



Task 3

Engage

Understand and map stakeholder perspectives

Engage

Facilitate the stakeholder workshop

At the end of the last task, the group has come up with a change vision statement that will be communicated to the employees of FABREX. Now it is on you – the change consultants – to organize a stakeholder workshop to generate insights about their perspectives regarding the change process.

Task 3a

Before starting the workshop, you need to get everybody on board and ensure that everybody has the same understanding about the next steps. You will start the meeting by giving a short presentation:

Your task is to prepare a short presentation (max. 10 min) about the following points:

- Recap: What happened last week? What change vision has been decided?
- Goals and agenda of today's workshop
- Explain the importance of stakeholder inclusion in change processes and explain the method of stakeholder mapping
- Explain how to conduct stakeholder interviews successfully

(see page 4 for more information)

Task 3b

Facilitate the Stakeholder Workshop

Preparation by class: Every student should have prepared a first persona reflecting a potential FABREX employee.

Today is the big day of the stakeholder workshop. The change consultants have invited key stakeholders from FABREX to join a workshop to generate insights about their perspectives.

Your task is to guide everyone through the stakeholder workshop. This means that you have to take care of the following aspects:

- Form groups (groups should be around 3 people)
- Know and be able to explain the different steps of the process to guide the group through it
- Time keeping so that we manage the workshop in time

(see page 5-7 for more information)

Engage: The Stakeholder Workshop

Agenda of the session

Timing (hrs:min)	Content
00:00 – 00:15	<p>Welcome and introduction presentation about stakeholder and stakeholder mapping</p> <p>You will welcome everyone to class and directly start with the first part of your presentation including the following points:</p> <ul style="list-style-type: none"> - What happened last week? - Goals of the day - The importance of stakeholder inclusion in change processes and the method of stakeholder mapping
00:15 – 00:30	<p>Collection of personas & preparation of own standpoint</p> <p>Every student should have prepared one persona for the class. Now they are given 10 minutes to develop their standpoint regarding the change process (from the perspective of their persona). Hand out some of the “hidden agenda” cards.</p>
00:30 – 00:50	<p>Preparation of stakeholder interviews</p> <ul style="list-style-type: none"> • Present the second part of your presentation: • Explain the procedure of the upcoming stakeholder workshop. • Provide the class with some hints how to prepare and conduct successful stakeholder interviews (about 5-7 minutes). • After that everybody gets another 7-10 minutes to prepare their stakeholder interviews (e.g., a first interview guideline)
00:50 – 01:40	<p>Stakeholder Workshop Part 1: Stakeholder Interviews (see also p. 5)</p> <p>(3 rounds à 16 minutes)</p> <p>Facilitate the workshop. This means that you are in charge that groups are formed, everybody knows what to do and time keeping.</p>
01:40 – 02:10	<p>Stakeholder Workshop Part 2: Consolidation of Insights (see also p. 6)</p> <p>Every group has now time to consolidate their insights (step 3 on Miro board) and put their stakeholders</p>
02:10 – 02:20	<p>Summarize the insights of the days</p> <p>Summarize what happened during the workshop and the key insights of the stakeholder map for everyone.</p>
02:20 – 02:45	<p>Method debrief and outlook (done by lecturer)</p>

Presentations for the day

What is important to cover

Part 1: Introduction

The goal is to get everybody in class up to speed again. Therefore, start your presentation with a recap on what happened the week before. After that quickly present the goals and agenda for today's workshop. This introduction should not take up more than 3 minutes.

Then give a short introduction on the importance of stakeholder inclusion in change processes and explain the method of stakeholder mapping. In order to make the stakeholder workshop successful, please ensure to explain the following concepts:

1. *What is a stakeholder analysis?*
2. *Why is it important to do stakeholder analyses at the beginning of change processes?*
3. *Explain the stakeholder map as a tool that will be used in the workshop.*

Part 2: Stakeholder Interviews

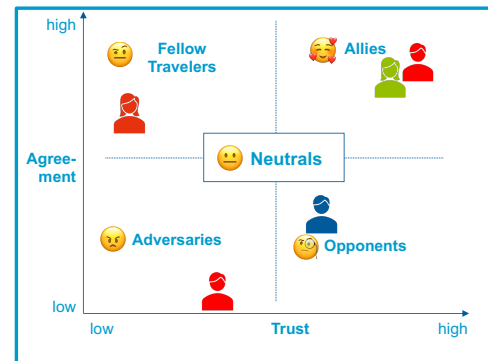
Prepare a short impulse (5-7 min) on the goals and success factors of stakeholder interviews in the context change processes. What tips do you give your peers for preparing and conducting the stakeholder interviews?

