I am going to talk about the art and science of stakeholder management.

My slides will be available through AMWA at the conclusion of this conference. There are references at the end of my slides.

I ask that you please hold your questions till the end.
Disclosure Statement

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Agenda

- Role of the Medical Writer as Project Manager
- Define Stakeholders
- The Basic Process
- Scenarios
- MW-specific techniques

Stakeholder management training could take the whole of this conference, so in the amount of time that we have here, My goal is to introduce you to some concepts and tools that PMs use to analyze SHs and create plans.
We will discuss the role of the MW as PM, then introduce the basics of SM and some of the routine tools used by PMs. And finally, We will go through some exercises and I will give you some MW-specific tips from my own experience.
Medical Writer Project Manager

- **The Medical Writer as Project Manager (PM)**
  - Medical Writers project manage document development, and drive teams to achieve business-critical objectives.

**Project Managers and Stakeholders**
- Stakeholder management is a core competency for Project Management
- Stakeholder Management is a skill that can be learned.

Suggested book: Managing Project Stakeholders, Building a Foundation to Achieve Project Goals by Trest Roeder

Show of hands – how many of you are doing at least some PM? How many feel like you’re doing half or more PM than actual writing? How many of you have had, as a MW, formal PM training?

Let’s face it, we do a lot of project management.
AND we do not, generally, get any formal training in PM

SM is a CORE competency skill for PM’s. and it is a skill that can be learned.

Suggested book: Managing Project Stakeholders, Building a Foundation to Achieve Project Goals by Trest Roeder
When we compare MWs and Project managers: we are not so very different.

Similar:
We are both a “contributory function”
We have deliverables that we will be held responsible for, but we do not have any direct authority over any of our team members.
So we both must rely on relationships to influence people in the project.

Different:
A lot of times MW role is not well understood – while PM usually is.
MW’s receive little to no formal training, whereas PMs’ usually do.
Let’s Define Stakeholders:
STAKEHOLDER:
A stakeholder is either an individual, group or organization who is impacted by the outcome of a project. They have an interest in the success of the project.

They can have a positive or negative effect on the project.
What is Stakeholder Management?

- The process by which an individual establishes and maintains support from internal staff members and external parties for a new product or project or change within the organisation.*
- Forming and maintaining relationships with stakeholders and influencing them in order to achieve an objective – or not undermine it **

What is SH Management?

There are many different definitions of stakeholder management, but they generally say the same thing.
It’s all about relationships - and this is where the ART of SM comes in. It’s a process that successful people use to win support from others. It’s all about building trust, instilling confidence in you and in the project, and ultimately, it is to build and sustain commitment to the objectives of the project.

2-way communication
Manage expectations
Build and sustain appropriate levels of commitment to the objective
Identify and mitigate resistance

It is ESSENTIALLY – stakeholder relationship management – but in a very specific way
Definitions

- Why do it?
  - Prioritize
    - We can’t keep all the people “happy” all the time – focus on the Key Stakeholders
  - Tap into resources for ideas, different viewpoints
  - Uncover and reduce risks
  - Increases the perception of success
  - More efficient process and project closure
  - Strengthens your position and gives more clout for opposition
  - Increases chance of success
  - Credibility for the team and the organization
  - Biggie – more likely to succeed in a less stressful manner

Why do it?

If we MANAGE our stakeholders, we get a lot of good things. Can’t keep everyone happy…. We need to focus on Key stakeholders
Matrix environment – tap into a variety of different viewpoints
Increases the perception of success – An axiom of PM: a project does not have to be successful in order for it to be perceived as such – if the stakeholders have been well managed
It’s more efficient,
It strengthens your position
Increases the chance of success.
Lends credibility
Biggie -
So let’s begin with the Process.
This is the general stakeholder management process. There are many, many models of these basic concepts. (internet)

So there’s a feedback loop

I see this process as a good way for me to objectively analyze the SHs on my team, which helps me manage time and resources. It makes me think in a different way
First of all, don’t skip the first step. You may THINK you know who all the SHs are, but you’d be surprised to find out that you’re leaving someone out.

OR – you’re not analyzing someone
Put some effort into making sure you identify ALL stakeholders, large and small so that you can analyze them.

