Stakeholder Engagement

DAU Lunch and Learn
Date: 27 September 2017
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Agenda

• A Framework for Building More Effective Stakeholder Relationships
• Creating a Foundation for Relationship Building
• Create a More Effective Organization for Relationship Building
• Stakeholder Strategy – Identify and Analyze
• Stakeholder Strategy – Engagement
• Evaluate and Improve Relationships
• Refresh your Stakeholder Engagement Plan
• Building a Trusting Relationship
Developing Stakeholder Relationships

Foundational Elements (Phase 1)

Stakeholders

Support Systems

Organization

Trust

You

Stakeholder Strategy (SEP) (Phase 2)

1) Identify Stakeholders (Stakeholder Map)
2) Prioritize Stakeholders (Power Grid)
3) Analyze Stakeholders (Interests, Expectations *Requirements
4) Focus Engagements (Involvement Matrix)
5) Plan Engagement Actions (What, When, Who)
6) Evaluate (Plan for Success)

Succeed!
Who is a Stakeholder?

• R. E. Freeman definition: “any group or individual who can affect or is affected by the achievement of the organization’s objectives.”

• Given Freeman’s definition, keep in mind that relationships are built with individuals who may represent organizations, not with organizations as a whole. You engage with people not entities.

• Types of stakeholders can include:
  - Governance
  - Customers
  - Internal
  - Operational
  - PROVIDERS
  - Administrative
  - External
Importance of Effective Stakeholder Engagements

Often building relationships is the **groundwork that must be laid** before realizing any success on a program or project. The larger, more complex your effort, the greater likelihood that you will have a **significant number of stakeholders**. When you establish **collaborative relationships** with stakeholders at work, it is much like the process you go through to develop lasting personal relationships. **Enduring relationships are based on a foundation of trust and understanding** each others values and history.
Importance of Effective Stakeholder Engagements

You will need to **invest time and effort up front** when you begin the relationship development effort. Any organization expects a commitment of resources to pay dividends. When building project plans, include **activities that will allow for developing stronger relationships**. Successful stakeholder engagements are symbiotic, with a welcomed mutual interdependence where **each benefits from the success of the other** but retains his or her own identity. However, even in the best acquisition relationships there will be difficulties. Effective relationships are an enabler to **overcome conflicts, rice bowl mentalities, competing priorities and polarities** that need to be balanced.
Know Yourself and Your Project

You

Know yourself:
• What are your preferences?
• How do you interact with others?
• What are your comfort zones?
• How do you approach conflict?

Know your project.
• What outcomes do you seek?
• What organizations are involved?
• What resources will be needed?
Know Yourself

• 360’s
• MBTI
• Conflict style
• Tolerance for ambiguity/change
• Emergenetics
• Leadership Style
• Emotional Intelligence
Emotions and Communications

- Emotional Intelligence is one tool to help build self-awareness and stakeholder awareness.
Creating a Foundation

Creating a Foundation for relationship building

Ensure alignment with the organization's mission and vision
Strengths, weaknesses, opportunities, and threats (SWOT)
A Vision Statement:

• Defines the optimal desired future state, the mental picture, of what an organization wants to achieve over time
• Provides guidance and inspiration as to what an organization is focused on achieving in five, ten, or more years
• Functions as the "north star"—it is what all employees understand their work every day ultimately contributes towards accomplishing over the long term
• Is written succinctly and often in an inspirational manner
Sample Vision Statements

- Defense Acquisition University (DAU): Enable the Defense Acquisition Workforce to achieve better acquisition outcomes, now and in the future.
- Boeing: People working together as one global enterprise for aerospace leadership.
- Chevron: To be the global energy company most admired for its people, partnership and performance.
- DuPont: Be the world's most dynamic science company, creating sustainable solutions essential to a better, safer and healthier life for people everywhere.
A Mission Statement:
- Defines the present state or purpose of an organization
- Answers three questions about why an organization exists
  - WHAT it does
  - WHO it does it for
  - HOW it does what it does
- Is written succinctly in the form of a sentence or two, but for a shorter timeframe (one to three years) than a Vision statement
A SWOT analysis is a structured planning method used to evaluate the strengths, weaknesses, opportunities, and threats for an individual or organization. It involves specifying the objective of the venture or project and identifying the internal and external factors that are favorable and unfavorable to achieve that objective.
SWOT Analysis

