



Stakeholder Assessment Toolkit

Fostering Successful Change Management through
Tailored Communication and Engagement

IT Forum

Table of Contents

1. Introduction	3
2. Conducting a Stakeholder Assessment	7
3. Appendix: Templates	12



Introduction

SECTION

1

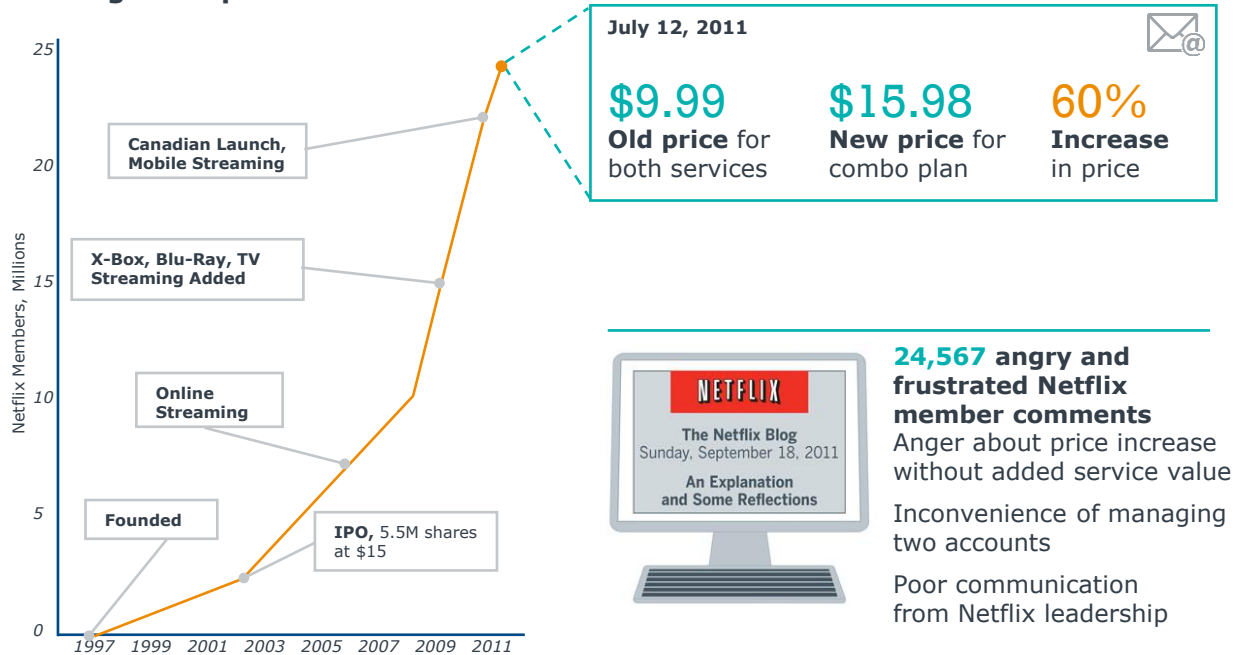
- The Communication Imperative
- Risks of Poor User Communication

The Communication Imperative

Netflix's Meteoric Rise Derailed by Failed Communication...

Netflix was founded in 1997 as a mail-order DVD service. Through the early 2000s, the company hit several milestones as its membership grew: an IPO, a shift to online streaming, a Canadian launch. In June of 2011, Netflix announced a new service plan which would separate the streaming service from the mail-order business. However, the change was made with little warning or input from users. As a result, the public reaction was staggeringly negative, and Netflix lost some 800,000 subscribers the following quarter.