We need to get buy-in/support from all – by making our stakeholders an integral part of the team

-------Varied perspectives are the name of the game....

Begin building relationships

For SH management plan
Stakeholder Management – Identify Stakeholders

Stakeholders can be:
- Person
- Group
- Organization

Identify your stakeholders – things to consider
- their interest
- their power within the organization
- their capacity to take action and to implement where they fit in the organization
- their goals organizational and personal
- how approachable they are
- how flexible they are
- their opponents or supporters
- how well the stakeholder believes the organization is performing
- the stakeholder’s judgment

Stakeholder can be any person, or a group or an organization.
Our core team are individuals – persons.
But they are also part of groups – for example – how important is your project within a function – in the overall context - when compared across all projects?

The organization – is this a high-visibility project whose success can have a significant impact on the company’s bottom line?

How important is it, for example, within the MW department that the execution of this project follows the SOPs or meets the terms of the contract with your provider CRO?

How important is it for the survivability of your TA that your project succeeds? Will the company divest the assets in this TA if this fails?

There can be many types of stakeholders and the more you know the better plan you can make.

They can all have a positive or negative interest in the project and its success

There are many VARIABLES that affect stakeholders, so it is important to try to find out as much about them as possible. This is where we get information that helps with “art” of management.
The Steps

- **Interview/onboard Stakeholders**
  - Extremely important!
  - New to project – ideal time
    - Reach out to the PM for names
    - Send out invitations for 30-minute 1:1 Onboarding meetings
    - Introduce yourself and tell a little about yourself – this sets the tone for the other person to do the same.
    - Take notes (it’s helpful if you have determined any specific things you’d like to discuss)
    - Schedule follow-ups as needed
  - Already embedded in the team/project
    - Re-identify stakeholders to analyze
    - What is their view of the project “now”
    - 1:1s to follow up on “lessons learned” OR get a better understanding of something they mentioned that you recognize is a problem (e.g., Do they have any problems with the project? With MW deliverables? Do they foresee any roadblocks ahead?)

I cannot emphasize enough, how important it is to reach out to your stakeholders in 1:1 meetings.
F2F is the best, second best is by TC, etc. This is how you will get a lot of the information you need.
For example, getting the SHs view of the project and colleagues.

If you’ve been on the project, you may already know your team, but go through the process of re-IDENTIFYING who your stakeholders are.
And get their view of the project “now”. use it as “lessons learned” follow up, or to get a better understanding of something
Take notes – and come with any specific questions you may have
It can be eye-opening what you learn from people that you work with EVERY DAY, when you come back to them with question - anything they foresee that could be a roadblock, etc.
People like to give their opinions – so ask them for them.
Let’s take a minute to talk about your core team stakeholder’s judgment. One area this is very important has to do with higher-level stakeholders – that is, their line management and above. You may/may not bring this up in the first 1:1, but once you do, you should ask very specifically about their relationship with their management and identify any problems that have occurred in the past.

The goal is to uncover any potential roadblocks to the success of this project and to determine how much and what kind of stakeholder management you will need for this person. Should you rely ONLY on your team SH’s information as a middle man?
You’ve identified all of your stakeholders, not let’s look at some typical ways of analyzing them.
Stakeholder Management – Analyze Stakeholders

Categorize/map stakeholders using simple tools

- Help prioritize, and manage your time
- Create a SM Plan

<table>
<thead>
<tr>
<th>Grids/Maps</th>
<th>Matrices / Continuum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power vs Interest</td>
<td>Engagement</td>
</tr>
<tr>
<td>Impact vs View of Project</td>
<td>View of MW</td>
</tr>
<tr>
<td>Potential Threat vs Cooperation</td>
<td>Resistance/Commitment model</td>
</tr>
</tbody>
</table>

The next few slides show you a few typical tools used by PMs to analyze and categorize stakeholders. So that you can create a SM plan to address the project needs.
I’d like to familiarize you with some concepts. These are all related to the effect on the project.

Power –
Impact – you could have someone who does not really have a lot of power, but can strongly affect the project (eg, external contract MW on a key document)

Interest –
Influence: If stakeholders are very involved, they have more influence.
Prioritize Stakeholders: Power vs Interest Grid

High Power - High Interest: these stakeholders are decision makers/ have a high level of authority, and can greatly affect the project success- hence you must closely manage their expectations.