Task 3

Map your stakeholders

Map out stakeholders that may impact the project or interact with the team.

After conducting the stakeholder interviews, you can generate a stakeholder map. This is an internal working tool for the change team and should not be disclosed publicly. Based on the stakeholder map you can come up with strategies and ideas how to approach each stakeholder during the project.



- Fellow Travelers**
 - Aligned with vision, goals and objectives, but trust is not mutual
 - May have a vested interest in the outcome
 - May want to provide some input
- Allies**
 - Shares your vision and wants it to succeed in a way that they can support
 - Treat as if they were members of your team
 - Will provide critical resources, information, or expertise
- Adversaries**
 - People with whom building agreements and developing trust have failed
 - Has questions, reservations, or concerns and is actively resisting the change
- Opponents**
 - Has conflicts visions, goals, or methods, and shares an honest, high trust relationship
 - May challenge your efforts, resulting in more effective strategies
 - May provide critical resources, information, or expertise
- Neutrals**
 - Cautious, non-committal, or unaware

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The Stakeholder Workshop

You are the facilitators of the stakeholder workshop!

Part 1: Conducting Stakeholder Interviews in Groups of 3

The goal is to that all students of the class engage in a group exercise of stakeholder interviews. Therefore, they need to come together in groups of 3.

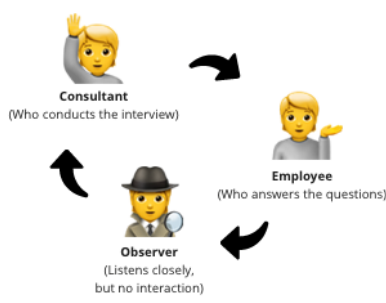
This part of the workshop will have three rounds. In every round the students will switch roles. There are three roles:

- 1. The FABREX employee.** This role is based on the persona that has been developed before and the “hidden agenda cards” that you have handed out.
- 2. The Change Consultant.** The person who conducts the interview with the employee. Key questions are:
 1. What is your stakeholder’s current position in the company?
 2. What is his/her opinion about the intended project?
 3. What is his/her interest in the intended project?
 4. Do you suspect a hidden agenda?
 5. What are his/her fears/ reasons for resistance?
- 3. The Observe.** The third person will take the role of a neutral observer to provide feedback for the interview afterwards. How does the consultant do? What went well? What could have been improved? How does the stakeholder react? Share constructive feedback with both of them.

Understand Stakeholders

Try to understand the perspective of each stakeholder, their level of trust as well as their interest in the project. Therefore, conduct interviews based on the following procedure.

3 Rounds, rotating roles



Consultant
(Who conducts the interview)

Employee
(Who answers the questions)

Observer
(Listens closely, but no interaction)

Conducting successful stakeholder interviews:

- 1) Generate an atmosphere of trust.
- 2) Start the conversation in an easy way, before moving to hard questions.
- 3) Ask about experiences instead of direct emotions.
- 4) Get the stakeholder into a “storytelling mood”.
- 5) Paraphrase and ask back questions to ensure that your assumptions are correct.
- 6) Be empathetic.
- 7) Do not make any promises if you are not sure whether you can keep them.

Checklist/ tips for observers

- 1) Did the consultant generate a trustworthy atmosphere?
- 2) Did the consultant ask open questions?
- 3) Did the consultant nudge the interviewee in a certain direction?
- 4) Did the consultant listen actively and ask back questions when needed?
- 5) Did the consultant miss important questions?
- 6) Did the interviewee feel comfortable?
- 7) Did the interviewee seem honest?
- 8) Did the interviewee understand the questions of the consultant? If not – what could the consultant have done better?

