, health and wellness, digital marketing, biotech, and real estate. Beyond communications, she also has experience in corporate event planning. Her current focus is on strategic communications and strategic planning in the government sector.