High power - Low interest: work to keep these stakeholders in the loop, and be kept satisfied even though they have a low level of interest – because they have power over your project. These type of stakeholders should be dealt with cautiously since they may use their power in a not desired way in the project if they become unsatisfied.

Low power – High interest: keep these people adequately informed, and talk to them to ensure that no major issues are arising. These people can often be very helpful with the detail of your project. Typically, just keeping them informed and updated is enough.

Low power - low interest: monitor these people, but do not bore them with excessive communication. (Takes the least amount of time). You should not ignore them completely.

You can customize this grid for any measure you want, for example: power vs influence (or involvement), or power vs project-specific knowledge.

This is the Power vs Interest grid and it is a standard in PM. It will help you prioritize your SHs and your time. Because without this, the stakeholders who complain the most are likely to take most of your time. And they may NOT be the ones you should be spending much time on.

Power –on the x-axis - is the measure of a stakeholder’s level of authority but is not a measure of the stakeholder’s ability to affect the project.

Interest – on the y-axis -is the stakeholder’s level of concern regarding the project outcomes.

FORGETTING TO MEET THE NEEDS OF JUST ONE INFLUENTIAL and POWERFUL SH at a critical time can possibly ruin a project.
Let’s map some typical stakeholders:

For example, a Medical Director has high interest, is involved and has a great deal of direct power over the project. But there may be someone with ultimate power in Upper Management over them. OR that person could have power, but are less interested in the day-to-day. (click) Caution - you have to WATCH this person and keep them satisfied. They can come out of nowhere to cause a problem. – perhaps have power over funding or resources.

You must keep in mind the project you’re thinking of. For example, for a protocol, a Clinical Operations lead would have high power and high interest, but less so for a late-stage abbreviated clinical study report.

A CRO may have a low to average amount of interest, but nominal power. AND – there is both the MW from the CRO vs the CRO as an entity. The CRO MW could greatly affect whatever document they are working on.

Someone with a great deal of power, but a peripheral interest could be the higher up Clin Pharm management – they just expect things to progress but would need to be informed if something goes wrong.

And the Labeling group may not be very interested in earlier phases of the project (perhaps it’s in Phase 1). But as time goes on, they become more interested. Ultimately, they are a key player as you head toward a Marketing Application Submission.
Impact vs View of the Project Grid:
Impact – ability to effect change in the project

• Stakeholders who are both high ability to impact and positive are the champions who the project manager would look to involve as leaders or sponsors. LEADERS/CHAMPIONS
• Stakeholder with a high ability to impact the project, but with a negative view would be a PRIORITY for direct work to engage them.
• Stakeholders with positive view of the project, but a low ability to impact the project will be helpful assistants in delivering the project and evangelising the benefits.
• Never forget – even those with low impact should be monitored. Having someone out there with a negative view of the project can be a distraction to the team.

Next we have: Potential Threat vs Cooperation Grid
Support vs resistance and more cooperation to less cooperation

• This grid could be used for things other than the commitment to the PROJECT. (click) For example, you could have SHs who are committed to the project, but not to the PROCESS for developing and reviewing documents – specific to MW. And this can put the project timelines and quality at risk.

• Who is the greatest threat to the project?
Do you have someone in a position of power who doesn’t review on time and keeps pushing your timelines out?

• Who are your allies? YOUR greatest ally? Identifying powerful people to target to invest effort in to get on your side is a good thing because:
  • Powerful people, simply by supporting you, “lend” you credibility and their influence.

• MW as a function, sits in a variety of different organizations in every company. And it changes over time. We’ve all been under larger umbrellas like biostats, clinical operations, regulatory, and others. If someone on your team, for example, biostats, is your representative on the global project team, it may be in your best interest to make sure that person hears you, is an ALLY FOR YOU, and will fight for you within the higher up teams. OR, they may work to have you added as a team member to a strategic team.

