



THE CHARTERED BODY FOR THE PROJECT PROFESSION

Engaging stakeholders on projects

How to harness people power

Elizabeth Harrin

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**by
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About the author

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Facebook users can continue the conversation in the Project Management Café Facebook group: facebook.com/groups/projectmanagementcafe.

Preface

Engaging Stakeholders is a book for project delivery professionals. Whether you work at project, programme or portfolio level, you'll have stakeholders involved in your activities. This book will help address the challenges you face when dealing with project-driven change in organisations.

If you've been in or around project management a while, you will have heard about stakeholder management and noticed how the vocabulary has shifted to talk about stakeholder engagement instead. This is a good thing. But what does 'engagement' actually mean? What do I do to engage people? That's what I wanted this book to help with. I wrote it for project managers, change managers and team leaders who know they ought to be working with other people to effect change and deliver projects in their businesses, but don't know where to start.

The book steps through the process for thinking about who is going to be affected and how best to reach, engage and work with them. You'll learn how to use people power to minimise resistance to change, leading to higher project success rates and better morale across teams.

I wanted this book to answer the questions:

- Why do I need to involve people in my projects?
- What does engagement look like?
- What tools have I got available to do so?
- How do I actually do it?

The simple guiding principle for the book is that people deliver projects and we should focus on those people.

I have tried to write this book in an inclusive way, to reflect the work done at all levels of project and change management. However, 'project, programme and portfolio' becomes tedious to write out each time and tedious to read. At various points in this book I use 'project' as a shorthand for 'project, programme or portfolio'. Wherever it says 'project', please assume that I'm talking about ideas that can be extrapolated to all levels of change delivery within an organisation. Equally, 'project manager' can also be read to include 'programme manager' and 'portfolio manager'.

Preface

A book about stakeholders is necessarily a book about relationships at work and not all workplaces are the same. This book provides core concepts and techniques for making those workplace relationships positive, professional and effective.

However, you know your workplace better than I do. The guidance I give is designed to be adapted, tailored or modified to different situations. Consider the cultural nuances – whether they are to do with your corporate culture or the global nature of your team – and make whatever tweaks you feel necessary to tailor how you approach engaging your stakeholders.

How this book is organised

This book is organised into seven chapters.

Chapter 1 looks at stakeholder identification, sharing techniques for finding out who is a stakeholder on your project, how they are going to be involved. Stakeholder analysis and categorisation techniques are also covered.

Chapter 2 covers working successfully in the sociopolitical environment of your organisation through understanding how your project fits within the social system of your business and beyond. It looks at organisational influences on your project and planning in complex environments.

Chapter 3 is about engaging others, how to do it and how to tell if it is working. It's a practical chapter full of tips for how to engage people in your project work. There's also advice on working with sponsors, as a disengaged project sponsor can be a particular type of challenge for a project.

One of the most common techniques for engaging people is simply talking. Chapter 4 looks into facilitation and meetings, sharing advice you can use today to help boost the efficiency of your conversations in a meeting setting.

Chapter 5 is your guide to dealing with resistance to engagement. Some people aren't going to want, or have time, to engage with your project. This chapter draws on change management techniques to consider options for dealing with resistant stakeholders.

Chapter 6 covers conflict management and resolution. It looks at what causes conflict, common flashpoints, a process for managing conflict and techniques for resolving it, both face-to-face and in virtual teams.

Finally, Chapter 7 is a deeper dive into the skills that are beneficial for effective stakeholder engagement. So many interpersonal and technical skills come into play when engaging others, but I've picked out ten core skills

and provided some ideas about how you can develop those to improve your practice.

At the end of most chapters you'll find action steps and key takeaways. The action steps are tasks for you to make your learning real. Reading a book about stakeholder engagement can only go some of the way to helping you improve your skills. Most of the improvement you'll see will come from doing the techniques, taking action and putting the information into practice at work.

Key takeaways are a list of summary points from the chapter. If you remember nothing else, remember those.

The book concludes with references and further reading. Here, you'll find a list of books that I have found useful over the years in my work on projects, programmes and portfolios of change. You may like to seek them out for more information on the concepts and techniques discussed in this book.

1

Identifying stakeholders

One of the most crucial aspects of being able to engage people on your project is identifying the right people to engage with.

