Part 1: The Stakeholder Analysis Framework

A. Environment & Culture

1. The environmental orientation in this organisation leans towards:

- € Power
- € Lattice
- € Role
- € Person

2. What are the implications of this for the influence process?

3. What are the specific cultural values that dominate this organisation?

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B. Identify the Stakeholders

"Individuals and organisations who are actively involved in (or can influence) the project, or whose interests may be positively or negatively affected as a result of project execution or successful project completion." (PMBoK)

1. Which stakeholder groups could impact this project?

___ Board
___ Senior management
___ Colleagues
___ Direct reports
___ Other employees
___ Shareholders
___ Partners
___ ----------
___ ----------

___ Analysts
___ Customers
___ Suppliers
___ Family & Friends
___ Media
___ Lobby groups
___ Public opinion
___ ----------
___ ----------

2. For each of the above groups, identify the individuals who could impact or be impacted by the project. Review the stakeholders, and identify potential groups to which they may belong. Where these groups have known opinion leaders, list their details as well.

Group	Person	Identity Group		Organisational Unit		Power Coalition	
		Occupation, Origins Gender, Race, School		*Common training or experience; Shared tasks; Shared supervision*		*Common interests in specific area*	
		Sub Group	**Opinion Leader**	**Sub Group**	**Opinion Leader**	**Sub Group**	**Opinion Leader**

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C. Complete the Importance/Influence Matrix

1. Who are the key decision-makers and opinion shapers, whose support is vital, or who should be at least neutralised, if not converted? Complete the following table for each:

Name	Importance	Influence	Position	Range	Strength	Attitude	Relationship
	1 = low *10 = high*	*1 = low* *10 = high*	*Supporter* *Persuadable* *Opponent*	*Whole* *Aspect*	*Strong* *Moderate* *Indifferent*	*Active* *Passive*	*Intimate* *Friendly* *Business* *Antagonistic*

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2. Using the values in the “Importance” and “Influence” columns, plot each stakeholder on the grid below. Use colours to indicate “Supporter”, “Opponent” or “Persuadable”.

Importance										
10										
9										
8										
7										
6										
5										
4										
3										
2										
1										
0	1	2	3	4	5	6	7	8	9	10
	Influence									

3. Complete the Influence Map by drawing in potential or known relationships between stakeholders. The stronger the link (*e.g.* people united by long-standing ties and interests) should be indicated with a thicker line, than those linked by opportunism.

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D. Interests, Objectives and Needs

1. Think about the various stakeholders and what their interests, needs and objectives might be, as far as the overall project and organisation are concerned. Think about ways in which they might impact the project, and ways in which the project might impact them.

Group	Name	Interests, Needs, Objectives	Potential Impact on Project	Assumptions

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Part 2: Communication, Influencing and Decision-Making Styles

Complete the following profile for each of your key stakeholders. You may not know all the answers, but as you continue interacting with this person make a concerted effort to get to know him/her better.

Name: _____ Updated On: _____

Profile (if known)

DiSC: _____ Myers-Briggs: _____ Other: _____

Key points to remember about this profile:

Metaprograms

□ Visual □ Auditory □ Kinaesthetic □ Auditory Digital

Words and phrases to use with this style

Habits & Motivators

Action	□ Proactive	vs	□ Reactive
Direction	□ Toward desired outcome	vs	□ Away from negative outcome
Source	□ Approval of self / internal	vs	□ Approval of others / external
Conduct	□ Options	vs	□ Rules and procedures
Response	□ Matcher	vs	□ Mismatcher
Scope	□ Details	vs	□ Big picture
Cognitive style	□ Creative	vs	□ Analytical
Sensory confirmation	□ See □ Hear		□ Experience
Confirmation pattern	□ Once	vs	□ Multiple

Power Base (may be context-specific)

Positional
- □ Centrality / visibility
- □ Coercion
- □ Conferred
- □ Control of scarce resources
- □ Legitimate / hierarchical
- □ Reward

Personal
- □ Assertiveness
- □ Charisma
- □ Communication skills
- □ Emotional
- □ Expert / Track record
- □ Information
- □ Perceived indispensability
- □ Referent

Relational
- □ Network
- □ Connections

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Comments on Power Base:

Values

What makes this person feel important?

What are this person's hot buttons?

