

Stakeholder Analysis and Engagement Plan Overview

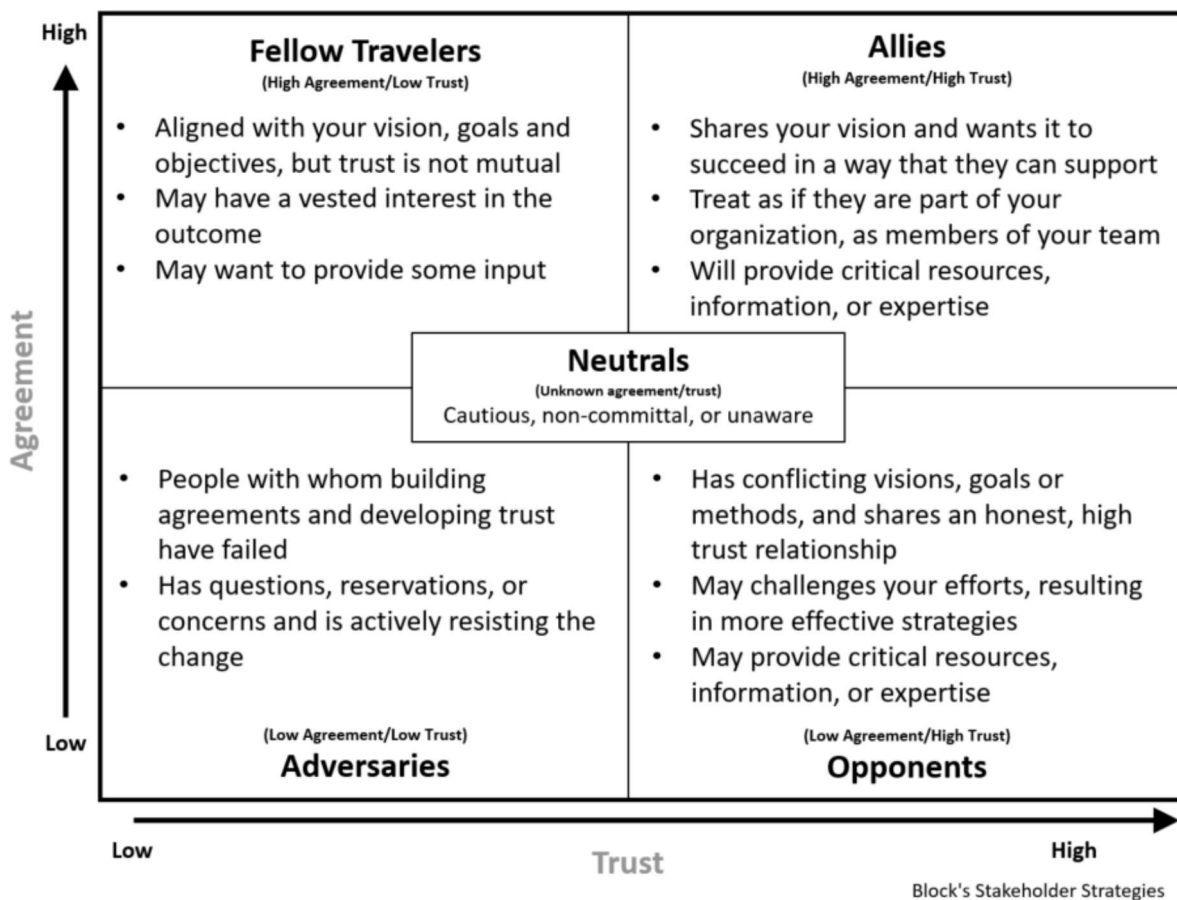
What is a Stakeholder?

A stakeholder is a person who has a vested interest in something and who is impacted by and cares about how it turns out. Refer to your COPIS, created during the process mapping phase of the project, as it provides a starting list of stakeholders.

Potential Stakeholders:

- People who can exert influence or pressure on your change
- People responsible for creating your change
- People who can choose to use or not use the results of your change
- People who will ultimately benefit from the work of your change

Stakeholders Types:



VCA - Business Process Management Office (BPMO), Priya Sarran.

