

STAKEHOLDER

ANALYSIS:

TURNING CHALLENGERS INTO CHAMPIONS

IIBA Philadelphia

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- Specializes in facilitating process / performance improvement and stakeholder engagement
- Consulting and facilitation for public, private, and nonprofits
- 25+ years of experience in project management, change management, strategic planning, business process reengineering, facilitation, agency outreach and communication, systems integration, federal procurement support, and performance management.
- Project Management Professional (PMP)
- Certified Management Consultant (CMC)

Agenda & Outcomes

● **AGENDA**

- Intro & Definitions
- Who are YOUR Stakeholders?
- Getting to Know Your Stakeholders
- Recognizing Resistance
- Working with Resistance
- Tools/Techniques
- Final Thoughts

● **OUTCOMES**

- 
- Recognize signs of resistance & understand why people resist change
 - Assess attitudes and interests of stakeholders to a change initiative
 - Explore strategies to turn challengers into champions

Exercise

1) Introductions

2) Definitions:

- **Stakeholder**
- **Stakeholder Management**

What is a “Stakeholder”?

“*Stakeholder*” - An individual, group or organization who may affect, be affected by, or perceive itself to be affected by a decision, activity or outcome of the project.

(PMBOK, 5th Edition)

What is Stakeholder Management?

“***Stakeholder Management***”, as a concept, refers to the necessity for an organization to manage the relationships with its specific stakeholder groups in an action-oriented way.

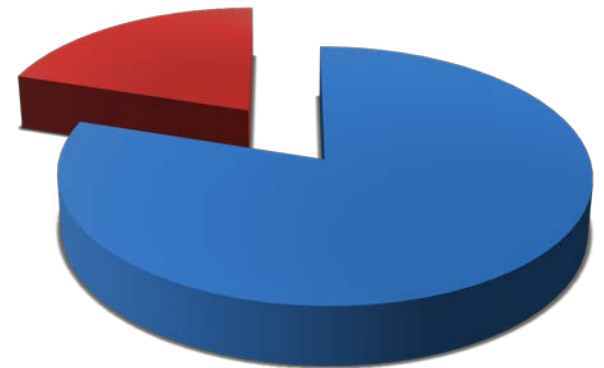
(Freeman, 1984)



