Your PMI Chapter’s Stakeholders: Who Are They and What Do They Want?

Michael R. Van Dyke, PMP
SERENGETI ENTERPRISES, LLC
(703) 850-1951 * (540) 554-4533
michael@SerengetiEnterprises.net
Objectives

- Explore strategies to identify Stakeholder groups for your PMI Chapter
- Clarify each Stakeholder’s needs within the context of the Chapter’s mission
- Determine criteria each Chapter committee can use to prioritize initiatives
- Identify “next steps” to bring back to your Chapter
Stakeholder Engagement from Chapter 13 in PMBOK

- **Identify Stakeholders**
  - Entities who are impacted by project outcomes
  - Entities who can influence (+/-) project outcomes

- **Plan Stakeholder Management**
  - The process document describing how to identify and engage Stakeholders

- **Manage Stakeholder Engagement**
  - Determine the level at which individual Stakeholder are currently engaged to compare to the desired level of engagement
  - Implement strategies to engage Stakeholders at the desired level

- **Control Stakeholder Engagement**
  - Monitor Stakeholder’s level of engagement by the success of implemented strategies
Applied to Your Chapter

- The Chapter is not a *project*
  - An ongoing operational entity
  - Plan Stakeholder Engagement at this level
- The Chapter has Strategic Objectives delegated to Committees
- Each Committee is a “program” with multiple projects serving related Stakeholder groups.
  - Related? Overlapping? Based on evidence?
  - Without documentation, this represents Stakeholder assumptions
Identify Stakeholders

- At a granular level
  - Beware “simplification”
  - Beware overlapping Committee Objectives
  - Ex: Outreach, Education, Community Support

- In order to evaluate a new/suggested initiative (Example: PM in High School)

- In order to evaluate current initiatives/projects (Example: PMP Preparation)
  - Identify who is currently involved
  - Determine who do needs to be involved
# Document Stakeholder Identification

## STAKEHOLDER REGISTER

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Role</th>
<th>Contact Information</th>
<th>Requirements</th>
<th>Expectations</th>
<th>Influence</th>
<th>Classification</th>
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*from *Snyder, *A Project Manager’s Book of Forms*, 2013*
Activity:
Stakeholder Register

For one Committee or Initiative,
List All Stakeholders and Stakeholder Groups

Classify each as High, Medium, or Low in their ability to impact success
(note any criteria on which you base your choice)
Plan Stakeholder Management

- A process document stating how to:
  - Identify Stakeholders/Stakeholder Groups
  - Classify Stakeholders/Stakeholder Groups
  - Determine strategies to engage Stakeholders/Stakeholder Groups
  - Measure success in appropriate engagement
  - Communicate with Stakeholders/Stakeholder Groups (in conjunction with Communications Management Plan)
### Stakeholder Management Plan

#### STAKEHOLDER MANAGEMENT PLAN

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Level 1 Unaware</th>
<th>Level 2 Resistant</th>
<th>Level 3 Neutral</th>
<th>Level 4 Supportive</th>
<th>Level 5 Leading</th>
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<tbody>
<tr>
<td>Members</td>
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<td>D</td>
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<td>End user</td>
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<td>Businesses</td>
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*C = Current level of engagement  D = Desired level of engagement*

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*From Synder, A Project Manager’s Book of Forms, 2013*
Activity:
Stakeholder Management

For one Committee, Initiative, or Project:
Determine Current and Desired Level of Engagement All Stakeholders and Stakeholder Groups
Manage Stakeholder Engagement

- Create Strategies to shift the level of Engagement
- Include “Success Criteria” – how will you measure whether or not the strategy is giving you the results you desire
- Set a time frame for measurement – how often and when will you evaluate Stakeholder engagement
# Stakeholder Management Planning

**STAKEHOLDER MANAGEMENT PLAN**

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**C = Current level of engagement**  **D = Desired level of engagement**

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<th>Stakeholder</th>
<th>Approach and Success Criteria</th>
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| Members      | Create and send announcements – email, in-person lunch meetings, in-person monthly meetings  
Success: Identify at least 6 volunteer ambassadors to implement outreach events before June 2015 |
| End Users    | Manage (to limit) the number of phone calls and emails asking for progress reports by establishing “office hours” two days per week  
Success: Committee members spend no more than 1 hour (of 5) per week on progress reports |
| Businesses   | Hold informational sessions and track number of attendees.  
Success: Gather contact information for at least 15 new business partners within one month |

From Synder, *A Project Manager’s Book of Forms, 2013*
Activity:
Stakeholder Engagement

For one Committee, Initiative, or Project:
Brainstorm Strategies to Achieve the Desired Level of Engagement All Stakeholders and Stakeholder Groups
Your Next Steps

List at least three actions you will implement to establish or measure Stakeholder Relationships for Your PMI Chapter
Contact Information

Michael R. Van Dyke
SERENGETI ENTERPRISES, LLC
(703) 850-1951 * (540) 554-4533
info@SerengetiEnterprises.net
www.SerengetiEnterprises.net

Everyday Leadership and Management blog:
http://teambuilderybu.wordpress.com