Procedure:

Each round:

1. Consultant conducts an interview with the employee (7 min)
2. Observer listens to the interview and makes observation notes
3. Consultant paraphrases the key insights from the interview and proposes where to position the employee on the map (3 min)
4. The employee gives feedback, whether his ideas align with the consultants assessment (3 min)
5. The Observer gives feedback about the interview (3 min)

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Explanation of the stakeholder workshop on the Miro board.

The Stakeholder Workshop

You are the facilitators of the stakeholder workshop!

Part 2: Consolidation of Insights

After the three rounds of stakeholder interviews, the groups need to consolidate the interview results by summarizing their key insights per stakeholder in the templates (see below).

After that the group should come to a judgement what kind of stakeholders they have been interviewing and categorize them in the stakeholder matrix.

3. Fill in template per stakeholder

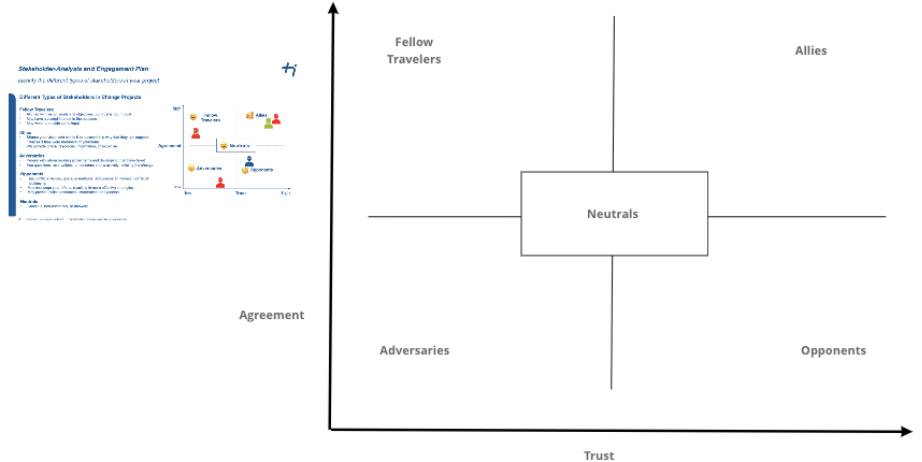
Fill in template per stakeholder

Understand the perspective of each stakeholder and fill in the small templates

<p>Name & Age: Division: Current Position:</p> <p>Opinion about project</p> <p>How agreeable they are with project</p> <p>How resistant</p>	<p>Name & Age: Division: Current Position:</p> <p>Opinion about project</p> <p>How agreeable they are with project</p> <p>How resistant</p>	<p>Name & Age: Division: Current Position:</p> <p>Opinion about project</p> <p>How agreeable they are with project</p> <p>How resistant</p>
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Move Stakeholders to the Matrix

Understand the perspective of each stakeholder and position him/her on the map based on your insights from the interview.



4

Map your stakeholders

Map out stakeholders that may impact the project or interact with the team.