INTERNAL FACTORS

STRENGTHS (+)
Characteristics of the organization that gives it an advantage over others

NEGATIVE FACTORS
Characteristics that place the organization at a disadvantage relative to others

EXTERNAL FACTORS

OCCUPORTUNITIES (+)
Elements that the organization could exploit to its advantage

THREATS (-)
Elements in the environment that could cause trouble for the organization

POSITIVE FACTORS
Characteristics of the organization that gives it an advantage over others

NEGATIVE FACTORS
Characteristics that place the organization at a disadvantage relative to others
Support Systems

Create a more effective organization for relationship building

- Organizational structures that support relationship building
- Venues for communicating with stakeholders
- The Communications Plan
Organization Structure and Communications

• In many organizations the structure defines the modes and the tone of interpersonal communication.
  – Highly stratified, hierarchical, organizations may use more formal methods of communication between stakeholders.
  – Smaller organizations may leverage the relatively flat nature of their organization charts to keep communication relatively terse and informal.
  – Matrixed organizations require careful communications coordination to avoid potential conflicts

• Effective leaders must learn how to match appropriate communication styles to company norms and culture.
Recognizing the need for effective communications as an enabler to build better relationships, both internal and external to the organization, positions have been created to foster more communication:

- Customer Advocate
- Customer Relations Department
- Human Relations Department
- Employee Advocate

These positions are not meant to be used to bypass the chain-of-command, but to supplement it.
Stakeholder Relationship(s) and Communications

• The basic premise of stakeholder theory is that the stronger your relationships are with other parties, the easier it will be to meet your objectives; the worse your relationships, the harder it will be.

• Strong relationships with stakeholders are those based on opportunities to connect, solid first impressions, effective communications, and your message or approach.
Forms of Communication

• We tend to think about traditional forms of communication:
  – Face-to-face/Direct contact
  – Telecom
  – Meeting
  – E-mail
  – Memorandum

• There are many more venues available for interacting w/stakeholders:
  – Web-based tools (Blogs, COPs, Chat rooms, etc.)
  – Blogs
  – SharePoint/Shared drives
  – Surveys
  – Knowledge sharing events (Industry Days, Conf, Symposia, etc.)
  – Reports
  – Social media (Facebook, LinkedIn, etc.)
“What we got here is failure to communicate.”

Where are you at with your stakeholders? Polite discussion or dialogue?
Communication Process Model

Activating Event(s)

Belief(s) about the events

Consequence(s)

Dispute your Beliefs

"D" Your "B"
Emotions and Communications

- Visible emotions will influence the outcomes of interactions
Emotions and Communications

- Visible emotions will influence the outcomes of interactions

Will your stakeholders be listening to the message or paying more attention to how it is delivered?
Stakeholder Communications Best Practices

- Appropriate frequency
- Two-way communications
- Built-in feedback mechanisms
- Trust
- Effective listening
- Predisposition to critical thinking
Develop a stakeholder strategy

Stakeholders

Develop a stakeholder **Strategy**

- Identify your stakeholders
- Analyze your stakeholders
  - Power Grid
  - Interests, Expectations, and Requirements
  - Involvement Matrix
- Identify where you want your stakeholders to be
- Develop a strategy
  - Move to a favorable position
  - Maintain in current position
- Evaluate your plan
  - Measure the success in achieving the requirements
  - Measure the success of the nature of your relationship
Trust in the Relationship

Building a Trusting Relationship

• Trust is a key element to building any relationship
• Know yourself and your stakeholders
  • Cores of Credibility
  • Thirteen behaviors

A relationship without trust is like having a smart phone with no service, all you can do is play games.

“If people like you, they'll listen to you, but if they trust you, they’ll do business with you.” – Zig Zigler
Trust and Your Stakeholders

- Thinking in terms of your project, stakeholders, and business relationships – Who do you Trust?

- Why do you trust each of these people? What is it that inspires confidence in these particular relationships?