This chapter looks at the definition of stakeholders, how to identify who is a stakeholder in your work, stakeholder categorisation and tools for analysis.

Defining stakeholders

This book uses the *APM Body of Knowledge* definition of stakeholder:

Stakeholders are individuals or groups who have an interest or role in the project, programme or portfolio, or are impacted by it.

Additionally, you may be dealing with stakeholders who feel they are involved or impacted . . . even if, by your assessment, they are not.

Stakeholders are often individuals, but can also be groups, such as a regulatory body or even a group of end users. In the case of a group, identify an individual who can be the nominated contact and representative for the project team. The project will benefit from having consistent representation from an individual on behalf of the group.

How to identify stakeholders

You can't engage people if you don't know who they are. The first step in any stakeholder engagement plan is identifying the right people.

There are a number of ways you can identify stakeholders who will have an interest in your project or be impacted by it. However, the bottom line is that you have to ask people. If you have been with your organisation for some time, you may know some of the key people who should be involved as stakeholders on the project. But in all other cases, you will need to rely on the knowledge of others in the organisation to help you identify your stakeholder groups.

Engaging stakeholders on projects

Even if you *think* you know who should make up your stakeholder community, do not skip the identification step. There may be new joiners to the organisation, or subject matter experts you are not aware of who do need to be consulted. Take the time to do a full identification exercise and do not make assumptions based only on your knowledge.

Below are some techniques for identifying stakeholders. Use a couple of techniques, at least, to give you a solid foundation for your stakeholder identification exercise.

1. Stakeholder lists

Hold a workshop or team meeting with the objective of discussing and agreeing who needs to be included as stakeholders for this project, programme or portfolio activity.

Get the core project team together. At an early point in a project, this is likely to be you, the project sponsor, the programme manager (if the project is part of a programme) and perhaps a representative from the PMO.

Make sure the group understands the definition of a stakeholder and the scope of the project work.

Each person makes a list of the individuals or groups that could be considered stakeholders.

Compare the lists. You could do this in pairs, if you have enough people in the room. Talking to each other may prompt you to add more stakeholders to the list as you bounce ideas around.

Compile a master list of stakeholders, based on the individual lists.

2. Stakeholder segments

Again, get the core project team together, or the people who have some knowledge of the project at this point.

Provide them with a list of typical stakeholder segments or categories e.g. IT, compliance, marketing, PMO etc. A sample list of stakeholder segments is available in Appendix A. Remember to consider both stakeholders internal to the organisation and those external.

Use the list as a starting point for brainstorming who will need to be involved as a stakeholder in the project. Ask the team to identify the individuals who represent or fit into each segment. Ask them to identify missing segments or teams who should also be involved.

3. Ask known stakeholders

People who are already involved in the project will have a good idea of what the work entails. They will also know who is currently involved and who amongst their peers or contacts is not yet involved.

One of the most valuable ways to identify stakeholders is to ask the current known stakeholders who else should be involved in the project. Once the stakeholder has reached the early engagement stage of their life cycle, they will know enough about the project to be able to comment on who else should be brought into the team.

Another time to ask about who else should be involved is when preparing information for senior stakeholders. Ask them if they want you to discuss whatever you are preparing with other colleagues before they see the final version. They may direct you to individuals with useful opinions or data to share.

As your project evolves, so too does the group of people who need to be involved. Stakeholder identification is not a one-off exercise. As the project or programme manager, you should be constantly considering who else needs to know about your work. Every change, every new piece of functionality or organisational shift could result in new people needing to know about or contribute to the project. Ask yourself, your team and your current stakeholders: "Who else needs to know about this?"

Stay alert for points in the project when you will need to expand your stakeholder community. Equally, some stakeholders may drop out of your engagement activity as their role in the project comes to an end.

Categorisation of stakeholders

All stakeholders are not created equal. It's valuable to spend some time thinking about who your stakeholders are, what you need from them and what they need from you.

You need to consider where to spend your time. Liaising with stakeholders and working on engagement activities can take up a lot of time. While it is important work, you only have limited time during the working day and you want to make sure you are using that time wisely.

Categorising and analysing stakeholders helps ensure your efforts are spent on the relationships that will have the most impact on project success.

