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?
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.

<table>
<thead>
<tr>
<th>Group</th>
<th>Person</th>
<th>Identity Group</th>
<th>Organisational Unit</th>
<th>Power Coalition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Occupation, Origins, Gender, Race, School</td>
<td>Common training or experience; Shared tasks; Shared supervision</td>
<td>Common interests in specific area</td>
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<td>Sub Group</td>
<td>Opinion Leader</td>
<td>Sub Group</td>
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</table>
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:

<table>
<thead>
<tr>
<th>Name</th>
<th>Importance</th>
<th>Influence</th>
<th>Position</th>
<th>Range</th>
<th>Strength</th>
<th>Attitude</th>
<th>Relationship</th>
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<tbody>
<tr>
<td></td>
<td>1 = low</td>
<td>10 = high</td>
<td>Supporter</td>
<td>Whole</td>
<td>Strong</td>
<td>Active</td>
<td>Intimate</td>
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<td>10 = high</td>
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<td>Persuadable</td>
<td>Aspect</td>
<td>Moderate</td>
<td>Passive</td>
<td>Friendly</td>
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<td>Opponent</td>
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<td>Antagonistic</td>
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</table>
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”.

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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.
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.

<table>
<thead>
<tr>
<th>Group</th>
<th>Name</th>
<th>Interests, Needs, Objectives</th>
<th>Potential Impact on Project</th>
<th>Assumptions</th>
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</table>
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 ☐ Reactive

Direction
☐ Toward desired outcome ☐ Away from negative outcome

Source
☐ Approval of self / internal ☐ Approval of others / external

Conduct
☐ Options ☐ Rules and procedures

Response
☐ Matcher ☐ Mismatcher

Scope
☐ Details ☐ Big picture

Cognitive style
☐ Creative ☐ Analytical

Sensory confirmation
☐ See ☐ Hear

Confirmation pattern
☐ Once ☐ 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
Comments on Power Base:

Values

What makes this person feel important?

What are this person’s hot buttons?

<table>
<thead>
<tr>
<th>Favourable words, issues and interests</th>
<th>Unfavourable words, issues and interests</th>
</tr>
</thead>
</table>

Decision-Making Styles

- Autocrat
- Consultant Autocrat
- Compromise Manager
- Consensus Manager
- Shareholder Manager

Preferred Influence Currencies

<table>
<thead>
<tr>
<th>Personal-related</th>
<th>Position-Related</th>
<th>Relationship-Related</th>
<th>Inspiration-Related</th>
<th>Task-Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-concept</td>
<td>Advancement</td>
<td>Acceptance</td>
<td>Vision</td>
<td>Resources</td>
</tr>
<tr>
<td>Challenge/learning</td>
<td>Recognition</td>
<td></td>
<td>Excellence</td>
<td>Assistance</td>
</tr>
<tr>
<td>Ownership/involve</td>
<td>Visibility</td>
<td></td>
<td>Moral / ethical</td>
<td>Cooperation</td>
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<td>Gratitude</td>
<td>Reputation</td>
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<td>correctness</td>
<td>Information</td>
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General Information
### Part 3: Conducting an Influence Campaign

#### A. Objectives

1. **What is the issue?**

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

3. **What are my personal objectives?**
   - Recognition
   - Getting the job done
   - Other:

<table>
<thead>
<tr>
<th><strong>Goals Should be:</strong></th>
<th><strong>Long Term Impact on:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific</td>
<td>Relationship</td>
</tr>
<tr>
<td>Measurable</td>
<td>Trust</td>
</tr>
<tr>
<td>Action-oriented</td>
<td>Influence Equity</td>
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<tr>
<td>Realistic</td>
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<tr>
<td>Time-framed</td>
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</tbody>
</table>
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?

_________________________________________________________________________
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?

<table>
<thead>
<tr>
<th>Forces Driving Change</th>
<th>Reasons to Accept Status Quo</th>
<th>Forces Resisting Change</th>
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</table>
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 strengthened¹?

4. How can the forces promoting / resisting {delete one} change be weakened¹?

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.
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
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?
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.
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?