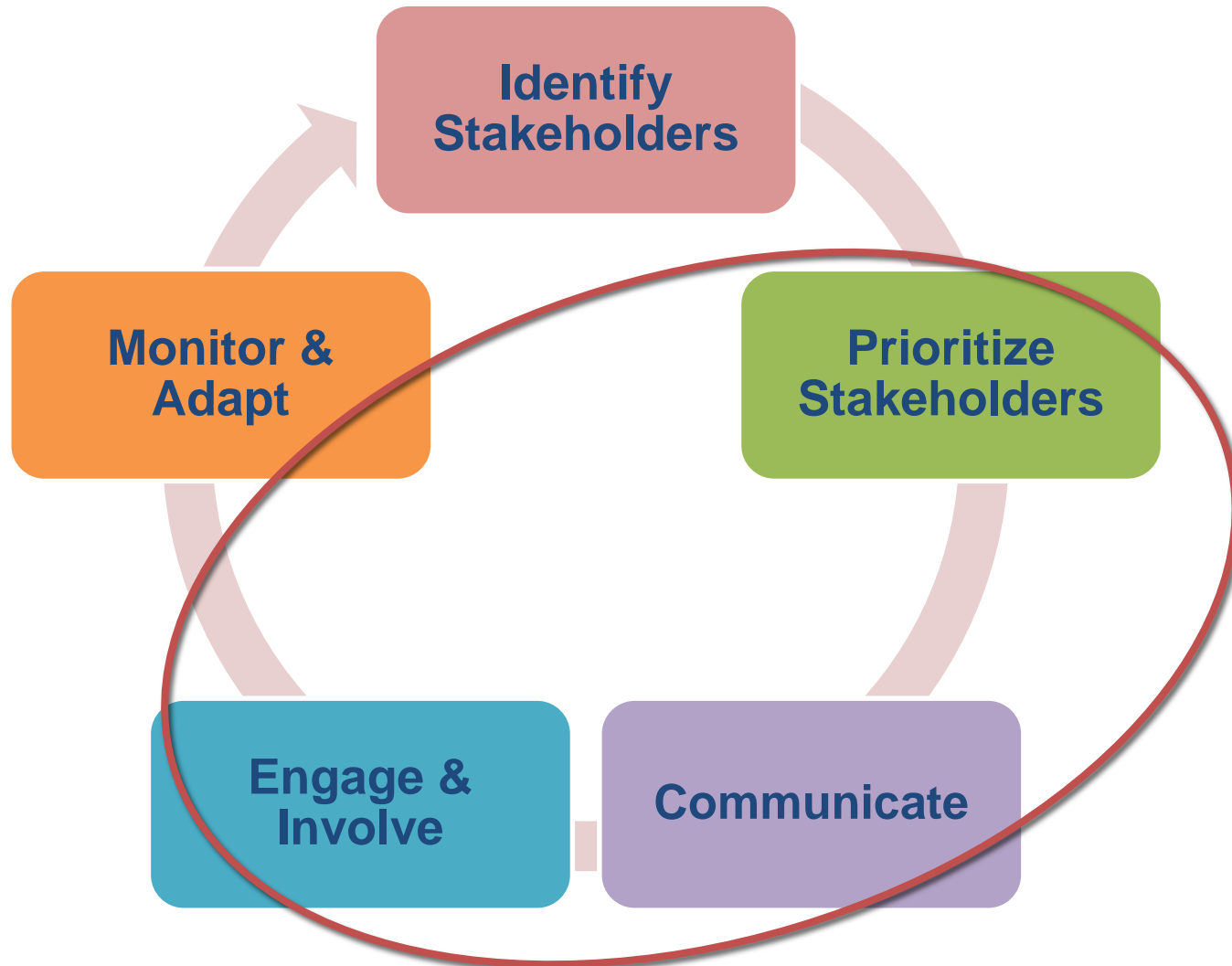
Did You Know....

One out of five projects does not meet its original goals and business intent due to *ineffective communications with stakeholders*

(PMI, May 2013)



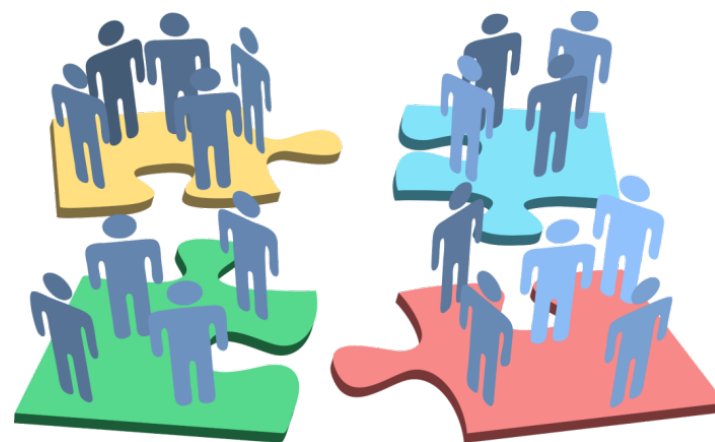
5 Steps to Stakeholder Management



Who Are Your Stakeholders?

- Who has a “stake” in your project/outcome?
 - Stakeholder Groups
 - Key Individuals within the group

What is their “stake”?