A simple way to categorise stakeholders is to consider them in terms of primary, secondary and interested groups.

3

Engaging and how to do it

Engagement helps drive action on projects. As it is people who do the work, engagement is therefore a contributing factor to getting tasks done on time, to the required scope and at a level of quality that results in stakeholder satisfaction.

This chapter looks at what engagement means in a project environment. It discusses the two elements of projects where engagement is required and covers core techniques for engaging others.

Engagement basics

Let's recap the definition of stakeholder engagement:

The systematic identification, analysis, planning and implementation of actions designed to influence stakeholders.

Essentially, it's all about working with people to build support to achieve the intended outcomes.

The core aspects of engagement are:

- understanding stakeholder perspectives;
- building trusted relationships; and
- taking action and influencing stakeholder perspectives to shape the work in the direction of the intended outcomes.

If those aspects were to be put into a formula, it would look like this:

UNDERSTANDING + ACTION + INFLUENCE = ENGAGEMENT

Understanding stakeholder perspectives

Your stakeholder identification work will have given you a high-level understanding of how an individual stakeholder will interact with and contribute to the project.

Engaging stakeholders on projects

Next, it's time to move into the early engagement stage of the stakeholder life cycle.

What issues are they dealing with? How do these affect the project? What point of view do they have about various different aspects of the project? Humans are nuanced. Don't assume that they hold one view about the work. They might be supportive of some aspects but critical of what the change might mean in other areas.

Try to uncover the values that shape their commitment to work. Hopefully you'll find you have values in common; if you work in the same organisation, it's likely that the corporate values are the ones people subscribe to.

Put yourself in their shoes. To be successful at engagement, two things must be understood:

- How stakeholders feel about the project and the effect it will have on them. This is emotional appeal (which you can think of – to use corporate buzzwords – as "winning hearts").
- How confident stakeholders feel that the work being done is the right work. This is rational appeal (which equates to "winning minds").

Table 3.1 shows a summary of what that sounds like from the point of view of a stakeholder. You may never hear these words, but you might hear something like them, or be able to tell from their actions and body language that that is how they are feeling.

	Emotional appeal	Rational appeal
Stakeholder opinion	You have listened to my views	I understand what the project is delivering, even if I don't agree with it
	I believe you've understood my views	I'm confident that the vision is achievable and the schedule is realistic
	I understand what the impact of the project will be on me, my team, my role and my place in the organisation	I'm confident the project team have the skills required to deliver the work
	I believe I've been told the truth	I believe I've been told the truth

Table 3.1 Appealing to emotional and rational aspects of engagement

Stakeholder satisfaction was identified as the most critical success factor in complex projects through a literature review of 27 publications by researchers Rezvani and Khosravi. Their work also identified that poor communication and relationships with stakeholders is joint top (along with poor planning and changing project requirements) of the list of factors that contribute to the failure of complex projects.

The more stakeholder positions can be understood, the more likely it is that you'll be able to deliver something they value and build a successful working relationship with them.

Building trusted relationships

The first actions you need to take are to create relationships with the stakeholders identified.

You can't influence without having a stake in the relationship, so building credible, trusted relationships with stakeholders should be high on your agenda.

Ideally, you will have started building relationships with core stakeholders long before you need to engage them on a project. It is easier to onboard a new stakeholder to your project if you already know something about them and they already know about you. That's why it is valuable to have a strong personal network within your organisation and your wider industry.

Demonstrating that you hold the same values as someone else is a way to build trusting relationships. You do this through your actions and what you say, so make sure the two are congruent. One of the fastest ways to lose trust is to say one thing and do another. People won't know which 'you' to believe, or who will show up on any given day.

It takes work to build relationships. Even if you have an established relationship with a stakeholder, it takes time and commitment to keep that relationship going. We'll look at activities you can do to engage later in this chapter.

Types of influence

There are two types of influence: soft and hard. You exert soft influence when you share knowledge, communicate, engage, inspire and work with others. Hard influence happens in situations where there is no choice: where rules, the law or regulation influence decision making because that's how it has to be. It's easier to get a decision if you can call on hard influence, but there could be plenty of grumbling about it.

5

Dealing with resistance to engagement

Projects and programmes change things. And not everyone embraces change.