Favourable words, issues and interests	*Unfavourable words, issues and interests*

Decision-Making Styles

- □ Autocrat _____
- □ Consultant Autocrat _____
- □ Compromise Manager _____
- □ Consensus Manager _____
- □ Shareholder Manager _____

Preferred Influence Currencies

Personal-related	*Position-Related*	*Relationship-Related*	*Inspiration-Related*	*Task-Related*
□ Self-concept	□ Advancement	□ Acceptance	□ Vision	□ Resources
□ Challenge/ learning	□ Recognition	□ Inclusion	□ Excellence	□ Assistance
□ Ownership/ involvement	□ Visibility		□ Moral / ethical correctness	□ Cooperation
□ Gratitude	□ Reputation			□ Information
	□ Importance / "insiderness"			
	□ Contacts			

General Information

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Part 3: Conducting an Influence Campaign

A. Objectives

1. What is the issue?

2. What is your specific objective (*i.e.* what to you wish to achieve)?

3. What are my personal objectives?

   € Recognition
   € Getting the job done
   € Other:

Goals Should be:	**Long Term Impact on:**
• Specific • Measurable • Action-oriented • Realistic • Time-framed	• Relationship • Trust • Influence Equity

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B. Stakeholder Roles

Stakeholder's Name: _____

1. What is this stakeholder's role in the situation?

2. Is this stakeholder a Supporter, Opponent or Persuadable? _____

   - What specifically is this person supporting/opposing?

   - What form might any opposition/support take?

3. What do you want/need from this stakeholder?

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C. Interests and Options

1. What are this stakeholder's expectations?

   - About the project?
   - About his/her role?
   - About the specific issue?

2. What are this stakeholder's perceived interests?

Forces Driving Change	Reasons to Accept Status Quo	Forces Resisting Change

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D. Changing Options

1. How can “Do Nothing” be eliminated as an option?

2. How can the status quo be eliminated as an option?

3. How can the forces promoting / resisting {delete one} change be strengthened[1]?

4. How can the forces promoting / resisting {delete one} change be weakened[1]?

5. What alternatives might this person consider as being feasible?

[1] If you want the change to proceed, you want to strengthen the forces in favour of change and weaken the ones resisting change. If you want to prevent the change, you would aim to strengthen the opposing forces and weaken those favouring change.

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E. Potential Strategies

1. Changing Incentives

€ Possible rewards for desirable behaviour
€ Punishment/disincentives for undesirable behaviour

Note: This depends on:

- Depend on authority, fear and expectation of reward
- Effective in short term
- Focus on behaviour, not attitudes

2. Using Social Influence

€ Use networks, opinion leaders, and third parties
€ Draw on power of reciprocity
€ Apply the principle of “entanglement”
€ Use behaviour modification to shape change in attitude

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3. Reframing Options

- € Invoke the common good
- € Link to core values
- € Highlight concerns about loss or risk
- € Rejection and retreat
- € Broaden the focus
- € Narrow the focus
- € Enlarge the pie
- € Neutralise killer issues
- € Inoculate against expected opposition
- € Provide a script for convincing others

4. Quid Pro Quo Negotiations

If nothing else works, would could I trade with this person to bring him/her on board?

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F. Implementation Tactics

1. *Primary approach(es):*
   - € Ongoing dialogue, planting seeds
   - € Raise questions
   - € One-on-one meeting (face-to-face / telephone / video conference)
   - € Email / letter
   - € Small group meeting
   - € Formal presentations
   - € Informal meeting

Notes:

1 In most cases you will need to use a combination of the above. Check all that apply, and outline the approach below.

2 Remember the principle of Influence Equity as you plan and implement the influence campaign.

3 Apply appropriate concepts from this manual, e.g. when conducting meetings, when phrasing speeches or memos, etc.

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G. Review

Issue:_____

Review Date: _____

1. Have you achieved your objective?
   - € Yes
   - € Not yet, but am well on track
   - € Not yet, and am getting nowhere
2. To date, worked *has* worked particularly well?
3. What has *not* worked very well?
4. Why has this not worked?
5. Review the stakeholder's interests, perceptions and communication/decision-making/influence styles.
6. What changes can you make to your tactics to try and get a breakthrough?
7. Have you updated your knowledge about the stakeholder?

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