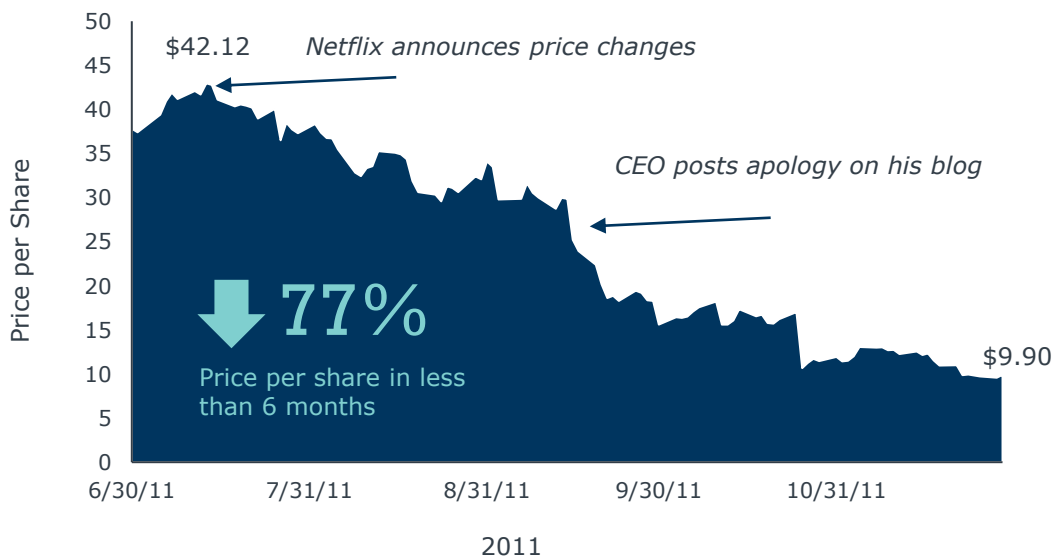
Netflix's Big Mishap



...with Real Consequences for the Organization

Moreover, the customer pushback was not without real consequences for the company. Less than six months after the pricing change, Netflix's share value had dropped almost 80 percent.

The Stock Price Plummets

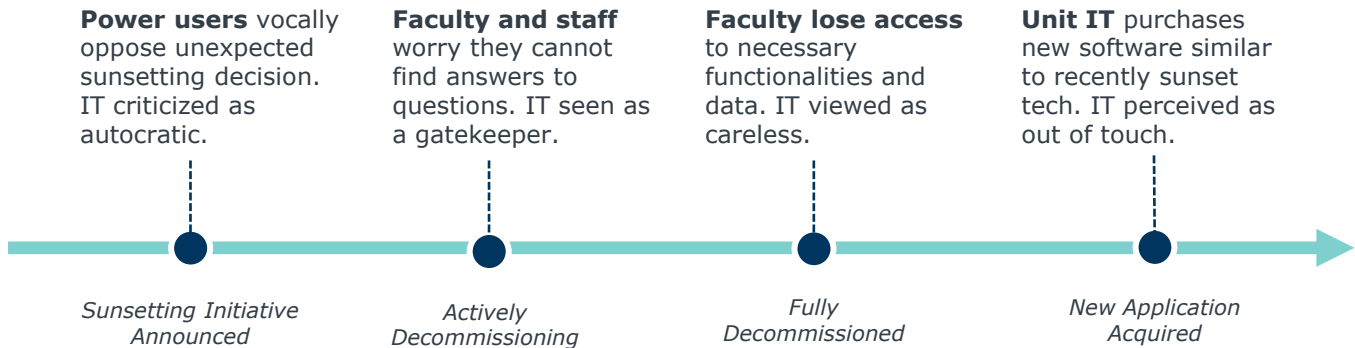


Poor User Communication Risks Derailing Change

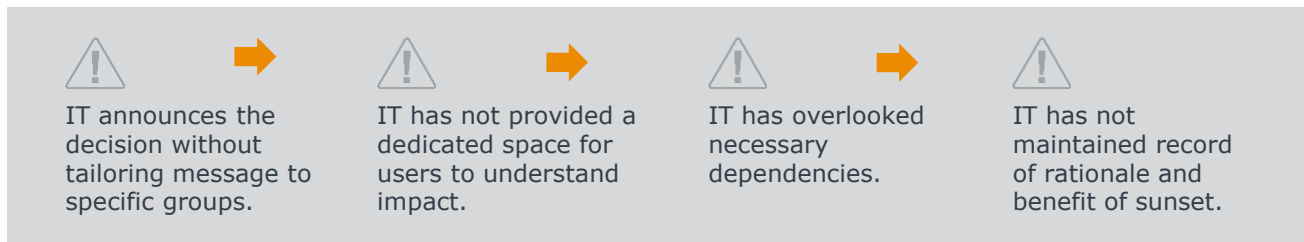
Why the Netflix Example Matters for IT

As IT organizations pursue small- and large-scale transformations on their campuses, the Netflix example highlights how poor stakeholder communication can risk derailing good faith efforts to implement, update, or decommission technology.

Example: Decommissioning Hazard Points



What's Not Working?



Stakeholder Assessment Addresses Root Causes of Failed Communication

IT organizations can better set themselves up for success by addressing two common change management pitfalls. Firstly, by assessing stakeholders across campus and tailoring communication efforts; and secondly, recognizing those stakeholders who may lack perceived power but may hold sufficient power to veto change.