This chapter looks at how to identify resistance to engagement and why it happens. It covers practical techniques to engage with people who are resistant to your project work.

There is no guarantee the techniques will work on your stakeholders, but hopefully the advice in this chapter will give you a solid grounding in simple approaches to try to turn around behaviour where you can.

How to identify resistance to engagement

Sometimes it is obvious to see which stakeholders are unsupportive of your work: your stakeholder analysis will have identified them earlier. Sometimes they'll come right out and tell you that they don't support the project or they are resistant to the change because of the impact it will have on them or their team.

However, some stakeholders are better at disguising their lack of support than others. Here's what to look for if you suspect someone of being covertly resistant to your efforts to engage them on the project:

- Stakeholders who accept meeting invites but then don't show up, or who turn up so late that they aren't able to make a meaningful contribution.
- Stakeholders who accept meeting invites but then send someone in their place who does not have the delegated authority to be useful.
- Stakeholders who sit silently through meetings and make no contribution (although before writing this person off as unsupportive, probe to see if they are uncomfortable contributing in a meeting environment for some reason).
- Stakeholders who don't reply to emails or return phone calls.
- Stakeholders who don't have time to come to briefing sessions or to learn more about the project, but who do have the time to complain about the project to anyone who will listen.

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- Stakeholders who don't complete their actions and have no good reason why.
- Stakeholders who promise to share information with their team and then you find out they never did, even though they had the opportunity.
- Stakeholders who do not deliver the things they committed to do.
- Stakeholders who question the project management process or the way the change is being delivered, for example, by asking for other subject matter experts to review the solution, querying why certain tools are being used over others etc. They do not question the project deliverables, but are picking holes where they can.

All of these can apply to core project team members as well as those individuals you might more traditionally think of as stakeholders.

These, and you can probably think of more, are all signs of someone who is not fully committed to project success for some reason. When these things happen, project timelines and budgets are adversely affected. The team's motivation can also be affected, because it feels as if they are constantly pushing and not receiving support for their work. Longer term, project benefits are affected because lack of support can mean that the full scope is not delivered in the expected way, or that the deliverables are not fully used to their full advantage.

Why people resist change

People resist change for lots of reasons including:

- they are scared;
- they are unwilling – consciously or unconsciously – to make the effort to change;
- they don't understand the benefits or they don't think there will be any;
- they can't see an advantage to them if the project is completed;
- they can see a disadvantage to them if the project is completed;
- they are unhappy about the personal implications of the project e.g. they are going to be made redundant;
- they don't understand about why the project or change is happening and therefore do not give it the priority it requires;
- they are part of your virtual team but located in the same building as their manager or other colleagues, and those people get their attention first;

Dealing with resistance to engagement

- they have had previous poor experience of how projects and change were managed;
- the organisation (or another organisation they have worked in) has a history of talking about delivery but nothing actually getting done so they don't believe it's worth investing the time in this work as it will come to nothing;
- they have come to the project late e.g. as the result of a scope change, and aren't yet fully invested in the outcome;
- they don't like you (or the project sponsor) enough to want to make any effort to engage.

Resistance to change can also come from a place of positivity. A stakeholder could genuinely have a reason for being nervous about fully committing to this project. Engaging with that person could uncover risks or challenges you were not previously aware of, and that will help shape the direction of the project.

One of the top reasons why people are resistant to change is that they weren't involved earlier. This causes problems for project teams because you've got dates you've committed to. Now you can't achieve them because a stakeholder isn't supportive of the work you need to get done. Perhaps they are asking for additional briefings before they commit their team to some work, or they are querying the solution you've already had agreed by the project board.

If you're in that situation, you'll need to do the best you can to get through it quickly, dealing with their resistance so that the project can get moving again.

Next time though, schedule your project after you've done at least some engaging.

Resistance to change is a normal and natural response. Jonah Berger, in his book *The Catalyst*, writes that people tend to do what they've always done. He adds:

Whether trying to change company culture or get the kids to eat their vegetables, the assumption is that pushing harder will do the trick. That if we just provide more information, more facts, more reasons, more arguments, or just add a little more force, people will change.

Implicitly, this approach assumes that people are like marbles. Push them in one direction and they will go that way.