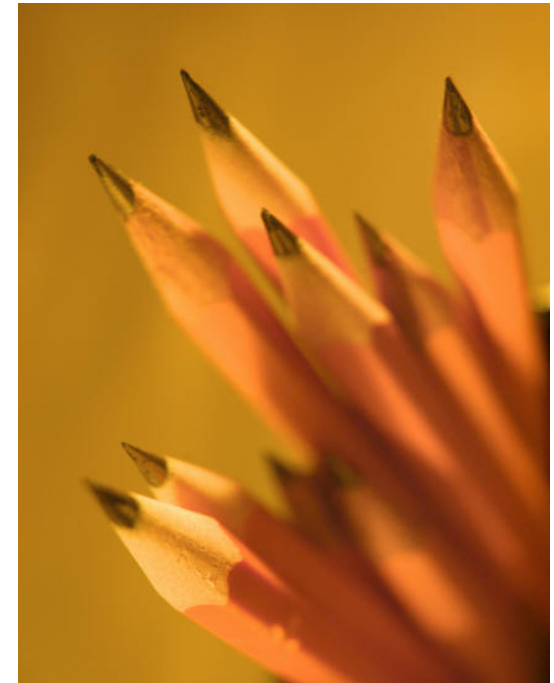


Primary vs Secondary Stakeholders

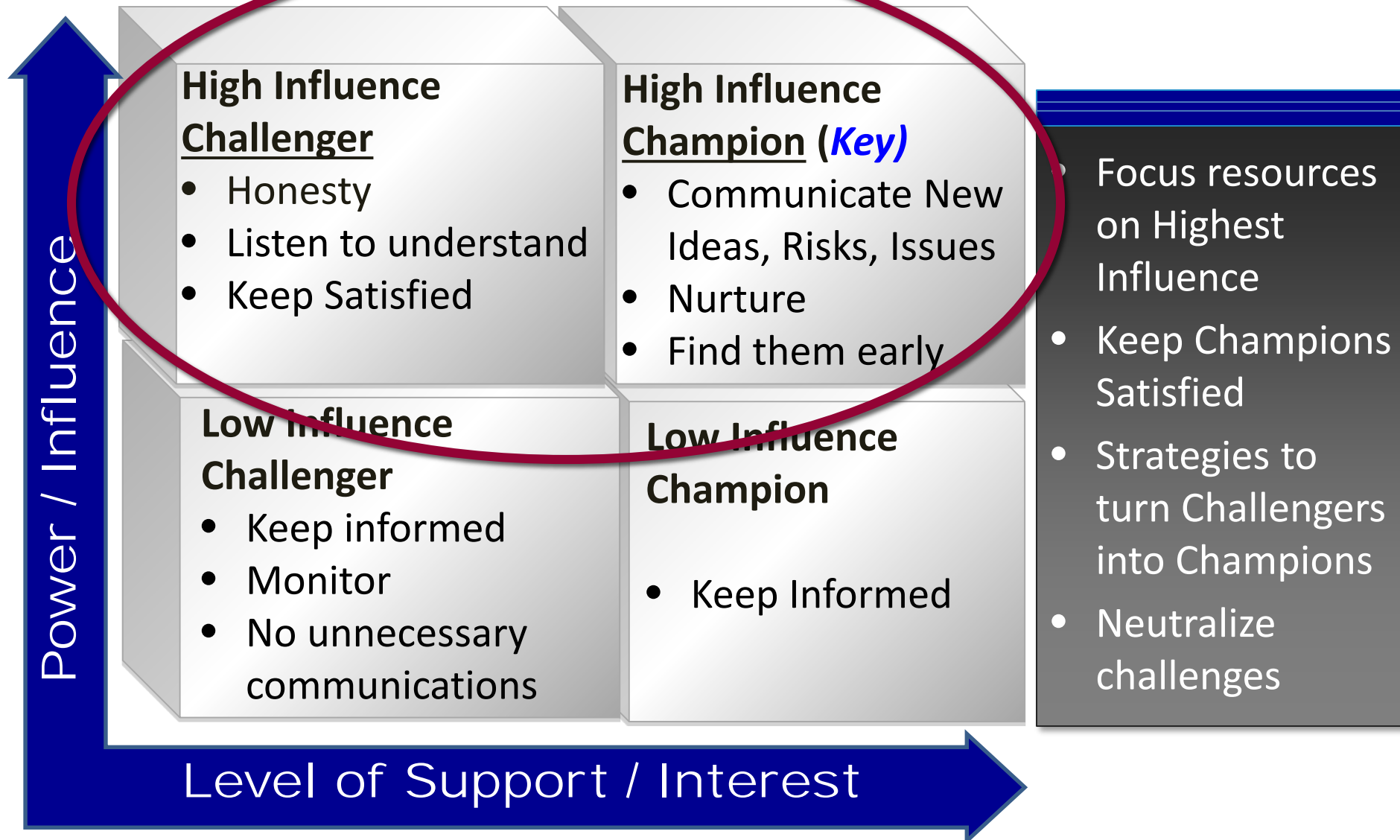
- Primary stakeholders = key decision-makers
- Secondary stakeholders
 - Key influencers of decision-makers
 - Experience in successfully engaging the primary stakeholders in decision-making activities
 - Guide opinions of key decision-makers
 - Often more accessible
 - Key role in determining communication channels
 - May be a channel themselves

How Well Do You Know Your Stakeholders?