- Do your Stakeholders trust you? What makes you believe so?
Cores of Credibility

Key Building Blocks of Trust

4 Cores of Credibility*:
- Integrity
- Intent
- Capabilities
- Results

13 Behaviors*:
- Talk Straight
- Demonstrate Respect
- Create Transparency
- Right Wrongs
- Show Loyalty
- Deliver Results
- Get Results
- Confront Reality
- Clarify Expectations
- Practice Accountability
- Listen First
- Keep Commitments
- Extend Trust

Fosters Relationships

Implements Communication

*Speed of Trust, Stephen M.R. Covey, Feb. 2008 (Free Press)
Common Behaviors for Building Trust

1. Talk Straight
2. Demonstrate Respect
3. Create Transparency
4. Right Wrongs
5. Show Loyalty
6. Deliver Results
7. Get Better
8. Confront Reality
9. Clarify Expectations
10. Practice Accountability
11. Listen First
12. Keep Commitments
13. Extend Trust

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Developing Stakeholder Relationships

1) **Identify** Stakeholders (Stakeholder Map)
2) **Prioritize** Stakeholders (Power Grid)
3) **Analyze** Stakeholders (Interests, Expectations *Requirements
4) **Focus** Engagements (Involvement Matrix)
5) **Plan** Engagement Actions (What, When, Who)
6) **Evaluate** (Plan for Success)

Succeed!
Identify and Analyze Your Stakeholders

1) Identify Stakeholders (Stakeholder Map)
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Identify and Analyze Your Stakeholders

1) **Identify** Stakeholders (Stakeholder Map)

2) **Prioritize** Stakeholders (Power Grid)

3) **Analyze** Stakeholders (Interests, Expectations *Requirements

4) **Focus** Engagements (Involvement Matrix)
The Stakeholder Engagement Process

1. Identify your project’s **stakeholders**
2. Prioritize the stakeholders in terms of primary, secondary and other (influence vs. importance) on the **Power Grid**
3. Identify the stakeholders’ **interests, expectations, and requirements**
4. Map the stakeholders involvement (commitment vs. engagement) on the **Involvement Matrix**
5. Develop **engagement actions** to position (move or maintain) stakeholders at the desired involvement
6. Evaluate the results of your Engagement Plan
Stakeholders come in many “flavors”
What Do We Know About Our Stakeholders

Understanding, clarifying, and confirming IERs is important:

• **Interests (Why)**
  – What motivates the stakeholder; *emotional interest(s)*
  – Hardly ever communicated

• **Expectations (How)**
  – How something should be *approached or completed* ---desired mode of operation
  – Prior experience with the stakeholder or feedback from others who know the stakeholder

• **Requirements (What)**
  – A product, service or *outcome negotiated/agreed upon* by parties
  – May include deliverables, data, reports, money, etc.
“You can’t build a relationship with an entity... to create a real relationship with a stakeholder you must deal with a person or set of people directly...”

Meeting interests, expectations, and requirements leads to credibility, confidence and trust in relationship partners.
Analyzing Your Stakeholders

Background:

• Family desires a 4 bedroom 3 bath house with mother-in-law suite, basement, and home office built (performance) by Thanksgiving (schedule)

• MIL suite is for your mother who is moving in

• Spouse needs a home office for CPA business

• Teenage daughter likes loud music and having friends over

• Neighborhood is zoned commercial/residential, but no businesses are in a four block radius of your lot.
Recalling that stakeholders come in many flavors, list some notional stakeholders that may be involved in this effort.
The Stakeholders

Recalling that stakeholders come in many flavors, list some notional stakeholders that may be involved in this effort.