Common Pitfalls of Change Management Communication



Failure to ID All Stakeholders

Proceeding with Change Before Considering Parties Affected Across Campus



Ignore Stakeholders Who Lack Perceived Power

Focusing Solely on Those Around Campus with Capital to Prevent Change



Conducting a Stakeholder Assessment

SECTION

2

- Mapping Stakeholders
- Maximizing the Potential for Action
- Crafting Compelling Messages

Getting the Right People On Board

The Degrees of Stakeholder Variance

In any change process, project leaders must assess stakeholders along three dimensions of variation.

Source of stake refers primarily to the formal powers of those individuals at the institution. For example, the President will hold “power” in the process; she may veto a decision or allow it to proceed. Students, however, will likely hold “constituency” as they are impacted by a given change but likely hold no formal veto.

Stakeholder stance simply refers to how favorable those different groups are to a proposed change (either perceived or actual). Supporters are those who will back the initiative, while dissenters are those who are likely to push back.

Finally, **factors of urgency** account for how sensitive the different groups across campus will be to change. Where these changes are implemented on groups quickly, or where they impact technologies that are of personal importance to people in those groups, the sensitivity is likely to be higher.

1 Source of Stake



Power

Stakeholders holding the authority and ability to prevent or allow a change to take place



Agency

Stakeholders responsible for designing and carrying out the change effort



Constituency

Stakeholders impacted by a change or concerned about the results of a change

2 Stakeholder Stance



Supporter

Can be counted on to support and promote the initiative, even if problems arise



Undecided

Uncertain of position; could be swayed to take action in spite of indecision



Dissenter

Actively opposed to the initiative; not expected to switch allegiance

3 Factors of Urgency



Time Sensitivity

The immediacy with which the change is needed by the person or group in question



Personal Importance

The importance of the claim to the person or group in question

Stakeholder Communication Map

Visualizing the Degrees of Variance in Change Management Processes

The stakeholder communication map is a useful tool to help IT leaders visualize and account for the different groups affected by a given change. Project leaders should begin by brainstorming the different groups across campus affected by the proposed change – from IT staff to different student groups. Once listed, these groups should be assigned sources of stake, stance, and sense of urgency.

Please see **page 13** for a completable template.

Change Initiative: Sunsetting Legacy Application

Stakeholder Name	Source of "Stake"			Stance			Sense of Urgency		
	Power	Agency	Constituency	Supporter	Undecided	Dissenter	Low	Medium	High
<i>President</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Provost</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>IT Staff</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>External IT Leaders</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>External IT Staff</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Faculty</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Staff</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Students</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Three Things to Keep in Mind for Stakeholder Assessment



List Initiative Stakeholders

Include external and internal stakeholders, covering groups and individuals.



Account for All Sources of Stake

Stakeholders may be any combination of "power," "agency," and "constituency."



Go with Your Gut

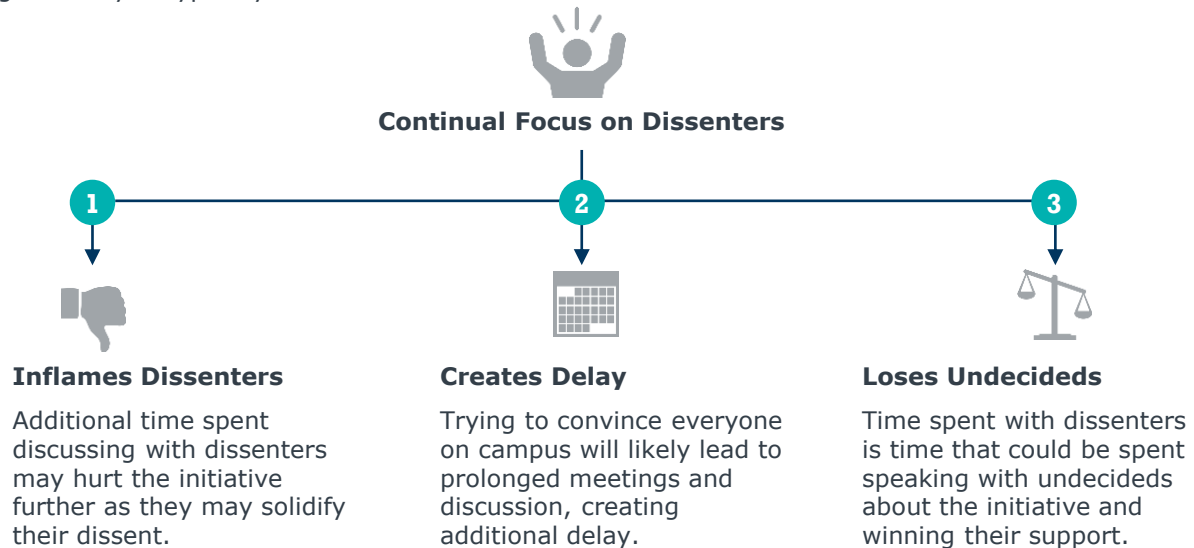
Complete efficiently and don't overthink assessments.

