# How to Analyze Stakeholders and Plan Their Engagement



# Engagement starts with understanding

*The plan should help people influence and adapt to a change that affects them.*

## Define the purpose

Stakeholder analysis examines who matters to the project, how they are affected, their needs and relationships, and how they can influence the result. Engagement puts that understanding into useful interaction.

## Expense-service case

A company replaces its employee expense process. Travellers, approvers, finance and support experience different problems and responsibilities.

## Use the map

The guide builds a register, tests assumptions and turns the analysis into a practical engagement plan. Review the picture as the work and people change.

**TAKE IT TO YOUR PROJECT**

Name a group affected by the change but absent from your current discussions.

# Identify the stakeholders

*Look beyond the people who attend the kickoff.*

## Use several lenses

Review users, delivery teams, sponsors, operators, suppliers, decision makers and affected groups. Follow the process and interfaces to find people who might be overlooked.

## Expense case

Employees submit claims, managers approve them, finance reconciles payment, IT supports access and policy owners define relevant controls. Each can reveal a different need.

## Check with others

Ask identified groups who else is affected or can influence readiness. A register is a working view, not proof that identification is complete.

**TAKE IT TO YOUR PROJECT**

Trace one process step to the people it affects.

# Create a proportionate register

*Record information that helps the project decide how to involve people.*

## Choose useful fields

Use role or group, relationship to the change, needs, impact, influence, decision authority, preferred interaction, engagement owner and review date as appropriate.

## Expense case

The register lists finance reconciliation as an affected function and names its representative role. It records the need for reliable records and the acceptance decisions they contribute to.

## Handle information carefully

Keep personal information appropriate, factual and limited to the legitimate project need. Review assumptions rather than labelling people permanently from a first impression.

**TAKE IT TO YOUR PROJECT**

Create a role-based entry with one confirmed need and one question to validate.

# Understand interests and impact

*People can support the objective while disagreeing about the solution.*

### Ask about the work

Find out what people need to achieve, what changes for them, what they may gain or lose and what would make the result acceptable.

### Expense case

Travellers want less duplicate entry. Finance wants a traceable approval and payment record. A longer form may serve one concern while making another harder.

### Validate the trade-off

Use actual examples and operating evidence. Distinguish a stated interest from your interpretation of it and confirm important assumptions with the group.

**TAKE IT TO YOUR PROJECT**

Ask one stakeholder to explain an ordinary case and a difficult exception.

# Assess influence and authority

*The ability to affect a project and the right to approve a decision are related but different.*

## Analyse the routes

Consider formal authority, expertise, operating dependence, relationships and control of critical inputs. Record how the influence is relevant to the project.

## Expense case

IT controls an access dependency, finance accepts reconciliation and employee representatives can reveal adoption barriers. The sponsor may approve funding but cannot replace all their evidence.

## Avoid a shortcut

A senior title alone does not determine every decision right. Confirm the actual governance and the people who must be involved in each commitment.

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Identify who can approve one key decision and who can materially affect it.

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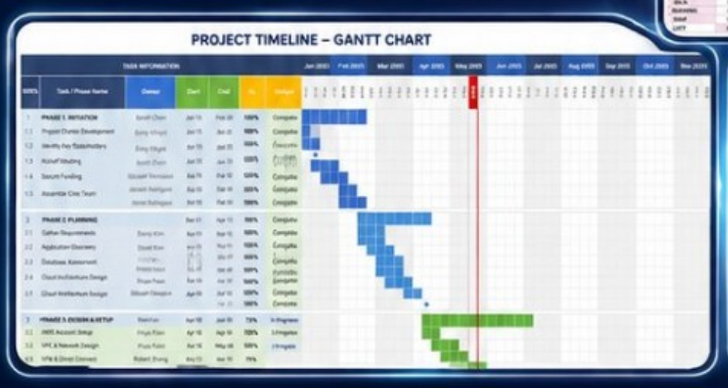
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# Use a map as a conversation aid

*A simple grid helps prioritise attention but cannot replace judgement.*

## Choose the dimensions

Influence and interest are common lenses. Impact, urgency and relationship strength can also matter. Define the dimensions and the evidence behind the placement.

## Expense case

Finance has strong influence on acceptance. Frequent travellers have high exposure to the new process even if they have less formal authority. Both need meaningful involvement.

## Check the gaps

A low-power group with significant impact should not disappear from the plan. Use appropriate representation and accessible ways to hear their needs.

**TAKE IT TO YOUR PROJECT**

Choose a group whose impact needs more attention than its formal power suggests.

# Understand current engagement

*A visible disagreement can provide useful information about readiness.*

## Use evidence

Assess understanding, concerns, participation and support in a context-sensitive way. Discuss what would help people engage, rather than treating a rating as a fixed personality trait.

## Expense case

Managers rarely join demos because their approval workflow has not been represented. The apparent lack of interest may reflect the design of the interaction.

## Define the desired state

Specify a practical change, such as managers testing an approval exception and agreeing readiness conditions. "Make everyone enthusiastic" is not a measurable plan.

**TAKE IT TO YOUR PROJECT**

Write a realistic engagement outcome for one group.

# Plan the interaction around a decision

*Every engagement activity should have a useful purpose.*

## Specify the action

Record the stakeholder, objective, information needed, activity, owner, timing, feedback route and expected evidence. Choose methods suited to the people and situation.

