**Stakeholder Engagement Strategy Tool Pack**

**Description**

This set of five tools provides a structured and systematic process for analyzing and prioritizing your initiative’s stakeholders, identifying appropriate stakeholder engagement methods, and finally developing a tactical stakeholder engagement plan.

**Steps**

**Tool #1: Stakeholder Analysis**

1. Confirm a common understanding of the term “stakeholder.” A *stakeholder* is any individual or group of people who either
   * will be impacted by changes resulting from the business initiative, and/or
   * can influence the success of the business initiative
2. Individually, in small groups, or as a full team, brainstorm a list of the various stakeholders and record their information in the Stakeholder Analysis template (NOTE: copy and paste the PowerPoint page to create additional template pages as needed)
   * *Name of Stakeholder Group*: short-hand name that you can use for quick reference (e.g., Marketing Leaders, Production Supervisors, Field Sales Managers, etc.)
   * *Individuals Associate with the Group*: full names (and titles) of those individuals who comprise the group (e.g., list all of the Field Sales Managers by name and title)
   * *#*: number of individuals in the stakeholder group (when there are many stakeholder groups, this is helpful for quickly scanning the table and discerning the size of each group)
   * *Business Area or Team*: functional area(s) of the company where the stakeholders work
   * *Physical Location*: where the stakeholders are located geographically (e.g., state, city, town, etc.)
3. Using the legend at the bottom of the page, assign a 1-5 rating to Impact, Influence, Disposition for each stakeholder group
   * *Impact*: extent to which stakeholder group is impacted by the initiative
   * *Influence*: extent to which stakeholder group can influence the initiative’s success
   * *Disposition*: thoughts, words, and actions directed toward the initiative (i.e., do they view this initiative positively/as an advocate or negatively/as a threat)
4. For visual quick reference, add shading to the Impact, Influence, and Disposition boxes:
   * *Impact*: 5=Red, 4=Orange
   * *Influence*: 5=Green
   * *Disposition*: 5=Green, 1=Red

**Tool #2: Stakeholder Prioritization Map**

1. Using the *Impact* and *Influence* values (1-5) from the Stakeholder Analysis exercise, plot each stakeholder group onto the Stakeholder Prioritization Map
   * Refer to the legend at the bottom of the page and use the size of the circle to represent the size of each stakeholder group (NOTE: simply copy and paste circles from the legend for consistency)
   * If needed, change the pre-set number ranges in the legend to better reflect the size ranges of your stakeholder groups
2. Once all stakeholder groups have been plotted, use the Stakeholder Prioritization Map as a visual guide for informing the most appropriate stakeholder engagement methods. Deference should be given to those stakeholder groups favoring the upper, right quadrant, as they are your highest priority.

**Tool #3: Engagement Strategy Continuum**

1. Where you plotted your stakeholders onto the Stakeholder Prioritization Map provides a natural guide for which stakeholder strategies to employ. Generally speaking the higher the priority of the stakeholder, the greater the degree of engagement is required.
2. When it comes to stakeholder engagement, there are a number of strategies to choose from. Review the Engagement Strategy Continuum in light of your Prioritization Map. Think about what strategy (or combination of strategies) might be appropriate for each stakeholder.

**Tool #4: Stakeholder Engagement Strategies**

1. Transcribe each stakeholder group name into the top row of the template.
2. Using the Stakeholder Prioritization Map as a guide, use a checkmark to assign one or two stakeholder engagement methods to each stakeholder group (NOTE: best practice is to have no more than two methods for each stakeholder group).
3. Once you have assigned stakeholder engagement methods for each stakeholder group, use this as a guide for developing your Tactical Stakeholder Engagement Plan.

**Tool #5: Tactical Stakeholder Engagement Plan**

1. In the first column, transcribe each stakeholder group name (NOTE: copy and paste the PowerPoint page to create additional template pages as needed).
2. In the second column, note the stakeholder engagement method(s) that you identified from the previous Stakeholder Engagement Methods exercise.
3. In column three, specific the tactics that you will use to engage each stakeholder group, being as specific as possible. Tactics may include:
   * Imparting key messages (e.g., a call to action)
   * Soliciting input on an aspect of the initiatives (e.g., a list of key questions)
   * Venue for engaging them (e.g., one-on-one, in-person, phone call, team meeting, etc.)
4. In column four, identify the outcomes you would like to achieve by engaging each stakeholder group. Refer to your Stakeholder Prioritization Map and Stakeholder Engagement Methods templates to ensure the stated outcomes align with your objectives. Outcomes may include:
   * Increased awareness and understanding of the initiative
   * Move from a negative to neutral disposition
   * Agreement to participate in an aspect of the initiative
5. In column five, note who specifically is responsible for engaging each stakeholder group (e.g., direct manager, business executive, project manager, etc.)
6. In the last column, specific the desired timing of the engagement tactic(s). This may be a specific date or week of the month. If specific timing is not yet known, this may simply be an approximate month or fiscal quarter (e.g., Q4 ’13).
7. Use tactical plan as a “playbook” for the change management team and program sponsors. Review this plan on a regular basis (e.g., weekly or monthly) and revise and update the activities as needed.