- Level of power / Influence over your project
- Current attitude / Level of interest or support
- Impact of the change
- Awareness of the change
- Transition needs/requirements
- Demographics



Stakeholder Quadrant / Map



Exercise

Who are YOUR Stakeholders?

1. Think of one of your projects
2. List the primary and secondary stakeholders

Where do they fit in the Quadrant / Map?

Things to Think About

- Are your stakeholders generally supportive or not supportive?
- With which stakeholders do you tend to spend the majority of your time / energy?
- Are you doing something – on a daily basis – to win the support and build relationships and trust with your stakeholders?



Knowledge is Power

What is Resistance?

“Resistance is any force that slows or stops movement.”

- Rick Maurer

Recognizing Signs of Resistance

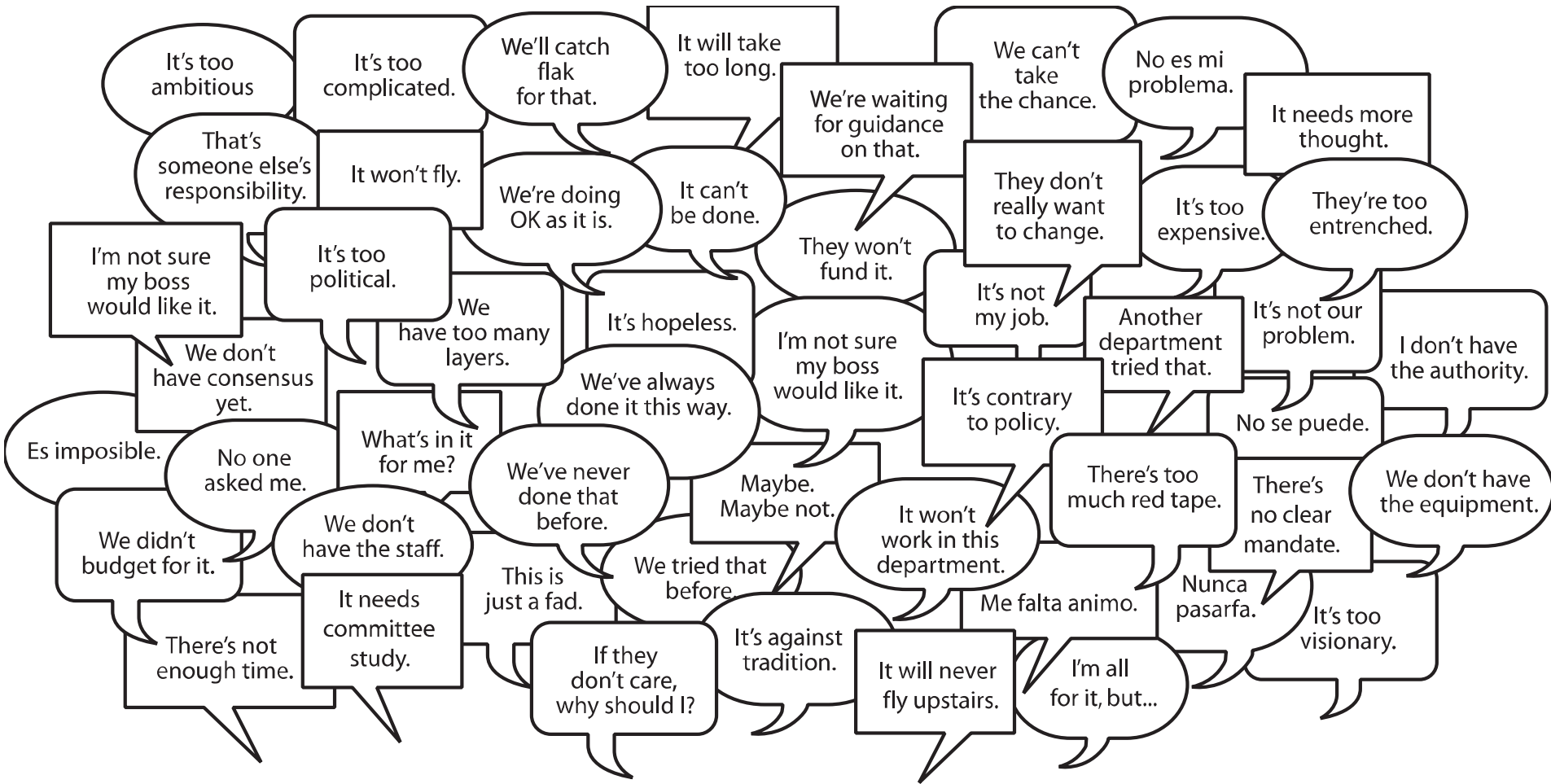
Things People Commonly Do

- Complain
- Delay adoption of new changes
- Attack or attempt to destroy the plan
- Gossip
- Test what happens when they resist change
- Miss meetings
- Miss deadlines
- Change the subject
- Hold endless or unfruitful debates

Things People Commonly Say

- “I’m confused...”
- “Explain that idea to me again” and again and again
- “Management has tried this before. It didn’t work then and it won’t work now!”
- “Will I lose my job once they make this change?”
- “I’m right, you’re wrong!”
- “But we’ve always done it this way!”
- “I have too much to do already – no time for this change!”
- “Why do we need to change anything? It’s working fine as it is!”

50 Reasons Not To Change



**Don't
underestimate me.**
I know more than I
say, think more
than I speak, &
notice more than
you realize.

Exercise

Resistance and Strategies Lists

Levels of Resistance

Level 1 (Information)

- Based on Information
- No hidden agenda – don't understand or don't agree
- Lack of information or confusion
- Disagreement with idea itself

Level 2 (Fear)

- Uncontrollable and based on fear
- Emotional Physiological Reaction
- Increased Blood pressure or Pulse, adrenaline flows
- Can be triggered without conscious awareness

Level 3 (Trust/Relationship)

- Resisting you – deepest, most firmly entrenched