Maximizing the Potential for Action

Avoiding Two Common Misconceptions of “Maximized Support”

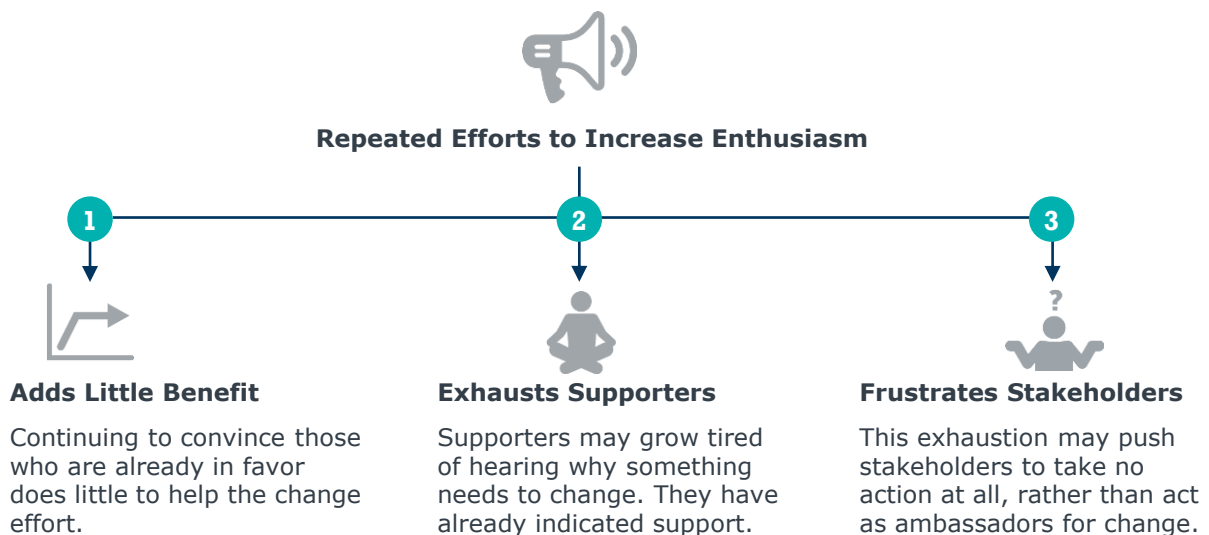
Misconception #1: Aiming for 100 Percent

Once stakeholders have been identified and evaluated, change leaders must determine the appropriate engagement strategy to drive support for the initiative and maximize the potential for stakeholder action. One common pitfall is attempting to achieve 100 percent support for the the decision to change. Focusing on getting total buy in typically results in wasted time and effort.



Misconception #2: Preaching to the Choir

Similarly, some project leaders may be inclined to over-invest in building excitement and enthusiasm amongst those who already support the change. This, unfortunately, also results in wasted time and may erode supporters’ willingness to act.






Messaging Varies Based on Stake

Getting the Right Reaction from the Right People

To maximize the potential for change, and to avoid the outlined pitfalls, IT leaders should deploy three different strategies based on stakeholder stance, with an understanding that additional time should be spent on undecideds.

Three Strategies Based on Stance




 <p>Supporter Inflate urgency to inspire continued action of supporters.</p>	 <p>Undecided Craft “what’s in it for me” for undecideds to gain buy-in.</p>	 <p>Dissenter Deflate urgency of dissenters to minimize pushback.</p>
--	--	---

Developing an Engagement Strategy Across Stakeholders

However, before deploying any of these strategies, project leaders should also recognize that engagement tactics must account for the stakeholder’s source of stake. The messaging for those with power will differ from those with constituency. With multiple sources of stake, project leaders should address each one.

Please see **page 14** for a completable template.