• We all need allies on our teams, but if you analyze your stakeholders and find that many of them are more in the “higher resistance” category and less in the higher cooperation, that’s important to plan for and you DEFINITELY need a stakeholder management plan to start changing that.
Resistance

- Resistance is the force that tries to thwart changes in the status quo
- Resistance simply “is”. Don’t expend energy trying to avoid it – you must Manage it
- People want predictability and control – change threatens this
- To progress to desired state (to change) people go through 3 phases. They must:
  - Leave the familiarity of the present state
  - Pass through a transition state (characterized by **uncertainty and insecurity**)
  - Gravitate to new mindsets/behaviors

“…. people will consistently choose to stay in familiar situations that they know are not working rather than face the ambiguity of the unknown. .” (Daryl Connor 2012)

Let’s take a moment to talk about resistance.  
This is an area we’re probably all familiar with and it can be hard to overcome.  
We could have an entire class on resistance theory and the models that are developed for it.  
One in particular stands out, the Connor Commitment Curve- in a minute

Conner
READ SLIDE

People must pass through 3 stages to move to a new place of comfort:
X, y, z.

And we have to find a way to help them get there.

http://www.connerpartners.com/how-challenging-is-the-change/resistance-to-change
Connor has created 3 models of resistance – but we are only looking at this one. In this model, we look at resistance through the “lens” of commitment.

X-axis – degree of support for new Mindsets and Behaviors
Y-axis – amount of time

There are 3 development phases, three thresholds and 8 stages:
In this model, while you want to help progress your SH’s up the curve, there are downsides to it if you don’t manage it well.

Each stage represents a JUNCTURE that is critical to the development of commitment. There are 2 possible outcomes for each stage.
For example, once someone has reached understanding,
And people can return to earlier stages while moving through the stages. Successful transition through a stage results in

We don’t have time to go into all of it, so I recommend you read about it online – Connor has some good posts = very helpful

A reference to his post is in the last slide.
This is a SM Engagement Assessment Matrix – you will hear SM and SE used interchangeably with some people. In this example, it is part of what we are assessing.

The SHs have been plotted according to where they stand now, and where we want them to be.

Example: IN this example, we want everyone supportive. But we can’t take them from unaware to supportive without a LOT of intermediate steps. And notice – resistance is a phase – we won’t skip it, but we need to manage it.

Stakeholder #1
- is “unaware”. So we know that in order to build their commitment and support, we need to look at the Connor Commitment Curve. We need to inform them, educate them, set their expectations, answer their questions, and take them through resistance.
- Because we’ve done our homework we may also want to consider simply moving them first to Neutral, then ultimately get them to Supportive.

Stakeholder #2: that’s probably and “easier” upgrade

And Stakeholder #3 is IMPORTANT – because while they are already where we want them, we need to make sure that we at least keep them there. And perhaps these people could become leaders/evangelists for our project or process!

https://www.projectengineer.net/3-types-of-stakeholder-matrix/
Let’s look at another way to analyze stakeholders.

This represents a continuum of the stakeholder perception of Medical Writing / or the Medical Writers.

No matter what team we’re on, or what company we’re writing for, we represent Medical Writing.

How hard is it going to be to work with someone who is very negative toward medical writing? What can we do about this and what sort of plan should we design?

For example: if we have a powerful, interested, engaged stakeholder who has a very negative perception of MW, this person can make our lives pretty difficult. We need to at least get them to move toward the neutral.

The strategy for changing this perception would likely be in baby-steps.

Those who are around “neutral” – how can we move them to a positive perception? What will it take?

The stakeholders who are happy with us can be a great influence on other team members – as our allies.

Remember? Identifying powerful people to target to get on your side can give you credibility in a team – lending you their influence.
Creating SM Plan
Step Three
Define a SM Plan

- Stakeholder Management Plan – is a living document
- After you have categorized your stakeholders, you will be better prepared to make a plan to manage them.
- You will have identified those stakeholders who need to be actively managed, who need to be kept satisfied or kept informed, and those who you should only monitor for a variety of reasons.
- You will identify those who can be helpful (allies), or resistant
- You will know who is committed and who you need to move to commitment/buy-in
There are many ways to work out a SH Management Plan. You can find tons online — google — and I’m not going to go into a lot of detail on this. You can pick up on some interesting ways to categorize and plan for stakeholders by looking at some of these. Some are downloadable.

Here are a couple of ways to use them.