Unfortunately, that approach often backfires. Unlike marbles, people don't just roll with it when you try to push them. They push back. Rather than saying

7

Skills builder

This chapter provides a deeper dive into 10 of the interpersonal skills and behaviours that are beneficial for successful stakeholder engagement. There are also tips for improving your practice and developing your skills in these areas.

This book has already talked extensively about communication and conflict resolution, so those skills – which would normally make my top 10 – have been set aside for now. There are so many interpersonal and technical skills that are useful when engaging others that it has been necessary to streamline and prioritise what can be covered in this section.

Whole books have been written about these topics. Selected further reading is listed in the Bibliography at the end of the book. The goal in the next few pages is to provide an overview and some quick action steps for boosting your abilities (or confirming your existing level of abilities), thus making it easier to do the work of engaging others.

The skills covered in this chapter are listed below.

1. Negotiation.
2. Influencing.
3. Listening.
4. Business acumen.
5. Resilience.
6. Credibility.
7. Assertiveness.
8. Contextual awareness.
9. Cultural awareness.
10. Ethical awareness.

In practice, excellent project professionals do all of these things without thinking about them. The skills become a part of how work gets done. The portfolio manager in your company doesn't wake up and think, "Today I'm going to do some really good influencing." More often than not, the influencing just happens as part of the inherent, subtle, interactions with others during the day. Perhaps they are done consciously, perhaps not. The more you master the skills, the more

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they become an integral part of how you do your job and not a specific tool you take out to wield at a given moment.

Leadership is also a core skill, but it happens as a result of all the skills listed here, and others.

Before looking at the skills, it's worth taking a moment to consider how much time and energy you should put into professional development and building your competence across the domain.

How much effort should you put into building skills?

Project delivery professionals are lifelong learners. Over the course of a career, the best project professionals remain curious. They are constantly learning and developing new skills, staying up to date with tools and techniques that work to generate engagement and create an environment for successful delivery.

However, sometimes there is little value in bolstering an area you have identified as a personal weakness. For example, let's say negotiation is not, and has never been, your strong point. You could spend thousands of pounds on negotiation courses and resources. You could practice your skills regularly, putting in hours of preparation prior to a negotiation. And you still might only ever be average.

Is it worth pursuing this avenue, at the detriment of other skills you could be developing? Or could you fill your personal gap with someone on the team who is an excellent negotiator? The time you spend on trying to improve your negotiating could be better spent on something else.

Sometimes there's a sensible trade-off to be had. The more you can use expertise on the team so that everyone is playing to their strengths and operating at their best level, the more successful the team will be and the more time you will have to do your best work.

It's obviously good in theory to build your skills in a range of different areas. But be realistic about your personal capabilities and the level you can achieve with a reasonable amount of time and effort. A better 'win' for the team and the organisation overall could be for you to work alongside a colleague who has complementary skills to your own.

With that in mind, let's dive into the skills that are fundamental to being able to create successful stakeholder relationships.

Contextual awareness

Contextual awareness is the ability to select the appropriate time, place and individuals for a particular interaction.

For example, you wouldn't talk to a colleague about their poor performance in front of the whole team, or in an open plan office. You wouldn't tell the project sponsor that their idea won't work in a project board meeting in front of their peers.

Contextual awareness can be gained from taking a systems thinking approach or carrying out business process modelling to understand the environment in which you are operating. It's also the product of being able to read a situation and make the best possible choices at the time.

Tips for improving practice

- Ask yourself before each stakeholder engagement: "How can I create the context for success?"
- Think about how you can research the organisational context and find out more about the operating environment before planning to engage.

Cultural awareness

Cultural awareness relates to the background and values of both the organisation and the people involved.

Organisational culture refers to how things get done in the organisation. It is the set of (sometimes unwritten) rules that dictate and influence how individuals and teams behave.

Large projects and programmes often create sub-cultures within the organisational culture, especially when the team is made up of individuals from a variety of entities. A common project culture can bring the team together under one common set of goals and values.

Your stakeholder analysis work will reveal clues about the cultural identifiers typically associated with the culture or sub-culture an individual is from. This kind of desk-based analysis and assumption is no substitute for getting to know stakeholders as individuals.

It's impossible to harness people power if you don't know the people as people.