- Resistance is bigger than the idea of the change
- Maybe due to history with you or who you represent
- Resistance based on relationships – past or present

Working with Resistance – Level 1

- Match strategy to the level of resistance
- Level 1 – Information-Based – “I Don’t Get it”
 - Give people information
 - Help them understand the proposed change and impacts
 - Provide opportunities for feedback and contribution

Working with Resistance – Level 2

- Level 2 – Fear-based – “I Don’t Like It”
 - Typical tactics (newsletters, presentations) are not sufficient
 - Remove as much of the fear as you can
 - Emphasize what’s in it for them
 - Find common ground
 - Build strong working relationships
 - Keep clear focus on both your goals and these stakeholders’ concerns
 - Encourage them to talk about their concerns
 - Listen with an open mind - create climate of trust and openness
 - Be honest. If change will hurt them, tell them the truth.
 - Stay calm and centered on the issue – don’t take attacks personally
 - Get them engaged in the process.

Working with Resistance – Level 3

- Level 3 – Trust/Relationship-based – “I Don’t Like You”
 - Based on your history together, conflicting values, or who you represent
 - Take responsibility for things that may have led to the tense relations
 - Continually work on building relationships – do all you can to build trust
 - Find ways to spend time together - work together to find a solution that works for everyone.
 - Begin small
 - Where all sides see that a mutual win is possible
 - Start with issues that are important, but not at center of struggle
 - Keep commitments – demonstrate that you are trustworthy
 - Have candid conversations – two-way dialogue
 - Support yourself – be emotionally ready to engage on the issues
 - Be prepared for setbacks – trust is difficult to build but easy to destroy
 - Be prepared to walk away – when risk or energy required is not worth it

Exercise

Resistance and Strategies List

~ A Second Look ~

Strategies used to Engage Stakeholders

(Sample of actual engagement strategies from a prior project)

What do you notice about these examples?