Your Guide to Tailoring Messaging

		<i>Source of Stake</i>			
		Power	Agency	Constituency	
Stance	 Undecided	Obtain Acceptance Gain firm commitment to change initiative	Tap Into Knowledge Employ information to design or refine change	Gain Compliance Convince to participate in change	}
	 Supporter	Leverage Power Utilize support to obtain resources and influence stakeholders	Delegate Ownership Designate responsibility for process components	Build Momentum Use support to withhold or exert pressure to change	
	 Dissenter	Overcome Dissent Use variety of methods to offset influence	Work Around Find supporter with knowledge to counter negative messages	Negate Urgency Block any effort to unite in opposition	}

Inciting Action from Undecideds

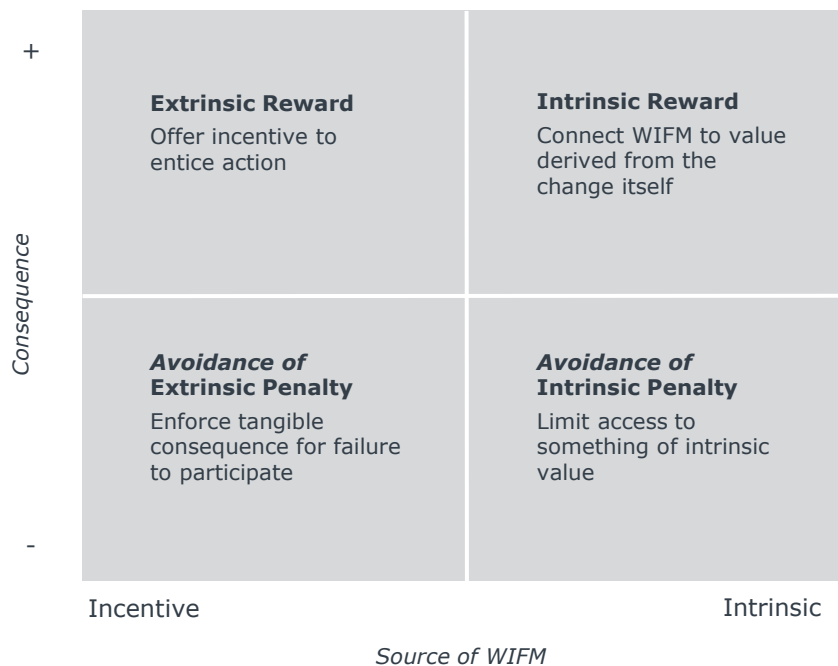
Crafting a Compelling Offer for Change

Undecideds represent a group that can make or break any change management process. However, they also represent a group where project leaders can have outsized influence on their perceptions and degree of support for a change effort.

IT leaders should be sure to explain to those undecided stakeholders their “what’s in it for me?” (WIFM) to garner their support. WIFM can be crafted in many ways, but leaders should consider what type of consequence (reward or penalty) and value (intrinsic or extrinsic) would most compel an undecided.

Please see **page 15** for a completable template.

Compelling Offers Guided by Consequences and “What’s In It For Me”



Your WIFM Offer Should Be...



Sufficient

Provide enough benefit to offset the cost of change



Accurate

Aligned with stakeholder’s actual WIFM, not what the leader thinks it should be



Controllable

Within your direct control



Appendix: Templates

SECTION

3

- Stakeholder Communication Map
- Stake-Based Messaging
- Crafting a Compelling Offer

Stakeholder Communication Map

Instructions: Brainstorm different groups across campus who will be affected by the proposed change – from IT staff to different student groups. List these groups under the first column titled “Stakeholder name” and then check the appropriate boxes that best describe the groups’ source of stake, stance, and sense of urgency.

Change Initiative: _____

Stakeholder Name	Source of “Stake”			Stance			Sense of Urgency		
	Power	Agency	Constituency	Supporter	Undecided	Dissenter	Low	Medium	High
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Varying Messaging Based on Stake

Instructions: Based on the Stakeholder Communication Map, plot each stakeholder within the appropriate section based on the assigned source of stake and stance. Once completed, use the table to identify the appropriate messages and engagement goal for the stakeholder groups.

		<i>Source of Stake</i>		
		Power	Agency	Constituency
<i>Stance</i>	?	Obtain Acceptance	Tap Into Knowledge	Gain Compliance
	+	Leverage Power	Delegate Ownership	Build Momentum
	-	Overcome Dissent	Work Around	Negate Urgency
	Undecided			
	Supporter			
	Dissenter			

Crafting a Compelling Offer

Instructions: Use the below template to brainstorm engagement mechanisms and messages that communicate a compelling “what’s in it for me” (WIFM) rationale for undecided stakeholders. The framework accounts for the types of consequence (reward or penalty) and value (intrinsic or extrinsic) that drive decision-making.





Washington DC | Richmond | Birmingham | Minneapolis | New York

202-747-1000 | eab.com