- Prime Contractor
- Architect
- Loan Agent
- HOA Rep
- Spouse
- Daughter
- Mother
- Next-door Neighbor
- Foreman
- Inspector
<table>
<thead>
<tr>
<th>Stakeholder (Name/Code)</th>
<th>POC Info</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>image:</strong> Brainstorm a list of your Stakeholders: Any group or individual who can affect or is affected by the achievement of the organization’s objectives. Try to identify by name or at least code. Consider the below categories of stakeholders: - Internal - External - Governance - Administrative - Operational - Suppliers - Customers</td>
<td><strong>image:</strong> include phone numbers (office and cell), email, and website (if applicable)</td>
<td></td>
</tr>
</tbody>
</table>
The Stakeholder’s Power Position

The Power Grid

- Purpose
- The importance of the quadrants
- Recognize the two axis
- Apply a list of stakeholders
Stakeholder Power Grid

Importance to stakeholder
Influence on project/program

Secondary
Secondary
Primary
Other
Importance to stakeholder

- Primary: Extent to which a stakeholder’s interests, expectations and requirements are affected by project/program outcomes.
  - “Your project outcomes importance to stakeholder”

- Secondary: Extent to which a stakeholder is able to act on project/program planning or operations and therefore affect project/program outcomes.
  - “Stakeholder’s influence on you -- project outcomes”

Influence on project/program

Power Grid
Recalling the definitions of Importance and Influence, place your stakeholders on the power grid.
Stakeholder Power Grid

- **Primary**: Mother, Spouse, Contractor, Foreman
- **Secondary**: Architect, Loan Agent, Inspector, HOA Rep, Other
- **Secondary**: Neighbor, Daughter

Influence on project/program:

- Importance to stakeholder
<table>
<thead>
<tr>
<th>Influence (S/W)</th>
<th>Importance (H/L)</th>
<th>Power (P/S/O)</th>
<th>Remarks (Justification)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Power Grid</strong></td>
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</tbody>
</table>

**Influence (S/W):** Extent to which a stakeholder is able to act on project/program planning or operations and therefore affect project/program outcomes. 
- S = strong 
- W = weak

**Importance (H/L):** Extent to which a stakeholder’s requirements, expectations, and interests are affected by project/program outcomes. 
- H = high 
- L = low

**Power (P/S/O):** Combination of Influence and Importance. 
- Strong/High = P (Primary) 
- Strong/Low = S (Secondary) 
- Weak/High = S (Secondary) 
- Weak/Low = O (Other)
What Do We Know About Our Stakeholders?

• Interests (Why)
  – What motivates the stakeholder; emotional interest(s)
  – Hardly ever communicated

• Expectations (How)
  – How something should be approached or completed -- desired mode of operation
  – Prior experience with the stakeholder or feedback from others who know the stakeholder

• Requirements (What)
  – A product, service or outcome negotiated/agreed upon
  – May include deliverables, data, reports, money, etc.
Stakeholder IERs

Using the notional list of stakeholders complete the IER’s. Remember to consider the differences between Interests, Expectations, and Requirements.

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Interests</th>
<th>Expectations</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architect</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prime Contractor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spouse</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Daughter</td>
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<tr>
<td>Next-door Neighbor</td>
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<td></td>
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<tr>
<td>Foreman</td>
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<td></td>
<td></td>
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<tr>
<td>Inspector</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mother</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Loan Agent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HOA Rep</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Homeowner (You) IERs

My Interests: (Why)
- Happy family
- Increase home value
- Status symbol / Showcase home

My Expectations: (How)
- Communicate early and often
- Avoid surprises (full disclosure)
- Control costs
- Meet schedule

Agreed Requirements: (What)
- Contract(s)
- Design (Blue prints)
- Payment
- Builder’s warranty
# Stakeholders’ IERs (Part 1)

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Interests</th>
<th>Expectations</th>
<th>Requirements</th>
</tr>
</thead>
</table>
| Architect             | Hopes to gain more business in the community                              | Fewer changes is better                                                    | Homeowner Inputs
Blueprints to contractor                                                      |
| Prime Contractor      | More work in the neighborhood                                             | Everything in writing
Detail oriented
Homeowner stay out of the way                                                   | Coordinate all efforts in the construction
Deliver house to the homeowner                                                  |
| Spouse                | Comfort and ease while working
Build a thriving business                                                     | Able to modify design
Home office wins when it comes to trade-offs                                   | Home office specs to
Architect
Parking spot for clients                                                        |
| Daughter              | This will be my house someday
Be popular with friends                                                       | She will get everything she wants
The house will be done quickly                                                  | Room with privacy and own separate bath
Playroom for hosting friends                                                     |
| Next-door Neighbor    | Retired and wants a quiet, peaceful environment                           | No changes to the aesthetics of the neighborhood
No disturbances business                                                       | Buy-in to the homebuilding project
## Stakeholders’ IERs (Part 2)