In the top example, the assessments I’ve described have been logged. They’ve also put some information in on how they plan to manage resistance.

In the second one, they’ve used the analysis to create a SH Communication Plan — this is one way I recommend. They’ve categorized their stakeholders, and then PLANNED the methods they plan to use to communicate with SHs, how often, etc.

You can set yours up to do anything. (end this subject). Let’s move on.
Analysis Example
We are going to work on an exercise to help analyze and plan for some stakeholders. Here we have a “typical” core team. The next few slides will go through just a few of these stakeholders.
We are going to analyze them and discuss some strategies
**Case Study – the Core Team**

<table>
<thead>
<tr>
<th>Dr A – PhD, Clin Pharm Lead</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Power</strong>=high; <strong>Interest</strong>=Moderate (Actively Manage and Keep Satisfied)</td>
</tr>
<tr>
<td><strong>Impact</strong>=high; <strong>View of Project</strong>=Negative</td>
</tr>
<tr>
<td><strong>Key:</strong> Very busy resulting in a negative view</td>
</tr>
<tr>
<td><strong>Inflexible but approachable:</strong></td>
</tr>
<tr>
<td>• Doesn’t handle surprises well</td>
</tr>
<tr>
<td>• Can take over a meeting when anxious</td>
</tr>
<tr>
<td>• Does not want his function to be viewed as a problem (critical path)</td>
</tr>
<tr>
<td>!!! Does not understand the process of document review; is disengaged with it (potential threat)</td>
</tr>
<tr>
<td>Reviews everything unless directed otherwise</td>
</tr>
<tr>
<td>Negative view of MW</td>
</tr>
</tbody>
</table>

Dr A:

Has high interest and high power, has high impact and a moderate view of the project – both actively manage and keep him satisfied.

Important to know that he has many, many projects and this is a major contributor to his negative view of the project. With many projects within his function, he has to choose to focus on one, and it may be at the expense of another.

Inflexible but approachable (see slide)

In a meeting, if something new comes up that is important to Clin Pharm - they “lose it”; anxiety takes over and he talks the entire meeting.

Potential threat to time/quality. – disengaged with the process and wants to do everything offline. He will review EVERYTHING - BUT he doesn’t have time to review everything! He hasn’t had good experiences with MW – perhaps in another company – and we are going to have to work on that with him.
For Dr A:

He has high power and moderate interest – actively manage and keep satisfied

He has high impact, with a negative view of the project – this is important – we MUST engage him and keep him satisfied.

Gauge his “threat potential” - He is NOT knowledgeable about the process (eg, reviews)- this makes him a threat to the success of the project

• He has a negative view of MW, but we may have an opportunity there.
• Resistance Curve – it is for PROCESS – and he is in the “understanding stage – he believes he has enough information to form an opinion about the process, and we need to move him to a positive perception – ie, WHAT’s IN IT FOR HIM? How is this process going to benefit the project and HIM, in particular?
  •
• We need to help manage his resistance and move him toward commitment. But we need to be realistic, and move him through the phases, keeping in mind we are moving him from his comfort zone (doing review offline) through something he doesn’t trust to get the change in mindset and behavior we need.

• We need to understand what is holding him up - is it the technology? Once he is more comfortable with using the technology, will that be enough? Likely we need to set his expectations realistically.
• we OVERSELL the benefits of this and then don’t reach those promises, he will see it as a failure.


# Case Study – the Core Team – MW Project Management Strategies

<table>
<thead>
<tr>
<th>Interests / Concerns</th>
<th>Strategy</th>
</tr>
</thead>
</table>
| Key: Very busy: high impact, negative view of project (because of time) | • Focus on relationship-building  
• 1:1 onboarding  
• Identify his needs and concerns and address them  
• Keep him engaged  
• Manage his expectations  
• Be organized with communications, meetings |
| Inflexible but approachable  
• Doesn’t handle surprises well  
• Can take over a meeting when anxious  
• Does not want his function to be viewed as a problem (critical path) | • Meet with him ahead of meetings to get his input and buy-in  
• Reassures him that he is being heard and give him time to process  
• Identify and resolve his concerns before the meeting  
• Engage him - ask for input into your slides (gives him ownership)  
• Inform him of potential problems ahead of time.  
• Gives him time to deliver something or apprise his manager of any problems |

Let’s look at some strategies:

So what does this mean? If we spend time getting to know him, and show that we are taking his concerns into account, this can go a long way in developing a positive relationship.