- Focus groups with key stakeholders
- Quarterly Stakeholder User Group
- Task force of stakeholders to address key issue(s)
- Asked for stakeholder feedback and advice
- Presented at conferences attended by stakeholders
- Used the Internet - website, social media, email campaigns
- Conducted webinars – some targeted / some open to all
- Created a branded newsletter around “shutdown” theme
- Conducted an “open house” and invite stakeholders

TOOLS / TECHNIQUES

“The Magic List” Tool

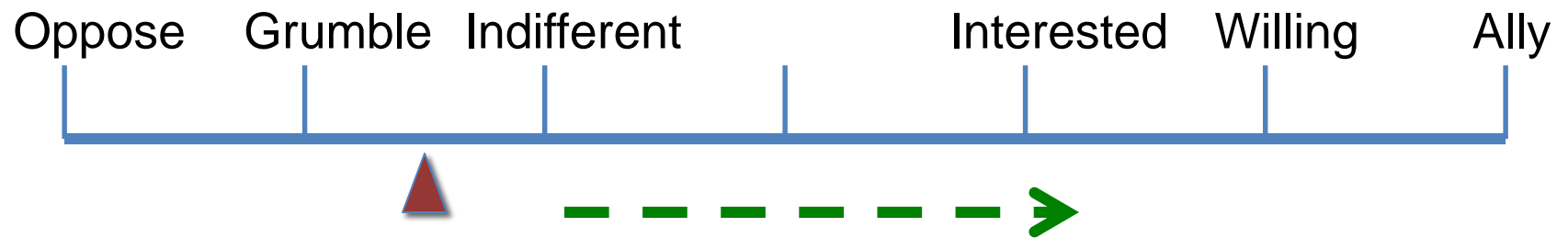
- Challengers / Resisters – Do you know what is driving their resistance?
- Create a short, four-question survey
 - Use an anonymous survey tool to collect the responses
 - Use narrative, open-ended, response boxes
- Four-Question Survey
 - Is there a need for [*the initiative*]? If so, please describe the need.
 - What is your reaction to the talk/discussion about making this change?
 - To what extent do the people you report to have what it takes to plan and implement a change like this?
 - Anything else you'd like to add?

Survey Instructions

- Tell them the survey results are anonymous
- Explain in one sentence why the results are important to you
- Say it will take them less than 10 minutes to answer the questions
- Give them a date when you need their responses



Energy Bar



"These two words - information and communication - are often used interchangeably, but they signify quite different things.

*Information is giving out;
communication is getting
through." - Sydney Harris*

Exercise

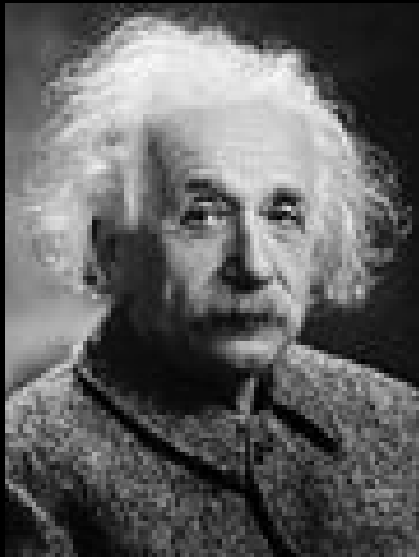
- **What have you heard today that might be useful to you on your projects?**

Final Thoughts

- Start as early as possible
- Be conscious and deliberate with your strategies
- Begin by watching what happens in every meeting
 - Watch for signs of resistance
 - Categorize it based on the three levels
 - Information-based
 - Fear-based
 - Trust/Relationship-based
 - Identify strategies (even small steps) to address the resistance
- Practice these new insights in every meeting
- Start trying and implementing some of the strategies
 - Lowest risk first
 - Build up