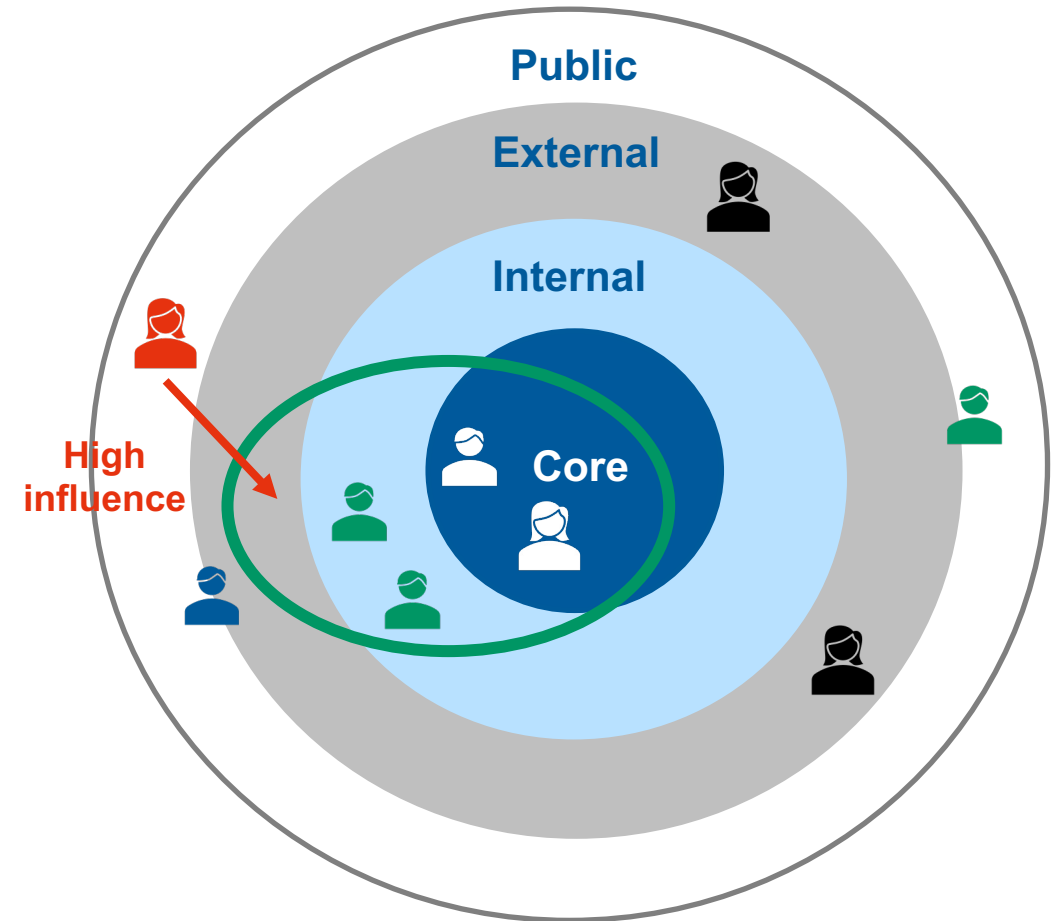
Why should you do a stakeholder analysis

When starting a new project, it's important to identify who else has a stake in the outcome, whether that's someone directly invested in the project or people you have to work with in order to reach your goal. Identifying them early will help steer you in the right direction, give you a network to reach out to for support and help prevent unforeseen roadblocks. Stakeholder maps are a tried-and-true method for driving out project specifics:

- Who is involved in a project
- Who is invested in the outcome
- Who has right of refusal
- Who will support the team
- Who are the key decision makers
- Who the team should meet with to help get context

Stakeholder maps help to visually represent a user and their world while showing connections within a context, such as an organization. They can help the team understand which parts of the organization will be affected by what is built.

A stakeholder map should be generated as early as possible on a project, usually during a kickoff meeting.



Map your stakeholders

Map out stakeholders that may impact the project or interact with the team.

Conducting stakeholder interviews

Conducting interviews with relevant stakeholders at the beginning of a transformation project is a powerful tool.

Stakeholder interviews will help you to

- understand the different perspectives (motivations, fears, resistances) of the stakeholders
- understand their "history" in the company and their current standing
- generate a first impression about each stakeholder's agenda in the project
- generate a first buy-in and get their support for the project.

A typical stakeholder interview is between 20 and 60 minutes long and should be conducted in a trustworthy atmosphere. It is important that the stakeholder knows that all information will be treated with confidentiality and no insights will have a detrimental effect on their career.

Conducting successful stakeholder interviews:

- 1) Generate an atmosphere of trust.
- 2) Start the conversation in an easy way, before moving to hard questions.
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Fellow Travelers

- Aligned with vision, goals and objectives, but trust is not mutual
- May have a vested interest in the outcome
- May want to provide some input

Allies

- Shares your vision and wants it to succeed in a way that they can support
- Treat as if they were members of your team
- Will provide critical resources, information, or expertise

