Developing Relationships Using a Stakeholder Management Approach

Records Management Society
Scotland Group Meeting 21st March 2006
Speaker: Susan Mansfield
Overview

Why undertake Stakeholder Management

1: Stakeholder identification and identification of desired stakeholder contribution and commitment

2: Development of an action plan to engage with your Stakeholders

The objective is to have a clear vision of who your Stakeholders are, where you need them to be, and how you’re going to get them there
Why Undertake Stakeholder Management?

- Initiatives fail without proper stakeholder management
- People cannot ‘second-guess’ your intentions and impacts
- People *will* second-guess consequences from their own perspective
- Individuals and groups need to know
  - **what** will happen as a consequence of your initiative
  - **why** it will happen this way
  - **when** they can expect to see it happening
  - **actions** they need to undertake to support it
- Stakeholder Management shapes your Communications planning
- Stakeholder Management helps you to identify and manage risk
- Stakeholder Management allows you to track and control your progress
First you need to think about:

- Who are the relevant stakeholders
- Where they sit on your chart
- Where you would like them to be in 12 months time
- What you need them to do for you
- What your key messages are
Step 1: Stakeholder Identification

Generate a list of key stakeholders for your initiative, remembering they …

- are preferably individuals but may be groups
- can be internal or external
- can be affected by a small part or all of your initiative
- can impact a small part or all of your initiative
- can be formal or informal influencers
- may not know that they are connected to your initiative
Plot your list of key Stakeholders for your initiative in a chart, considering their level of influence in the organisation, and the support they currently show for your work …

- Consider actions as well as words
- Take an organisation-wide view as well as considering their relationship with you and your team
- Use a voting system to prioritise your stakeholders
Indicators of Influence

- Leadership qualities
- Status and role in hierarchy
- Intelligent
- Articulate
- Those with strong social networks
- Access to Chief Executive/Managing Director
- People with large teams
- High delegated authority over budgets
- People with relationships outside organisation – media, politicians, customers
- Members of groups on ‘the management radar screen’
- Difficult to manage mavericks
- People with perceived expertise and credibility
Indicators of Support

Positive Behaviours

• Take steps to find out about your work
• Get involved in the detail
• Volunteer resources
• Talk about your initiatives
• Are prepared to take a lead by presenting or otherwise championing your project (especially in the face of opposition)
• Mimic what is happening
• Will give things up (like own project)
• Give time to your project
• Take accountability for delivering this for you
• Prepared to be a lone voice in support

Negative Behaviours

• Don’t attend meetings
• Claim already have leading practice and won’t share or compromise
• Say ‘yes’ but then do nothing
• Hide information
• Pretend your initiative is not happening
• Don’t take decisions
• Offer hurdles and barriers (bureaucracy, say ‘we’re different’, keep asking for more evidence or clarification)
• Say ‘yes’ to one audience but ‘no’ to others
• Let others fight your corner when they should
• Promote or sponsor ‘rival’ solutions or even ‘rival’ initiatives
• Put it low on their priority list – don’t find time to meet you, don’t provide resources etc.
Step 3: Stakeholder Progression

Consider whether you are happy with their position or want them to move …

- Where do you want the stakeholder to be within 6-12 months?
- Take an organisation-wide view, consider other relationships that will help you get there

[Diagram showing a matrix with levels of influence and support, along with labels for LR, RS, RF, BJ, AP, and ST.]
Step 4: Building Key Messages

Identify the blockers and benefits of your project to the stakeholders. Remember …

- Blockers are barriers to your initiative successfully moving forward
- Benefits are the enablers or good things to come out of your initiative
- By clustering them around a theme you will then be able to form key messages around the identified clusters
- Try to limit these to 5 or 6 key topics
Step 5: Stakeholder Action Planning

Against each Stakeholder…

- Document the impact of the initiative on them
- Define the activities & behaviours you require them to undertake to support your initiative to completion
- Consider the benefits and potential blockers coming from your initiative that might affect the way your Stakeholders respond to your work
- Outline actions you have to take to support each stakeholder

|----------|----------------|--------------------------|-----------|-----------|----------|

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By now, you will have...

identified stakeholders

plotted your stakeholders

built key messages

developed the detail

We now need to use this information in stage 2 to support delivery of the initiative …
In part two you get value from the work done to date

- Undertake stakeholder management planning
- Create a stakeholder communications plan
- Review and agree next steps
### Step 6: Stakeholder Management Plan

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- Project Deliverable/Milestone

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● Use your Stakeholder Management Plan to update your Stakeholder Chart …

● And your Stakeholder Chart to review your Stakeholder Management requirements going forward

● This information will enable you to identify specific Communications activities that you can undertake to support your plan

● Progress and issues that arise from Communications and Stakeholder Management will inform your risk and issue management
Step 7: Stakeholder Communications Planning

The next step is to plan your communications by identifying:

- The purpose and message you wish to communicate
- The channel by which you will communicate the message
- Who has responsibility for ensuring the activity takes place
- The date the activity is to happen
- The status of the activity
<table>
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Review and Next Steps

By now, you will have…

- identified stakeholders
- plotted your stakeholders
- built key messages
- developed the detail

planned stakeholder interaction

Planned communications
Like any process this needs ongoing management

- Be clear about who is doing what
- By when
- How you will monitor progress
- Hold review meetings