**Insanity: Doing the same thing,
over and over again, and
expecting different results**

-- Albert Einstein



*Do the best you can until
you know better.*

*Then, when you know
better, do better.*

- Maya Angelou

Where to learn more

- Stakeholder Management

- Freeman, R.E. 1984. *Strategic Management: A Stakeholder Approach*. Boston: Pitman. Print.
- Kerzner, Harold. 2015. *Project Management 2.0: Leveraging Tools, Distributed Collaboration, and Metrics for Project Success*. New York: Wiley. Print.
- LinkedIn Group: *Stakeholder Engagement Professionals*
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- Madsen, Susanne 2012. *The Project Management Coaching Workbook*. Tysons Corner: Management Concepts Press. Print.
- Maurer, Rick. *The Magic List: Secrets of Successful Organizational Change. Version I, 2013. ebook.*
- Maurer, Rick. *Levels of Resistance*. 2010. www.rickmaurer.com.
- Maurer, Rick. *The Energy Bar*. 2014. www.rickmaurer.com.
- Project Management Institute, Inc. *Pulse of the Profession*. March 2013
- Project Management Institute, Inc. *Pulse of the Profession – In-Depth Report: The Essential Role of Communications*, May 2013
- Project Management Institute, Inc. *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) – Fifth Edition*, 2013

- Facilitation

- Mid-Atlantic Facilitators Network, www.mafn.org

Strong facilitation skills are critical, whether you are an organizational development expert, coach, trainer, or a leader in your enterprise. But how do you develop and enhance your facilitation skills and professional networks? One of the best ways is to join the Mid-Atlantic Facilitators Network (MAFN). Make an Investment in your Professional Future.

What Does MAFN Do?

Through its signature DC Facilitators Workshop Series, Webinars, networking opportunities and its online presence, MAFN provides resources, knowledge, encouragement and support for individuals to grow their skill and confidence as facilitators. MAFN welcomes practitioners at all levels who want to deepen their knowledge of facilitation and learn from each other. MAFN also promotes the benefits of facilitation and the talents of MAFN members to companies, government agencies, and nonprofits seeking qualified facilitators.



What Are the Benefits of Being a MAFN Member?

- ✓ **Professional Development** – each month there are both face to face and virtual workshops featuring some of the greatest global talents in facilitation
- ✓ **Professional Networks** – connect and share with a growing community of practitioners from around the Mid-Atlantic – and increasingly from around North America
- ✓ **Business Opportunities** – MAFN's Find-A-Facilitator program provides members with business opportunities not seen elsewhere
- ✓ **Cost Savings** - Members receive reduced pricing for all MAFN events (the monthly webinar series is free for members!). MAFN also partners with like-minded organizations to offer reduced fees for their events.

A vibrant and inclusive community of professionals working to advance excellence in facilitation.

- ✓ Develop Yourself
- ✓ Develop Community
- ✓ Develop Your Services
- ✓ Develop the Profession

For more information about MAFN and to join, visit www.mafn.org

Outcomes



Questions?



Keep in touch!

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SUPPORTING SLIDES

Getting to Know Your Stakeholders

- What is their interest in the outcome of the project?
- What do they care about? What is their “stake” in the project?
- Why might they want to see it succeed? Fail?
- What are their fears and worries about the project?
- What are their hopes/dreams about outcomes of the project?
- Are there risks they think you are not mitigating? Issues that not being addressed?
- Are they satisfied with the frequency and content of project communications and status reports?
- What info are they most interested in? How would they like to receive it?
- Have they been involved in similar change projects before? If so, what lessons did they learn? How can you best leverage their knowledge?
- Who influences their opinions generally? Who influences their opinion of you?
- What could influence them to be more supportive of you or your project?

Write it down!

Stakeholder Name/Group

- Describe the group

Key Interest/Issues, Key Impacts

- Describe the Interests, Issues, and key impacts

Current Support Level

- What is their attitude toward the project?
- Challenger vs Champion?

Desired Support Level

- Where do you WANT them to be?
- What do you need them to do?

Communication Approach

- How do you plan to communicate?
- What is the best way to reach them?

Messages Needed

- What kind of messaging do you need to create?

Actions

- What actions need to be taken?