Be organized with communications: clear, concise emails – he is time-constrained; 1 email vs many; follow up meetings with action items
### Case Study – the Core Team – MW Project Management Strategies

<table>
<thead>
<tr>
<th>Interests / Concerns</th>
<th>Strategy</th>
</tr>
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</table>
| Does not understand the process of document review; is disengaged with it – Potential Threat | • Training needed  
  • Preferably 1:1 training – use very organized slides and/or take him through process – more than once if necessary |
| (Manage his resistance – move him first  
Understanding then towards buy in/commitment) | • Needs rationale for abiding by the process (eg, time, quality)  
  • Ask for time in a routinely-scheduled meeting to go back over things or re-train entire team  
  • Give directions for strategic reviews (he does not need to review everything)  
  • “lock down” certain sections of a document |
| Reviews offline and reviews everything unless directed otherwise |                                              |
| Negative view of MW                                       | • Develop relationship with him (all of the above)  
  • Move to Neutral first, then reassess  
  • Ultimately, deliver on promises (notify him if something changes) – move him toward positive |

Ultimately,

Do a webex showing him how to use the technology and be with him the first time he does it.

He needs rationale to abide by the process – WHAT’S IN IT FOR HIM?
**Case Study – the Core Team**

<table>
<thead>
<tr>
<th>Dr C : MD – Safety Director</th>
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<tbody>
<tr>
<td><strong>Power=high; Interest=high</strong> (Actively Manage)</td>
</tr>
<tr>
<td>(Engaged primarily with Safety)</td>
</tr>
<tr>
<td><strong>Impact=high</strong> (very influential with Team), <strong>View of Project=positive</strong></td>
</tr>
<tr>
<td>(Potential Ally /Leader)</td>
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</tbody>
</table>

**Very busy:**
- Bottleneck for reviews; but only reviews safety
- Approachable but hard to get time with
- Low threat in general, however
- !! Disorganized – potential threat to process

**Flexible/ makes decisions easily**

**Wants/needs MW to write his sections**

**Neutral view of MW**
Case Study – Analyze Stakeholders – Dr C

For Dr C:

He has high power and high interest - very influential with the team
Impact = high and POSITIVE view of the project = potential ally and leader – get him to support us, he will lend us credibility and his influence.
Gauge his “threat potential” -Organization and time management is his problem – need to help manage him

• He has a neutral view of MW, but we may have an opportunity there – very influential – ally!!!!
• Not resistant

I did not do a resistance curve for him, because he is fully committed.
Case Study – Analyze Stakeholders – Dr C

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Unaware</th>
<th>Resistant</th>
<th>Neutral</th>
<th>Supportive</th>
<th>Leading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder 1</td>
<td>C</td>
<td></td>
<td></td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>Stakeholder 2</td>
<td></td>
<td>C</td>
<td></td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>Dr C</td>
<td></td>
<td></td>
<td></td>
<td>C D</td>
<td></td>
</tr>
</tbody>
</table>

Perception of Medical Writer

For Dr C:

Move to Leading?
We know that he is Very Busy, and we need to be smart about how we handle him.

How do we help organize the process and minimize his time?

For documents where he must provide input, assess how much you can do....

It’s a fine line between oversupporting him and giving him what he needs.
## Case Study – the Core Team

<table>
<thead>
<tr>
<th>Interests / Concerns</th>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible/ makes decisions easily / very influential</td>
<td>• Meet with him ahead of time to get his buy-in before a meeting</td>
</tr>
<tr>
<td></td>
<td>• Call on him during a meeting for his views to help others make decisions</td>
</tr>
<tr>
<td>Neutral view of MW:</td>
<td>• All of the above will build positive relationship</td>
</tr>
<tr>
<td></td>
<td>• Deliver good output and promises</td>
</tr>
</tbody>
</table>

Meet ahead of time – if have a good relationship with him, you may be able to send info by email.
So, let’s talk briefly about Difficult Stakeholders:
There can be many different types of difficult stakeholders. Ultimately, there are 2 different types – those whose support is “nice to have” and those whose support is “must have”

Find a way to work with them and MUST create a working relationship with them.