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Interests</th>
<th>Expectations</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreman</td>
<td>UNK</td>
<td>UNK</td>
<td>Efficient and effective work of the crew</td>
</tr>
<tr>
<td>Inspector</td>
<td>UNK</td>
<td>UNK</td>
<td>Approval of construction</td>
</tr>
<tr>
<td>Mother</td>
<td>A place to live that she can “live with”</td>
<td>Have a say in the design&lt;br&gt;Be allowed to check on progress and provide comment anytime&lt;br&gt;Approve any changes</td>
<td>Self contained suite</td>
</tr>
<tr>
<td>Loan Agent</td>
<td>UNK</td>
<td>No waivers or deviations required</td>
<td>Approval of financing&lt;br&gt;Loan package from Homeowner</td>
</tr>
<tr>
<td>Homeowner’s Assc Rep</td>
<td>Hates conflicts and wants everybody to get along</td>
<td>Will not violate any of the Assc rules&lt;br&gt;Neighbors have been consulted</td>
<td>Approval of design and overall project</td>
</tr>
<tr>
<td>Interests</td>
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<tr>
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<td><strong>image:</strong> Interests (Why): What motivates the stakeholder internally; emotional interest(s)</td>
<td><strong>image:</strong> Expectations (How): How something should be approached or completed (stakeholder’s mode of operation)</td>
<td><strong>image:</strong> Requirements (What): A product, service or outcome negotiated and agreed upon by parties/stakeholders (i.e. deliverables)</td>
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The Stakeholders Disposition

Involvement Matrix

• Purpose
• Recognize the two axes
• Recognize the importance of each block in the matrix
• Application exercise
Stakeholder Involvement Matrix

- Commitment +

<table>
<thead>
<tr>
<th>Sponsor</th>
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Engagement
How committed or focused is the stakeholder on the outcomes of the project – how much of an investment of time or resources have they made?

How engaged or informed is the stakeholder in the outcomes of the project/program?
Recalling the definitions of Engagement and Commitment, place your stakeholders on the Involvement Matrix.
Where do your stakeholders need to be for success?

Are all your stakeholders where you want/need them to be?
Guidelines for Changing Attitudes or Behavior:

- Be Sincere. Do not promise anything that you cannot deliver. Forget about the benefits to yourself and concentrate on the benefits to the other person.
- Know exactly what it is you want the other person to do.
- Be empathetic. Ask yourself what is it the other person really wants.
- Consider the benefits that person will receive from doing what you suggest.
- Match those benefits to the other person’s wants.
- When you make your request, put it in the form that will convey to the other person the idea that they personally will benefit.

From Dale Carnegie’s “How to Win Friends and Influence People” 1936
<table>
<thead>
<tr>
<th>Engagement (W/S) As Is</th>
<th>Commitment (P/N/A) As Is</th>
<th>Involvement As Is</th>
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<tr>
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<td><strong>Involvement To Be</strong></td>
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**Commitment:** How committed or focused is the stakeholder on the outcomes of the project—how much of an investment of time or resources have they made?
- P = Pro/Positive
- N = Neutral
- A = Anti/Against

**Engagement:** How engaged or informed is the stakeholder in the outcomes of the project/program?
- W = Weak
- S = Strong

**Notes:**
- Are all your stakeholders where you want/need them to be?
- Where do you want/need your stakeholders to be for success?
Develop an Action Plan

1) Identify Stakeholders (Stakeholder Map)
2) Prioritize Stakeholders (Power Grid)
3) Analyze Stakeholders (Interests, Expectations, Requirements)
4) Focus Engagements (Involvement Matrix)
5) Plan Engagement Actions (What, When, Who)
6) Evaluate (Plan for Success)

Succeed!
Getting From “As is” to “To be”