Central HR - Organizational Effectiveness, Delia Clark .

Central HR - Learning & Development, Kathy Mendonca.

University of California - Berkeley.

https://hr.berkeley.edu/sites/default/files/change_management_toolkit.pdf

Identify each of your stakeholders into their appropriate types:

List Your Allies
List Your Opponents
List Your Fellow Travelers
List Your Neutrals
List Your Adversaries

Strategy for engaging each Stakeholder Type:

Once your stakeholders are identified into the appropriate type, it is a best practice to prioritize stakeholder engagement in the following order:

- 1) Allies,
- 2) Opponents
- 3) Fellow Travelers
- 4) Neutrals
- 5) Adversaries

This prioritization strategy ensures the highest level of ongoing support for the change effort.

Stakeholder Approaches:

Listed below are various approaches for each Stakeholder Type to either maintain or shift each stakeholders' level of commitment.

Allies (High Agreement/High Trust)

An approach for Maintaining Agreement and Trust

Goal: Affirm agreement

1. Reaffirm the quality of the relationship
2. Acknowledge any doubts and vulnerability you have with respect to your vision and project
3. Discuss their issues or concerns with your project
4. Ask them for advice and support
5. Achieve understanding on their role and responsibilities
6. Confirm their commitment to support your project

Fellow Travelers (High Agreement/Low Trust)

An approach for Maintaining Agreement and Increasing Trust

Goal: Build trust

1. Reaffirm agreement by reiterating the value and importance of their support of your project
2. Acknowledge any caution that exists
3. Make it clear you are not expecting them to get actively involved
4. Ask them how they would like to be updated on the project going forward

Opponents (Low Agreement/High Trust)

An approach for Shifting Commitment and Maintaining Trust

Goal: Build agreement

1. Reaffirm the quality of the relationship
2. Identify their particular skills and talents and how these connect to your project
3. State your position (case for change, vision for change, benefits to them)
4. State what you think their position is in a neutral way
5. Extend a personal invitation for them to get involved with your project
6. Engage in problem-solving so that you build something together
7. Confirm their commitment to support your project

Adversaries (Low Agreement/Low Trust)

An approach for Shifting Agreement and Increasing Trust

Goal: Minimize threat to your project

1. Estimate the impact on your project if this person is not on board
2. Identify individuals who can educate you about this person, their issues and concerns
3. State your position (case for change, vision for change, benefits to them)
4. Ask questions that respectfully uncover root cause of their resistance
5. State what you think their position is in a neutral way
6. Identify your own contribution to the lack of trust that exists
7. End the meeting with your plans and no demands
8. If you are going to go around them or over them, tell them your plans
9. Let go; the more you try to convert and pressure them, the more entrenched they will become in their position

Neutrals (Unknown Agreement and Unknown Trust)

An approach for Determining Agreement and Level of Trust

Goal: Educate and determine their position

1. State your position (case for change, vision for change, benefits to them)
2. Ask where they stand
3. Ask what it would take for them to support your project
4. Extend a personal invitation for them to get involved with your project

Stakeholder Analysis and Engagement Plan Template

Assess the level of commitment of each stakeholder and determine the actions needed to enhance agreement and trust.

- List all stakeholders identified above for your proposed change
- Describe your perception of their current understanding
- Place an “X” in the column that denotes their current Stakeholder Type
- Place a “●” in the column to denote the desired Stakeholder Type
- Describe the desired understanding you would like them to have
- Based on their current Stakeholder Type, cut and paste the approach provided in the *Stakeholder Approaches* section to develop an action plan for engaging with the stakeholder

Stakeholder	Current Understanding <i>(Describe stakeholder's current understanding of the project and any needs/concerns)</i>	Neutrals	Adversaries	Fellow Travelers	Opponents	Allies	Desired Understanding <i>(Describe the desired understanding for each stakeholder to ensure successful adoption)</i>	Discussion Approach <i>(List the elements of the approach you plan to use with the stakeholder)</i>

Adapted from Linkage