Generally, a PM is expected to form relationships/interact with all levels of stakeholders. We are no different – we have our own job to do, our own deliverables, and we must do what is needed as professional MWs.

- MW has to juggle both the core team member relationship and that of their line managers and above.
This is where we can have an advantage – whether new to a team, or have been on the team, either way, if you have someone who has been a problem in the past. Reach out to them directly.
If on a team for a long time, you can be transparent and use that as an example if necessary to go to them and try to work out a solution.
Difficult Stakeholders

Step One – Uncover the source of the difficulty

• Conduct research – what is the root cause of the problem?
  • Interview stakeholders for their perspective on why the SH behaved this way
  • Review written correspondence to identify when the problem began to arise
  • Go through a timeline sequence of events
• Stand in the shoes of the Difficult Stakeholder
  • Was their point of view valid? What made it valid

The first step – Uncover the source of the difficulty.
If you don’t already know what it is -
• Conduct research to find out as much about it as you can. Reach out to team members (and also other MWs) to get their perspectives on the problem.
• Review written correspondence – at what point a different “tone” – or, as is many cases, were you very distant from this person and it was a total surprise? [CLEARLY we did not adequately evaluate all of our key SHs here]
• Create a timeline – it can help you organize your thoughts if the problem is not obvious

Stand in the Shoes of the difficult SH – Valid point of view?

• Engage our Core Team to Manage their managers – but don’t just leave it up to them.
• EXAMPLE Line manager comes in to final review and is completely surprised by the strategy/presentation of the document.
• Clearly – we missed analyzing a SH. If we relied on our core team member to do 100% of the SH management in his/her line, what made us think they were doing that?
• If we had a direct line to this person, were there things we could have done ahead of time?  CUT OUT THE MIDDLE MAN
Difficult Stakeholders

Step Two – Plan of action

- Hold 1:1 meeting to find a path/agreement
- Communicate – possibly for the first time – select project details that may not be known by the SH
- Re-communicate project details that the SH may not have understood
- Ask the SH for input on how to resolve the problem
- Engage a 3rd party with a strong relationship to both the difficult SH and either the PM, the sponsor, the function, etc.
- Add a new SH to the project as a balance with the difficult SH
- Diplomatically remove the difficult SH from the project

READ THIS (not the slide)
1:1 – F2F = ideal Meetin people in person always makes a difference.
Select project details – was there something they were unaware of that might have made a difference for them?
Something they did not understand?

Always try to go to the difficult SH with the problem first. Take an ally with you. Many times having another person in the meeting with you can be a factor to help “contain” the difficult SH.
Prepare your discussion and write it down. Then write down their answers. This can be powerful information if you have to move to escalation.

Be courageous, don’t be afraid. If you respectfully and professionally, make every attempt to work with this SH, and if you also include other SHs in this process, it can be very difficult for the SH to continue being disruptive in the exact way as before. If other SHs are as unhappy as you are about it, they may see your efforts and join in.

ESCALATION:
Before you escalate it, have a plan of action in mind and make that a proposal. You will find that your managers will be much more open to discussing this, if you have analyzed it and hand them a custom-made plan of action – even if it’s only a few lines.

I say again, you must be courageous. And managing YOUR management may be a big part of this. If you are not getting support from your management, Analyze them as SHs, see if you can identify what is motivating them ….have realistic discussion with them.
Monitoring Stakeholder Management Plan
Step Three
Monitoring SM Plan

- Set up specific times (plan up front) when you will open the SM plan and update it
  - Weekly, monthly, quarterly
  - At major milestones
  - When a new team member joins or another leaves
- Pre-specify – what will the measures be?
  - Are there any new ones needed?
- Make adjustments as needed
The following are axioms and tips from my own experience.
Medical Writing Best Practices –Tips

- Begin the way you want to continue
  - Be professional and assertive
  - Understand your responsibilities and your rights – your deliverables
    - You must do what it takes to deliver!
- You are the boss in your meetings – you own the agenda
  - Set your own agenda (always have one!)
  - Set ground rules at the beginning of meetings (especially those you anticipate will be problematic)
  - Know what agreements/resolutions/solutions you must achieve
  - Have someone else be timekeeper if needed
- Don’t ask, just do
  - Hold team accountable: Instead of asking the team if they will “do it this way”, inform them that this is process that we will be using
  - If the “main” kickoff does not allow time for your agenda, hold your own MW kickoff to get what you need to deliver

Being in a Leadership position with no authority but still responsible for deliverables is exactly the position that all PMs find themselves in.