Adversaries

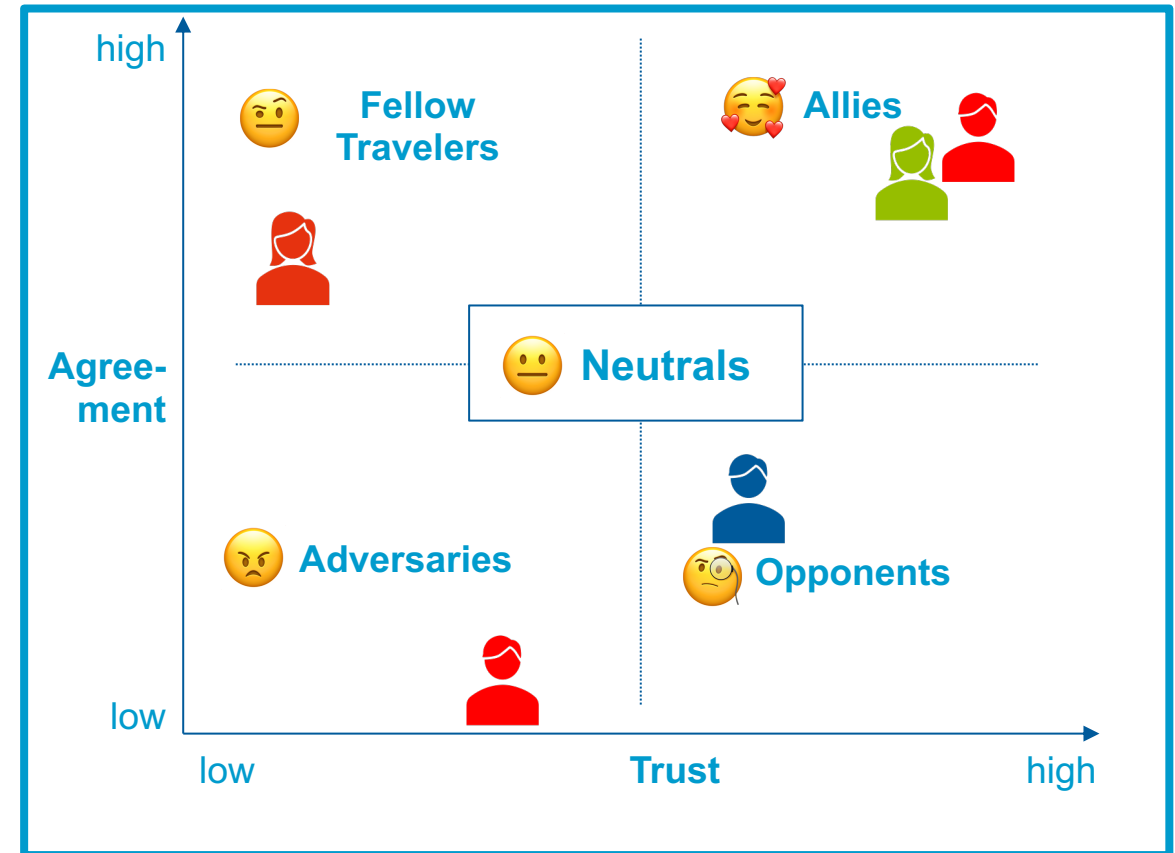
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Opponents

- Has conflicts visions, goals, or methods, and shares an honest, high trust relationship
- May challenge your efforts, resulting in more effective strategies
- May provide critical resources, information, or expertise

Neutrals

- Cautious, non-committal, or unaware



Engage your stakeholders

Find ways to engage each stakeholder type

Based on your stakeholder analysis, come up with ideas how to engage each stakeholder type in your change initiative. On this page, you find first ideas and hints how to include the stakeholder that have a neutral to positive opinion about the change project.

On the next page, you find ideas and hints for stakeholders that are critical towards the project. It is very important that you find strategies tailored to each of the stakeholder groups.



Allies

Goal: Affirm agreement

1. Reaffirm the quality of the relationship
2. Acknowledge any doubts and vulnerability regarding the 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

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



Neutrals

Goal: Educate and determine their position

1. State your position (vision & case 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

Engage your stakeholders

Find ways to engage each stakeholder type



Opponents

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

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

Turn your ideas into a Stakeholder Engagement Plan

Map out stakeholders that may impact the project or interact with the team.

(additional information - will not be covered in the simulation)

Assess the level of commitment of each stakeholder and determine the actions needed to enhance agreement and trust. Based on that, develop a detailed stakeholder engagement plan how to include all the groups throughout the process.

- List all stakeholders identified 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