## Expense case

Run a short approval workshop with managers and finance before the workflow decision. Use representative claims to expose disagreements about exceptions.

## Check the output

The useful result is a clarified rule, a decision or an identified gap. Attendance alone does not establish that engagement achieved its purpose.

**TAKE IT TO YOUR PROJECT**

Design one interaction and state what should be different afterwards.

# Choose accessible channels

*The way you involve people affects which evidence reaches the team.*

## Fit the context

Consider location, language, accessibility, working hours, urgency and confidentiality. Combine suitable workshops, interviews, trials, demonstrations and written records.

## Expense case

Travelling staff cannot attend the office demonstration. Provide a suitable remote trial and a short way to record what blocked them in a realistic submission.

## Close the feedback loop

Tell participants what was learned, what changed and what remains undecided. People should be able to see how their contribution was used.

**TAKE IT TO YOUR PROJECT**

Find an audience whose current channel makes participation difficult.

# Handle concerns constructively

Resistance can reflect a real cost, constraint or missing need.

### Investigate the cause

Listen to the concern, ask for examples and separate facts, interests and assumptions. Assess the consequence for the project and its intended outcomes.

### Expense case

Approvers worry that notifications will create constant interruptions. Explore batching and escalation rules while preserving time-sensitive controls.

### Seek a workable response

Discuss options and the appropriate decision owner. Engagement should improve understanding and choices, not pressure people to agree with an untested design.

**TAKE IT TO YOUR PROJECT**

Write a concern as a need the team can investigate.

# Coordinate stakeholder relationships

People receive conflicting messages when engagement owners work separately.

## Map the interfaces

Identify groups whose needs or decisions overlap and agree how engagement owners will coordinate. Use one current decision record for important outcomes.

## Expense case

Finance and the app team give different explanations of receipt requirements. Bring the rule owner and user representatives together, then publish the agreed current guidance.

## Use escalation well

When the conflict exceeds the team's authority, present the evidence, options and required decision to the appropriate owner.

### TAKE IT TO YOUR PROJECT

Identify two engagement activities that need a shared message or decision.

# A worked engagement plan

Use a compact set of actions that can be reviewed.

## Travellers

Objective: validate a simpler claim submission. Action: representative trial with frequent and occasional users before design sign-off. Owner: user-research lead. Evidence: observed problems and agreed improvements.

## Approvers

Objective: validate exception handling and notification rules. Action: scenario workshop before the approval-flow decision. Owner: process lead. Evidence: resolved rules and remaining issues.

## Finance and support

Objective: confirm reconciliation and operating readiness. Action: end-to-end rehearsal with the relevant records. Owner: service lead. Evidence: readiness decision and follow-up actions.

| Group | Activity | Evidence |
| --- | --- | --- |
| Travellers | Representative trial | Observed user issues |
| Approvers | Exception workshop | Agreed decision rules |
| Finance / support | Service rehearsal | Readiness and actions |

**TAKE IT TO YOUR PROJECT**

Create one row that connects a stakeholder need with an observable result.

# Measure whether engagement helps

Useful measures look beyond the number of updates sent.

## Choose the evidence

Track whether understanding improved, relevant people influenced decisions, commitments were made and readiness gaps were resolved. Use qualitative feedback as well as suitable counts.

## Expense case

Twenty people attended a demo, but none tested a rejected claim. A later scenario rehearsal exposes the missing rule and leads to a controlled change.

## Inspect and adapt

If the activity does not produce the needed information or decision, change its timing, audience or method. Record why the plan changed.

**TAKE IT TO YOUR PROJECT**

Choose a measure tied to a specific engagement objective.

# Review the map when facts change

*Stakeholder needs and influence can shift during delivery.*

## Use triggers

Review at major decisions, stage changes, team changes, new risks or significant feedback. Keep owners and contact routes current.

## Expense case

A new shared-service team takes over payment operations. The project adds its representative, revisits the handover plan and checks previously agreed assumptions.

## Preserve the history

Keep significant decisions and the reason for changed engagement. Avoid using an obsolete map to justify excluding people from a current decision.

**TAKE IT TO YOUR PROJECT**

*Name a project event that should trigger a stakeholder review.*

# Work a readiness conflict

Apply the analysis to a decision with competing needs.

## Scenario

Employees like the simpler claim form, finance cannot reconcile one exception and the sponsor wants to launch next week. Support has not rehearsed the failure route.

## Reason through it

Identify the affected objectives and decision rights. Bring the right representatives into an end-to-end rehearsal and present feasible launch options with evidence.

## Check the result

An engagement plan should help the team reach an informed readiness decision and assign unresolved actions. A positive survey alone cannot answer every operating question.

**TAKE IT TO YOUR PROJECT**

Write the next interaction, participants and decision it should enable.



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# Your engagement-plan desk check

*Make the plan useful to the people doing and experiencing the change.*

## Check the analysis

Have you identified affected groups, confirmed important needs and understood influence, impact and authority? Which beliefs still need validation?

## Check the actions

Does each priority interaction have a purpose, owner, timing, feedback route and evidence? Are channels accessible to the intended participants?

## Check learning

Do people see what changed from their input, and does the map evolve when the context changes? Use the plan to improve decisions and relationships.

**TAKE IT TO YOUR PROJECT**

Review one stakeholder row from its need to its resulting project decision.