For MW, having a firm understanding of our position and our responsibilities and being able to represent and communicate those is an important perspective when managing stakeholders.

Here are some “tips” to share from my experience.

Professional - agendas, slides, organized

Assertive – “having or showing a confident and forceful personality

We are held responsible for deliverables – ie, documents to quality and time. THEREFORE, we must do what it takes to deliver. We are full members of the teams we are working on and should expect respect.

Consider this – YOU are the boss of you meetings!

Don’t ask, just do = you have a review process, but your team members have become lax and have been sending comments offline by email. “We will be using this company-mandated program for review, and I will be unable to accept off-line comments”.

This will help identify those who are uncomfortable with the process or technology so you can plan for them.
Medical Writing Best Practices - Axioms

- Engage team members - make your stakeholders an integral part of the effort (e.g., engaged instead of multitasking)
  - In meetings (e.g., kickoffs), have each team member give part of a presentation/slide
  - During comment reviews, ask each team member to explain their questions
  - When reviewing “process” as a team, directly ask specific SHs to address something
- It’s about relationships – but not about oversupporting team members
- Develop your allies
- Ask – “what level of MW support do you want?” – when team is not utilizing your talents or acknowledging your value
- Be pro-active: Reach out to the PM to let them know when you are not getting what you need

Read engage

Who are your allies? Identifying powerful people to target to get on your side can give you credibility in a team – lending you their influence. MW as a dept, sits in a variety of different functions in every company. And it changes over time. We’ve all been under larger umbrellas like biostats, clinical operations, regulatory, and others. If someone on your team, for example, biostats, is your representative on the global project team, it may be in your best interest to make sure that person hears you and will fight for you within the higher up teams. OR, they may work to have you added as a team member to a strategic team – where you can have, for example, direct input into timelines.

PRACTICAL ADVICE: When you start on a project, reach out to the PM and in your 1:1, ask them who represents MW at the Global Project Team level? (or asset team or medical team)

Do not “oversupport” him, ie, do everything he asks/for him to get on his good side. That leads to over-dependence by the team on the MW.

What level of MW support do you want? They may not be AWARE of your value. “basic” level. My talents redeployed.

When they ask what you mean – clarify for them that it appears they are asking for a more clerical or less experienced MW. And that MW dept may be able to meet that need, but we have limited resources and your considerable experience is likely to be better utilized elsewhere. (MW best practices that can make this project work better with shorter reviews, timelines, rework, higher quality, etc).
Medical Writing Best Practices - Axioms

- Educate your stakeholders re: Time
- Our stakeholders are scientists; data are powerful with them – so try to use data
  
  Example: Timelines are too short: Not enough time between the comments review and delivery of the next draft

Give an example:
If 150 questions X 5 – 10 minutes each for resolution (conservative estimate) = 750 – 1,520 minutes
= 12.5 to 25.3 hours

- How many working days are needed for the MW to resolve all comments?
- How many projects does the MW support?
- How many internal MW process initiatives is the MW supporting?
- Is the MW on a business trip or holiday/vacation during any of that time?

When you hold a kickoff, have each of your stakeholders present a piece.
When you are in a Comments Resolution Meeting, call on the stakeholders to explain their questions or comments
Call out individual people to answer questions – be forthright.

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(MW best practices that can make this project work better with shorter reviews, timelines, rework, etc).
Stakeholder Management

- MW’s are Project Managers
- Understand your role, responsibilities and deliverables
- Be assertive and professional
- ID and analyze your stakeholders, create SM plans
- Reach out to your management and request some formal PM training (personal development objectives)
Are there any questions?
When you hold a kickoff, have each of your stakeholders present a piece.
When you are in a Comments Resolution Meeting, call on the stakeholders to explain their questions or comments.
Call out individual people to answer questions – be forthright.