• Where are your stakeholders on the Involvement Matrix?
• What stakeholders do you want to keep where they presently are?
• What will you do to maintain their position?
• Are there any stakeholders you need to move?
• If so, to where do you move them?
• What will you do to move them?
Management Actions Can Include

- Commitment +

Sponsor
Advocate
Apathetic
Supporter
Skeptic
Adversary

“Partner” for long-term relationship
“Monitor” IERs for changes
“Consult”

Firewall
Neutralize

Engagement
Management Actions Can Include

- Engagement

Commitment +

Sponsor | Advocate
Apathetic | Supporter
Skeptic | Adversary

“Partner” for long-term relationship
• Work towards collaboration
• Identify common objectives
• Satisfy each others concerns
• Emphasize problem solving
  – Where do differences lie?
  – Generate new alternatives
  – Select solutions that meet both concerns

“Partner” for long-term relationship

Partner Management Action

- Commitment +

Engagement

Sponsor
Advocate

Apathetic
Supporter

Skeptic
Adversary
Management Actions Can Include

- Engagement + Commitment +

**Sponsor**

**Advocate**

**Apathetic**

**Supporter**

**Skeptic**

**Adversary**

---

“Inform”
Inform Management Action

- Determine how stakeholders prefer to receive information (format, frequency)
- Determine how best to provide information
- Provide the information
- Promote communication
- Invite your stakeholder specifically to participate
- Increase involvement/engagement
Management Actions Can Include

- Commitment +

Engagement

OEM Management Actions Can Include

“Monitor” IERs for changes

Sponsor
Advocate
Apathetic
Supporter
Skeptic
Adversary
Monitor Management Action

- Detect changes in the stakeholders
  - Changes to their IERs
  - Changes in commitment or involvement
  - Transfers/retirements/promotions/replacements
  - Changes in the situation/environment/life cycle phase

- Promote positive influence

- Consider inform/consult management actions

- Do not ignore
Management Actions Can Include

- **Commitment** +
- **Engagement**

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"Consult"
• Ask for opinions
• Request feedback
• Solicit inputs/advice
• Promote teamwork
• Collaborate to improve trust
• Discuss interests and expectations
• Identify and resolve areas of conflict
Management Actions Can Include

- **Commitment +**
  - **Sponsor**
  - **Advocate**
  - **Apathetic**
  - **Supporter**
  - **Skeptic**
  - **Adversary**

**Firewall**

**Engagement**
Firewall Management Action

- Isolate them from the other stakeholders
- Information starvation
- Limit access
Management Actions Can Include

- Commitment +

Engagement

Sponsor
Advocate
Apathetic
Supporter
Skeptic
Adversary
Neutralize
Neutralize Management Action

- Last resort, when all other management actions fail
- Determine how best to provide information to other stakeholders to mitigate/counter this stakeholder
- Promote access and disseminate information to other stakeholders
- Promote communications between ourselves and the other stakeholders
Management Actions Can Include

- **Sponsor**
  - "Inform"
  - "Monitor" IERs for changes

- **Advocate**
  - "Partner" for long-term relationship

- **Apathetic**
  - "Consult"

- **Supporter**

- **Skeptic**

- **Adversary**
  - Firewall
  - Neutralize

---

**Engagement**
Scenario Management Actions

- Spouse – Partner
- Mother – Partner
- Daughter – Inform
- Contractor – Monitor
- Foreman - Partner
- Loan Agent – Consult
- Architect – Monitor
- HOA Rep – Consult / Monitor
- Inspector - Monitor
- Neighbor – Consult (Firewall)
Stakeholder Strategy

What specific activities do you need to take?

- What outcome do you want with the stakeholder? (what do you want to improve or do differently?)
- Is there a behavior that you or they need to adopt? (what vital behaviors need to be changed/adopted that support achievement of the outcome above?)
- Are there specific ways you can influence that behavior?

"You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you." – Dale Carnegie
### Stakeholder Engagement Strategy

<table>
<thead>
<tr>
<th>Action Strategy</th>
<th>Activity</th>
<th>When/Periodicity</th>
<th>Responsibility</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Inform - Determine information needs. Determine how best to provide information. Promote access and disseminate information. Promote communications.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Monitor - Incremental changes in either commitment or engagement. Keeping tabs on the stakeholder for changes in status of REI and act accordingly to promote a positive influence.</td>
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<tr>
<td></td>
<td>Consult - Directly involve. Obtain opinions, feedback and inputs. Promote access to edit and review. Invite to participate as a team member. Provide coaching.</td>
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<tr>
<td></td>
<td>Firewall - Isolate them from the other stakeholders. Information starvation. Limit access.</td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td>Neutralize - Determine how best to provide information to other stakeholders. Promote access and disseminate information to other stakeholders. Promote communications between ourselves and the other stakeholders.</td>
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</tr>
</tbody>
</table>
Evaluate the situation. Is your strategy working? Are your relationships working? How do you know they are working?

Your stakeholder engagement plans should not be static, they are living documents. You will need to review and renew them regularly.
Measures of Success

Two ways to measure the success of your plan

- The requirements in the relationship
  - Quality inputs
  - Timely deliverables

- The nature of the stakeholder relationship
  - Degree of engagement
  - Is the stakeholder in the desired involvement position?
Essential Questions

• Have you fully analyzed your stakeholders?
• Have you identified key Engagement action(s)?
• Have you outlined an Engagement Action Plan?
• Have you defined success?
• How will you evaluate that success?
## Evaluating a Stakeholder Engagement Plan

### Measure for Success

<table>
<thead>
<tr>
<th>Success looks like (short term and long term)</th>
<th>Evaluation Area(s)</th>
<th>Method(s)</th>
<th>Sources of Info</th>
<th>Periodicity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>This can be success of the relationship and/or degree of success in meeting the requirement</td>
<td>Engagement, communication, cost, schedule, performance</td>
<td>Direct contact, meetings, time-trackers, feedback</td>
<td>Logs, reports, minutes, surveys, etc.</td>
<td>One-time event, as required, regularly scheduled.</td>
<td></td>
</tr>
</tbody>
</table>
Scenario Measures of Success

Spouse – Happy wife, Happy Life

Contractor – Ahead of schedule / under cost

HOA Rep – Calls and lets use know if a neighbor is complaining

Neighbor – Has spouse do his taxes
## Execute With a Communications Plan

<table>
<thead>
<tr>
<th>Audience</th>
<th>Purpose</th>
<th>Topics of Discussion</th>
<th>Key Messages</th>
<th>Tool/Media</th>
<th>Owner</th>
<th>Sender / Transmitter</th>
<th>Frequency</th>
<th>Notes/Markings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>image:</strong> Who is the target? Does the interaction involve just one stakeholder or a number of different stakeholders? Can you leverage one communique to multiple outlets?</td>
<td><strong>image:</strong> Is the purpose of the interaction to: Inform Persuade Approve Seek approval Review Some other purpose</td>
<td><strong>image:</strong> What are you trying to convey with the interaction/What is the key message?</td>
<td><strong>image:</strong> Who owns the message?</td>
<td><strong>image:</strong> How will the interaction occur? Tool - report, press release, spreadsheet, checklist, email, etc. Media - VTC, Telecom, meeting, web-based (blog, chat, COP, etc.), face to face</td>
<td><strong>image:</strong> Who controls the media/tool? Webmaster, Protocol, HR, IT, etc.</td>
<td></td>
<td></td>
<td>Ensure any special handling or security classification markings and rules are applied</td>
</tr>
</tbody>
</table>

Ensure any special handling or security classification markings and rules are applied.
• Do you see your stakeholders differently?
• How will you apply the tools in this course?
• What new opportunities do you see to engage your stakeholders?
• What pitfalls can you now avoid?
• What new actions will you apply?
• What have you done in the past that you would do differently now?
Available now

- ACQ-450 - Leading in the Acquisition Environment
- ACQ 452 – Forging Stakeholder Relations
- Forging Stakeholder Relationships Marble Card
- WSM 007 Stakeholder Management
- CLM 058 Critical Thinking

Coming Soon

- CLM052 Developing Stakeholder Relationships
- Stakeholder Engagement Plan (SEP) Tool
- Communications Plan
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